

**SALEM AREA MASS TRANSIT DISTRICT  
BOARD OF DIRECTORS****~ WORK SESSION ~**

Monday, January 14, 2019

5:30 PM

Courthouse Square – Senator Hearing Room  
555 Court Street NE, Salem, Oregon 97301**AGENDA**

- 1. CALL TO ORDER** (President Bob Krebs)
- 2. “SAFETY MOMENT”**
- 3. PRESENTATION**
- 4. DISCUSSION**
  - a. Present Draft 2019 Legislative Agenda **1**
  - b. Salem River Crossing Discussion **9**
  - c. Fare Policy **43**
  - d. Service Enhancement Discussion – STIF Revenue Estimates **89**
  - e. Board-Appointed Advisory Committees **93**
  - f. Continuation of Advertising Discussion **95**
  - g. MWVCOG Annual Meeting and Dinner **97**
- 5. GENERAL MANAGER COMMENTS**
  - a. Draft Agenda for the January 24, 2019 Regular Meeting **99**
  - b. Upcoming Board Agenda Items **101**
  - c. Calendar Review **103**
- 6. ADJOURN**

**Mission**Connecting people with places  
through safe, friendly, and reliable public transportation services**Values**

Safety – Service Excellence – Communication – Innovation – Accountability

**SALEM AREA MASS TRANSIT DISTRICT  
BOARD OF DIRECTORS****~ WORK SESSION ~**

This is an open, public meeting at an accessible location. Special accommodations are available, upon request, for persons with disabilities. Services may be requested for sign language interpretation or languages other than English. To request accommodations or services, please call 503-588-2424 at least two business days prior to the meeting. People with a hearing loss should call the Oregon Telecommunications Service at 711.

Aquellos individuos que necesiten servicios especiales como Interpretes para el lenguaje de señas u otros, para participar en la reunión de la Junta, deben solicitar dichos servicios al menos 48 horas antes de la reunión. Por favor dirigir su solicitud al Secretario de la Junta al 503-588-2424. Las personas con pérdida de audición deben llamar al Servicio de Telecomunicaciones de Oregón al 711.

**Mission**

Connecting people with places  
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**Values**

Safety – Service Excellence – Communication – Innovation – Accountability



## WORK SESSION MEMO

Agenda Item WS.4.a

**To:** Board of Directors

**From:** Allan Pollock, General Manager

**Date:** January 14, 2019

**Subject:** **Proposed 2019 Legislative Agenda**

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The Board annually adopts a legislative agenda to set direction for legislative activities. The agenda is used as a guide when responding to legislative matters and as a communication tool with legislators and other interested parties.

Staff is developing the proposed legislative agenda for the District in conjunction with CFM Strategic Communications, the District's legislative consultant. The proposed 2019 federal and state legislative agenda are included as Attachment A. The District's proposed agenda identifies legislative priorities and projects for annual appropriations and grant opportunities.

The purpose of tonight's discussion is to review and finalize the proposed legislative agenda. It is the intent of staff to present the proposed agenda for Board adoption at the January 24, 2019 Board meeting.

Attachments:  
Draft 2019 Federal Legislative Agenda  
Draft 2019 State Legislative Agenda





## 2019 FEDERAL LEGISLATIVE AGENDA

### GRANT REQUESTS

Because of the substantial reduction in federal funding for buses in MAP-21 and other factors, Salem Area Mass Transit District (SAMTD) is facing a significant bus replacement problem. In 2019, 37% of SAMTD's 64 bus fleet will be operating past useful life, increasing maintenance costs, roadside service calls and reducing overall service levels. Buses are a transit system's most valuable physical asset because good customer service is dependent on the condition of the fleet. SAMTD is committed to providing a system that is both responsive and improves and promotes environmental sustainability.

#### PROJECT DESCRIPTION

#### REQUEST

##### **CNG Replacement Buses**

**\$2,100,000**

SAMTD is requesting funds to replace five (5) compressed natural gas buses. The proposed replacement buses exceed 15 years of age and will have between 525,000 and 570,000 miles at replacement. FTA standard useful life is 12 years old or 500,000 miles, whichever comes first. This will complete the replacement of the District's compressed natural gas fleet.

The replacement buses will have newer technology and safety features, and help SAMTD maintain reliable on-time service for our passengers and connections with regional transportation partners. New buses would also reduce maintenance costs, increase on-time performance and improve safety for our riders.

##### **Regional Transit Center Construction**

**\$7,600,000**

Transit Centers are designed to enhance smart growth and development from both a business and residential perspective. Cherriots has identified plans for the development of three new Transit Centers to improve neighborhood connectivity, improve access to employment and education, reduce commuter travel times and costs, and increase ridership options for current and future riders. The first transit center completed by Cherriots was the Keizer Transit Center in 2012.

The second Transit Center scheduled for construction is the South Salem Transit Center (SSTC). This facility will improve transit reliability to the regular transit rider, encourage use by new riders, and improve overall efficiency of the transit service.

SSTC will contribute to a more stable work force by providing an appealing, reliable, and efficient transportation system.

SSTC will link frequent corridor service to neighborhood circulators. The design of the Transit Center will typically include the following elements: a 6-8 bay bus transfer center, sheltered passenger waiting area, bicycle parking facilities, energy efficiency features, and opportunities for connections with regional service. Depending on the location, an appropriately sized park and ride could be part of the project as well.

The third transit center has been identified for the east side of the Salem-Keizer area and is to be developed at a future time.

Activity	Federal Share	Local Share	Total Project Cost
Site Selection/ Preliminary Design	\$160,000	\$40,000	\$200,000
NEPA	\$120,000	\$30,000	\$150,000
Property Acquisition	\$1,840,000	\$460,000	\$2,300,000
Design and Engineering	\$480,000	\$120,000	\$600,000
Permits	\$168,000	\$42,000	\$210,000
Construction	\$4,800,000	\$1,200,000	\$6,000,000
Total Project	\$7,568,000	\$1,892,000	\$9,460,000

**Intelligent Transportation System (ITS) Project**

**\$ 500,000**

Intelligent Transportation Systems (ITS) improves transit planning and the customer experience by providing technological solutions to improve the customer experience and service efficiency. One element of ITS technology that provides significant assistance with service reliability is traffic signal green light extension. This system works in conjunction with other ITS components to allow the bus to extend the length of a green light with the onboard systems determine that the bus is running behind schedule. This assistance helps with providing excellent on time performance for the customer, and helps the district avoid having to add more buses to routes to stay on time. The investment in green light extension can lead to increase ridership due to reliability and operational cost savings from avoiding unneeded allocation of resources to maintain schedules.

## POLICY ISSUES

### **Support Funding for the Bus and Bus Facility (BBF) Program**

**Infrastructure Package:** SAMTD supports a \$2.85 billion funding increase in the BBF program. This funding request would simply fill the gap in funds diverted from the program between 2013-2020. This funding would create approximately 102,000 jobs and procure more than 14,000 domestically manufactured buses.

**FY2020 THUD Appropriations Bill:** SAMTD is grateful to the House and Senate Appropriations Committee for investing in bus transit programs in the FY18 and FY19 THUD Appropriations bills. We strongly support \$550 million in additional investments for the Bus and Bus Facility Program in the FY20 THUD Appropriations bill.

Funding cuts continue to steadily erode the state of good repair of the nation's bus fleet and supporting facilities. Between 2009 and 2016, the number of transit buses operating past useful life (12-years) increased nearly 40% and the number of buses operating more than 15 years increased a staggering 92%. At the same time, total bus fleets contracted by 15% highlighting the impact of budget cuts on transit systems across the country.

### **Extend and Make Permanent the Alternative Fuels Tax Credit**

The Alternative Fuels Tax Credit provides a tax credit for a portion of costs associated with alternative fuel use by transit systems. The District supports an extension of the credit through 2019 or a permanent extension of the provision as the annual impact of this legislation on operations is approximately \$170,000.



#### **CONTACT:**

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202.347.9171; [joelr@cfmdc.com](mailto:joelr@cfmdc.com)







**2019 STATE LEGISLATIVE AGENDA**

Salem Area Mass Transit District (aka Cherriots) has established as its top 2019 legislative priority the continued appropriate implementation of the 2017 transportation package and protecting against devastating reductions to transit services for seniors and people with disabilities.

**Cherriots adopts the following legislative agenda:**

Priority	Item
1	<b>HB 2017 Implementation and Monitoring.</b> <i>Work with OTA, ODOT, transit advocates and others to identify issues with HB 2017 (2017) implementation and address them to Cherriots satisfaction. Protect against efforts to reduce transit funding resulting from the new statewide transit payroll tax.</i>
1	<b>Senior/Disabled Funding.</b> <i>Protect against reductions in senior and disabled transit funding.</i>
1	<b>Transit Governance.</b> <i>Monitor any discussions around SB 10 (2017) implementation. Efforts will include working with the Governor's office, Senators Courtney and Winters.</i>
1	<b>Clean Fuels Exchange.</b> <i>Look into opportunities to convert existing business energy tax credits into Clean Fuels credits and sell on marketplace.</i>
2	<b>Electric Vehicles.</b> <i>Monitor opportunities to increase investments in electric vehicle transit infrastructure throughout the state.</i>
2	<b>Cap and Invest.</b> <i>Monitor discussions around legislation that create a carbon-trading program to be regulated by DEQ and other state agencies.</i>
3	<b>Transit Safety.</b> <i>Monitor legislation and potentially advocate on efforts to enhance safety for drivers and riders.</i>
3	<b>TNC Legislation - Uber/Lyft.</b> <i>Monitor legislation and potentially advocate.</i>
3	<b>VW Settlement.</b> <i>Monitor implementation and potentially advocate.</i>

In addition, Cherriots supports the Oregon Transit Association (OTA) legislative priorities for the 2019 legislative session. As particular bills work through the system, CFM will work with Cherriots leadership to monitor and report on any legislative concepts which may impact the District and prepare an appropriate response.

Contact:

Allan Pollock, General Manager/CEO Cherriots  
 503.588.2424 [allan.pollock@cherriots.org](mailto:allan.pollock@cherriots.org)

Dale Penn II, CFM Strategic Communications  
 503.510.2200 [dalep@cfmpdx.com](mailto:dalep@cfmpdx.com)





**To:** Board of Directors

**From:** Allan Pollock, General Manager

**Date:** January 14, 2019

**Subject:** Salem River Crossing Discussion

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Over the last several months there have been discussions at meetings held by the SKATS Policy Committee and the City of Salem about the Salem River Crossing project. This was initiated at the October 23, 2018 SKATS Policy Committee meeting where a motion passed to direct SKATS staff to develop a letter regarding the history and the need for the City of Salem to move forward with the river crossing study. The motion passed 6-1 with one abstention (Fricke). Director Lincoln opposed the motion.

At the November 13, 2018 SKATS Policy Committee special meeting, a draft letter was presented to the committee for discussion. Ultimately a motion was passed directing Chair Clark to sign the letter "as is" and the letter would be forwarded to the Salem City Council. The motion passed 6-1 with one abstention (Fricke). Director Lincoln opposed the motion. A copy of her testimony is included as an attachment.

At the November 26, 2018 Salem City Council meeting a motion was made to direct staff to prepare an ordinance and all other necessary land use actions to respond to the issues raised in LUBA's remand of the City's UGM expansion decision concerning the Salem River Crossing.

A substitute motion was made that the City Council hold a work session to discuss all potential issues concerning the Environmental Impact Statement for the third bridge, including, but not limited to, its effect on neighborhoods, Wallace Marine Park, Edgewater Drive, the Rosemont exit; projected congested areas and travel times, under build and no-build options; and financing options.

A second substitute motion was made to combine the main and substitute motions. The second substitute motion failed. The first substitute motion passed. The work session has been scheduled for January 30, 2019.

As a result of these actions, I felt it important that the Board have a discussion on the Salem River Crossing project and begin to formulate a board position when it comes to the Salem River Crossing project.

In order to help with the discussion, I have included the following documents:

1. November 13, 2018 SKATS Special Meeting Packet.
2. November 20, 2018 email from Mike Jaffe that includes Director Lincoln's notes from the November 13, 2018 Special Meeting and November 13, 2018 Special Meeting minutes.
3. November 26, 2018 City of Salem City Council meeting staff report on the Salem River Crossing project.
4. Testimony by Director Lincoln at the Joint Public Hearing on October 12, 2016.

The goal of this work session is to have a conversation to understand board member perspectives and to begin work, if appropriate, on the Board's position concerning the Salem River Crossing project. Based on the discussion, next steps will be determined.

**Agenda**  
**Salem-Keizer Area Transportation Study (SKATS)**  
**Policy Committee (PC)**  
**Special Meeting**

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**Date:** November 13, 2018  
**Time:** 11:00 a.m.  
**Place:** 100 High St. SE, Suite 200  
Salem, OR 97301  
**Phone:** (503) 588-6177 FAX (503) 588-6094  
**E-mail:** [mwvcog@mwvcog.org](mailto:mwvcog@mwvcog.org)  
**Website:** [www.mwvcog.org](http://www.mwvcog.org)

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- A. Call to Order ..... **Cathy Clark**
- B. Public Comment..... **Cathy Clark**
- C. Draft Letter to the Salem City Council..... **Mike Jaffe**

Background: At the October 23, 2018 SKATS Policy Committee meeting, the Policy Committee directed staff to draft a letter from SKATS to the Salem City Council related to Salem River Crossing. The purpose of the letter is to request that the council respond to the LUBA remand and support completion of the Salem River Crossing Final EIS.

Action

Requested: Review and modify letter as necessary. Motion to send letter to Salem City Council.

- D. Other Business..... **Cathy Clark**
  - Next meeting of the SKATS Policy Committee: **November 27, 2018.**
- E. Adjournment ..... **Cathy Clark**

The Mid-Willamette Valley Council of Governments is pleased to comply with the Americans with Disabilities Act (ADA). If you need special accommodations or translation services to attend this meeting, please contact Lori Moore at (503) 540-1609, or send e-mail to [lomoore@mwvcog.org](mailto:lomoore@mwvcog.org) at least 72 hours prior to the meeting. *Hearing impaired please call Oregon Telecommunications Relay Service, 7-1-1.* Thank you.

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SKATS

SALEM-KEIZER AREA TRANSPORTATION STUDY



100 High St. SE, Suite 200 Salem, OR 97301 Phone (503) 588-6177 FAX (503) 588-6094

November XX, 2018

To: Salem City Council

Re: Salem River Crossing and Environmental Impact Statement (EIS)

With this letter, the Salem-Keizer Area Transportation Study (SKATS) Policy Committee respectfully requests that the Salem City Council undertake the required actions to respond to the Land Use Board of Appeals (LUBA) remand and support the completion of the Final Environmental Impact Statement (FEIS) for the Salem River Crossing.

SKATS is the designated Metropolitan Planning Organization (MPO) for the Salem-Keizer area. An MPO is a federally mandated body for any urban area over 50,000 in population. MPOs are responsible for regional transportation planning that is continuing, cooperative, and comprehensive. The SKATS MPO is directed by a Policy Committee composed of elected representatives from the cities of Keizer, Salem, and Turner; Marion and Polk Counties; the Salem Area Mass Transit District; the Salem-Keizer School District; and a manager from the Oregon Department of Transportation's (ODOT) Region 2 office.

The SKATS Policy Committee and staff have been extensively involved throughout the Salem River Crossing Study and Environmental Impact Statement (EIS) process. Over the last 12 years, the Policy Committee has had numerous updates about the Salem River Crossing study. SKATS provided about half the funds used for the study. Five elected officials of the Policy Committee are also members of the Salem River Crossing study's Oversight Team.

This project has a long history that spans over a decade. Because SKATS has been involved since the outset, this letter begins with a history and milestones of the Salem River Crossing Study and the EIS, and the SKATS Policy Committee's interest in seeing it completed.

## **Previous Willamette River Crossing Studies by SKATS.**

SKATS has been the leading body for examining issues related to crossing the Willamette River in the Salem-Keizer area with studies completed by SKATS and its predecessors in the 1970s, 1980s, 1990s, and 2000s. In 1997-98, SKATS led the *Bridgehead Engineering Study*; and several projects from the study's recommendations have been constructed. The *Willamette River Crossing Capacity Study (1999)* and the *General Corridor Evaluation (2002)* evaluated 16 potential river crossing corridors from north of Keizer to south of Salem. Those two reports concluded that among those 16 corridors, the Tryon/Pine corridor best met the goals for reducing traffic congestion with the least negative impacts and should be studied in greater detail as part of an EIS.

## **History of the Salem River Crossing Study and EIS**

The Salem River Crossing Study began in 2006 with funding agreements between the Oregon Department of Transportation (ODOT) and both the city of Salem and SKATS. Because a new bridge would have wide-ranging impacts for the Mid-Willamette Valley region, an Oversight Team was created that included key local jurisdictions and districts: City of Salem, City of Keizer, Polk County, Marion County, the Salem-Keizer Transit District, and ODOT. The Oregon Division of the Federal Highway Administration (FHWA) participated as a non-voting member. The city of Salem's representative on the Oversight Team began with Councilor Dan Clem, who was later succeeded by Councilor Jim Lewis.

Between 2006 and 2014, the Oversight Team met multiple times each year to guide the work of ODOT and local staff and the project consultants; define the purpose and need of the project; examine (and narrow) a wide range of alternatives; review traffic forecasts and impacts; discuss options for how roads should function; review bridge types; discuss potential funding options with affected local jurisdictions, stakeholders, and the community; and oversee many other aspects of the project during development of the EIS. A project management team (PMT) composed of staff from the city of Salem (Julie Warncke), ODOT (Dan Fricke), Polk County (Austin McGuigan), and SKATS (Mike Jaffe) collaborated on the EIS and coordinated the work of the consultant team. SKATS staff provided the numerous travel model forecasts used in the traffic analysis and was involved in many other aspects such as public outreach, document reviews, and numerous public and project meetings.

Before developing the alternatives evaluated in the draft EIS, in 2006 the PMT and consultant initially analyzed 17 crossing concepts (along 10 potential alignments) for a new river crossing between the existing bridges and Tryon Avenue (Salem Parkway), including several concepts for either widening and/or reconfiguring the existing Center Street and Marion Street Bridges. Over 400 people attended and submitted comments

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during Open Houses in 2007. A Stakeholder Task Force met over 20 times between 2006 and 2008; and in September 2008, the Task Force narrowed the alternatives to three corridors: the existing bridges corridor, a Hope Street to Tryon Street corridor, and a Hope Street to Pine/Hickory Street corridor.

The draft Environmental Impact Statement (**DEIS**) evaluated a total of eight build alternatives in those three corridors plus a no-build alternative. After extensive analysis, the DEIS (700+ pages) was published in April 2012. Two well-attended Open House events in May 2012 and an online questionnaire were used to gather public comments. After three more meetings of the Stakeholder Task Force – including consideration of public comments and a joint Oversight Team/Task Force meeting -- in August 2012, the Task Force voted to advance Alternative 1 (No-Build), 2A, 4A, and 4D as the top four alternatives.

In August 2012, the Oversight Team selected Alternative 4D as a preliminary recommendation of the Locally Preferred Alternative (**LPA**) and requested additional feedback from individual jurisdictions and the public. Between 2012 and 2013, Salem City Council had a combination of 12 work sessions, public hearings, or project updates about the project. In June 2013, Salem City Council rejected Alternative 4D and endorsed the “Salem Alternative,” which was presented to the Oversight Team in August 2013.

Based on that input from Salem and direction by the Oversight Team, the project team designed a new LPA to align with all the major elements of the Salem Alternative, including reducing the number of lanes on the bridge span from six to four; changing the approaches on both the east and west ends of the proposed bridge from elevated ramps (as proposed in Alternative 4D) to surface street connections; changing the north-south connection in west Salem from an elevated roadway to an at-grade road (Marine Drive in the Salem Transportation System Plan); and developing additional bicycle and pedestrian facilities as part of the project. In February 2014, the Oversight Team unanimously recommended to advance the LPA based on the Salem Alternative as the preferred alternative for the Final Environmental Impact Statement (FEIS). Because the Salem Alternative wasn’t specifically included as one of the alternatives in the 2012 DEIS, additional public outreach (mailers to 5000 addresses in the study area and an Open House) occurred in May and June of 2014 to get community responses to the new LPA.

With the choice of the LPA for the FEIS selected by the Oversight Team and the local governments, the next step was to adopt the LPA into the local land use and transportation plans including adoption into the Polk County and city of Salem Transportation System Plans. It would also require exceptions to Statewide Planning Goals or an Urban Growth Boundary expansion.



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On October 12, 2016, there was a Joint Public Hearing of the various decision-making bodies (city of Salem, city of Keizer, Marion County, Polk County, and their corresponding Planning Commissions) for the proposed land use actions needed to accommodate the revised footprint including expanding the Urban Growth Boundary, City of Salem TSP amendments, and taking an exception to Statewide Planning Goal 15 (Willamette River Greenway). City of Salem passed Ordinance 14-16 on December 5, 2016 to approve these actions.

As you know, Salem's ordinance was appealed to the state Land Use Board of Appeals (LUBA). In its final order of 8/9/17, LUBA denied the majority of the petitioners' assignments of error except for three relatively minor issues that could be corrected by the city: adjustment of population forecasts, the zoning for the land to be added to the UGB, and making findings addressing the Willamette River Greenway Policies 2 and 6. To date, the Salem City Council has taken no action to address the LUBA remand.

In early 2018, the Salem City Council formed a Congestion Relief Task Force and retained a consultant to evaluate potential infrastructure improvements to reduce congestion on the bridges and connecting streets in downtown Salem and West Salem. The study examined every feasible idea from previous studies or newly submitted by the community but concluded that "no single project at a specific location significantly reduced congestion" on the two bridges. Ideas were then grouped into solution packages. The final report found that the costlier, long-term infrastructure options in these solution packages for widening the existing bridges -- which were evaluated but not recommended by the Task Force -- would have "benefits that may not be long lived." Instead, the final report's recommendation of 14 short-term projects and programs (signage, minor infrastructure and operational projects, and travel demand management) will have a limited (and unquantified) result for solving congestion on, and around, the two bridges.

Since 2006, the Salem River Crossing Study and work on the EIS has cost over \$8 million (including \$3.9 million from SKATS). Thousands of hours of have been put in by city of Salem, ODOT, and MPO staff and the elected officials on the Oversight Team. The public has been extensively involved during the entire process.

An ODOT memorandum of October 30, 2018 (***attached***) outlines the remaining tasks to complete the FEIS and for FHWA to issue a record of decision (ROD). As noted, the ROD could be issued for the preferred alternative, but only if the land use and LUBA remand issues are resolved by the city of Salem. The other option would be that FHWA issue a ROD for the No-build alternative. FHWA's deadline to complete the FEIS and ROD was extended to September 30, 2019. After that time, ODOT and SKATS may be required to payback all or a portion of the federal funds expended on the project; both

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ODOT and SKATS are strongly opposed to being in a position requiring us to payback any federal funds.

## **Past and Future SKATS Support of Improvements to the Existing Bridges River Crossing Area**

SKATS shares the city's goal of identifying and funding projects and programs that reduce congestion on the existing bridge and extend its useful life and resiliency. Over the last 20 years, SKATS has provided a portion of its discretionary federal funds (matched with local funds and state funds) for multimodal programs and improvements to the reduce congestion on the existing bridges and connecting system including these projects:

- Improvements at the Center Street Bridge ramp exits to northbound and southbound Front Street (projects from the *Bridgehead Engineering Study*)
- Wallace Road @ Glen Creek Road intersection widening
- Multi-use path in Wallace Marine Park that connects to the Union Street Bicycle and Pedestrian Bridge
- New traffic signal and bike/pedestrian crossing at the Commercial Street and Union Street intersection.
- \$2.3 million for the Union Street NE (Commercial Street to 12<sup>th</sup> Street) *Family Friendly Bikeway* (construction in 2020)
- Annual funding (about \$500,000/year) for the Regional Traffic Signal Control System operated by city of Salem staff
- Approximately \$20 million in bus replacements, bus shelters, transit centers, and smart technology systems
- Regional Travel Options Program to promote/assist with ridesharing, vanpools, and other travel demand management (\$250,000/year from SKATS plus additional ODOT and Cherriots' funds).
- Center Street Bridge Seismic Retrofit Study: \$179,460 from SKATS plus match from Salem/ODOT
- SKATS advocated for the Center Street Seismic Retrofit - \$60 million was provided in *Keep Oregon Moving* (HB2017)

These projects have helped reduce or will reduce, either directly or indirectly, traffic congestion on the bridges as well as provide alternative options to using a vehicle for crossing the river. However, they have not been enough to significantly solve the traffic congestions problems that exist on the bridges today or the worse congestion forecast for the future.

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## **Position of the SKATS Policy Committee**

As noted above, we are rapidly approaching the end of our time limit for completing the FEIS for a new Salem bridge, and the process has been suspended until Salem finishes addressing the land use remand from LUBA.

It seems to be the right time, perhaps the last time, to ask the city to move the FEIS process onward in view of current and ongoing realities, such as;

1. Latest traffic volume numbers over the two Salem bridges are the highest ever and rising. In 2017, 72% of all weekday (Monday-Friday) traffic counts exceeded 100,000 vehicles per day! Population in the region is continuing to grow, and traffic demand on the bridges will increase.
2. As noted, the 2018 Congestion Relief study conducted by Salem showed no substantial congestion enhancements would occur from that study's short-term or long-term recommendations. After a decade of study, the LPA based on the Salem Alternative was selected as the best option available for substantially reducing congestion on the existing bridges and improving mobility for people and freight across the river.
3. There may not be any long-term answers to seismic threats that our current bridges can address. By next year we'll have a better understanding whether a seismic upgrade is feasible for the Center Street Bridge and approaches. Due to its design and age, the Marion Street Bridge is not being considered for any seismic upgrades. As noted in the DEIS, mitigation for seismic hazards using modern standards would be part of the structural design of the LPA's new bridge and structures.
4. We continue to see accidents or events at the bridge (such as the overturned hay truck on October 19<sup>th</sup> of this year) in which the traffic flow of goods and services is halted, not to mention the mobility needs of our residents. These blockages impact emergency services, traffic, and access since there is no nearby vehicle bridge to function as emergency response routes. We need an alternative crossing for the region to better ensure the provision of emergency services; and in the case of a Cascadia earthquake event, to be better prepared for a potential catastrophic failure of the existing bridges.

Completion of the Final EIS and a Record of Decision is only a first step in the process. It gives us permission from FHWA to take the next steps. Construction of a new bridge and other parts of the LPA will take many years and potentially be done in several phases, as demonstrated by other major regional projects like the Newberg-Dundee bypass. There will be future opportunities for the elected officials in the region to decide on funding and phasing for the actual construction of the LPA's new bridge and other

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infrastructure. Abandoning the process now sets back our region for many years (or decades) to come.

Please don't let our region suffer from an inadequate and congested transportation system for generations. Please keep the process moving before time to complete the FEIS runs out.

Respectfully yours,

Cathy Clark  
Chair, Salem-Keizer Area Transportation Study (SKATS)

CC:lm

Attachment

<h:/transport/Policy Committee/2018/Nov Spc Mtg/SKATS Draft ltr 11 7 18.docx>



# Oregon

Kate Brown, Governor

## Department of Transportation

### Region 2 Headquarters

455 Airport Road SE Building B

Salem, Oregon 97301-5395

Telephone (503) 986-2600

Fax (503) 986-2630

## MEMORANDUM

**DATE:** October 30, 2018

**TO:** SKATS Policy Committee

**FROM:** Dan Fricke, Senior Transportation Planner

**SUBJECT:** Salem River Crossing – Remaining Tasks to Complete the Environmental Impact Statement

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At your October 23 meeting, the Policy Committee had an extended discussion about the Salem River Crossing and how to characterize the project in the update of the Regional Transportation Plan currently in preparation. To inform that and future discussions, you asked that I provide a summary of the remaining tasks to complete the Final Environmental Impact Statement (FEIS) and issue a record of decision (ROD). The following describes those remaining steps and additional information required to complete each.

- Project staff and the consultant team are working to complete drafting the FEIS document based on the preferred alternative identified by the Project Oversight Team. Drafting the document should be completed early next year.
- The City of Salem and other local partners adopted an urban growth boundary amendment to accommodate the future alignment of the preferred alternative. Project opponents appealed the City of Salem's adoption to the Land Use Board of Appeals (LUBA) which subsequently remanded the decision back to the city based on three technical issues. The city has not acted on resolving the remand issues to date. ODOT's State Agency Coordination agreement and administrative rule require, at OAR 731-015-0075(3):

*"The Department shall rely on affected cities and counties to make all necessary land use decisions necessary to achieve compliance with the statewide planning goals and compatibility with local comprehensive plans after completion of the Draft Environmental Impact Statement or Environmental Assessment and before completion of the Final Environmental Impact Statement or Revised Environmental Assessment. These shall include adoption of general and specific plan provisions necessary to address applicable statewide planning goals."*

Based on this, ODOT is not in a position to publish the FEIS and recommend adoption of the ROD for the preferred alternative to the Federal Highway Administration (FHWA) until the remand issues are resolved.

- FHWA has issued a preliminary “de minimis” finding for impacts from the project to Wallace Marine Park. This requires approval by the City of Salem as the park operator, documenting their concurrence as the “Official With Jurisdiction.” To date, the city has not provided that concurrence to ODOT and FHWA. This is necessary to complete compliance with the requirements of Section 4f of the 1965 Highway Act. While lack of concurrence would not stop the project, it would result in an adverse impact finding that would require extensive (and expensive) revision to the FEIS and 4f report – which we do not have the time or budget to complete.
- FHWA has extended the deadline to complete the FEIS and ROD to September 30, 2019. After that time, we may be required to payback all or a portion of the federal funds expended on the project. This would be a substantial financial impact on ODOT and SKATS – the agencies that have provided the majority of federal funds for the project.

To complete the process, FHWA must issue a ROD. The ROD could be issued for the preferred alternative, but only if the land use and LUBA remand issues are resolved by the City of Salem. The other option would be that FHWA issues a ROD for the No-build alternative. As I have stated on previous occasions to the Policy Committee, it would take an extraordinary set of circumstances for ODOT to put our partners in a position to have to payback any federal funds. Therefore, we will continue to work with our local partners and FHWA to reach a decision and issue a ROD prior to our September 2019 deadline.

Please let me know if you need additional information.

DLF:

cc: Sonny Chickering  
Lisa Nell  
Terry Cole  
Sean O'Day  
Mike Jaffe

24014 Site Name: Salem Bridges (24-014) Region: 2 Vehicle Type: Vehicles County:   
 30 Mile Point: 25.90 Start Date: 1/1/2017 Lane / Direction / Flow: Combined   
 ADT: 95036 Avg Weekdays (Mon - Thu): 99841 Avg Day: 94960   
 Max Hour: 8967 Day: Fri Date: 4/21/2017 Hour: 17   
 Max Day: 113119 Day: Fri Date: 6/2/2017

Sunday		Monday		Tuesday		Wednesday		Thursday		Friday		Saturday	
Date	Value	Date	Value	Date	Value	Date	Value	Date	Value	Date	Value	Date	Value
1/1	53442	1/2	58108	1/3	90091	1/4	89476	1/5	95908	1/6	101441	1/7	32643
1/8	26923	1/9	87961	1/10	95021	1/11	56086	1/12	90305	1/13	97447	1/14	77748
1/15	63712	1/16	84216	1/17	90349	1/18	95765	1/19	98509	1/20	101321	1/21	80084
1/22	64014	1/23	94946	1/24	97344	1/25	98787	1/26	100298	1/27	102330	1/28	83728
1/29	66697	1/30	94499	1/31	98207	2/1	100070	2/2	97954	2/3	95561	2/4	80788
2/5	59664	2/6	93568	2/7	96909	2/8	97402	2/9	99741	2/10	106079	2/11	89512
2/12	72043	2/13	99919	2/14	101091	2/15	97524	2/16	97831	2/17	107517	2/18	86493
2/19	68452	2/20	86792	2/21	99234	2/22	99833	2/23	102650	2/24	105480	2/25	90428
2/26	68218	2/27	96810	2/28	101120	3/1	103491	3/2	101540	3/3	106504	3/4	87076
3/5	72283	3/6	84054	3/7	98435	3/8	100216	3/9	101616	3/10	109168	3/11	86388
3/12	75498	3/13	96424	3/14	99542	3/15	101664	3/16	106491	3/17	106991	3/18	86085
3/19	77015	3/20	97567	3/21	101349	3/22	101278	3/23	103289	3/24	102770	3/25	84624
3/26	67016	3/27	92315	3/28	95107	3/29	95626	3/30	99408	3/31	106482	4/1	85013
4/2	77981	4/3	102342	4/4	103622	4/5	105371	4/6	105115	4/7	104644	4/8	90875
4/9	73960	4/10	100843	4/11	102978	4/12	103106	4/13	105669	4/14	111476	4/15	93951
4/16	72339	4/17	99480	4/18	103963	4/19	102751	4/20	105930	4/21	112878	4/22	90312
4/23	71920	4/24	97932	4/25	100363	4/26	102084	4/27	104907	4/28	111268	4/29	92364
4/30	77577	5/1	101061	5/2	103255	5/3	107330	5/4	107937	5/5	110950	5/6	91006
5/7	78276	5/8	103161	5/9	106231	5/10	107446	5/11	103130	5/12	110185	5/13	93588
5/14	80759	5/15	100393	5/16	102089	5/17	103736	5/18	105861	5/19	112005	5/20	95426
5/21	82053	5/22	103571	5/23	104563	5/24	105622	5/25	107989	5/26	110259	5/27	88933
5/28	77673	5/29	74034	5/30	103176	5/31	104990	6/1	108257	6/2	113119	6/3	92997
6/4	78700	6/5	104475	6/6	107130	6/7	107653	6/8	107935	6/9	110581	6/10	89595
6/11	76280	6/12	101129	6/13	103169	6/14	106001	6/15	104937	6/16	110701	6/17	88010
6/18	82002	6/19	100906	6/20	103343	6/21	104202	6/22	105395	6/23	109778	6/24	92530
6/25	79401	6/26	101379	6/27	102328	6/28	103815	6/29	105643	6/30	109988	7/1	89291
7/2	76287	7/3	97240	7/4	71103	7/5	104047	7/6	104879	7/7	109223	7/8	90692
7/9	78901	7/10	103103	7/11	104849	7/12	106316	7/13	105619	7/14	110412	7/15	91625
7/16	78415	7/17	102181	7/18	-	7/19	105382	7/20	105403	7/21	109084	7/22	89441
7/23	79046	7/24	101015	7/25	103948	7/26	105779	7/27	105924	7/28	108190	7/29	89609
7/30	78774	7/31	103915	8/1	107024	8/2	106244	8/3	105284	8/4	111227	8/5	93481
8/6	80955	8/7	102896	8/8	103070	8/9	104701	8/10	105550	8/11	107991	8/12	90091
8/13	76037	8/14	102129	8/15	106619	8/16	107301	8/17	105101	8/18	101670	8/19	80005
8/20	74323	8/21	67213	8/22	104755	8/23	106874	8/24	108113	8/25	111743	8/26	93887
8/27	78454	8/28	102190	8/29	103594	8/30	105242	8/31	109195	9/1	111245	9/2	88393
9/3	78753	9/4	74876	9/5	104768	9/6	102987	9/7	103428	9/8	110427	9/9	91273
9/10	76981	9/11	101046	9/12	102512	9/13	104198	9/14	105840	9/15	110516	9/16	90719
9/17	75445	9/18	98189	9/19	100801	9/20	101794	9/21	103324	9/22	109465	9/23	91302
9/24	76534	9/25	100383	9/26	102815	9/27	103941	9/28	105946	9/29	110080	9/30	88616
10/1	75707	10/2	100384	10/3	103399	10/4	105047	10/5	106095	10/6	109988	10/7	90486
10/8	75410	10/9	101015	10/10	102529	10/11	103028	10/12	103222	10/13	107841	10/14	89690
10/15	76044	10/16	100655	10/17	101926	10/18	102049	10/19	100904	10/20	107606	10/21	82305
10/22	69024	10/23	99426	10/24	101122	10/25	103451	10/26	103591	10/27	109608	10/28	89016
10/29	72168	10/30	99353	10/31	102610	11/1	102372	11/2	102188	11/3	107783	11/4	84512
11/5	71094	11/6	98476	11/7	100066	11/8	99041	11/9	102433	11/10	100137	11/11	84222
11/12	70214	11/13	95659	11/14	99802	11/15	99209	11/16	102497	11/17	107519	11/18	85206
11/19	71214	11/20	98474	11/21	101316	11/22	99850	11/23	64566	11/24	82298	11/25	73328
11/26	66428	11/27	97417	11/28	98120	11/29	101460	11/30	100721	12/1	108866	12/2	84011
12/3	71188	12/4	98277	12/5	101548	12/6	101982	12/7	102247	12/8	106101	12/9	87745
12/10	72456	12/11	98120	12/12	99940	12/13	100642	12/14	102438	12/15	106193	12/16	84723
12/17	71363	12/18	96598	12/19	95988	12/20	100416	12/21	98764	12/22	99878	12/23	79976
12/24	64628	12/25	52209	12/26	81744	12/27	88403	12/28	89755	12/29	92627	12/30	76827
12/31	63626												
Avg:	72516	Avg:	95199	Avg:	100313	Avg:	101405	Avg:	102448	Avg:	106820	Avg:	86551



Allan Pollock &lt;allan.pollock@cherriots.org&gt;

## FW: Kathy Lincoln Notes for last SKATS policy committee

2 messages

Jaffe, Mike <MJaffe@mwvcog.org>

Tue, Nov 20, 2018 at 4:28 PM

To: Allan Pollock <allan.pollock@cherriots.org>, "Steve Dickey (steve.dickey@cherriots.org)" <steve.dickey@cherriots.org>  
Cc: "O'Day, Sean" <SODay@mwvcog.org>

Below is Kathy's email to Lori, and attached are the notes that Kathy read from at the November 13<sup>th</sup> meeting.

Also attached are the draft November 13 Policy Committee minutes (ignore the sentence with yellow highlights – we forgot to remove the highlight).

**From:** Moore, Lori <lomoore@mwvcog.org>  
**Sent:** Tuesday, November 20, 2018 3:52 PM  
**To:** Jaffe, Mike <MJaffe@mwvcog.org>  
**Subject:** FW: Notes for last SKATS policy committee

**From:** Kathryn Lincoln <klincoln@q.com>  
**Sent:** Saturday, November 17, 2018 9:26 AM  
**To:** Moore, Lori <lomoore@mwvcog.org>  
**Subject:** Notes for last SKATS policy committee

Lori- attached are my notes from the Nov. 13th meeting. I hope the minutes will also reflect that the Marion County commissioner threatened Cherriots with "grief" for the next two years because of our fiscally and environmentally responsible position, in spite of the fact that the motion to send the letter passed anyway.

CONFIDENTIALITY NOTICE: This message is intended solely for the use of the individual and entity to whom it is addressed, and may contain information that is privileged, confidential, and exempt from disclosure under applicable state and federal laws. If you are not the addressee, or are not authorized to receive information for the intended addressee, you are hereby notified that you may not use, copy, distribute, or disclose to anyone this message or the information contained herein. If you have received this message in error, please advise the sender immediately by reply email and delete this message. Thank you


**For the January 14, 2019 SAMTD Board Work Session  
Agenda Item No. WS.4.b - ATTACHMENT 2**




CONFIDENTIALITY NOTICE: This message is intended solely for the use of the individual and entity to whom it is addressed, and may contain information that is privileged, confidential, and exempt from disclosure under applicable state and federal laws. If you are not the addressee, or are not authorized to receive information for the intended addressee, you are hereby notified that you may not use, copy, distribute, or disclose to anyone this message or the information contained herein. If you have received this message in error, please advise the sender immediately by reply email and delete this message. Thank you

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**2 attachments**

 **Statement to SKATS re third bridge 11.11.2018.docx**  
16K

 **Draft November 13 Special Meeting Minutes.pdf**  
143K

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**Allan Pollock** <Allan.Pollock@cherriots.org>  
To: Robert Krebs <Robert.Krebs@cherriots.org>

Tue, Nov 20, 2018 at 4:33 PM

FYI


Thanks.


Allan

**Allan Pollock**  
General Manager/CEO  
allan.pollock@cherriots.org  
Direct: 503-361-2550  
[Quoted text hidden]

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**2 attachments**

 **Statement to SKATS re third bridge 11.11.2018.docx**  
16K

 **Draft November 13 Special Meeting Minutes.pdf**  
143K

I cannot sign the letter to the Salem City Council unless It recommends a No Build decision. It looks like no consensus among the jurisdictions so that is the only decision that will avoid a potential payback to FHWA.

A lot of work and time from many people went into the current DEIS, and for years prior. Agree, there were opportunities for public input. However, there was not a lot of listening by the decision-makers. What the study shows us is that congestion and redundancy problems cannot be solved by building another bridge in the middle of Salem. 3rd bridge proposal is a flawed and unaffordable proposal; there are better, more affordable ways to address traffic congestion and also to make the existing bridges safer and work better.

1. Cost is a major factor in our decision. By the time this bridge would be built, likely to be well over ½ billion dollars. No money from the state – ODOT has made that clear. Highly unlikely to get any federal money. Any highway money from the feds would go to a new Columbia River Crossing. Even IF outside money, local match would require raising fuel taxes, property taxes and tolls – on all bridges. It would suck up a disproportionate amount of the transportation money for this region, leaving other local highways, bridges, and transit short of funds.
2. Cost is not only a concern for construction of the bridge, but also maintenance. As we saw a few weeks ago, the list of bridges in the region that are going from good to fair to poor condition keeps getting longer. Do we want to add to that list the maintenance costs for a bridge that is almost a mile long across a liquefaction zone? As already mentioned ODOT has no desire to take over jurisdiction of a third bridge so the cost would fall on the local residents.
3. The Preferred Alternative is a huge project that benefits one mode of transportation, cars. In this era of climate change and the catastrophic impacts that we see today in California, we should not be encouraging more driving. We have to give people other travel alternatives in order to meet the state's GHG reduction targets. I know there are bike/ped lanes but only most intrepid, experienced cyclists would use them, and even then they do not go where a cyclists or walker would want to go. Going to the coast or Dallas or downtown Salem, walkers and bikers will use the much friendlier, safer pedestrian bridge and bike paths along Edgewater and in

- downtown Salem. Buses would not use the new bridge – again, does not take people anywhere except from the coast highway to maybe Keizer station. There are no places along the route that are used by people.
4. Benefits primarily regional travel, yet that is a small percentage of the traffic on the bridge, and would be paid for locally.
  5. Building new highways does not reduce congestion in the long run. That has been proven over and over. Traffic studies for the EIS show that traffic congestion in the region will more than triple whether the bridge is built or not built. At best, a new bridge would shift where congestion occurs. In addition, the effect of a 3rd bridge would be to induce more travel, which would likely worsen traffic congestion in the long term. Traffic studies show that this bridge increases congestion north on the Parkway and N. Wallace road, which would be over capacity almost immediately. The impact on the lower income neighborhoods of north Salem is a concern also.
  6. The proposed letter to the city acknowledges that the bridge may not be built for many years. If the PA is adopted but sits on a shelf for years, that puts a pall on development of property in the bridge footprint, and makes it difficult to make long term plans. It also deters investment in other congestion relief projects, such as more frequent transit, bus rapid transit, fixed rail systems across the river and congestion pricing proposals. And our focus now should be on improving the safety and resilience of the existing bridges downtown, instead of constructing new ones.

So for these reasons, the Cherriots' board is not going to be signing the letter to the Salem City Council. We are interested in working with our partners to pursue other, more feasible solutions. For now, the appropriate course of action should be to conclude the EIS process by selecting the no-build alternative.

# DRAFT

## Minutes

Salem-Keizer Area Transportation Study (SKATS)  
Special Policy Committee Meeting  
November 13, 2018  
100 High St. SE, Suite 200  
Salem, OR  
Noon

### **Policy Committee Members Present**

Sam Brentano, Marion County Board of Commissioners  
Cathy Clark, 2018 Chair, Keizer Mayor  
Paul Kylo, 2018 Vice Chair, Salem-Keizer School District  
Jim Lewis, Salem City Council  
Kathy Lincoln, Cherriots  
Craig Pope, Polk County Board of Commissioners (via telephone)  
Gary Tiffin, Turner Mayor

### **Members Absent**

Lisa Nell, ODOT

### **Others Present**

Phil Carver, Marion County Resident  
Bob Cortright, Citizen Interest  
Steve Dickey, SAMTD  
Mike Jaffe, MWVCOG-SKATS  
Lori Moore, MWVCOG-SKATS  
Karen Odenthal, MWVCOG-SKATS  
Doug Parrow, Citizen Interest  
Kim Sapunar, MWVCOG-SKATS  
Janelle Shanahan, Marion County Public Works  
Julie Warncke, Salem Public Works

### **Agenda Item A. Call to Order**

Chair Cathy Clark called the meeting to order at 11:02 p.m.

### **Agenda Item B. Public Comment**

Phil Carver distributed written comments to committee members, staff, and interested parties. He provided an overview of the comments. Mr. Carver commented that Marion County residents do not believe that the federal or state governments will supply funding to build a 3<sup>rd</sup> bridge across the Willamette River. He suggested a new type of innovative Cherriots service between

West Salem and downtown: run like an Uber-type service using vans with seating for 9-12-passengers. He also suggested that free state worker bus passes and increases in downtown parking rates could also reduce congestion.<sup>1</sup>

Councilor Jim Lewis stated that he has been an advocate of park and rides and an east-west shuttle service for the last 14 years. However, increased transit concept funding has a history of failure with local voters, and the park and ride lot on Wallace Road has seen minimal usage.

Doug Parrow testified that the need for a new bridge is structured around demand numbers. He expressed doubt that local revenue could fund such a large project as a new bridge. He was curious if the elected officials in the room would commit to providing the funding necessary for a new bridge.

Councilor Jim Lewis responded that the city of Salem has successfully passed large bond measures to fund projects with approximately \$600 million successfully passed since 2008. He noted that people will fund things that they value.

Commissioner Sam Brentano commented that it is unlikely that the federal and state governments would not assist in funding a third bridge. Should that happen, it would make a difference. However, the point under consideration at today's meeting is to complete the EIS make the option possible to build a 3<sup>rd</sup> bridge in the future.

Chair Cathy Clark commented that the Newberg-Dundee project is a large and expensive project that is currently being funded in phases. Phase 1 has been completed and is open to public use now. She reiterated the comment that the action being considered today is to urge the city of Salem to complete the LUBA (Land Use Board of Appeals) remand so that a Record of Decision (ROD) can be reached for the Environmental Impact Statement. It is not to build or finance a new bridge today. Someday, a new bridge will be needed.

Chair Clark thanked those that testified at today's meeting.

Mike Jaffe provided an overview of the draft letter included in the agenda packet including previous steps and actions related to a possible 3<sup>rd</sup> bridge. The letter documents the public participation which was ongoing all through the planning studies and EIS work over the years to determine a purpose and need for the EIS, examine potential alignments, narrowing the alignments to three corridors and eight alternatives within those three corridors in the draft EIS (DEIS), and revising the preferred corridor to match the Salem Alternative, plus all the required technical reports leading up to development of a final EIS (FEIS). The letter references an attachment of an ODOT letter regarding time frame to complete the EIS and potential repayment of federal funds if the EIS is not completed. Also attached to the letter was daily traffic counts on the two bridge for 2017, showing the majority of weekdays traffic volumes exceed 100,000 vehicles. The letter ends with the reasons for the SKATS Policy Committee position for asking the city of Salem to respond to the LUBA remand and support completion of the FEIS.

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<sup>1</sup> See a copy of Mr. Carver's written comments attached at the end of the minutes.

Councilor Jim Lewis commented that the Salem Congestion Relief Task Force identified several improvements that could assist in easing congestion; however, their solutions did not eliminate congestion. He suggested that the work done by the task force aligns well with work done on the bridge study.

Chair Clark noted that the task force recommendations do not come with numbers. Commerce across the river is increasing not decreasing. She has grave concerns regarding the safety and equity of the current bridges as related to services and crashes and earthquake readiness.

**Motion was made by Gary Tiffin, seconded by Craig Pope, to direct Chair Clark to sign the letter “as is” and forward it to the Salem City Council.**

Kathy Lincoln remarked that she could possibly support the “No Build Scenario.” However, she cannot support a Build Scenario. She feels that it is unlikely that the federal or state government would contribute to this expensive and flawed project. She mentioned that even if the bridge is built, there will be ongoing maintenance costs associated with it following construction. She sees this project as only benefiting cars. Reading from the notes she provided,<sup>2</sup> she expressed opposition to the proposed letter to Salem City Council.

Commissioner Sam Brentano asked for clarification from Ms. Lincoln. He asked if she is expressing her personal opinion or reflecting the current position of the Cherriots’ Board of Directors. Ms. Lincoln confirmed that in late 2016, the Cherriots’ Board expressed their opposition to the city of Salem’s process to expand the UGB through the proposed land use decisions. Commissioner Brentano expressed disappointment with the position of the Cherriots’ Board.

Councilor Jim Lewis commented that even if the city competes the LUBA remand, it won’t translate to building a bridge. He expressed confidence that if the local community puts forth a proposal to build another Willamette River Bridge in the future, it is likely that the federal and state government will assist in paying for it.

Chair Clark asked who benefits from restricting access back and forth across the river? She expressed concerns about travel back and forth across the river being limited to the “able bodied.” Park and rides are nice and a part of a whole, but not a solution for everyone. She also expressed concern regarding limitations on housing due to employment location. In her opinion, the responsible thing to do is move forward to a Record of Decision (ROD) for the preferred alternative.

Commissioner Brentano expressed satisfaction with the draft letter; although, he preferred a previous shorter version that he had submitted. Councilor Lewis concurred with Ms. Lincoln’s view of the value of transit; however, he doesn’t agree with limiting potential solutions to only one mode.

It was asked if today’s vote needs to be unanimous. Mike Jaffe responded that the only unanimous votes required are for the adoption of the Transportation Improvement Program (TIP)

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<sup>2</sup> See Attached Notes from Kathy Lincoln following the minutes.

and the Regional Transportation Solutions Plan (RTSP). All other Policy Committee motions require a vote from majority of members present in order to be passed.

Commissioner Craig Pope requested that each member's vote be recorded. Chair Clark reminded the commissioner that each member's vote is recorded in the minutes along with whether or not a motion passed or failed.

Those voting in favor of the motion were: Sam Brentano, Cathy Clark, Paul Kylo, Jim Lewis, and Gary Tiffin for the motion. Kathy Lincoln opposed the motion. Although Ms. Nell was not present at the meeting, she had informed the chair prior to the meeting that she would abstain on any motion related to the draft letter. **The motion passed with six votes for the motion, one vote against the motion, and one abstention.**

The meeting was adjourned at 11:46 a.m.



**Staff Report**

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**File #:** 18-531  
**Version:** 1

**Date:** 11/26/2018  
**Item #:** 5. a.

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**TO:** Mayor and City Council  
**FROM:** Councilor Jim Lewis, Ward 8

**SUBJECT:**

Motion from Councilor Jim Lewis concerning the Salem River Crossing

Ward(s): All Wards

Councilor(s): All Councilors

Neighborhood(s): All Neighborhoods

**MOTION:**

I move that City Council direct staff to prepare an ordinance and all other necessary land use actions to respond to the issues raised in LUBA's remand of the City's UGB expansion decision concerning the Salem River Crossing. The ordinance and other actions shall be presented for City Council's consideration prior to June 2019.

Attachments:  
None

**For the January 14, 2019 SAMTD Board Work Session  
Agenda Item No. WS.4.b - ATTACHMENT 3**



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LEGAL MEMORANDUM

Legal Department, City of Salem, Rm. 205 City Hall, Phone: (503) 588-6003

To: City Council

Through: Steve Powers, City Manager

From: Dan Atchison, City Attorney

Date: November 26, 2018

Subject: Summary of actions required on remand of the City's UGB expansion decision

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The purpose of this memo is to summarize the Land Use Board of Appeals' (LUBA) decision that remanded the City's 2015 decision to expand the Salem Area Urban Growth Boundary (UGB) and make other changes to the City's land use regulations. In summary, while the City prevailed on most of the substantive assignments of error, particularly on the transportation and "need" issues, the City will need to correct errors identified by LUBA in cooperation with Polk County and our other regional partners. LUBA found the City's decision erred in three respects;

1. Used incorrect population forecast,
2. Zoning district for the property was incorrect/may not sufficiently limit permitted uses, under the Goal 15 (Willamette Greenway) exception.
3. Lack of findings for compliance with Comprehensive Plan, Willamette Greenway Goals.

1. Incorrect population forecast.

LUBA's final order stated that the City used the wrong population forecast in its analysis of the proposal. LUBA's decision strongly implied that if Portland State's (PRC) forecast is available when the City takes action on remand, that the City use the PRC forecast. In the alternative, the City could use the acknowledged 2009 forecast. The forecast used by the City overestimated the UGB's future population by 13,000 as compared to the PRC forecast.

**Steps to address:**

- Work with MWCOG to revise transportation analysis applying the correct population numbers. Once the analysis is complete, the City will need to

revise findings and conclusions relative to the applicable criteria. Depending on the resulting traffic volumes, there may be a need to engage a consultant to conduct additional traffic analysis.

- City staff/consultant will need to review the analysis, and draft revised findings and conclusions.

## 2. Zoning.

LUBA's final order found that the zoning for the property subject to the UGB expansion and the property subject to the Goal 15 (Willamette Greenway) exception were not correct. For the UGB expansion property, the retention of the EFU zoning was in error, because the EFU zoning does not allow an "urban" transportation facility contemplated in the decision. In regard to the Goal 15 exception, LUBA stated that the City, on remand, must more clearly explain how the zoning for the property limits the uses . . . to those justified in the exception (urban transportation uses).

To comply with LUBA's direction, the properties must be rezoned to uses that; 1) allow an urban transportation use, and; 2) limits the zone to only that use. There are portions of the subject property within and without the City limits. Therefore there will need to be two-rezoning decisions; one conducted by the City and the other conducted by Polk County.

The City property rezoning is fairly straight forward procedurally. The City would legislatively initiate the proceeding (either Planning Commission or Council can initiate).

The Polk County property rezoning is a bit more complicated. Polk County has agreed that it is the appropriate decision maker for the application. In this scenario, the City would apply to Polk County, and its Board would make the ultimate decision.

Alternatively, the City could annex the Polk County property and process the zone changes together. In both rezonings, the decisions would be conditioned on the City's overall UGB decision being approved, because the findings in the rezoning decisions would rely on the results of the City's UGB decision.

### **Steps to address:**

- Prepare facts and findings for the "City" zone change,
- Initiate the zone change proceeding, hold a hearing, and issue a final decision.

### 3. Willamette Greenway Goal Policies.

The City did not have findings of compliance with certain Willamette Greenway policies contained in the comprehensive plan. While there is substantial evidence in the decision regarding the Greenway that evidence was not tied directly to the Greenway policies.

#### **Steps to address:**

- Review the record to verify there is substantial evidence to show the proposal complies with the Willamette Greenway policies contained in the comp. plan. If so, draft findings of compliance. If not, prepare substantial evidence and draft findings of compliance.

### 4. Overall action on remand.

Once all the work has been done on the remand issues, the City, and the City's partner jurisdictions will need to conduct new hearings. The scope of the hearing(s) on the UGB expansion can be limited to the remand issues.

#### Conclusion.

Depending on the size and scope of the work required to address the revised population estimate, and how the zoning issues will be resolved, it will likely be six to nine months before the project would be ready for consideration on remand.



555 Court St. NE, Ste. 5230  
Salem, OR 97301-3980

(503) 588-2424 Fax (503) 566-3933  
www.cherriots.org



Date: October 12, 2016

To: Cities of Keizer and Salem  
Marion and Polk Counties

From: Director Kathy Lincoln  
SAMTD Board of Directors

Re: Testimony on behalf of Salem Area Mass Transit District at the Joint Public Hearing on Land Use Action to Support the Salem River Crossing Preferred Alternative

Good evening, I am Kathy Lincoln, board member, Salem Area Mass Transit District. I am speaking this evening on behalf of the Board of Directors.

The Salem Area Mass Transit District Board of Directors opposes the current process to expand the city's Urban Growth Boundary and amend of the Transportation System Plan for the following reasons:

- The current Preferred Alternative has been altered from the alternative that was endorsed by the Board of Directors in April 2014
- As a member of the Salem River Crossing Oversight Team, the Transit District Board has not had an adequate opportunity to evaluate the:
  - Traffic and Transportation Tech report
  - Land Use Tech Report
  - Construction, geology and other technical reports that were made public just days ago.

These reports describe how the Preferred Alternative operates, what impacts it has on the neighborhoods and traffic system, and how well public transit will operate on the system. This is the first information we have seen about the proposed bridge since the last Oversight Team meeting in December 2014. There has not been sufficient time to review this information and make an informed decision.

The Transit District participated in funding the Alternate Modes Study, which was released in April 2010. There appears to be no desire to include projects from this study as part of the river crossing project. These projects will help reduce congestion at the current bridge heads.

Before committing to an expensive, new highway and bridge, the Board would like to work with the other oversight members to implement the projects in the Alternate Modes Study, including support for transit amenities.

Additionally, at this time, there is no firm decision about which jurisdiction will operate and maintain the new bridge and highway after it is built. We have not seen information regarding how that will affect the city's streets and bridges maintenance budget, which impacts how well the district's buses operate. A facility that big will require considerable maintenance funds which will presumably come from the city's budget. We have seen no plan to pay for the continued maintenance of the bridge over the years.

The proposed Project Funding Strategy, dated March 6, 2015 (a copy is attached) has not been carefully vetted and would impact the ability to raise funds for other public services in this community. Before adding the Preferred Alternative to the city's TSP, area residents should be allowed to weigh in on potential funding options including a local gas tax increase, tolling, increased vehicle registration fees and property taxes.

The Project Funding Strategy assumes that the Mid-Willamette Valley Area Commission on Transportation will agree to set aside multiple years of its allotment of state funds to help pay for the bridge. There is no commitment from the ACT on that.

If the proposed funding plan is implemented it will make a significant dent in the amount of public funds left over in this community for other services, such as police and public transit.

Although we would welcome the opportunity to work with the oversight team jurisdictions to resolve these concerns, the current action is premature and speculative and the Transit District Board does not support it.

Sincerely,

Kathy Lincoln  
Board of Directors

# Project Funding Strategy Memorandum

TO: Project Oversight Team  
FROM: Project Management Team  
DATE: March 6, 2015

## 1. Purpose

The intent of this memorandum is to document the conceptual funding strategy for the Salem River Crossing Project (SRC) Preferred Alternative that was developed by the Project Oversight Team (OT) on December 11, 2014.

## 2. Funding Requirements

The estimated cost of the SRC Project is approximately \$430 million<sup>1</sup>. While it would be preferable to construct the entire project at the same time, it may be constructed in phases over a longer period of time as funding became available. Recognizing that financial limitations may require phasing, the project has been divided into four possible major construction phases, summarized below:

### **Phase B Key Elements (Approximate Cost: \$300 million)**

- Construct new bridge and ramp connections on both east and west sides of river
- Realignment of Front Street and other street modifications in North Salem
- Widening of Wallace/Hope Avenue intersection
- Widening of Wallace/Orchard Heights intersection

### **Phase M-South Key Elements (Approximate Cost: \$20 million)**

- Construct southern section of Marine Drive (from Hope Avenue Extension to Glen Creek Road)
- Construct Beckett Street (new street opposite Narcissus Court)
- Extension of 5<sup>th</sup> Avenue NW between Cameo Street and Marine Drive

### **Phase M-North Key Elements (Approximate Cost: \$10 million)**

- Construct northern section of Marine Drive (from Hope Avenue Extension north to River Bend Road)

### **Phase R Key Elements (Approximate Cost: \$100 million)**

- Construct fly-over ramps from Marine Drive to Highway 22
- Construct Marine Drive at-grade section south from Glen Creek Road to fly-over ramps
- Modifications to Highway 22, including closure to westbound off-ramp at Rosemont Avenue (to be coordinated with possible relocation of this exit further west)

<sup>1</sup> This cost estimate will be refined and updated for the Final Environmental Impact Statement.

Per Federal Highway Administration (FHWA) guidance (FHWA, 2014), the SRC Project, as a project with an estimated cost between \$100 million and \$500 million, would be required to prepare a Financial Plan. An initial Financial Plan would need to be submitted to FHWA prior to FHWA project authorization for construction; however, a Financial Plan is *not* required to be prepared during the Final Environmental Impact Statement (FEIS) process as a prerequisite to the project being issued a Record of Decision (ROD) by FHWA.

### 3. Funding Options

Transportation infrastructure projects such as SRC could be funded through a mix of federal, state, and local sources. However, with limited options for federal and state funds, discussions with the community have focused on identifying potential local sources of revenue.

Four local funding sources were identified as the most likely to be applicable to the SRC project: **1) gas tax, 2) vehicle registration fee, 3) property tax, and 4) tolls.**

The above local funding mechanisms were considered most likely to be applicable to the project based on the following criteria (ECONorthwest, 2014):

- **Legal authority.** A funding source must not be prohibited by State statute, or it must become legal within a desired timeframe. Even for legal funding sources, complicated legal requirements could result in legal challenges, extra administrative costs, and political uncertainty.
- **Efficiency.** An efficient funding source creates and maintains net revenues (net of collection costs) by providing sufficient revenue generating capacity, stability, and flexibility of use while minimizing administrative costs (i.e., the costs of collecting on the source).
- **Fairness.** In the context of transportation funding, fairness is achieved when infrastructure improvement charges are tied to the users who receive benefits from (or impose costs on) the transportation system. Definitions of fairness can be modified to allow for special dispensation of certain groups (e.g., low-income families, the elderly, and people with disabilities). In other cases people may benefit from transportation improvements that they do not personally use but nevertheless provides an indirect cost-savings, such as through more efficient (and cheaper) freight routes. Geography can also play a role in evaluating fairness, for example, if residents in one county pay all of the cost for a project that benefits residents in multiple counties.
- **Political acceptability.** Political acceptability considers whether elected officials and the public at large are likely to support the funding source. This depends to a large extent on the issues above: if a revenue source is legal, efficient, and fair, then it should get political support from the public, advisory groups, and decision makers. Generally, public opinion is against most new or increased taxes and fees. But, if the public believes the services or projects to be funded by these taxes and fees are important, then their opinion of the revenue source may change.

Two funding workshops were held on December 3, 2014 to gather input from stakeholders about which of the local revenue sources to utilize, and at what levels, in an overall funding



strategy. The afternoon workshop was held for elected officials, public agency staff, and interested stakeholders. The evening workshop was open to all members of the public.

At the funding workshops participants discussed the strengths and weaknesses of the four potential local revenue sources and performed a funding tool exercise that allowed them to create funding strategy scenarios.

## 4. Summary of Funding Strategy Discussion

On December 11, 2014 the OT held a meeting to consider the funding strategy feedback provided by workshop participants and to develop a conceptual funding strategy that would serve as a guiding framework for future funding efforts and decision-making. The OT also considered potential sequencing of construction phases with regard to funding.

The discussion began with the introduction of a funding strategy table containing four rows listing each of the construction phases and columns containing blank cells in which to allocate funding contribution amounts from each of the four local revenue sources as well as federal and state sources. OT members discussed the advantages and disadvantages of the respective revenue sources and the sequencing of construction phases. The OT considered ranges for each revenue source and discussed which revenue source made the most sense for particular construction phases and the project as a whole.

A first cut at the funding sources and amounts was provided by one of the OT members and is summarized in Table 1. This proposal was based on discussions that had taken place at the funding workshops and funding strategies that have been used to successfully fund other projects in the region. It was pointed out that the sum of all the funding amounts proposed exceeded the revenue needs of the project. It was clarified that the values placed in the table represented **upper ranges of revenue** that could potentially be raised for each of the funding sources. If one or more of the funding sources was not secured, it may be necessary to pursue increased funding from another source up to the maximum shown to meet the need. Or vice

Project Phase	Approx. Cost	Funding Source					
		FEDERAL	STATE	LOCAL	LOCAL	LOCAL	LOCAL
				Gas Tax	Vehicle Reg. Fee	Property Tax	Tolling
Phase B	\$300,000,000	\$20 M	\$75 M	\$65 M	\$65 M	--	\$175 M
Phase M-South	\$20,000,000					\$20 M	
Phase M-North	\$10,000,000					\$10 M	
Phase R	\$100,000,000	\$20 M	\$75 M	\$20 M	\$20 M		\$100M
<b>Total Project Cost</b>	<b>\$430,000,000</b>	<b>\$40 M</b>	<b>\$150 M</b>	<b>\$85 M</b>	<b>\$85 M</b>	<b>\$30 M</b>	<b>\$275M</b>

versa, funding amounts from one source may be reduced if more funding from another source is secured.

**Table 1: Initial Proposal for Funding Strategy**

M = Million

Key points discussed by OT members with respect to the development and selection of a conceptual funding strategy are paraphrased below:

- Based on a review of funding plans for other projects and the contribution those projects have received from federal and state funding sources, one OT member suggested that it was reasonable to anticipate project funding contributions being approximately 50% from local revenue sources and 50% from state and federal sources. This project has the same ability to affect the state as Pioneer Mountain-Eddyville (Hwy. 20), the Newberg-Dundee bypass, and the I-5 interchange area in Woodburn, which all received a high percentage of state funding.
- A goal of this discussion was to keep the initial funding strategy broad enough that future elected officials will have flexibility to propose politically viable options to voters.
- The point was emphasized that this is a conceptual funding strategy and no decisions regarding actual funding commitments are being made. The funding strategy being developed is just a framework to move forward.
- With regard to phasing, the OT agreed that the best scenario would be that all project phases would be constructed concurrently within a short time period. This is a regional project and all the proposed project elements are needed to create a safer, more efficient system and provide regional benefit.
- Using property tax as a revenue source was felt to have limited utility with the exception of funding Marine Drive, which could potentially be funded with a City of Salem property tax. Marine Drive has independent value, is already in the City's transportation system plan (TSP) and City residents have approved transportation improvement property taxes in the past (the most recent in 2008). Some private dollars may be collected from adjacent developments to contribute to the construction of Marine Drive.
- A source of state and federal funding discussed was the Statewide Transportation Improvement Program (STIP) which includes federal and state funds. The Mid-Willamette Valley Area Commission on Transportation (MWACT) has a role in recommending projects that would use these funds. It would take approximately three years to construct the bridge, another year for Marine Drive, and two years to construct the ramps, so that would allow six or seven years to accumulate funding through future potential recommendations by MWACT to set aside funds in the STIP for these projects. The last STIP allocation for MWACT was approximately \$17 million. Over three STIP cycles a potential of \$30-50 million could be allocated for the project. This is ODOT

Enhance Program money, but it is primarily federal dollars. If \$45 million in Enhance Program money was allocated to this project, that would break down to approximately \$5 million in state dollars and about \$40 million in federal funds. It was agreed that this money should be added into the initial funding strategy – it would be reasonable to anticipate this funding amount and it may be more reliable than some of the other local revenue sources.

- Raising more than a few million dollars of state funding would require state legislative action similar to the 2009 Jobs and Transportation Act (JTA), so some felt it may not be realistic to suggest that \$150 million of state funding could be secured, but the OT agreed that it should remain in the funding strategy as a source of revenue that should be pursued.
- Raising local revenue for this project through a gas tax and/or vehicle registration fee may be more successful if the project was part of a regional package of projects.
- Tolling allows for a broader funding base – the cost burden would not fall only on local residents. There should however be price reductions for seniors and low-income people if tolls were installed.
- It was suggested that a more reasonable revenue amount to be raised through tolling would be based on a toll of \$1.50, which would raise \$175 million. This funding could be used to construct the new bridge or some portion of the ramp connections to Hwy 22.

## 4. Recommended Funding Strategy

Following the discussion summarized in Section 3 of this memorandum, the funding strategy for the SRC Preferred Alternative was revised by the OT and is shown in Table 2.

**Table 2: Recommended Funding Strategy**

Project Phase	Cost	Funding Source					
		FEDERAL	STATE	LOCAL	LOCAL	City of Salem	LOCAL
				Gas Tax	Vehicle Reg. Fee	Property Tax	Tolling
Phase B	\$300,000,000	\$20 M*	\$5 M* \$75 M**	\$65 M	\$65 M	--	\$175 M
Phase M-South	\$20,000,000					\$20 M	
Phase M-North	\$10,000,000					\$10 M	
Phase R	\$100,000,000	\$20 M*	\$75 M**	\$20 M	\$20 M		
<b>Total Project Cost</b>	<b>\$430,000,000</b>	<b>\$40 M*</b>	<b>\$5 M*</b> <b>\$150 M**</b>	<b>\$85 M</b>	<b>\$85 M</b>	<b>\$30 M</b>	<b>\$175 M</b>
Tax/Fee/Toll necessary to generate revenue shown				\$.06/Gallon	\$25/Year	\$0.37/\$1K	\$1.50/crossing

M = Million

\*Potential MWACT STIP allocation

\*\* Would require legislative action

To reiterate, the sum of all the funding amounts proposed exceeds the revenue needs of the project and should be viewed as suggested maximum values that could potentially be secured with each of the funding sources. The development of financial plans for large transportation infrastructure projects such as this is an iterative process where the funding strategies are often modified based on the success or failure in securing funding.

## References

ECONorthwest. November 12, 2014. *Salem River Crossing Revenue Projections Memorandum*.

Federal Highway Administration (FHWA). December 18, 2014. *Major Project Financial Plan Guidance*.



**To:** Board of Directors

**From:** Ted Stonecliffe, Transit Planner II, Programs  
Steve Dickey, Director of Transportation Development

**Thru:** Allan Pollock, General Manager

**Date:** January 14, 2019

**Subject:** Fares Analysis Discussion

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Fares are evaluated every two years at the direction of the Board. The last fare change for the District occurred in January 2015. In 2017, at the February 23 Board meeting, the Board directed staff to move the evaluation of fares to the month of September (2017) with any changes to take effect in July (2018). In 2017, House Bill 2017 for the Statewide Transportation Improvement Fund (STIF) passed; and the District began to prepare for STIF funding and the delivery of additional weekend, holiday and later evening service. The September fare analysis was delayed to 2018.

Staff conducted a public outreach process in May and June 2018; and a full analysis of the outreach was provided in the 2018 Fares Analysis Report, as **Attachment A**. Feedback had been gathered from riders and non-riders on a fare proposal that had four major proposed changes:

- A new category for people to qualify for reduced fares on Cherriots Local and Cherriots Regional services based on income (200% of federal poverty level or below; also called a “low income fare”)
- A new free youth fare on Cherriots Local and Regional buses
- Simplification of Cherriots Regional fares on contracted regional buses (Routes 10X, 20X, 30X, 40X, 50X, and the Polk County Flex) to make fares the same as Route 1X fares
- Introduction of a new universal day pass that would work on both Cherriots Local and Cherriots Regional buses

Subsequent to the public outreach, it was determined that a low income fare would cost the District approximately \$434,000 per year, and the free youth fares would cost an

additional \$393,000. The Board voted to remove the low income qualification for reduced fares at the October 25, 2018 board meeting, and proposed a youth fare for ages 6 to 18 that would cost less than the current reduced fare, as part of the approval process for the Statewide Transportation Improvement Fund (STIF) Plan. This change allowed for more service to be provided on the street, which would benefit all paying customers.

In the Fares Analysis Report (in Attachment D and on page 21) the Title VI fare equity analysis showed a strong potential for disproportionate burdens to low income people who use the contracted regional buses, if the regional fares were simplified without the implementation of a low income fare category. Consequently, the original proposal to simplify the regional fare structure was postponed for consideration at a future date to be determined. There was also a potential disparate impact to minorities and disproportionate burden to low income people based on the analysis, if a universal day pass replaced the current contracted regional day pass. For that reason, it was recommended that all changes proposed in the May-June 2018 public outreach be excluded in the fare change schedule for July 1, 2019; except for the youth fare programs on both Cherriots Local and Cherriots Regional. Youth fares would not be free as originally proposed, but significantly lower than the current reduced fare. The Summer Youth Pass is proposed to be discontinued due to the low numbers who purchase the pass, and the relatively high cost to produce the additional fare product. Details are provided in Table 1 below:

**Table 1.** Youth fares proposed (effective July 1, 2019)

<b>Category</b>	<b>Current Reduced Fare</b>	<b>Proposed Youth Fare</b>
Cherriots Local one ride youth (6-18)	\$0.80	\$0.50
Cherriots Local day pass youth (6-18)	\$1.50	\$1.00
Cherriots Local 30-day pass youth (6-18)	\$22.50	\$10.00
Cherriots Local annual pass youth (6-18)	\$270.00	\$120.00
Summer Youth pass (6-18)	\$40.00	Discontinued
Cherriots Regional one ride youth (6-18)	\$1.50	\$1.00
Cherriots Regional day pass youth (6-18)	\$3.00	\$2.00
Cherriots Regional month pass youth (6-18)	\$30.00	\$20.00

With the adoption of Board Resolution No. 2018-09, a plan for the newly available STIF program was approved at the October 25, 2018 board meeting. The application for the STIF formula funds was submitted to the Oregon Department of Transportation (ODOT) on November 1, 2018. The youth fares in Table 1 were included in the STIF grant application, and satisfy a requirement of the STIF program to use at least one percent of the funds to improve transportation for students grades nine through twelve. The

District's STIF grant application dedicated over two percent of the grant funds to the proposed youth fare program in FY2020 and FY2021.

Another goal of the STIF program was met for programs established to benefit low income people. The proposed youth fares would make it much more affordable for families with children ages 6 to 18 to ride transit, especially low income families. The new youth fare would be a savings of \$122.50 per year for the typical high school student who buys a 30-day pass nine times a year, and the Summer Youth Pass when school is out of session. If they currently purchase an annual pass, the savings would be \$150.00 per year.

Based on the 2016 Rider Survey, 19.9 percent of Cherrits Local riders were ages 6-18. The District's cost to implement the youth fares in Table 1 is estimated at approximately \$137,000 per year. For Cherrits Regional, 8.8 percent of riders were ages 6-18 in the survey. This implies an annual cost of about \$2,200 for Cherrits Regional riders.

The formal process to implement the new Youth Fare will commence at the January 24, 2019 Board meeting with the first reading of Ordinance No. 2019-01 and a public hearing. The public hearing will conclude at the February 28, 2019 Board meeting with the second reading of Ordinance No. 2019-01 and action taken by the Board to adopt the ordinance. Once adopted, the new fare structure will go into effect on July 1, 2019.



**2018**

*FARES ANALYSIS REPORT*

*DECEMBER 2018*



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## 1.0 Introduction

As part of the FY2006 budget process, the Board directed staff to evaluate fares every two years to assess the need for changes. This procedure was also recommended as a standard practice in the District's 2004 Strategic Business Plan. The last fare change occurred in January 2015, and subsequent analyses were delayed due to the expected influx of new operating funds beginning in 2019 from the Statewide Transportation Improvement Fund (STIF). It was determined in 2017 that an analysis should be postponed until 2018 when the enhanced service plan (the "A Better Cherrriots" plan) is finalized and submitted to the Board's STIF Advisory Committee for review.

## 2.0 Proposal for July 2019 Fare Change

A proposal with five major goals was developed by staff and presented to the Board at the April 9, 2018 work session. Among other items, the Administrative Rules for this new funding call for transit agencies to *"fund the implementation of programs to reduce fares for public transportation in communities with a high percentage of Low Income Households."*

### 2.1 Proposal goals

The goals of the fare change proposal are as follows:

1. Simplify fare structure
2. Facilitate transfers between local and regional buses
3. Help families and low-income riders
4. Encourage youth to ride
5. Ensure fare structure is equitable

### 2.2 Public outreach

In turn, a survey was developed to ask the public their opinion of each proposed change and to hear their ideas about other desired changes. The proposal was presented to the public for three weeks in May and June 2018 with details in English and Spanish on the following website: [cherrriots.org/better](http://cherrriots.org/better). Surveys were also collected on paper in English and Spanish via in-person tabled events. Notices were placed at the following locations:

- Posters on all Cherrriots Local buses
- Take-one flyers on all Cherrriots Local and Regional buses
- Monitor ads on the Downtown Transit Center departure screens
- Stop notices at all Cherrriots Regional bus stops
- Advertising on the front page of [cherrriots.org](http://cherrriots.org)

- Social media posts (Twitter and Facebook)

Seven in-person events were held to solicit participation in the survey. Table 1 below shows the date, time, and location of each:

**Table 1.** Outreach event dates, times, and locations

<b>Date</b>	<b>Time</b>	<b>Location</b>
5/22/18	12:30 – 3:30pm	Downtown Transit Center (DTC) Customer Service Lobby
5/24/18	2:30-5:30pm	DTC Center Island Table
5/29/18	11:00-2:00pm	Chemeketa Community College Free Speech Table (Building 2)
5/30/18	11:00-1:00pm	Open Bus at Wed. Farmers' Market
5/31/18	10:00-1:00pm	DTC Customer Service Lobby
6/6/18	12:30-3:30pm	DTC Customer Service Lobby
6/7/18	1:00-4:00pm	Keizer Transit Center lobby

## 2.3 Existing versus Proposed Fare Structure

The existing fare structure has not changed since January 2015. The existing fares are summarized in Figure 1 below.

**Figure 1.** Current Cherrriots fare structure (June 2018)



The original proposal for a new fare structure, beginning in July 2019, is summarized in Figure 2. No changes to the Cherriots Local system fares are proposed with this proposal.

**Figure 2.** Proposed Cherriots Fare Structure (July 2019) as presented to the public in May and June 2018



Staff gathered input from the public through outreach events and in-person and online surveys in English and Spanish.

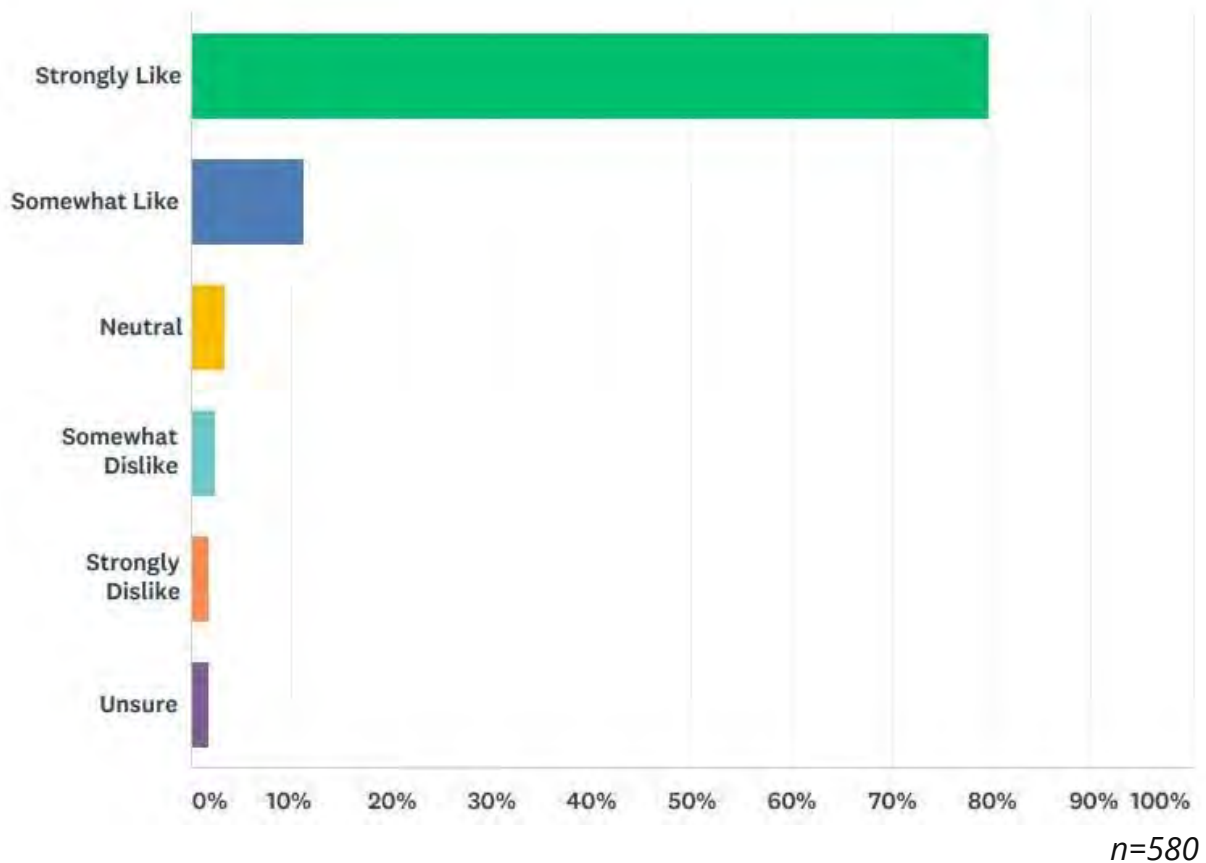
## 2.4 Survey Results

In total, 592 surveys were received (141 paper copies and 451 online), which is a good response rate considering the non-controversial nature of the survey and how only one fare category is proposed to increase. The following are results of each survey question:

### 2.4.1 Survey question #1

The first question on the fare survey asked people about the proposal to make low-income a qualification for being able to ride by paying only a reduced fare on all Cherriot's services. Figure 3 below shows the survey results for question #1:

**Figure 3.** Question #1: “How do you feel about the proposal to allow low-income households who qualify for selected social service programs (exact programs to be determined at a later date) to qualify for reduced fares on all Cherriot's Local and Regional buses?”

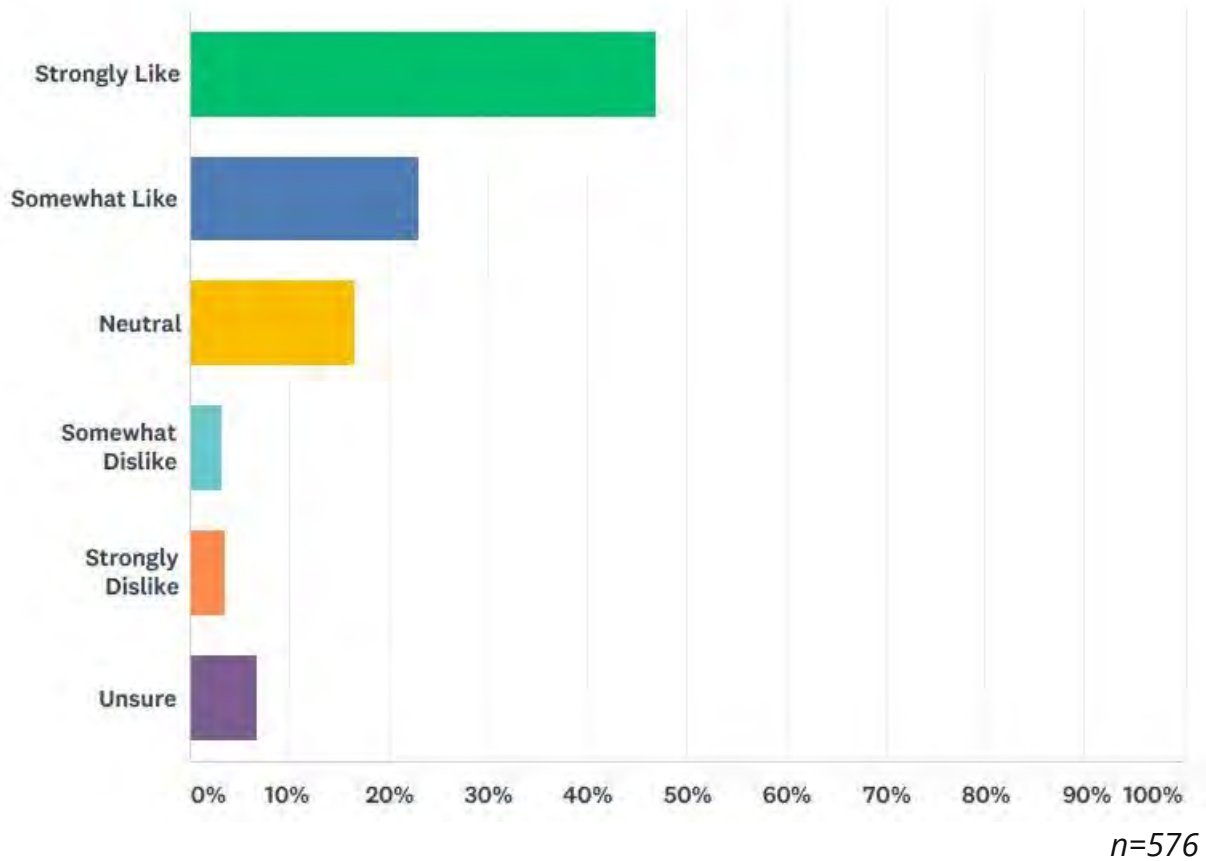


An overwhelming majority of respondents approved of the idea of including low-income as a qualification for reduced fares with 90.9 percent saying they either strongly liked or somewhat liked the proposal. This is likely due to the fact that at least two-thirds of existing riders would qualify for the reduced fare based on income.

### 2.4.2 Survey question #2

The second question asked people about the plan to simplify fares for the Cherriots Regional system. Figure 4 below shows the resultant response:

**Figure 4.** Question #2: How do you feel about the proposal to make the fares for Route 1X and other Cherriots Regional routes the same (\$2.50 for adults)? This would mean a reduction in the price for Route 1X and an increase for Routes 10X, 20X, 30X, 40X, 50X and the Polk County Flex.



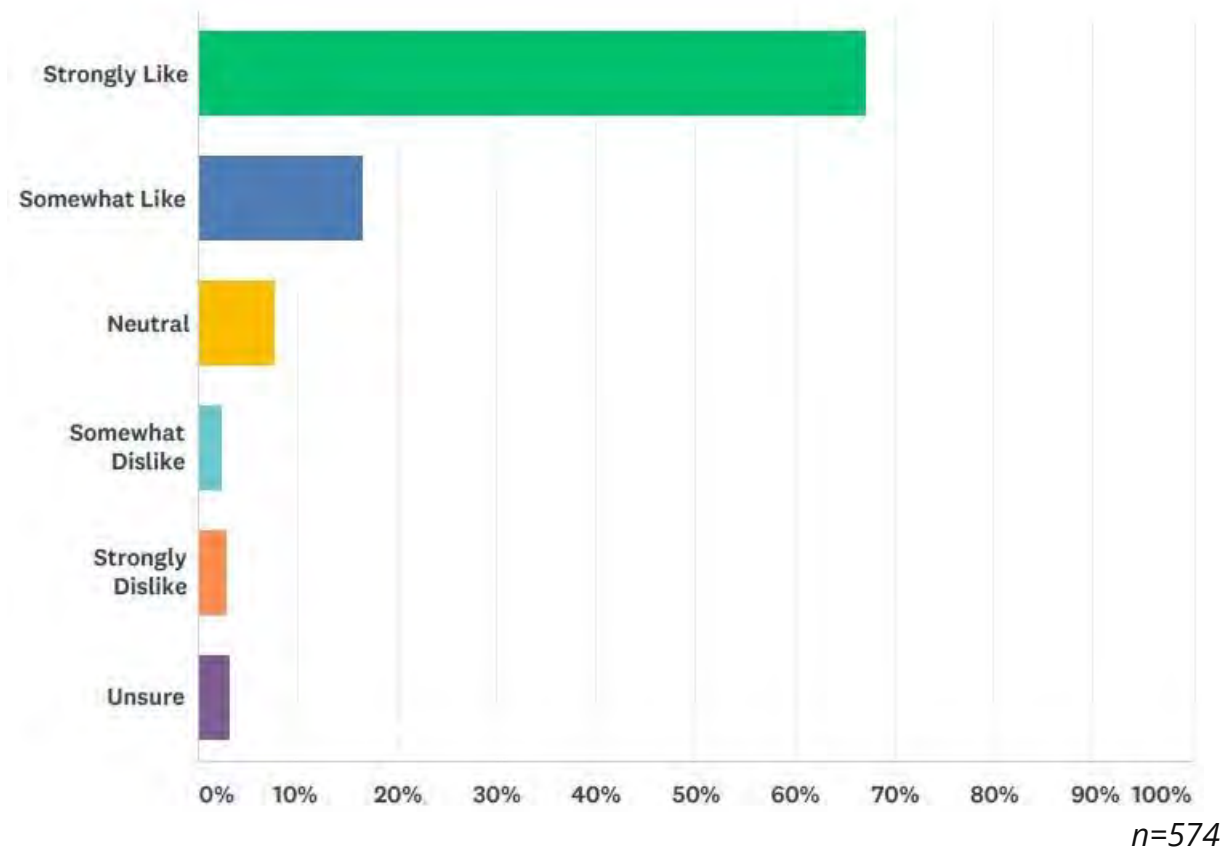
Again, a large majority of respondents approved of the idea of simplifying fares on the Cherriots Regional services with 70.0 percent saying they either strongly liked or somewhat liked the proposal. There were 3.7 percent that strongly disliked the proposed fare simplification. Those were likely the people who only ride Routes 10X, 20X, 30X, 40X, or 50X, and never transfer to other services; neither would they qualify for the low-income fare category. A large number of respondents were neutral on the subject most likely due to the fact that they never ride the regional buses.



### 2.4.3 Survey question #3

The third survey question asked people if they would favor creating a universal day pass for \$5.00, which could be used on all Cherriots services for one day. Figure 5 shows the results.

**Figure 5.** Question #3: How do you feel about creating a universal day pass for \$5 (adults) good on all Cherriots Local and Regional buses (including Route 1X), and lowering the price for the universal month pass from \$85 (for adults) to \$75?

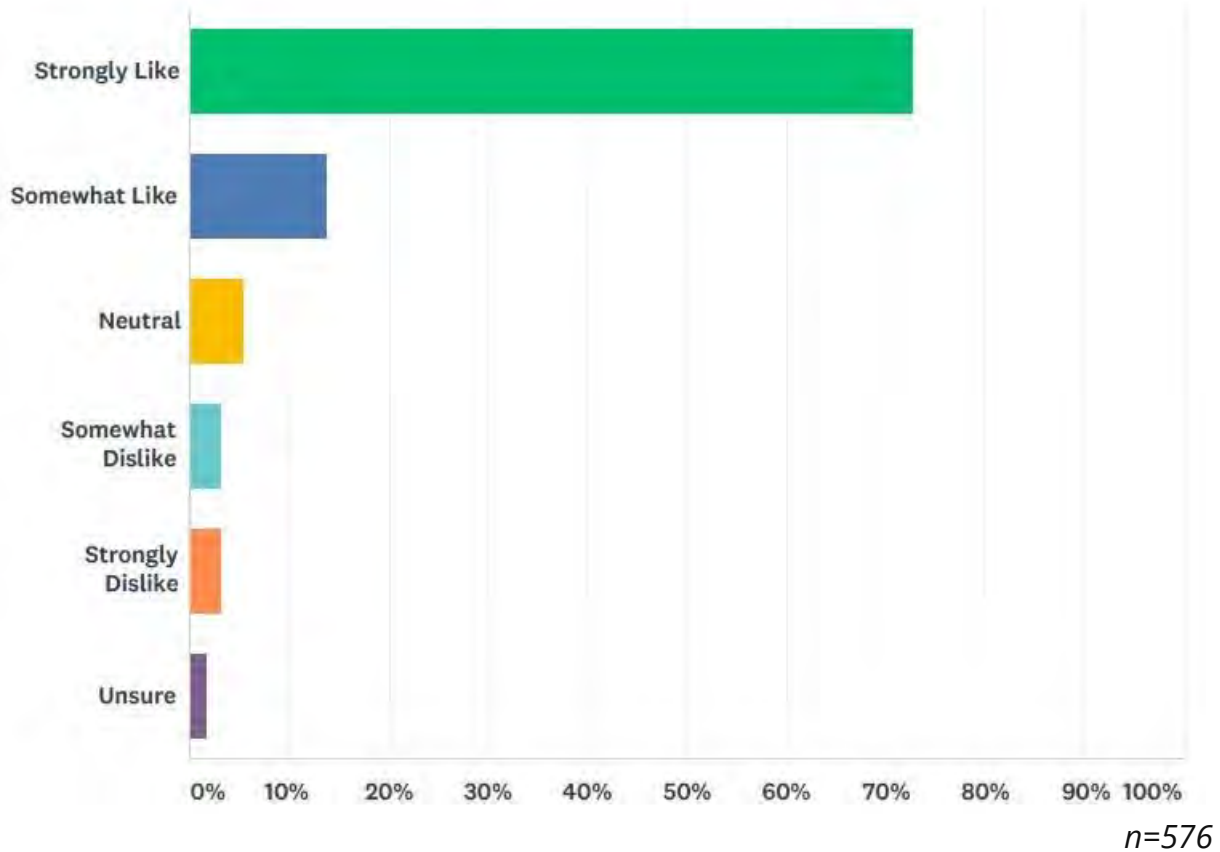


Again, most people (83.8 percent) responding to the survey said they either strongly like or somewhat like the proposal. A small number who strongly disliked the proposed change are riders who only ride Routes 10X, 20X, 30X, 40X, or 50X and buy a monthly pass today for only \$60. The increase to \$75 was unacceptable to them because they wouldn't transfer to the Cherriots Local routes or Route 1X. However, looking at pass sales in the Customer Service Lobby at the Downtown Transit Center, most people riding the 10X, 20X, 30X, 40X, and 50X do not buy the Regional only month pass, they purchase the universal month pass, because they ride on Cherriots Local or 1X buses in addition to the 10X, 20X, 30X, 40X, or 50X.

#### 2.4.4 Survey question #4

The fourth question asked people about making the fare free for children 0-11 and middle and high school students who have a valid student ID. The results are displayed in Figure 6. below.

**Figure 6.** Question #4: Cherrriots is proposing to make it free to ride for children ages 0-11, middle school, and high school students (including home-schooled children)... How do you feel about this proposal?

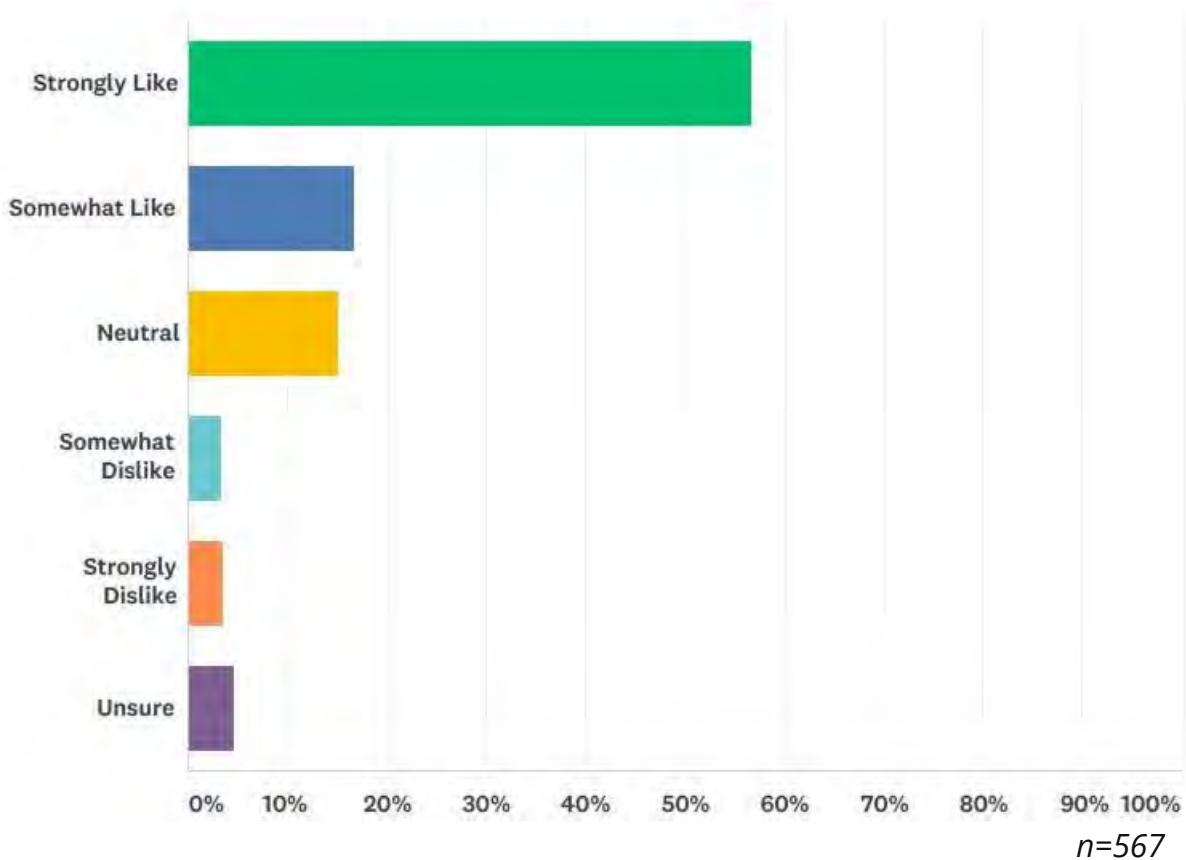


86.6 percent of respondents approved of this idea to make it easier for youth and families to ride together. Those who disliked the proposal said that the kids should continue to pay the reduced fare in order to reduce unpunished vagrancies committed on the bus by youths.

### 2.4.5 Survey question #5

The fifth question asked people about creating a month pass for Cherriots LIFT customers. This pass would be valid for a whole calendar month and would allow unlimited rides on Cherriots LIFT, Regional, and Local buses. Figure 7 below shows the responses to this question:

**Figure 7.** Question #5: How do you feel about the proposal to create a monthly universal pass for Cherriots LIFT customers, which would be good on all Cherriots LIFT, Local, and Regional buses for \$90/month?

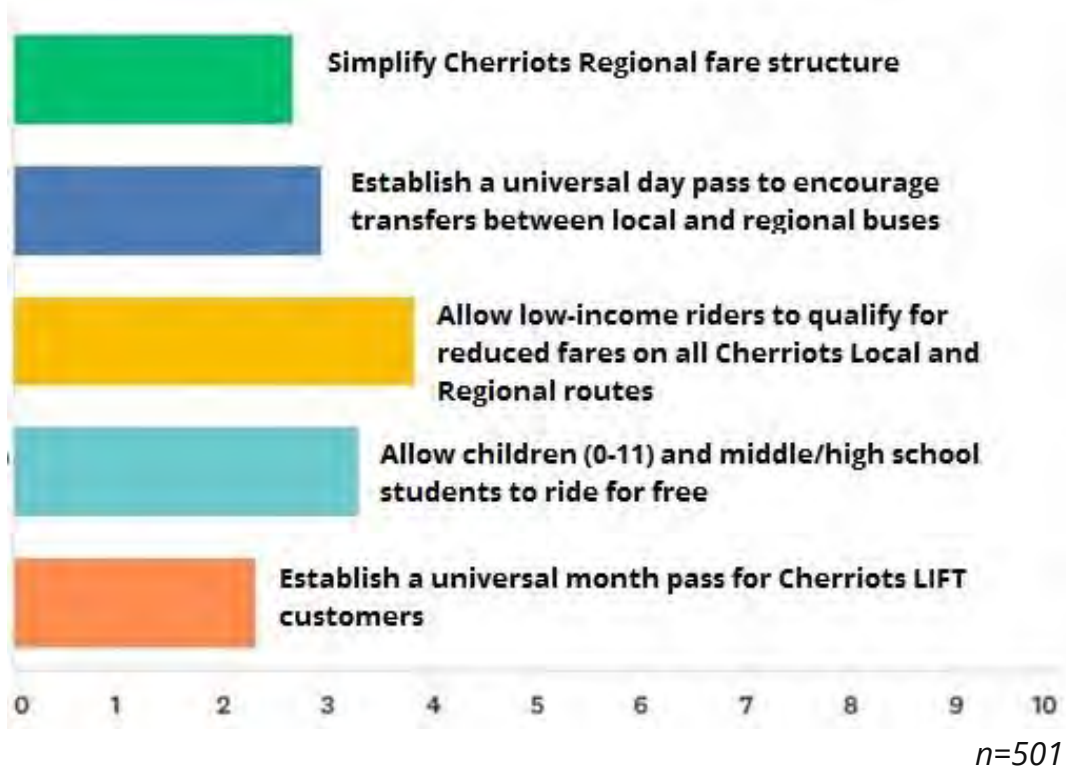


A large majority (73.5%) of respondents approved of the idea of creating a month pass for Cherriots LIFT customers. The reason behind the proposed pass is to offer people who are eligible for ADA paratransit the same benefit fixed-route bus customers get from having a monthly pass. Although not required by the ADA or FTA, it closes an equity issue in the family of Cherriots services.

### 2.4.6 Survey question #6

The sixth question asked people to rank the previous five fare strategies in order of preference so if one had to be funded before another, the Board would have some direction on rider preference. Figure 8 shows the results below:

**Figure 8.** Question #6: Please rank the strategies in questions 1 through 5 above, with 1 as your most important and 5 as your least important.



Survey respondents preferred the low-income fare first (score of 3.83), followed by the free youth fares (3.30), then establishing a universal day pass (2.96), then simplifying the Cherriots Regional fare structure (2.68), and lastly establishing a month pass for Cherriots LIFT customers (2.33). If funding were short, the programs with the lowest scores could be considered first, but the effect on the budget would also have to be taken into consideration.

### 2.4.7 Survey question #7

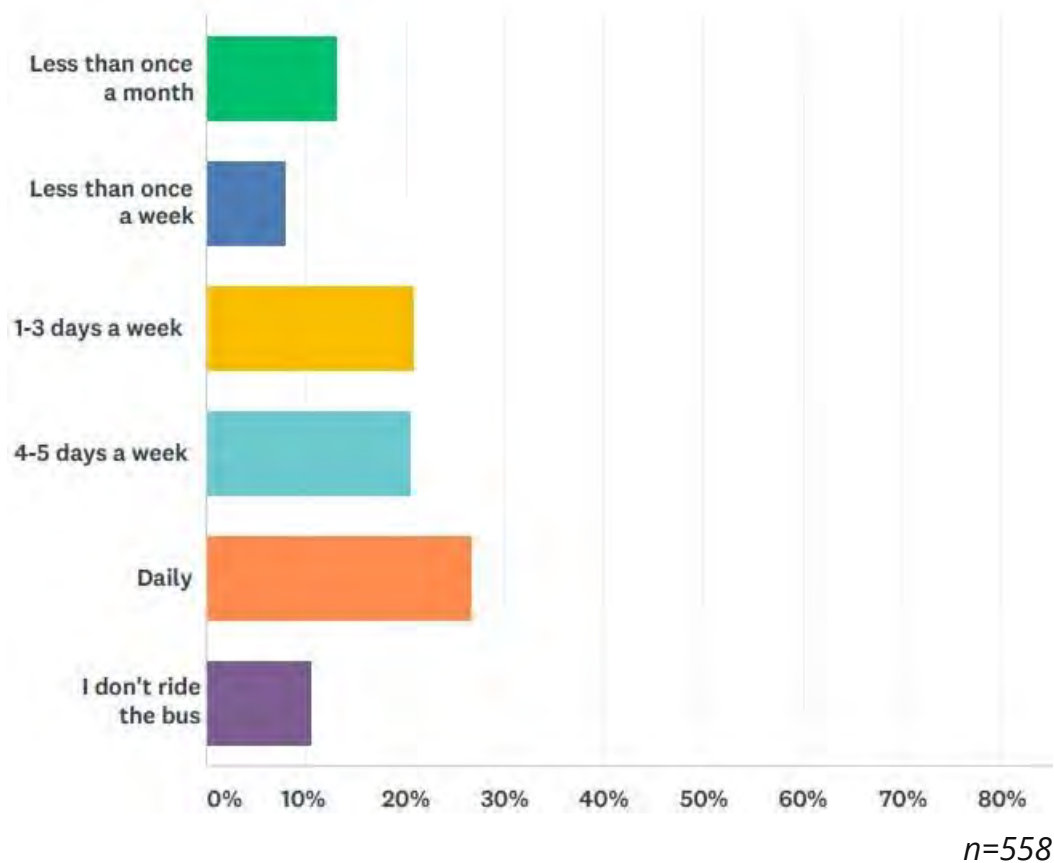
This question was an opportunity for people to write whatever comments they had regarding the fare change proposal. All of the comments were read and summarized in a spreadsheet provided in Appendix D. The following bulleted list summarizes the comments into major categories followed by the detailed comments, in order of frequency. Comments with only a single occurrence are excluded; the number of comments received appears in parentheses after each:

- Cheaper fares needed (50)
  - Reduced or free fare needed for college students too (15)
  - Cheaper monthly passes requested (5)
  - Cheaper for low-income families (3)
  - Cheaper for disabled riders (3)
  - Cheaper than proposed for all categories (2)
  - Free for everyone (2)
  - Cheaper annual pass (2)
  - Free for low-income people instead of reduced (2)
  - Free for seniors over 80 years old (2)
  - Cheaper adult day pass (2)
  - Lower all fares to minimize complexity (2)
  - Change senior age cutoff to 55+ rather than 60+ (2)
- Service suggestions (46)
  - 7-day service needed (23)
  - Extended evenings needed (9)
  - Expand coverage in West Salem (2)
  - Improve frequency to increase ridership (attract non-riders) (2)
- Technology requests (15)
  - Implement efare technology (12)
  - Smartcards with money loaded on them (2)
- No free youth fares (13)
  - Middle & High School students can pay reduced fare (4)
  - Youth should pay unless low-income (3)
- Cherriots LIFT month pass too expensive (8)
- Even increments desired (6)
  - Increments of 25 cents better than current system, which requires nickels and dimes (5)
- On-board experience suggestions (5)
  - Zero tolerance for misbehavior
- Ticket books requested (3)
  - One-ride tickets should be available (2)
- Route 1X suggestions (3)
- Bring back paper transfers with time limits (3)
- Have a weekly pass option (3)
- 30-day pass is actually a 22-day pass (2)
- Low income and free youth fares will take away service from the rest of the riders (2)
- Safety a high priority (2)

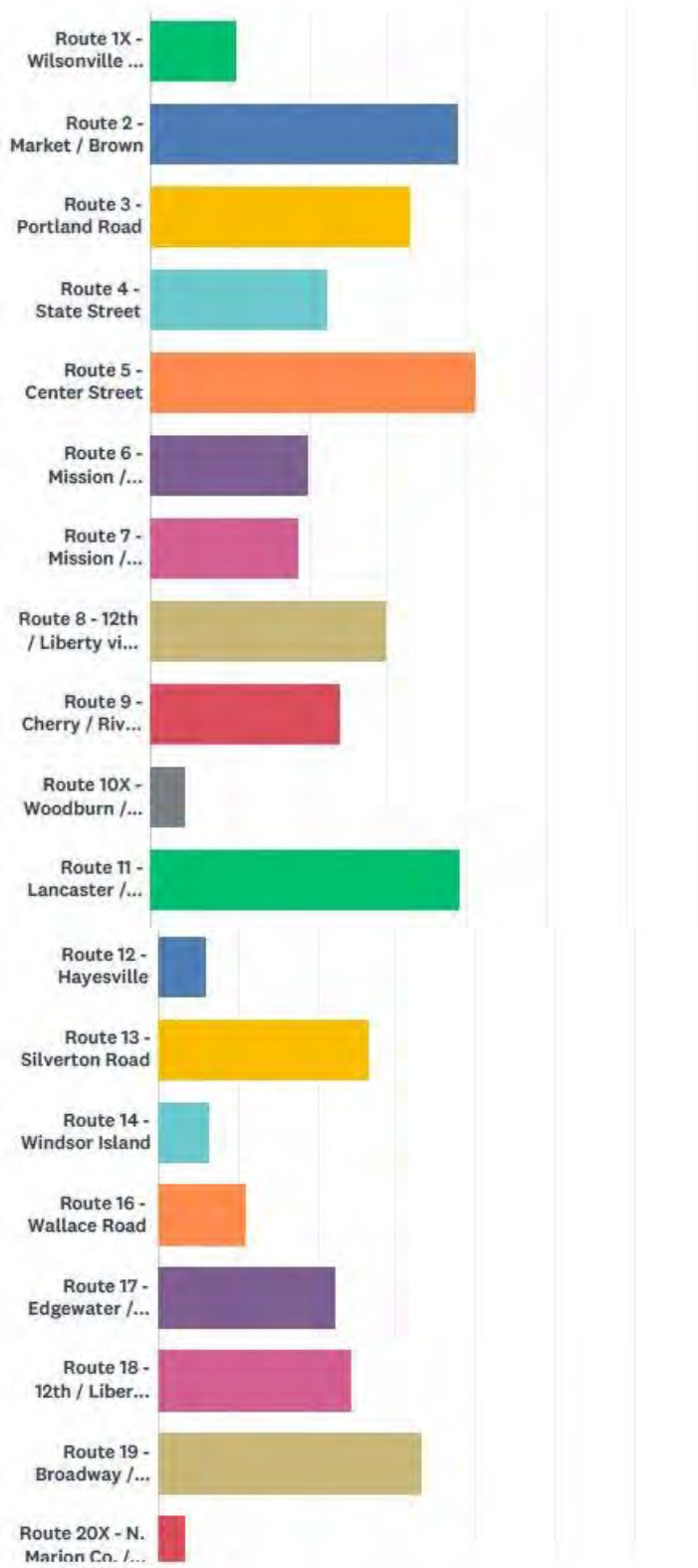
### 2.4.8 Survey questions #8 – 14

The end of the survey included some optional questions to find out if they ride often or not, gauge whether we were reaching riders on all services, and ask whether they live inside or outside of the Salem-Keizer urbanized area. Question 8 asked how often they ride. Question 9 listed all of the routes offered and let people check the ones they have used. Questions 10-13 asked their name, email, and phone number, and #14 asked whether they live inside or outside the Salem-Keizer area. Figures 9 – 11 show the results from these optional questions:

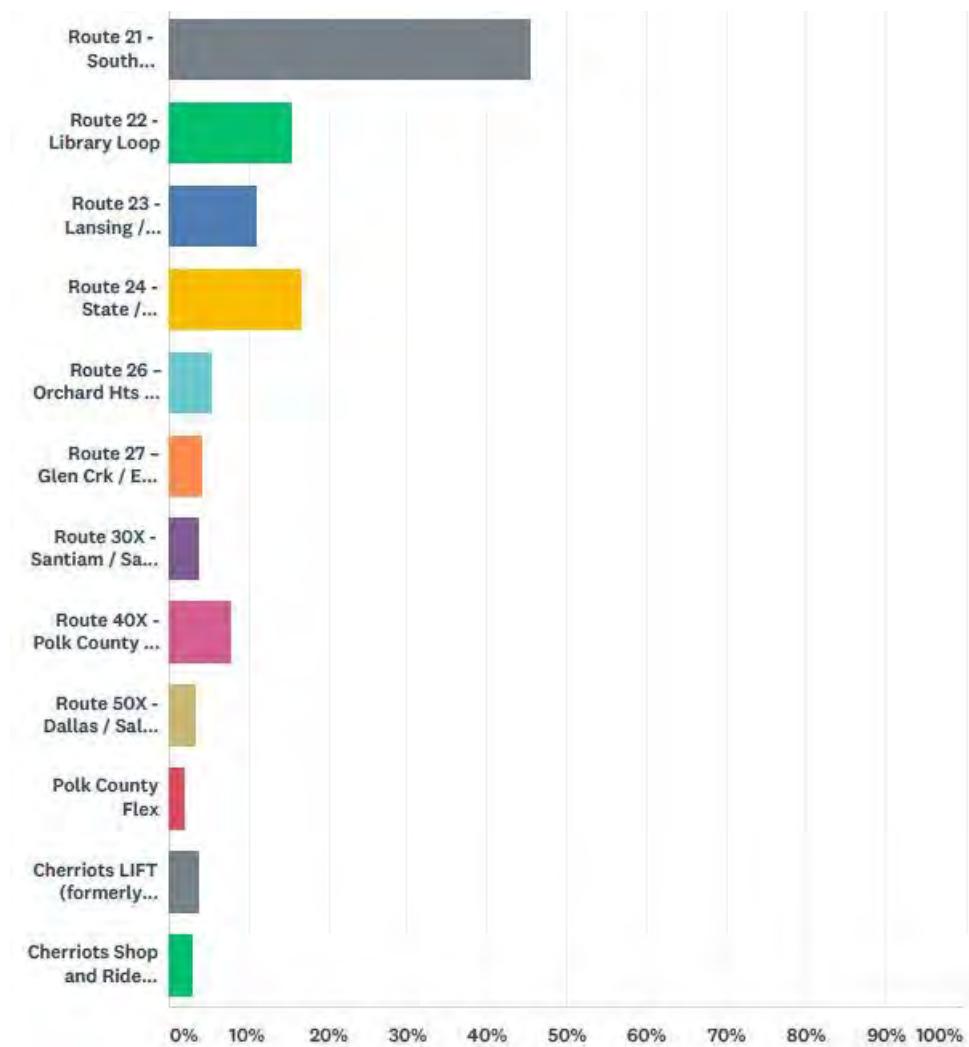
**Figure 9.** Question #8: Generally, how often do you ride the bus?



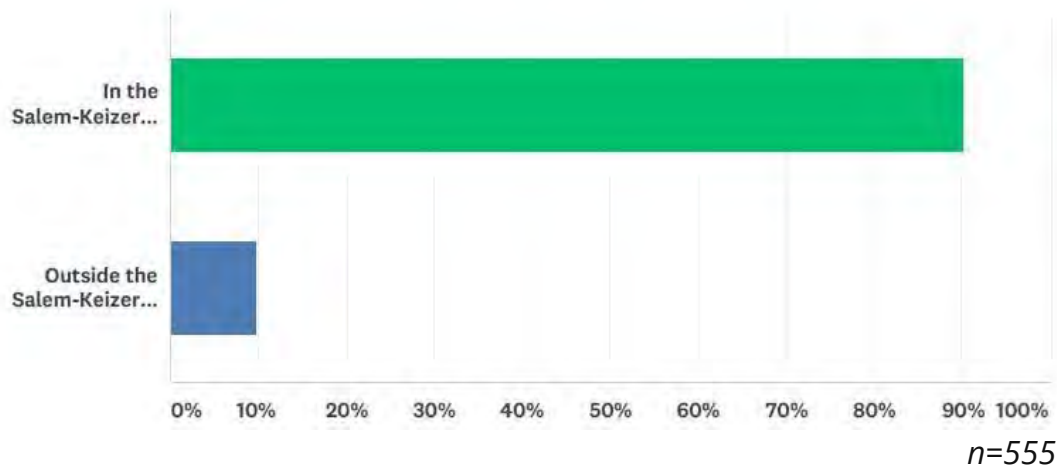
**Figure 10.** Question #9: What routes or services do you ride? Check all that apply.



**Figure 10.** Question #9 (continued)



**Figure 11.** Question #14: Where do you live (inside or outside of the Salem-Keizer area)?





### 3.0 Data analysis and proposal revisions

The survey data presents the opportunity to weigh costs and benefits of each of the five proposed changes proposed for July 2019. The following section discusses these costs and risks, and makes recommendations for any revisions to the proposal that will go to the Cherriots Board for approval.

#### 3.1 Costs of letting low-income individuals qualify for reduced fares

According to the rider survey completed in 2016, about three quarters of adult fare riders are living at or below 200% of the Federal Poverty Level (FPL). Looking at the fare income received in fiscal year 2016, and assuming that 100% of those eligible would pay the reduced fare instead of a full fare, this implies that the District would have to supplement approximately \$449,000 in Statewide Transportation Improvement Fund (STIF) dollars for lost fare revenue each year.

This program would rely on existing social benefit programs in order to validate a customer’s income. The programs displayed in Table 2 below are proposed for income proof:

**Table 2.** Qualifying programs that validate a person as having a low income

<b>Program</b>	<b>Income eligibility (FPL = Federal Poverty Level)</b>	<b>2018 Oregon household income for a single person</b>	<b>2018 Oregon household income for a family of four</b>
Supplemental Nutrition Assistance Program (SNAP)	185% FPL	\$22,464	\$46,440
Oregon Department of Education Child Nutrition Program (free and reduced price lunch)	Reduced price meals: 187% FPL Free meals: 132% FPL	Reduced price meals: \$22,311 Free meals: \$15,678	Reduced price meals: \$45,510 Free meals: \$31,980
Oregon Health Plan / Medicaid	Adults: 138% FPL Children: 300% FPL Pregnant women: 187% FPL	Adults: \$16,644 Children (family of two): \$49,536 Pregnant women: \$22,920	Adults: \$22,920 Children: \$75,036 Pregnant women: \$46,740
Oregon Temporary Assistance for Needy Families (TANF) or the Oregon Trail Card (EBT)	125% FPL (or 200% FPL with exceptions)	\$21,978 (\$23,760 with exceptions)	\$30,375 (\$48,600 with exceptions)

Customers would come in to Customer Service at the Downtown Transit Center and present a form of personal identification and proof that they receive benefits from one of the above programs. Program cards such as SNAP or EBT cards that do not have the person's name on them will not be accepted. Acceptance letters from the sponsoring organization must be provided in these cases. The Customer Service Representative would then issue them a reduced fare card in order for the drivers to know that they should allow them to pay only the reduced fare. This is the same card that disabled, seniors over 60, and Medicare card holders receive and does not identify them as a low income person.

### 3.1.1 Low-Income Fare Determination

In October, 2018, it was determined that the costs of implementing a low-income fare were too great in order to begin such a program in 2019, especially with the uncertainty of the STIF allocation dollar amounts. This fact was presented to the STIF Advisory Committee, which agreed that beginning the program should wait until the STIF formula allocation is better known.

## **3.2 Costs of regional fare simplification**

Standardizing Cherriots Regional fares would simplify the fare structure and make it easier to communicate the cost to ride on a Cherriots Regional bus to customers. This will mean lower fares for Route 1X adult paying customers, but adults riding the contracted regional routes (10X, 20X, 30X, 40X, 50X, and Polk County Flex) who do not qualify for a reduced fare will pay a slightly higher fare (\$2.50 instead of \$2.25). The justification for this higher fare is that riders will be getting a higher level of service beginning in September 2019 with the service enhancements made as part of the A Better Cherriots changes. This will likely include Saturday service and an increased number of daily round trips on some regional routes.

As part of the simplification, reduced cash fares would be lowered to be a true half fare, where today the reduced fare is 67% of the adult fare. A combination of these changes for contracted regional and Route 1X fares would have a negative impact of \$7,415 per year. This would be partially offset by the establishment of the universal day and month passes as described in Section 3.3 below.

### 3.2.1 Regional Fare Simplification Determination

Simplifying the regional fare structure is highly desirable from a customer service standpoint, but the analysis required by the District's Title VI program shows that steps such as creating a universal day pass would disproportionately burden low-income riders. Without the option of a reduced fare where income could qualify a

rider for the lower fare, the District will not be able to provide a simpler fare structure for the regional system.

### ***3.3 Cost of establishment of the universal day pass and lowering the cost of the universal month pass***

Currently there is no day pass on Route 1X. The other regional routes have a day pass that costs \$4.50 (\$3 for reduced), but these day passes do not work on the 1X or on Cherriots Local routes. The day pass for Cherriots Local does not work on regional buses either. Riders would benefit from a fare product that allows them to ride on one pass for the entire day, no matter what service they ride.

Also, there is currently a universal month pass for \$85 (\$42.50 for reduced) that works on all Cherriots routes. There is also a month pass that only works on contracted regional routes for \$60 (\$30 for reduced).

Replacing the day pass of the contracted regional routes with a universal day pass at a low cost of \$5 (\$2.50 for reduced) would increase the mobility options for users who ride two or more of the three fixed-route Cherriots systems (Cherriots Local, Cherriots Regional, and Route 1X). People ineligible for the reduced fare would see an increase in the cost of a monthly pass from \$60 to \$75, but they would also get access to the entire system. To demonstrate the added value to this expansion of access, one could say that a person using a universal month pass has access to approximately seven times more bus service if one compares the Cherriots Local system revenue hours to the Cherriots Regional system. Even if a person who rides daily on Cherriots Regional buses only rides Local and Regional services five times in a month, it would be more economical to purchase the universal month pass when compared to the old Regional month pass plus five day passes on Cherriots Local. This makes this option very attractive to a large number of Cherriots Regional customers.

The projected annual cost to implement the universal day pass (\$5 for adults, \$2.50 for reduced) and lower the cost of the universal month pass (from \$85 to \$75 for adults) is a gain of revenue instead of a loss. This is due to the fact that more people purchase the contracted regional month passes than the universal month passes. The projected gain is \$2,503. Therefore, there is a net loss of \$4,912 due to the changes in Sections 3.2 and 3.3 (fare simplification and establishment of the universal day pass and lowering the cost of the universal month pass).

### 3.3.1 Universal day pass and lowering the cost of the universal month pass Determination

#### **3.4 Cost and concerns of offering free youth rides**

Currently large families have to spend a lot of money to ride on transit together. Children ride for free through age five, but after that they need a youth fare to ride. When a family has multiple children, the cost to ride can add up quickly and make driving seem much more cost-effective. The cost of the fares is especially burdensome for low-income families.

Additionally, it is costly for middle and high school students to ride the bus. The State of Oregon used to fund a program to give free bus passes to these students. When that program was discontinued in 2011, the drop in ridership Cherriots experienced was higher than the drop we saw when we eliminated Saturday service in 2009.

The strategy proposed to the public included free rides for all children ages 0-11 and middle and high school students who display a valid student ID to the driver. Reasons provided that support this change include:

- Making trips free for children 11 and younger would reduce the burden experienced by low-income families.
- Bringing back the middle and high school student bus pass program would give students access to school, before and after school activities, summer programs, and employment.
- Both programs would lead to more people riding the bus at a younger age, making it more likely they would ride as adults—and helping more riders in the community see the value of transit firsthand.

Disadvantages of letting youth ride for free were heard in the public outreach conducted in May and June 2018. People are concerned that youth will not be disciplined if they don't follow the rules of riding the bus. Another concern is that vagrancy of youth could convince good behaving riders (including youth) that the ride isn't safe and they will seek other options, lowering ridership. These are valid concerns, but not anything that could not be monitored and addressed through education and enforcement campaigns.

Overcrowding of buses around the times when schools let out could also happen, but this could be solved by providing overload "trippers" that are added on when needed.

The cost of providing a free youth pass is estimated at \$393,000 per year. However, if the goal of Cherriots is to increase ridership, this is a very easy way to accomplish this.

### 3.4.1 Free youth Ride Determination

The Cherriots Board weighed in to the idea of a free youth program at the October 8, 2018 Board Work Session. There, they voiced a desire to help youths have cheaper fares, but also voiced concerns for the concept of a free pass for all youth ages 0-18. Therefore, the final proposal was developed to provide a discount to youth ages 6-18, even lower than the reduced pass rate. This would help all families and make it easier for youth to get around via transit. The one-ride youth fare on Cherriots Local would be 50 cents, a day pass would cost \$1.00, and a 30-day pass would be only \$10.00 (compared to the reduced fare which would be 80 cents for one ride, \$1.50 for the day pass, and \$22.50 for a 30-day pass). Cherriots Regional youth fares would be \$1.00 for one-ride, \$2.00 for a day pass, and \$20 for a thirty-day pass (compared to the reduced fare of \$1.50 for one-ride, \$3.00 day pass, and \$30 day pass). The cost of implementing this youth program for Cherriots Local and Regional combined is estimated at \$139,055.

### **3.5 Costs and Risk of Cherriots LIFT month pass**

Establishing a month pass for Cherriots LIFT customers was widely accepted as a good idea in the public outreach responses. Some people said that the proposed cost of \$90 per month was too expensive for riders. This product was proposed to close the gap of a potential equity issue when comparing complementary paratransit riders to Cherriots Local riders. However, this is not a product required by the Americans with Disabilities Act (ADA) or the FTA. Also, all other transit agencies in Oregon (other than TriMet) do not offer a monthly LIFT pass.

There is a high level of risk associated with establishing such a program because it is very difficult to estimate how many people would utilize the LIFT month pass. If more people decide to book trips more often, it could translate into higher operating costs (more vehicles and drivers needed in peak periods). Since the cost to the District to provide a one ride trip on Cherriots LIFT is over \$35, Cherriots should not do anything to increase the likelihood that ridership would increase. Therefore, the proposal to create a monthly Cherriots LIFT pass is recommended to be dropped. Fares would remain as-is at \$3.20 for one ride.

### **3.6 Final Proposal**

As a result of the public comments received on the fare change survey, the Title VI fare equity analysis, and comments from the Board at the October Work Session, three changes from the original proposal are being proposed. First, instead of a low-income fare category, more service will be put on the road in Salem and Keizer for all customers. Since the base fares for Cherriots Local services are not changing, low-

income residents are receiving more value for their 30-day passes. Cash and day-pass customers have the increased opportunity to ride during the late evening hours (10-11pm) and on weekends and holidays. Additionally, the creation of a youth fare will provide relief to low income families by significantly reducing the cost of fares for their children.

Second, instead of offering a free youth pass for children and teens ages 0-18, more service will be provided in the Cherrits service areas and a new youth fare category will be instituted. This will make riding the bus more affordable for youth riders, especially the high school students who rely on the bus more than any other group in this category.

Third, because of the potential disproportionate burdens placed on low-income riders of Cherrits Regional services, the regional fare simplification proposal will be dropped. Only until the District can provide reduced fares for low-income individuals will it be possible under the current Disproportionate Burden for Fare Changes policy to raise the cash and month fares on the contracted regional buses. Also, the newly defined universal day pass will not be instituted without a low-income category for the reduced fare. The equity analysis also shows a possible disproportionate burden for that increase as well. Moreover, the fare survey data for the Cherrits Regional system does not represent a dataset with a confidence interval to the 95 percent confidence interval, which is called for in the current Title VI policies. Therefore, the contracted regional and Route 1X fares will remain the same.

Finally, the last change from the original proposal will be that there will not be a Cherrits LIFT month pass offered. This option was survey respondents' last priority, and there is significant risk that the Cherrits LIFT service would have to be expanded due to an increase of trips by current customers.

## **4.0 Title VI equity analysis**

In compliance with the adopted Cherrits Title VI Program and its associated policies 710 through 712, an analysis of the fare change as it relates to any potential disparate impacts to minorities and potential disproportionate burdens to low-income people must be made. Due to the fact that all fares are proposed to either stay the same or decrease, most riders will be benefiting from this change.

The fare equity analysis showed that there could be disparate impacts to minorities and disproportionate burdens for low income individuals with two of the fare change proposals. First, the idea of simplifying the Cherrits Regional system would mean

that riders on Route 1X buses would see a drop in the adult cash fare by 50 cents, but the contracted regional routes (10X, 20X, 30X, 40X, and 50X) would see an increase of 25 cents. Since there are many more minorities and low income people on the contracted regional routes, the analysis showed a potential disparate impact and disproportionate burden to the riders who would see an increase in fare. Per District Policies 711 (Disparate Impact for Fare Changes) and 712 (Disproportionate Burden for Fare Changes), these potential adverse effects must be either avoided, minimized, mitigated, or justified. To avoid the potential impacts and burdens, staff has decided to drop the proposal at this time.

Another issue found during this process is that the data set for the contracted regional routes from the rider survey in 2016 did not meet the requirement of statistical significance to the 95 percent confidence level (per policies 711 and 712). Staff has decided to avoid the impacts entirely by dropping the proposal for simplifying the regional fare structure at this time. Another survey will be taken in 2019, in which it is hoped to collect more surveys from the current contracted regional riders. After obtaining more data, the decision could be made within the constraints of policies 711 and 712.

Therefore, given the available data and the established methodology for evaluating equity of the proposed fare changes, the analysis shows that with the revised proposal all proposed changes for all fare categories have no potential disparate impacts to minorities and no potential disproportionate burdens for low-income individuals. The resulting table is provided as Appendix D for inspection.

# Appendices

Appendix A: History of Cherriots Fares

Appendix B: Fare Survey Forms (English & Spanish)

Appendix C: Summary of Survey Written Comments

Appendix D: Title VI Equity Analysis



## Appendix A. History of Cherrriots Fares

The history of the last twenty years of Cherrriots' fare changes adds context to the discussion. The following contains the history and background:

On September 25, 1998, the Board of Directors adopted Ordinance No. 97-01, to establish rate categories to impose fares or other user fees for the District's transportation services. By resolution, fares were increased five times since 1995. The base fare changes are listed below:

- from 75 cents to 85 cents in 2005
- from 85 cents to \$1.00 in 2006
- from \$1.00 to \$1.25 in 2008
- from \$1.25 to \$1.50 in 2010
- from \$1.50 to \$1.60 in January 2015

As part of the FY2006 budget process, the Board directed staff to evaluate fares every two years to assess the need for changes. This procedure was also recommended as a standard practice in the District's 2004 Strategic Business Plan. On February 23, 2012, the Board declared an emergency to supersede Ordinance No. 10-01 with the adoption of Ordinance No. 12-01 to implement an experimental change in youth fares for the purpose of increasing ridership. A temporary reduction in youth monthly and day passes was implemented for the period March - August 2012.

On August 23, 2012, the Board adopted Ordinance No. 2012-02 repealing Ordinance No. 2012-01 and reduced the number of fare options to simplify the fare structure to make it easier for customers to use and understand; and eliminated the youth fare category and charged youth fares at the same rate as reduced fares for seniors and people with disabilities.

The current fares were established with Ordinance 14-02 adopted by the Board on September 25, 2014.

## Appendix B. Survey Instrument English



### A BETTER CHERRIOTS – FARE PROPOSAL JULY 2019 FEEDBACK FORM

*With the passage of Oregon House Bill 2017 (HB 2017), Cherriots will be getting more resources in 2019 to provide a major expansion in service and address other longstanding needs. We have proposals for changes to fares beginning in July 2019. Please review the proposal at **Cherriots.org/better** and make your voice heard using this form.*

#### **First strategy: make it cheaper for low-income people to ride local and regional buses**

*Many low-income people struggle to find the money to ride the bus. The new State Transportation Improvement Fund (STIF) funding requires transit agencies to offer options for low-income households. Cherriots is proposing to add an additional qualification of "low-income household" as a qualification for a reduced fare.*

1. How do you feel about the proposal to allow low-income households who qualify for selected social service programs (exact programs to be determined at a later date) to qualify for reduced fares on all Cherriots Local and Regional buses?

- Strongly Like    Somewhat Like    Neutral    Somewhat Dislike  
 Strongly Dislike    Unsure

#### **Second strategy: simplify the fare structure**

2. The current fare structure for Cherriots Regional routes is complicated. Cherriots is proposing to simplify the fare structure by lowering the fare for Route 1X and raising fares for Routes 10X-50X and the Polk County Flex. [Note: adults qualifying for reduced fares based on income would ride one-way for \$1.25.]

How do you feel about the proposal to make the fares for Route 1X and other regional routes the same (\$2.50 for adults)? This would mean a reduction in the price for Route 1X\* and an increase for Routes 10X-50X and the Polk County Flex?

[\*Note: Route 1X buses are jointly operated by Cherriots and SMART, which have not yet finalized fare discussions.]

- Strongly Like    Somewhat Like    Neutral    Somewhat Dislike  
 Strongly Dislike    Unsure

**Third strategy: encourage transfers between local and regional buses**

3. It is quite costly with today's fares to ride two one-way trips on both Cherriots Local and Regional buses in a single day (\$7.70 combined for adults).

This makes it hard for people riding into Salem-Keizer from the rural cities to access jobs, medical, school, shopping, and recreational destinations. Cherriots is proposing to establish a universal day pass for \$5 (adults) good on all Cherriots Local and Regional buses (including Route 1X), and to lower the price for the universal month pass from \$85 (for adults) to \$75. How do you feel about this proposal?

- Strongly Like    Somewhat Like    Neutral    Somewhat Dislike
- Strongly Dislike    Unsure

**Fourth strategy: encourage youth and families to ride transit**

4. Many families do not choose transit due to the high cost. Cherriots is proposing to make it free for children through age 11 and middle and high school students (including home-schooled kids) to ride for free. This will also provide a safe alternative for high school students who do not drive to get to school, jobs, shopping, and recreational activities. Youth ages 12-18 without a valid student ID card would pay the reduced fare.

*How do you feel about this proposal?*

- Strongly Like    Somewhat Like    Neutral    Somewhat Dislike
- Strongly Dislike    Unsure

**Fifth strategy: make fares equitable for Cherriots LIFT customers**

5. Cherriots LIFT customers currently do not have the option of a month pass, which can be very costly if they ride on a daily basis. In addition, some LIFT customers ride Cherriots Regional buses as well, which makes the cost even more. How do you feel about the proposal to create a monthly universal pass for Cherriots LIFT customers, which would be good on all Cherriots LIFT, Local, and Regional buses for \$90/month?

- Strongly Like    Somewhat Like    Neutral    Somewhat Dislike
- Strongly Dislike    Unsure

**Rank strategies 1 - 5**

6. Please rank (circle) the strategies in questions 1 through 5 above, with 1 as your most important and 5 as your least important.

1 2 3 4 5 Establish a month pass for Cherriots LIFT customers

- 1 2 3 4 5 Allow low-income riders to qualify for reduced fare on all Cherriots services
- 1 2 3 4 5 Allow children (0-11) and middle/high school students to ride for free
- 1 2 3 4 5 Simplify Cherriots Regional fare structure
- 1 2 3 4 5 Establish a universal day pass to encourage transfers between local and regional buses

7. What changes, if any, would you make to the fare change proposal?

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PLEASE HELP US LEARN MORE ABOUT YOU

*These questions are optional to help us learn more about you.*

8. Generally, how often do you ride the bus?

Less than once a month     Less than once a week     1-3 days a week

4-5 days a week     Daily     I do not ride the bus

9. What routes or services do you ride? *Check all that apply.*

- |  |  |
|--|--|
| <input type="checkbox"/> Route 1X - Wilsonville / Salem    | <input type="checkbox"/> Route 19 - Broadway / River       |
| <input type="checkbox"/> Route 2 - Market / Brown          | <input type="checkbox"/> Route 20X - N. Marion Co. / Salem |
| <input type="checkbox"/> Route 3 - Portland Road           | <input type="checkbox"/> Route 21 - South Commercial       |
| <input type="checkbox"/> Route 4 - State Street            | <input type="checkbox"/> Route 22 - Library Loop           |
| <input type="checkbox"/> Route 5 - Center Street           | <input type="checkbox"/> Route 23 - Lansing / Hawthorne    |
| <input type="checkbox"/> Route 6 - Mission / Fairview Ind. | <input type="checkbox"/> Route 24 - State / Lancaster      |
| <input type="checkbox"/> Route 7 - Mission / Hawthorne     | <input type="checkbox"/> Route 26 - Orchard Hts / Glen Crk |
| <input type="checkbox"/> Route 8 - 12th / Liberty          | <input type="checkbox"/> Route 27 - Glen Crk / Eola Dr     |
| <input type="checkbox"/> Route 9 - Cherry / River Road     | <input type="checkbox"/> Route 30X - Santiam / Salem       |
| <input type="checkbox"/> Route 10X - Woodburn / Salem      | <input type="checkbox"/> Route 40X - Polk County / Salem   |
| <input type="checkbox"/> Route 11 - Lancaster / Verda      | <input type="checkbox"/> Route 50X - Dallas / Salem        |
| <input type="checkbox"/> Route 12 - Hayesville             | <input type="checkbox"/> Polk County Flex                  |
| <input type="checkbox"/> Route 13 - Silverton Road         | <input type="checkbox"/> Cherriots LIFT                    |
| <input type="checkbox"/> Route 14 - Windsor Island         | <i>(formerly CherryLift)</i>                               |

- Route 16 - Wallace Road
- Route 17 - Edgewater / Gerth
- Route 18 - 12th / Liberty

- Cherriots Shop and Ride  
*(formerly RED Line)*

10. First name:

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11. Last name:

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12. Email:

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13. Phone number:

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14. Where do you live?

- In the Salem-Keizer area
- Outside the Salem-Keizer area

Once complete, return to  
**Cherriots Customer Service** by **Friday, June 8**.  
Alternatively, fill out the feedback form online at

**[Cherriots.org/better](http://Cherriots.org/better)**

**FOR ADMIN USE ONLY**

Date Received \_\_\_ / \_\_\_ / \_\_\_\_ Comment Number \_\_\_\_

Entered into SurveyMonkey

Customer service     Event \_\_\_\_\_

## Spanish



### FORMULARIO DE COMENTARIOS PARA "A BETTER CHERRIOTS" - PROPUESTA DE TARIFA PARA JULIO 2019

*Cherriots no ha cambiado sus tarifas desde enero de 2015. Debido al nuevo dinero estatal aprobado el año pasado por House Bill 2017, Cherriots podrá mejorar el servicio a partir de septiembre de 2019 utilizando el nuevo Fondo Estatal de Mejoras de Transporte (STIF, por sus siglas en inglés). En **Cherriots.org/better** se pueden encontrar los detalles de los cambios en el servicio, así como la propuesta completa de cambios en las tarifas. Dado que los ingresos de tarifas son una parte integral de la ecuación para determinar cuánto servicio de autobús se puede proporcionar, Cherriots está solicitando comentarios a la comunidad antes de cambiar las tarifas en julio de 2019.*

#### **Primera estrategia: hacer que sea más barato para las personas de bajos ingresos viajar en autobuses de Cherriots Local y Cherriots Regional**

*Muchas personas de bajos ingresos luchan por obtener el dinero para viajar en el autobús. El nuevo financiamiento de STIF del Estado requiere que las agencias de transporte público ofrezcan opciones para los hogares de bajos ingresos. La siguiente figura muestra la calificación adicional de "hogar de bajos ingresos" como calificador para una tarifa reducida:*

Calificaciones de Descuento	
<b>Gratis</b>	0-11 años Secundaria/Preparatoria
<b>Reduced</b>	12-18 años 60+ años Titulares de Medicare Discapacitados Bajos Recursos

1. ¿Qué opina acerca de la propuesta de permitir que los hogares de bajos ingresos que califican para los programas de servicios sociales seleccionados (los programas exactos se determinen en una fecha posterior) califiquen para tarifas reducidas en todos los autobuses locales y regionales de Cherriots?

- Me gusta mucho     Me gusta parcialmente     Neutral     Me disgusta parcialmente
- No me gusta para nada     No estoy seguro

**Segunda estrategia: simplificar la estructura de las tarifas**

La estructura actual de tarifas para las rutas regionales de Cherrriots es complicada. El siguiente diagrama muestra la propuesta para simplificar la estructura tarifaria al reducir la tarifa para la Ruta 1X y aumentar las tarifas para las Rutas 10X, 20X, 30X, 40X, 50X, y Polk County Flex. [Nota: los adultos que califiquen para tarifas reducidas basadas en los ingresos viajarían en un solo viaje por \$ 1,25.]

**Actualmente:**



**Propuesto:**

Cherriots **Regional**



*UN PASEO*

**NORMAL \$2.50**

REDUCIDO \$1.25

2. ¿Qué opina acerca de la propuesta de igualar las tarifas para la Ruta 1X y otras rutas de Cherriots Regional (\$ 2,50 para adultos)? Esto significaría una reducción en el precio de la Ruta 1X\* y un aumento en las Rutas 10X, 20X, 30X, 40X, 50X, y Polk County Flex.

[\*Nota: Los autobuses de la ruta 1X son operados conjuntamente por Cherriots y SMART, que aún no han finalizado las discusiones de tarifas].

- Me gusta mucho     Me gusta parcialmente     Neutral     Me disgusta parcialmente
- No me gusta para nada     No estoy seguro

**Tercera estrategia: fomentar las transferencias entre los autobuses de Cherriots Local y Cherriots Regional**

*Es bastante costoso con las tarifas actuales viajar en dos viajes de ida en los autobuses de Cherriots Local y Cherriots Regionales en un solo día (\$ 7,70 combinados para adultos). Esto dificulta que las personas que viajan a Salem y Keizer desde las ciudades rurales accedan a empleos, centros médicos, escuelas, centros comerciales, y destinos recreativos. La siguiente figura muestra el cambio de las tarifas existentes a las tarifas propuestas:*



**Actualmente:**

Cherriots **Universal**

**PASE MENSUAL**

NORMAL	<b>\$85</b>
REDUCIDO/ JUVENIL	\$42.50

**Propuesto:**

Cherriots **Universal**

**PASE DEL DÍA | PASE MENSUAL**

NORMAL	<b>\$5</b>	<b>\$75</b>
REDUCIDO	\$2.50	\$37.50

3. ¿Qué opina sobre crear un pase universal de un día por \$ 5 (adultos) válido en todos los autobuses de Cherriots Local y Cherriots Regional (incluida la ruta 1X) y reduciendo el precio del pase universal mensual de \$ 85 (para adultos) a \$ 75?

- Me gusta mucho     Me gusta parcialmente     Neutral     Me disgusta parcialmente
- No me gusta para nada     No estoy seguro

**Cuarta estrategia: alentar a los jóvenes y a las familias a viajar en transporte público**

*Muchas familias no eligen el transporte público debido al alto costo. Cherriots propone que sea gratuito para los niños viajen de hasta 11 años de edad, y para los estudiantes de escuela intermedia y secundaria (incluidos los niños que estudian en casa) que viajen gratis. Esto también proporcionará una alternativa segura para los estudiantes de secundaria que no conducen para llegar a la escuela, trabajos, centros comerciales, y actividades recreativas. Los jóvenes de entre 12 y 18 años de edad sin una tarjeta de*

identificación de estudiante válida pagarían la tarifa reducida. El siguiente gráfico muestra las categorías de viajes de tarifas gratuitas o reducidas:

Calificaciones de Descuento	
<b>Gratis</b>	0-11 años Secundaria/Preparatoria
<b>Reduced</b>	12-18 años 60+ años Titulares de Medicare Discapacitados Bajos Recursos

4. ¿Qué opina sobre esta propuesta?

- Me gusta mucho     Me gusta parcialmente     Neutral     Me disgusta parcialmente
- No me gusta para nada     No estoy seguro

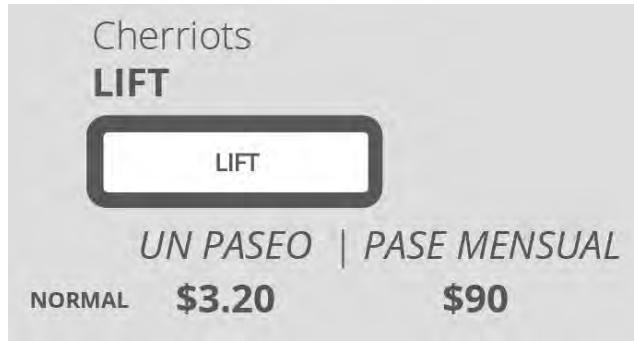
#### **Quinta estrategia: hacer las tarifas equitativas para los clientes de Cherriots LIFT**

Los clientes de Cherriots LIFT actualmente no tienen la opción de un pase de un mes, lo que puede ser muy costoso si viajan diariamente. Además, algunos clientes de LIFT viajan en los autobuses de Cherriots Regional, lo que hace que el costo sea aún mayor. La siguiente figura muestra las tarifas actuales y propuestas para los clientes de LIFT:

**Actualmente:**



**Propuesto:**



5. ¿Qué opina sobre la propuesta de crear un pase universal mensual para los clientes de Cherriots LIFT, que sería bueno para todos los autobuses Cherriots LIFT, locales, y regionales por \$ 90 al mes?

Me gusta mucho    Me gusta parcialmente    Neutral    Me disgusta parcialmente

No me gusta para nada    No estoy seguro

**Clasifique las estrategias del 1 al 5**

6. Clasifique las estrategias en las preguntas 1 a 5 abajo, con 1 como la más importante y 5 como la menos importante.

1 2 3 4 5 Simplificar la estructura regional de tarifas de Cherriots

1 2 3 4 5 Establecer un pase universal de un día para fomentar las transferencias entre los autobuses de Cherriots Local y Cherriots Regional

1 2 3 4 5 Permitir que los pasajeros de bajos ingresos califiquen para tarifas reducidas en todos los servicios de Cherriots

1 2 3 4 5 Permitir que niños de 0-11 años y estudiantes de escuelas secundaria/preparatoria viajen gratis

1 2 3 4 5 Establecer un pase universal de mes para los clientes de Cherriots LIFT

7. ¿Qué cambios, en su caso, haría a la propuesta de cambio de tarifas?

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AYÚDENOS A SABER MÁS SOBRE USTED

*Estas preguntas son opcionales para ayudarnos a saber más sobre usted.*

8. Generalmente, ¿con cuánta frecuencia viaja en bus?

- Menos de una vez al mes     Menos de una vez a la semana
- De 1 a 3 días a la semana     De 4 a 6 días a la semana
- Diariamente     No viajo en bus

9. ¿En cuáles rutas o servicios viaja? *Marque todas las que aplican.*

- |   |   |
|---|---|
| <input type="checkbox"/> Ruta 1X - Wilsonville / Salem    | <input type="checkbox"/> Ruta 19 - Broadway / River       |
| <input type="checkbox"/> Ruta 2 - Market / Brown          | <input type="checkbox"/> Ruta 20X - N. Marion Co. / Salem |
| <input type="checkbox"/> Ruta 3 - Portland Road           | <input type="checkbox"/> Ruta 21 - South Commercial       |
| <input type="checkbox"/> Ruta 4 - State Street            | <input type="checkbox"/> Ruta 22 - Library Loop           |
| <input type="checkbox"/> Ruta 5 - Center Street           | <input type="checkbox"/> Ruta 23 - Lansing / Hawthorne    |
| <input type="checkbox"/> Ruta 6 - Mission / Fairview Ind. | <input type="checkbox"/> Ruta 24 - State / Lancaster      |
| <input type="checkbox"/> Ruta 7 - Mission / Hawthorne     | <input type="checkbox"/> Ruta 26 - Orchard Hts / Glen Crk |

- Ruta 8 - 12th / Liberty
- Ruta 9 - Cherry / River Road
- Ruta 10X - Woodburn / Salem
- Ruta 11 - Lancaster / Verda
- Ruta 12 - Hayesville
- Ruta 13 - Silverton Road
- Ruta 14 - Windsor Island
- Ruta 16 - Wallace Road
- Ruta 17 - Edgewater / Gerth
- Ruta 18 - 12th / Liberty

- Ruta 27 – Glen Crk / Eola Dr
- Ruta 30X - Santiam / Salem
- Ruta 40X - Polk County / Salem
- Ruta 50X - Dallas / Salem
- Polk County Flex
- Cherriots LIFT
- Cherriots Shop and Ride

10. Primer nombre:

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11. Apellido:

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12. Correo electrónico: -

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13. Número de teléfono:

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14. ¿Dónde vive?       En el área de Salem-Keizer       Fuera del área de Salem-Keizer

Una vez completo, devolver a  
**Servicio de Atención al Cliente de Cherriots** antes del **viernes, 8 de junio**.

Alternativamente, complete el formulario de comentarios en línea en

**[Cherriots.org/better](https://cherriots.org/better)**

**PARA USO DE LA ADMINISTRACIÓN ÚNICAMENTE**

Date Received \_\_\_ / \_\_\_ / \_\_\_\_ Comment Number \_\_\_\_

Entered into SurveyMonkey

Customer service     Event \_\_\_\_\_

# Appendix C. Summary of Survey Written Comments

Fare Outreach Comment Summary (taken from 210 comments received)									
Count	Comment								
50	Cheaper fares needed	Lower adult day pass	Lower one ride prices	Lower all fares to reduced rate to minimize complexity	Reduced fare needed for college students	LI families			
		2	1	2	15	3			
		Monthly passes	Cherriots LIFT day and one ride fares should be reduced	Disabled riders	Accept food cans if rider unable to pay in cash	Cheaper annual pass			
		5	1	3	1	2			
		Free for everyone	Free for seniors over 80 years old	Include students in adult transition programs	Free for LI people instead of reduced	Reduced fares for low income			
		2	2	1	2	1			
		Reinstate the State employee bus pass program	Change senior age cutoff to 55+	Free for disabled and medicare riders	Cheaper than proposal needed				
		1		2	1	3			
15	Technology requests								
	Implement efare technology	Free wifi	Pass cards with money loaded on them						
	12	1	2						
13	No free youth fare								
	Children 5-11 should pay \$1 for day pass	Middle/HS students will stop riding at 19 once they have to start paying	Middle/HS kids can pay reduced fare	Youth should pay unless LI					
	3	1		4	3				
	Vagrancy on buses will increase if this is implemented	Kids already get a good break and don't need a free fare	Kids 0-11 should be required to ride the bus with a paying adult for safety	Buses will be full					
	3	1	1	1		1			
10	Cherriots LIFT month pass								
	Too expensive	For LIFT month pass, offer reduced fare as well as full fare based on Cherriots Local reduced fare categories							
	8	1			1				
									during times of low demand
6	Even increments desired								
	Increments of 25 cents desired	Increments of \$1 desired							
	5	1							
3	Ticket books								
	Books of tickets for Route 1X buses	One-ride tickets should be available							
	1	2							
3	Route 1X suggestions								
	Call button for 1X to go to KTC and pickup riders (50 cent surcharge)	Increase the number of locations where passes are sold	Books of tickets						
	2	1	1						
9	Bring back paper transfers with time limits								
2	Have a weekly pass option								
2	30-day pass is actually a 22-day pass								
2	Low income and free youth fares will take away service for the rest of the riders								
1	Everyone should have a monthly pass option								
1	Encourage employers to cover transit pass costs								
1	Increase service on 60-min. routes before lowering anybody's fare								
1	Encourage choice riders with incentives like getting half price on your 30-day pass if you ride 20 times the previous month								
1	Medical should qualify for LI fare								
1	Create a universal annual pass for \$600-650 for adults and \$300-325 for reduced								
1	Color coding for passes preferred								
1	Large font on passes for sight-impaired requested								
1	Business tax preferred over property tax								
1	Children in an alternative education program should ride for free								
1	Offer gift cards								
1	Reinstate fareless square for downtown Salem								
1	Make bicycles pay a surcharge								
1	LI people who really need the benefit may not qualify for other state/fed. programs or they can't get through the paperwork, so doesn't make sense to offer LI qualifier for reduced fare								
1	Change regional month passes to 30-day passes								
1	Model TriMet fare structure								
1	Raise the age for seniors to qualify for reduced fare to 65								
1	Two out of 5-day pass needed								
46	Service suggestions	Later regional bus trips	Extended evenings needed	7-day service needed	Easier for disabled people to board/deboard buses	Event shuttles for Riverfront park needed			
		1	9	23	1	1			
	Cherriots Regional should serve McMinnville	Extend 30X to Detroit	Route 10X should leave after 5pm	Expand West Salem coverage	Serve colleges when according to class schedules				
	1	1	1	2	1				
	More benches at stops	Too many strollers take up disabled seating area and are not expected to move for wheelchairs	Improve frequency to increase ridership (attract non-riders)	Use 35' pillars on regional routes					
	1	1	2		1				
5	On-board experience suggestions								
	Wait for pack to sit down before going	Have people stay in their seats	Zero tolerance for mis-behavior	More courtesy towards moms with babies					
	3	1	2	1					
2	Safety								
	For women and children	Keep video surveillance longer							
	1	1							

# Appendix D. Title VI Equity Analysis

			Cost				Demographics									
			Current	Proposal	Net Change	Percent Change	MINORITY					LOW-INCOME				
							Minority	Percent Minority	Non-Minority	Percent Non-Minority	Significant at 95% Confidence	Low-Income	Percent Low-Income	Higher Income	Percent Higher Income	Significant at 95% Confidence
Cherriots Local	Adult / Full	Cash (1-Ride)	\$1.60	\$1.60	\$0.00	0.0%	78	31.6%	84	22.6%	Yes	26	21.1%	70	31.5%	Yes
		1-Day Pass	\$3.25	\$3.25	\$0.00	0.0%	111	44.9%	151	40.6%	Yes	51	41.5%	93	41.9%	Yes
		Month Pass	\$45.00	\$45.00	\$0.00	0.0%	57	23.1%	131	35.2%	Yes	45	36.6%	57	25.7%	Yes
		Universal Month Pass	\$85.00	\$75.00	-\$10.00	-11.8%	1	0.4%	1	0.3%	No	0	0.0%	1	0.5%	No
		Annual Pass	\$540.00	\$540.00	\$0.00	0.0%	0	0.0%	5	1.3%	No	1	0.8%	1	0.5%	No
		<b>Total</b>					247		372			123		222		
	Reduced / Youth	Reduced Cash (1-Ride)	\$0.80	\$0.80	\$0.00	0.0%	8	4.7%	4	1.4%	No	3	2.9%	6	9.4%	No
		Youth Cash (1-Ride)	\$0.80	\$0.50	-\$0.30	-37.5%	5	2.9%	12	4.3%	No	1	1.0%	1	1.6%	No
		Reduced 1-Day Pass	\$1.50	\$1.50	\$0.00	0.0%	42	24.6%	77	27.9%	Yes	43	41.7%	30	46.9%	No
		Youth 1-Day Pass	\$1.50	\$1.00	-\$0.50	-33.3%	72	42.1%	18	6.5%	Yes	3	2.9%	1	1.6%	No
Reduced Month Pass		\$22.50	\$22.50	\$0.00	0.0%	23	13.5%	123	44.6%	Yes	48	46.6%	19	29.7%	No	
Youth Month Pass		\$22.50	\$10.00	-\$12.50	-55.6%	21	12.3%	27	9.8%	Yes	4	3.9%	1	1.6%	No	
Annual Pass		\$270.00	\$270.00	\$0.00	0.0%	0	0.0%	15	5.4%	No	1	1.0%	6	9.4%	No	
		<b>Total</b>					171		276			103		64		
Cherriots Regional	Adult / Full	Cash (1-Ride)	\$2.25	\$2.35	\$0.10	4.4%	13.6	50.0%	13.6	50.0%	No	12.5	57.1%	9.40	42.9%	No
		(Univ.) 1-Day Pass	\$4.50	\$5.00	\$0.50	11.1%	0	0.0%	14.4	100.0%	No	3.33	75.0%	1.11	25.0%	No
		(Univ.) Month Pass	\$60.00	\$75.00	\$15.00	25.0%	2.50	13.3%	16.3	86.7%	No	0	0.0%	8.75	100.0%	No
		(Exist.) Univ. Month Pass	\$85.00	\$75.00	-\$10.00	-11.8%	1.76	13.3%	11.5	86.7%	No	4.41	62.5%	2.65	37.5%	No
			<b>Total</b>					17.8		55.7			20.3		21.9	
	Reduced / Youth	Reduced Cash (1-Ride)	\$1.50	\$1.25	-\$0.25	-16.7%	0.83	20.0%	3.33	80.0%	No	3.3	100.0%	0	0.0%	No
		Youth Cash (1-Ride)	\$1.50	\$1.00	-\$0.50	-33.3%	2.67	50.0%	2.67	50.0%	No	0	0.0%	0	0.0%	No
		Reduced 1-Day Pass	\$3.00	\$2.50	-\$0.50	-16.7%	0.83	20.0%	3.33	80.0%	No	0.8	50.0%	0.83	50.0%	No
		Youth 1-Day Pass	\$3.00	\$2.00	-\$1.00	-33.3%	0.67	20.0%	2.67	80.0%	No	0	0.0%	0	0.0%	No
		Reduced Month Pass	\$30.00	\$37.50	\$7.50	25.0%	6.25	55.6%	5.00	44.4%	No	5.0	57.1%	3.75	42.9%	No
Youth Month Pass		\$30.00	\$20.00	-\$10.00	-33.3%	0.67	20.0%	2.67	80.0%	No	0	0.0%	0	0.0%	No	
Red. Univ. Month Pass		\$42.50	\$37.50	-\$5.00	-11.8%	0.00	0.0%	3.53	100.0%	No	1.8	100.0%	0	0.0%	No	
	<b>Total</b>					11.9		25.1			11.4		4.58			
Route 1X	Adult / Full	Cash (1-Ride)	\$3.00	\$2.50	-\$0.50	-16.7%	3.33	66.7%	1.67	33.3%	No	1.7	33.3%	3.33	66.7%	No
		Universal Month Pass	\$85.00	\$75.00	-\$10.00	-11.8%	4.41	22.7%	15.0	77.3%	Yes	1.8	11.1%	14.1	88.9%	No
		<b>Total</b>					7.75		16.7			3.43		17.5		
Reduced / Youth	Reduced Cash (1-Ride)	\$1.50	\$1.25	-\$0.25	-16.7%	0.00	0.0%	1.67	100.0%	No	0.8	100.0%	0.83	100.0%	No	
	Youth Cash (1-Ride)	\$1.50	\$1.00	-\$0.50	-33.3%	0.00	0.0%	0.00	0.0%	No	0.0	0.0%	0	0.0%	No	
	<b>Total</b>					0.00		1.67			0.8		0.83			
<b>Regional and 1X Combined</b>																
Adult / Full	Cash (1-Ride)	\$2.25	\$2.50	\$0.25	11.1%	14.4	50.0%	14.4	50.0%	No	13.3	57.1%	10.00	42.9%	No	
	(Univ.) 1-Day Pass	\$4.50	\$5.00	\$0.50	11.1%	0.00	0.0%	5.56	100.0%	No	3.3	75.0%	1.11	25.0%	No	
	(Univ.) Month Pass	\$60.00	\$75.00	\$15.00	25.0%	2.50	28.6%	6.25	71.4%	No	0.0	0.0%	8.75	100.0%	No	



		Cost				Demographics										
		Current	Proposal	Net Change	Percent Change	MINORITY					LOW-INCOME					
						Minority	Percent Minority	Non-Minority	Percent Non-Minority	Significant at 95% Confidence	Low-Income	Percent Low-Income	Higher Income	Percent Higher Income	Significant at 95% Confidence	
Adult / Full	(Exist.) Univ. Month Pass	\$85.00	\$75.00	-\$10.00	-11.8%	1.76	20.0%	7.06	80.0%	No	4.4	62.5%	2.65	37.5%	No	
	Cash (1-Ride)	\$3.00	\$2.50	-\$0.50	-16.7%	3.33	66.7%	1.67	33.3%	No	1.7	33.3%	3.33	66.7%	No	
	Universal Month Pass	\$85.00	\$75.00	-\$10.00	-11.8%	4.41	22.7%	15.0	77.3%	Yes	1.8	11.1%	14.1	88.9%	No	
	<b>Total</b>					26.5		50.0				24.5		40.0		
Reduced / Youth	Reduced Cash (1-Ride)	\$1.50	\$1.25	-\$0.25	-16.7%	0.83	20.0%	3.33	80.0%	No	3.33	100.0%	0.0	0.0%	No	
	Youth Cash (1-Ride)	\$1.50	\$1.00	-\$0.50	-33.3%	2.67	66.7%	1.33	33.3%	No	0.00	0.0%	0.0	0.0%	No	
	Reduced 1-Day Pass	\$3.00	\$2.50	-\$0.50	-16.7%	0.83	33.3%	1.67	66.7%	No	0.83	50.0%	0.8	50.0%	No	
	Youth 1-Day Pass	\$3.00	\$2.00	-\$1.00	-33.3%	0.67	100.0%	0.0	0.0%	No	0.00	0.0%	0.0	0.0%	No	
	Reduced Month Pass	\$30.00	\$37.50	\$7.50	25.0%	6.25	50.0%	6.25	50.0%	No	5.00	57.1%	3.8	42.9%	No	
	Youth Month Pass	\$30.00	\$20.00	-\$10.00	-33.3%	0.67	100.0%	0.0	0.0%	No	0.00	0.0%	0.0	0.0%	No	
	Red. Univ. Month Pass	\$42.50	\$37.50	-\$5.00	-11.8%	0	0.0%	1.76	100.0%	No	1.76	100.0%	0.0	0.0%	No	
	Youth Univ. Month Pass	\$42.50	\$20.00	-\$22.50	-52.9%	0	0.0%	0.47	100.0%	No	0.47	100.0%	0.0	0.0%	No	
	Reduced / Youth	Reduced Cash (1-Ride)	\$1.50	\$1.25	-\$0.25	-16.7%	0	0.0%	1.67	100.0%	No	0.83	50.0%	0.8	50.0%	No
		Youth Cash (1-Ride)	\$1.50	\$1.00	-\$0.50	-33.3%	0	0.0%	0.0	0.0%	No	0.00	0.0%	0.0	0.0%	No
	<b>Total</b>					11.9		16.5			12.2		5.4			





**To:** Board of Directors  
**From:** Allan Pollock, General Manager  
**Date:** January 14, 2019  
**Subject:** **HB 2017 STIF Program Revenue Estimates**

In December, ODOT released revised revenue estimates. For most Qualified Entities, the revenue estimates are higher than the April 2018 forecast. The main reason is the upwards adjustment of about 2.5% of the expected Transit Payroll Tax collections. I have attached a copy of the December 2018 estimate. Below is a table depicting the total revenue forecast for the District. The attachment breaks the revenue estimate down by in and out of District.

<b>SAMTD w/out of District</b>	<b>FY 2019</b>	<b>FY 2020</b>	<b>FY 2021</b>	<b>Total</b>
April 2018 Forecast	\$2,739,000	\$6,219,000	\$7,035,000	\$15,993,000
Change	\$37,000	\$184,000	\$308,000	\$529,000
December 2018 Forecast	\$2,776,000	\$6,403,000	\$7,343,000	\$16,522,000



# Statewide Transportation Improvement Fund Formula Fund Allocation Estimate, December 2018 Update

## Introduction

ODOT has completed the annual update to the Statewide Transportation Improvement Fund (STIF) Formula Fund allocation estimate. For most Qualified Entities (QEs)<sup>1</sup>, the revenue estimates are higher than the April 2018 forecast. The main reason is the upwards adjustment of about 2.5% of the expected Transit Payroll Tax collections. Some QEs might see larger gains than others due to relative gains in the QEs own payroll share. This forecast is updated annually with the state revenue forecast and includes the most current employment payroll data from the Oregon Employment Department.

Ninety (90) percent of the revenue will be distributed by formula to QEs, which are required to coordinate with Public Transportation Service Providers (PTSPs)<sup>2</sup> in their area of responsibility to develop a sub-allocation method and estimates as a starting point for local decision-making.

## Estimate Assumptions

The forecast is conservative because the tax is new and we lack historical data to predict future revenues. The level of taxpayer compliance is also uncertain. ODOT will only distribute the revenue it receives, which may be more or less than this estimate, up to the QEs-approved STIF Plan funding limit.

The table on page 2 summarizes the estimated Formula Fund revenues available to each QE based on the date of distribution by fiscal year. The estimate for Fiscal Year 2019 (July 1, 2018-June 30, 2019) includes two quarters of revenue. Updated estimates for the Formula, Discretionary and Intercommunity Discretionary funds for FY 2019 (two quarters) through FY2021 are summarized in the table below.

Estimated Payroll Distribution	Q3, Q4 of FY 2019-FY 2021
Formula Fund	\$201.9 M
Discretionary Fund	\$11.2 M
Intercommunity Discretionary Fund	\$9.0 M

Distributions will occur quarterly, contingent on Oregon Transportation Commission approval of the QE's service improvement plan (STIF Plan).

## Estimate Calculation Method

- Gross revenue is multiplied by projected tax payer compliance rate, assumed to begin at 75% and improve each quarter
- Department of Revenue collection and administration costs are deducted from the gross revenue
- The result is multiplied by 90% to determine the projected Formula Fund net total
- Note that the remaining 10% is dedicated to the Discretionary Fund (5%), Intercommunity Discretionary Fund (4%), and the Technical Resource Center (1%), which also funds ODOT administration of STIF Program
- The projected net total is multiplied by the QE payroll shares resulting in QE revenue estimates
- QE payroll shares are calculated using the most current annual payroll data from Oregon Employment Department, with adjustments to ensure each QE receives the minimum annual allocation of \$100,000

<sup>1</sup> Qualified Entities are defined in statute as a county in which no part of a Mass Transit District or Transportation District exists, a Mass Transit District, a Transportation District or an Indian Tribe.

<sup>2</sup> Public Transportation Service Provider means a QE or a city, county, Special District, Intergovernmental Entity or any other political subdivision or municipal or Public Corporation that provides public transportation services.



Qualified Entity (QE)	April 2018 Forecast			Change			December 2018 Forecast		
	FY 2019	FY 2020	FY 2021	FY 2019	FY 2020	FY 2021	FY 2019	FY 2020	FY 2021
Baker County	\$ 68,000	\$ 154,000	\$ 178,000	\$ -	\$ 4,000	\$ 5,000	\$ 68,000	\$ 158,000	\$ 181,000
Basin Transit Service District w/ out of district	\$ 305,000	\$ 693,000	\$ 784,000	\$ 5,000	\$ 22,000	\$ 37,000	\$ 310,000	\$ 715,000	\$ 821,000
In district	\$ 251,000	\$ 571,000	\$ 645,000	\$ 2,000	\$ 13,000	\$ 25,000	\$ 253,000	\$ 584,000	\$ 670,000
Out of district	\$ 54,000	\$ 122,000	\$ 139,000	\$ 3,000	\$ 9,000	\$ 12,000	\$ 57,000	\$ 131,000	\$ 151,000
Benton County	\$ 674,000	\$ 1,531,000	\$ 1,732,000	\$ 2,000	\$ 28,000	\$ 55,000	\$ 676,000	\$ 1,559,000	\$ 1,787,000
Burns Paiute Tribe	\$ 50,000	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ 50,000	\$ 100,000	\$ 100,000
Columbia County	\$ 149,000	\$ 337,000	\$ 381,000	\$ 4,000	\$ 14,000	\$ 22,000	\$ 153,000	\$ 351,000	\$ 403,000
Confederated Tribes of Coos, Lower Umpqua and Siuslaw	\$ 50,000	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ 50,000	\$ 100,000	\$ 100,000
Confederated Tribes of Grand Ronde Community of Oregon	\$ 50,000	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ 50,000	\$ 100,000	\$ 100,000
Confederated Tribes of Siletz Indians	\$ 50,000	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ 50,000	\$ 100,000	\$ 100,000
Confederated Tribes of the Umatilla Indian Reservation	\$ 50,000	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ 50,000	\$ 100,000	\$ 100,000
Confederated Tribes of Warm Springs	\$ 50,000	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ 50,000	\$ 100,000	\$ 100,000
Coos County	\$ 304,000	\$ 689,000	\$ 780,000	\$ (1,000)	\$ 10,000	\$ 21,000	\$ 303,000	\$ 699,000	\$ 801,000
Coquille Indian Tribe	\$ 50,000	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ 50,000	\$ 100,000	\$ 100,000
Cow Creek Band of Umpqua Tribe of Indians	\$ 50,000	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ 50,000	\$ 100,000	\$ 100,000
Crook County	\$ 100,000	\$ 225,000	\$ 254,000	\$ (17,000)	\$ (31,000)	\$ (32,000)	\$ 83,000	\$ 194,000	\$ 222,000
Curry County	\$ 79,000	\$ 178,000	\$ 202,000	\$ (1,000)	\$ 2,000	\$ 4,000	\$ 78,000	\$ 180,000	\$ 206,000
Deschutes County	\$ 1,183,000	\$ 2,885,000	\$ 3,037,000	\$ 88,000	\$ 247,000	\$ 326,000	\$ 1,271,000	\$ 2,932,000	\$ 3,383,000
Douglas County	\$ 530,000	\$ 1,203,000	\$ 1,361,000	\$ 4,000	\$ 31,000	\$ 53,000	\$ 534,000	\$ 1,234,000	\$ 1,414,000
Gilliam County	\$ 50,000	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ 50,000	\$ 100,000	\$ 100,000
Grant County Transportation District	\$ 50,000	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ 50,000	\$ 100,000	\$ 100,000
Harney County	\$ 50,000	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ 50,000	\$ 100,000	\$ 100,000
Hood River County Transportation District	\$ 179,000	\$ 404,000	\$ 458,000	\$ 6,000	\$ 24,000	\$ 34,000	\$ 185,000	\$ 428,000	\$ 492,000
Jefferson County	\$ 88,000	\$ 200,000	\$ 226,000	\$ 1,000	\$ 6,000	\$ 11,000	\$ 89,000	\$ 206,000	\$ 237,000
Josephine County	\$ 332,000	\$ 756,000	\$ 853,000	\$ 11,000	\$ 35,000	\$ 54,000	\$ 343,000	\$ 791,000	\$ 907,000
Klamath Tribes	\$ 50,000	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ 50,000	\$ 100,000	\$ 100,000
Lake County	\$ 50,000	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ 50,000	\$ 100,000	\$ 100,000
Lane Transit District w/out of district	\$ 2,297,000	\$ 5,216,000	\$ 5,899,000	\$ 27,000	\$ 144,000	\$ 248,000	\$ 2,324,000	\$ 5,360,000	\$ 6,147,000
In district	\$ 2,179,000	\$ 4,947,000	\$ 5,595,000	\$ 25,000	\$ 136,000	\$ 233,000	\$ 2,204,000	\$ 5,083,000	\$ 5,828,000
Out of district	\$ 118,000	\$ 268,000	\$ 303,000	\$ 2,000	\$ 8,000	\$ 14,000	\$ 120,000	\$ 276,000	\$ 317,000
Lincoln County	\$ 232,000	\$ 527,000	\$ 596,000	\$ 4,000	\$ 17,000	\$ 27,000	\$ 236,000	\$ 544,000	\$ 623,000
Linn County	\$ 684,000	\$ 1,508,000	\$ 1,705,000	\$ 2,000	\$ 29,000	\$ 58,000	\$ 686,000	\$ 1,537,000	\$ 1,783,000
Malheur County	\$ 158,000	\$ 358,000	\$ 405,000	\$ 3,000	\$ 13,000	\$ 19,000	\$ 161,000	\$ 371,000	\$ 424,000
Morrow County	\$ 98,000	\$ 221,000	\$ 250,000	\$ 6,000	\$ 17,000	\$ 24,000	\$ 104,000	\$ 238,000	\$ 274,000
Rogue Valley Transportation District w/ out of district	\$ 1,255,000	\$ 2,850,000	\$ 3,223,000	\$ 25,000	\$ 103,000	\$ 164,000	\$ 1,280,000	\$ 2,953,000	\$ 3,387,000
In district	\$ 1,145,000	\$ 2,599,000	\$ 2,939,000	\$ 24,000	\$ 96,000	\$ 152,000	\$ 1,169,000	\$ 2,695,000	\$ 3,091,000
Out of district	\$ 110,000	\$ 251,000	\$ 283,000	\$ 2,000	\$ 6,000	\$ 13,000	\$ 112,000	\$ 257,000	\$ 296,000
Salem Area Mass Transit District w/ out of district	\$ 2,739,000	\$ 6,219,000	\$ 7,035,000	\$ 37,000	\$ 184,000	\$ 308,000	\$ 2,776,000	\$ 6,403,000	\$ 7,343,000
In district	\$ 1,982,000	\$ 4,455,000	\$ 5,039,000	\$ 15,000	\$ 106,000	\$ 192,000	\$ 1,977,000	\$ 4,561,000	\$ 5,231,000
Out of district Marion County	\$ 581,000	\$ 1,319,000	\$ 1,491,000	\$ 20,000	\$ 68,000	\$ 98,000	\$ 601,000	\$ 1,387,000	\$ 1,589,000
Out of district Polk County	\$ 196,000	\$ 446,000	\$ 505,000	\$ 2,000	\$ 11,000	\$ 18,000	\$ 198,000	\$ 457,000	\$ 523,000
Sherman County	\$ 50,000	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ 50,000	\$ 100,000	\$ 100,000
Sunset Empire Transportation District	\$ 236,000	\$ 535,000	\$ 606,000	\$ 2,000	\$ 16,000	\$ 25,000	\$ 238,000	\$ 551,000	\$ 631,000
Tillamook County Transportation District	\$ 126,000	\$ 287,000	\$ 325,000	\$ 2,000	\$ 9,000	\$ 14,000	\$ 128,000	\$ 296,000	\$ 339,000
Tri County Metropolitan Transportation District w/ out of district	\$ 19,653,000	\$ 44,622,000	\$ 50,468,000	\$ 374,000	\$ 1,572,000	\$ 2,506,000	\$ 20,027,000	\$ 46,194,000	\$ 52,974,000
In district	\$ 18,793,000	\$ 42,670,000	\$ 48,261,000	\$ 297,000	\$ 1,363,000	\$ 2,235,000	\$ 19,090,000	\$ 44,033,000	\$ 50,496,000
Out of district Clackamas County	\$ 649,000	\$ 1,474,000	\$ 1,688,000	\$ 74,000	\$ 196,000	\$ 246,000	\$ 723,000	\$ 1,670,000	\$ 1,914,000
Out of district Multnomah County	\$ 19,000	\$ 44,000	\$ 51,000	\$ -	\$ 2,000	\$ 1,000	\$ 19,000	\$ 46,000	\$ 52,000
Out of district Washington County	\$ 191,000	\$ 433,000	\$ 490,000	\$ 2,000	\$ 12,000	\$ 21,000	\$ 193,000	\$ 445,000	\$ 511,000
Umatilla County	\$ 412,000	\$ 935,000	\$ 1,059,000	\$ 4,000	\$ 25,000	\$ 41,000	\$ 416,000	\$ 960,000	\$ 1,100,000
Union County	\$ 132,000	\$ 300,000	\$ 339,000	\$ 2,000	\$ 8,000	\$ 14,000	\$ 134,000	\$ 308,000	\$ 353,000
Wallowa County	\$ 50,000	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ 50,000	\$ 100,000	\$ 100,000
Wasco County	\$ 149,000	\$ 340,000	\$ 385,000	\$ 14,000	\$ 36,000	\$ 46,000	\$ 163,000	\$ 376,000	\$ 431,000
Wheeler County	\$ 50,000	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ 50,000	\$ 100,000	\$ 100,000
Yamhill County	\$ 496,000	\$ 1,127,000	\$ 1,275,000	\$ 12,000	\$ 43,000	\$ 67,000	\$ 508,000	\$ 1,170,000	\$ 1,342,000
<b>Totals Statewide</b>	<b>\$ 33,438,000</b>	<b>\$ 75,700,000</b>	<b>\$ 85,414,000</b>	<b>\$ 616,000</b>	<b>\$ 2,608,000</b>	<b>\$ 4,151,000</b>	<b>\$ 34,054,000</b>	<b>\$ 78,308,000</b>	<b>\$ 89,565,000</b>

FY 2019 (July 1, 2018 – June 30, 2019) includes two quarters of revenue. District totals may not add up due to rounding.



**To:** Board of Directors

**From:** Allan Pollock, General Manager

**Date:** January 14, 2019

**Subject:** Board Appointed Advisory Committees

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There are four board appointed advisory committees:

- Budget Committee
- Special Transportation Fund Advisory Committee
- Citizens Advisory Committee
- Statewide Transportation Improvement Fund Advisory Committee

In order to keep the board informed of activities of the committee, the following process will be followed for each committee.

1. After a committee meeting, the lead staff advisor will prepare a one-page information sheet for the board liaison so that they can provide an update at the next board meeting.
2. The staff advisor will ensure a copy of the minutes are provided for inclusion in the board packet for review. If the minutes have not yet been approved by the committee they will be annotated as draft.

In addition, over the next several months, staff will review each committee's by-laws so that as much as possible, the by-laws sections are consistent regardless of the committee. A set of revised by-laws will be presented to the board for adoption later this year.







## WORK SESSION MEMO

Agenda Item WS.4.f

**To:** Board of Directors

**From:** Allan Pollock, General Manager

**Date:** January 14, 2019

**Subject:** Advertising Program

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At the November work session, there was discussion about the bus advertising program. Specifically, there was discussion about the new buses, and whether or not to place advertising on the new buses. A review of the contract indicated that there is no provision for allowing certain buses to be exempt from advertising. For the remainder of the contract, the entire Cherriots fleet is available to Stott Outdoor advertising to place ads on.

There is about 3.5 years left on the contract. As it comes time to rebid the contract we will engage the board in a discussion about the intent of the advertising program and gather feedback to help staff develop the next proposal for firms to bid on.



**Mid-Willamette Valley Council of Governments  
Annual Meeting and Dinner**

Host: City of Keizer Community Center, 930 Chemawa Rd NE

Date: Wednesday, February 20 2019

Time: 6:00 – 9:30 PM

- Registration and Reception with No-Host Bar ..... 6:00 PM
- Presentation of the Colors and Welcome ..... 6:30 PM
- Buffet Dinner ..... 7:00 PM  
Includes choice of Beef Brisket or Vegetarian Lasagna,  
hearty selection of sides, and Chef's selected desert
- Presentations ..... 7:30 PM

Register: Registration with Payment required ..... \$35 per person

- District pays for Board member registration
- Board member pays for guest registration

Due Date: RSVP to Linda by Friday, February 1, 2019

Cancellation Policy: **No refunds** for cancellations received after February 8, 2019



Reservations For:             **One**             **Me & Guest**             **Not Going**

- Board Member: \_\_\_\_\_
- Guest: \_\_\_\_\_

Make Payment to: MWVCOG  
100 High Street SE, Suite 200  
Salem, Oregon 97301

Questions: Contact Denise VanDyke  
(503)540-1602 or [dvandyke@mwvcog.org](mailto:dvandyke@mwvcog.org)



Thursday, January 24, 2019 at 6:30 PM  
Courthouse Square – Senator Hearing Room  
555 Court Street NE, Salem, Oregon 97301

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## **AGENDA**

### **A. CALL TO ORDER (President Robert Krebs)**

1. Note of Attendance for a Quorum
2. Pledge of Allegiance (Director Jerry Thompson)
3. "SAFETY MOMENT" Thought for the Day

### **B. ANNOUNCEMENTS & CHANGES TO AGENDA**

### **C. FIRST READING AND PUBLIC HEARING - ORDINANCE 2019-01**

Shall the Board direct the First Reading of Ordinance #2019-01 by Title, and set a Public Hearing from the January 24, 2019 Board meeting to the February 28, 2019 Board meeting pursuant to ORS 198.540 and ORS 267.150; to receive citizen testimony regarding a revised fare structure, rates and effective date for transportation services provided by Cherriots with the adoption of Ordinance 2019-01 that will repeal Ordinance No. 2014-02 adopted on October 23, 2014?

*President Krebs will open the Public Hearing for oral and written citizen testimony.*

### **D. PUBLIC COMMENT**

*Time is designated at each Board meeting for citizen testimony, both oral and written, on any items of Board business, being limited to three minutes.*

### **E. CONSENT CALENDAR**

*Items on the Consent Calendar are considered routine and are adopted as a group by a single motion unless a Board member requests to withdraw an item. Action on items pulled for discussion will be deferred until after adoption of the Consent Calendar.*

#### **1. Approval of Minutes**

- a. Minutes of the December 12, 2018 Board Meeting

### **F. ITEMS DEFERRED FROM THE CONSENT CALENDAR**

**G. ACTION ITEMS**

- 1. Adoption of 2019 Legislative Agenda

**H. INFORMATIONAL REPORTS**

**I GENERAL MANAGER'S REPORT**

**J. BOARD OF DIRECTORS REPORTS .....**

*Board members report on their Board assignments and citizen communications as a representatives of the District.*

**K. ADJOURN BOARD MEETING**

Upcoming Board Meeting and Work Session Agenda Items  
January 16, 2019

Work Session	Board Meeting
<p><b>January 14, 2019</b> <b>Packets due to GM office: January 7</b></p> <ul style="list-style-type: none"> <li>• Board-appointed Advisory Committees</li> <li>• Advertising Discussion</li> <li>• Salem River Crossing Discussion</li> <li>• Fare Policy / Ordinance #2019-01</li> <li>• MWVCOG Annual Meeting/Dinner</li> <li>• Present Draft 2019 Legislative Agenda</li> <li>• Service Enhancement Discussion – STIF Revenue Estimates</li> </ul>	<p><b>January 24, 2019</b> <b>Packets due to GM office: January 10</b></p> <ul style="list-style-type: none"> <li>• 1st Reading – Fare Ordinance #2019-01</li> <li>• Adoption of 2019 Legislative Agenda</li> </ul>
<p><b>February 11, 2019</b> <b>Packets due to GM office: February 4</b></p> <ul style="list-style-type: none"> <li>• Service Enhancement Discussion</li> <li>• Budget Amendment Discussion</li> <li>• South Salem Transit Center</li> <li>• DOT Procurement Thresholds Discussion</li> </ul>	<p><b>February 28, 2019</b> <b>Packets due to GM office: February 14</b></p> <ul style="list-style-type: none"> <li>• Resolution 2019-XX Amend 2019 Adopted Budget</li> <li>• 2nd Reading – Fare Ordinance #2019-01</li> <li>• Q2 Finance, Trip Choice, Performance Report</li> </ul>
<p><b>March 11, 2019</b> <b>Packets due to GM office: March 4</b></p> <ul style="list-style-type: none"> <li>• Service Enhancement Discussion</li> <li>• Revisions to Policy 416 per Federal Changes</li> </ul>	<p><b>March 28, 2019</b> <b>Packets due to GM office: March 14</b></p> <ul style="list-style-type: none"> <li>• Purchase Fixed Route Vehicles</li> <li>• Purchase Paratransit Vehicles</li> </ul>
<p><b>April 8, 2019</b> <b>Packets due to GM office: Apr 1</b></p> <ul style="list-style-type: none"> <li>• Service Enhancement Discussion</li> </ul>	<p><b>April 25, 2019</b> <b>Packets due to GM office: April 11</b></p> <ul style="list-style-type: none"> <li>• May Service Change Briefing</li> </ul>
<p><b>May 13, 2019</b> <b>Packets due to GM office: May 6</b></p> <ul style="list-style-type: none"> <li>• Service Enhancement Discussion</li> </ul>	<p><b>May 23, 2019</b> <b>Packets due to GM office: May 9</b></p> <ul style="list-style-type: none"> <li>• Consent: Adopt FY2020 Board Meeting Schedule</li> <li>• Q3 TripChoice, Performance, Finance</li> </ul>
<p><b>June 10, 2019</b> <b>Packets due to GM office: Jun 3</b></p> <ul style="list-style-type: none"> <li>• Service Enhancement Discussion</li> </ul>	<p><b>June 27, 2019</b> <b>Packets due to GM office: June 13</b></p> <ul style="list-style-type: none"> <li>• Appoint STIFAC Chair and Vice-Chair</li> <li>• Budget Hearing</li> <li>• Res#2019-XX Adopt FY20 Approved Budget</li> <li>• Approval of FY2020 United Way Donation</li> </ul>

<p><b>July 8, 2019</b>  <b>Packets due to GM office: Jul 1</b></p> <ul style="list-style-type: none"> <li>• Service Enhancement Discussion</li> </ul>	<p><b>July 25, 2019</b>  <b>Packets due to GM office: July 11</b></p> <ul style="list-style-type: none"> <li>• Accept Prelim Annual EOY FY2019 Financial Report</li> <li>• Budget Committee Appointments</li> </ul>
<p><b>August 12, 2019</b>  <b>Packets due to GM office: Aug 5</b></p> <ul style="list-style-type: none"> <li>• SDIS Board Best Practices Assessment</li> <li>• Issue GM Performance Evaluation Packets</li> <li>• Review Neighborhood Association Contacts</li> <li>• Board Committee assignments</li> </ul>	<p><b>August 22, 2019</b>  <b>Packets due to GM office: August 8</b></p> <ul style="list-style-type: none"> <li>• Trip Choice Report – 4<sup>th</sup> Quarter/Year End</li> <li>• Performance Report – 4<sup>th</sup> Quarter</li> <li>• September Service Change Briefing</li> </ul>
<p><b>September 9, 2019</b>  <b>Packets due to GM office: Sep 2</b></p>	<p><b>September 26, 2019</b>  <b>Packets due to GM office: September 12</b></p> <ul style="list-style-type: none"> <li>• Accept annual security report</li> <li>• Approval of annual SDIS board check list ©</li> <li>• FY 2019 Performance Report</li> <li>• GM performance evaluation (<b>Executive Session</b>)</li> </ul>
<p><b>October 14, 2019</b>  <b>Packets due to GM office: October 4</b></p> <ul style="list-style-type: none"> <li>• Proposed FY2021 Budget Calendar</li> </ul>	<p><b>October 24, 2019</b>  <b>Packets due to GM office: October 10</b></p> <ul style="list-style-type: none"> <li>• Approval of FY2021 Budget Calendar (C)</li> </ul>
<p><b>November 12, 2019 Tuesday</b>  <b>Packets due to GM office: November 1</b></p> <ul style="list-style-type: none"> <li>• STIFAC / CAC / STFAC Updates for Dec meeting <ul style="list-style-type: none"> <li>○ Member Appointments</li> <li>○ Chairs &amp; Vice-Chairs Appointments</li> </ul> </li> </ul>	<p><b>November - No Board meeting</b></p>
<p><b>December – No work session</b></p>	<p><b>December 12, 2019</b>  <b>Packets due to GM office: November 27 (Wed)</b></p> <ul style="list-style-type: none"> <li>• CONSENT CALENDAR: <ul style="list-style-type: none"> <li>○ Committee Appointments-STFAC/CAC</li> <li>○ Appoint Chair &amp; Vice-Chair CAC</li> </ul> </li> <li>• January Service Change Briefing</li> <li>• Q1 Finance, Trip Choice, Perf Report</li> </ul>
<p><b>To Be Scheduled – Work Session</b></p> <ul style="list-style-type: none"> <li>• R#2018-XX re: IT Policy</li> </ul>	<p><b>To Be Scheduled – Board Meeting</b></p> <ul style="list-style-type: none"> <li>• Capitol City CycleShare Program (Spring 2019)</li> <li>• Tire Contract</li> </ul>



**UPDATED:** January 11, 2019

**TO:** SAMTD BOARD OF DIRECTORS  
**FROM:** ALLAN POLLOCK, GENERAL MANAGER  
**SUBJECT:** CALENDAR OF SCHEDULED MEETINGS

Meetings are held in the Senator Hearing Room at Courthouse Square, 555 Court St NE, unless otherwise noted

• **JANUARY 2019**

- |    |     |               |  |
|----|-----|---------------|--|
| 1  | Tue | <b>CLOSED</b> | <b>HOLIDAY: New Year's Day</b><br><ul style="list-style-type: none"> <li>• <b>CLOSED</b> Cherriots Administration Offices-Customer Service; <b>NO</b> Bus Service</li> </ul> |
| 8  | Tue | 3:00-4:30 PM  | Special Transportation Fund Advisory Committee (STFAC)   |
| 14 | Mon | 5:30 PM       | SAMTD Board Work Session   |
| 21 | Mon |               | <b>HOLIDAY: Martin Luther King Day</b><br><ul style="list-style-type: none"> <li>• Cherriots is <b>OPEN</b> for business</li> </ul>  |
| 22 | Tue |               | 2019 Oregon Legislative Session begins   |
| 24 | Thu | 6:30 PM       | SAMTD Board of Directors Meeting -<br><ul style="list-style-type: none"> <li>• 1st Reading of Ordinance 2019-01 re: Fares</li> </ul>   |
| 29 | Tue | 9:30a-2:00p   | STFAC Technical Advisory Subcommittee Meeting  |
| 31 | Thu | 11:30a-7:00p  | Cherriots Job Fair   |

• **FEBRUARY 2019**

- |           |            |               |   |
|-----------|------------|---------------|---|
| 5         | Tue        | 3:00-4:30p    | Special Transportation Fund Advisory Committee  |
| 11        | Mon        | 5:30 PM       | SAMTD Board Work Session  |
| <b>18</b> | <b>Mon</b> | <b>CLOSED</b> | <b>HOLIDAY: President's Day</b><br><ul style="list-style-type: none"> <li>• <b>CLOSED</b> Cherriots Administration Offices-Customer Service: <b>NO</b> Bus Service</li> </ul> |
| 20        | Wed        | 6:00 PM       | MWVCOG Annual Meeting / Dinner<br><ul style="list-style-type: none"> <li>• Keizer Community Center, 930 Chemawa Rd NE, Keizer</li> </ul>                                      |
| 24-26     |            |               | APTA Legal Affairs Seminar, New Orleans, LA   |
| 28        | Thu        | 6:30 PM       | SAMTD Board of Directors Meeting<br><ul style="list-style-type: none"> <li>• 2nd Reading of Ordinance 2019-01 re: Fares</li> </ul>  |

• **MARCH 2019**

- |       |     |            |  |
|-------|-----|------------|--|
| 5     | Tue | 3:00-4:30p | Special Transportation Fund Advisory Committee             |
| 10    | Sun | 2:00 AM    | <b>DAYLIGHT SAVING TIME Begins</b> - Spring Forward        |
| 11    | Mon | 5:30 PM    | SAMTD Board Work Session                                   |
| 17-19 |     |            | APTA Legislative Conference, Washington D.C.               |
| 18    |     |            | Cherriots Transit Operators & Maintenance Appreciation Day |
| 19    | Tue | 5:30-7:30p | Citizens Advisory Committee                                |
| 28    | Thu | 6:30 PM    | SAMTD Board of Directors Meeting                           |

• **APRIL 2019**

- |       |     |            |  |
|-------|-----|------------|--|
| 2     | Tue | 3:00-4:30p | Special Transportation Fund Advisory Committee |
| 8     | Mon | 5:30 PM    | SAMTD Board Work Session                       |
| 13-15 |     |            | APTA CEOs Seminar, Chicago, IL                 |

14-16			WSTA Clerks of the Transit Authority Meeting
15	Mon		REMINDER to file SEI Report
16	Tue	5:30 PM	Citizens Advisory Committee
25	Thu		National Transit Day "Get on Board"
25	Thu	6:30 PM	SAMTD Board of Directors Meeting

• **MAY 2019**

2	Thu	6:00 PM	SAMTD Budget Committee Meeting 1
7	Tue	3:00-4:30p	Special Transportation Fund Advisory Committee
9	Thu	6:00 PM	SAMTD Budget Committee Meeting 2
13	Mon	5:30 PM	SAMTD Board Work Session
16	Thu	6:00 PM	SAMTD Budget Committee Meeting 3 (if necessary)
17-21	.....		APTA International Bus Rodeo, Louisville, KY
19-22			APTA Mobility Conference (APTAs <i>enhanced</i> Bus & Paratransit Conference)
23	Thu	6:30 PM	SAMTD Board of Directors Meeting
<b>27</b>	<b>Mon</b>	<b>CLOSED</b>	<b>HOLIDAY: MEMORIAL DAY</b> <b>Closed</b> Cherriots Administration Offices-Customer Service; <b>NO</b> Bus Service
	Thu	11:30 AM	Keizer Iris Festival Sponsor Appreciation Lunch • In the big tent, 4100 Cherry Ave NE
	Sat	10:00 AM	Keizer Iris Festival Parade

• **JUNE 2019**

8	Sat	6:00 PM	Cherriots Employee Recognition Banquet
10	Mon	5:30 PM	Board Work Session
18	Tue	5:30 PM	Citizens Advisory Committee
27	Thu	6:30 PM	SAMTD Board of Directors Meeting • Budget Hearing
30			2019 Legislation Session Ends

• **JULY 2019**

<b>4</b>	<b>Wed</b>	<b>CLOSED</b>	<b>HOLIDAY 4<sup>th</sup> of July</b> <b>Closed</b> Cherriots Administration Offices-Customer Service; <b>NO</b> Bus Service
8	Mon	5:30 PM	SAMTD Board Work Session
25	Thu	6:30 PM	SAMTD Board of Directors Meeting

• **AUGUST 2019**

Wed	5:00 PM	Statewide Transportation Improvement Fund Advisory Committee
Mon	5:30 PM	SAMTD Board Work Session
Thu	6:30 PM	SAMTD Board of Directors Meeting
Wed	5:00 PM	Statewide Transportation Improvement Fund Advisory Committee

• **SEPTEMBER 2019**

<b>2</b>	<b>Mon</b>	<b>CLOSED</b>	<b>HOLIDAY: Labor Day</b> <b>Closed</b> Cherriots Administration Offices-Customer Service; <b>NO</b> Bus Service
<b>3</b>	<b>Tue</b>	.....	<b>CHERRIOTS SERVICE CHANGES</b> (go to: <a href="http://cherriots.org/en/changes">http://cherriots.org/en/changes</a> )
		3:00-4:30p	Special Transportation Fund Advisory Committee
9	Mon	5:30 PM	SAMTD Board Work Session
17	Tue	5:30 PM	Citizens Advisory Committee