



LANE TRANSIT DISTRICT BOARD OF DIRECTORS SPECIAL TRANSPORTATION FUND COMMITTEE

Tuesday, November 20, 2018

4:00 p.m.

NextStop Center 1099 Olive Street, Eugene (at the Eugene Station)

AGENDA

Table with 3 columns: TIME, ITEM, PAGE. Contains agenda items I through VIII with descriptions and action needed.

IX. NEXT MEETING: TUESDAY, DECEMBER 11, 2018

5:00 p.m. X. ADJOURNMENT

The facility used for this meeting is wheelchair accessible. To request a reasonable accommodation or interpreter, including alternative formats of printed materials, please contact LTD's Administration office no later than 48 hours prior to the meeting at (541)682-5555 (voice) or 7-1-1 (TTY through Oregon Relay).



SPECIAL TRANSPORTATION FUND COMMITTEE
COMMUNITY ADVISORY COMMITTEE
BYLAWS

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ARTICLE I
NAME AND PURPOSE

SECTION 1.1 *Purpose.* The Special Transportation Fund Committee (the “STFC” or “Committee”) was established by the Lane Transit District (“LTD” or the “District”) Board of Directors to advise and assist the Board in carrying out the purposes of the Special Transportation Fund (the “STF”) for the elderly and people with disabilities Transportation Operating (the “STO”) Grants Program.

ARTICLE II
GOVERNANCE PROCEEDINGS

SECTION 2.1 *Governance Procedures.* The Special Transportation Fund Committee will comply with Oregon’s Public Meetings Law, Public Records Law, and all applicable governance procedures set forth in the LTD Ordinance Providing Rules for Meetings of the Lane Transit Board of Directors, attached hereto as Exhibit A.

ARTICLE III
MEMBERSHIP, COMPOSITION, APPOINTMENT

SECTION 3.1 *Membership.* The Committee shall consist of at least 5 and not more than 15 members, a majority of whom meet the qualifications set forth in Section 3.3 (c)(i)-(iv). All members of the Committee are voting members. Pursuant to OAR 732-005-0031(7) the Oregon Department of Transportation will be notified of changes in Committee membership.

SECTION 3.2 *Appointment.* Committee members will be appointed by the LTD Board of Directors. Applications for membership will be available electronically on the District’s website with submissions going to the clerk of the Board.

SECTION 3.3 *Composition.* To be qualified to serve on the Committee, a member must:

- a) Reside in the Lane Transit District boundaries;
- b) Be knowledgeable about the transportation needs of the Elderly and People with Disabilities; and
- c) Be a person who:
 - i. Is Elderly or a person with a disability and is a User of Transportation Services in the District;
 - ii. Is Elderly or is a person with a disability and who lives in an area of the District where there are no Public Transportation Services;
 - iii. Is Representative of Elderly persons residing in the District;
 - iv. Is Representative of People with Disabilities residing in the District; or
 - v. Represents a Provider of services to the Elderly or People with Disabilities residing in the District.

The LTD Board of Directors will consider geographic diversity and balance of the membership qualifications identified in Section 3.3 (c)(i)-(v) when appointing new members to the Committee.

ARTICLE IV
TERMS OF SERVICE, VACANCIES

SECTION 4.1 Terms of Service. Members shall serve for 2 year terms. Members may be eligible for reappointment for up to three additional 2 year terms, for a total term of 8 years. Notwithstanding the above, due to the nature of their position, members meeting the qualifications set forth in Section 3.3 (c)(v) may continue to be reappointed and are not subject to the 8-year limitation, set forth above. Providers are responsible for changing their representative to the Committee at their discretion.

SECTION 4.2 Vacancies. For members appointed to the Committee pursuant to Section 3.3 (c)(v), the LTD Board of Directors shall appoint the member's successor to serve for the remainder of the unexpired term. For members appointed to the Committee pursuant to Section 3.3 (c)(i)-(iv) the LTD Board of Directors, will appoint the member's successor.

ARTICLE V
OFFICERS

SECTION 5.1 Officers. The Committee shall choose from among its members, by majority vote of the members, a president and vice president to serve one year terms. Terms of office shall begin on the first day of July and end on the last day of June each year.

SECTION 5.2 President. The president, and in the president's absence, the vice president; and in the absence of both, a member selected by the members present to act as president pro tem, shall preside at Committee meetings. The presiding officer shall be entitled to vote on all matters and may make and second motions and participate in discussion and debate.

SECTION 5.3 Vice President. In the event of the absence of the president, or of the president's inability to perform any of the duties of the president's office or to exercise any of the president's powers, the vice president shall perform such duties and possess such powers as are conferred on the president, and shall perform such other duties as may from time to time be assigned to the vice president by the president or Committee.

SECTION 5.4 Secretary. This section intentionally left blank.

SECTION 5.5 Treasurer. This section intentionally left blank.

SECTION 5.6 Vacancies. In the case of a vacancy in any office other than by expiration of an officer's term, the vacancy shall be filled by election by the Committee members when the need arises and the newly elected officer shall take office immediately upon the occurrence of such vacancy to fill the balance of the unexpired term.

SECTION 5.7 Committee Assignments. This section intentionally left blank.

ARTICLE VI
DUTIES

SECTION 6.1 Required Functions. Oregon Administrative Rule ("OAR") 732-005-0031(3) requires the Committee to:

- a) Advise the Board regarding the opportunities to coordinate STF moneys and STF-funded projects with other transportation programs and services to avoid duplication and gaps in service;

- b) Review the proposed distribution of Formula Program moneys and make recommendations to the Board;
- c) Review STO and Discretionary Grant proposals and make recommendations to the Board;
- d) Adhere to Public Meetings Law;
- e) Meet a minimum of two times per year, or a sufficient number of times so as to advise the LTD Board in carrying out the purposes of the STF Program;
- f) Participate in developing the STF Plan that will be used to perform the activities described herein; and
- g) Be guided by written bylaws that may include, but are not limited to, committee membership criteria, terms of office for the committee members, procedures of the committee, meeting schedule and other operating and decision-making procedures.

To perform the activities described above, the Committee will review the Projects proposed for funding by Formula Program and Discretionary Program moneys, including the proposed Recipient, Project purpose, intended User of Transportation Services, and the proposed funding level. The Committee may recommend to the LTD Board any changes to the proposed distribution of Formula Program moneys or Discretionary Grant applications it considers necessary.

The Committee is also responsible for the Human Service Transportation Coordination Plan ("Coordination Plan"). The committee will:

- a) Review and oversee the outreach process;
- b) Make recommendations to the LTD Board of Directors

SECTION 6.2 *Purpose and Use of the STF and STO Moneys.* The STF and STO funds are intended to provide a flexible, coordinated, reliable and continuing source of revenue in support of Transportation Systems and Services that provide transportation for the Elderly and People with Disabilities.

- a) STF and STO moneys may be used for the following purposes:
 - i. Maintenance of existing Transportation Systems and Services for the Elderly and People with Disabilities.
 - ii. Expansion of such Systems and Services.
 - iii. Creation of new Systems and Services.
 - iv. Planning for, and development of, access to transportation for the Elderly and People with Disabilities who are not currently served by transportation programs and services.
- b) The STF and STO moneys may be used as matching funds for state and federal programs also providing transportation programs and services to the Elderly and People with Disabilities.
- c) Use of STO moneys is limited to Operations Expense; Capital equipment is not eligible.
- d) When funded by STF and STO moneys:

- i. Projects will comply with the requirements of USDOT Federal Transit Administration regulations, 49 CFR PART 37 TRANSPORTATION SERVICES FOR INDIVIDUALS WITH DISABILITIES (Americans with Disabilities Act) section 37.3, as applicable to the specific Project and Provider.
 - ii. Projects financed in whole or part with STF and STO moneys will be coordinated with other transportation programs and services to the maximum extent feasible.
- e) Except in the case of a uniform budget reduction, STF and STO moneys will not be used to supplant moneys currently appropriated by STF Agencies for transportation projects benefiting the Elderly and People with Disabilities. STF and STO moneys may supplement funds from other sources.

ARTICLE VII
CODE OF ETHICS AND CONFLICT OF INTEREST POLICY

SECTION 7.1 *Code of Ethics and Conflicts of Interest Policy.* Each Committee member is governed by Oregon's Government Ethics Law and the Federal Transit Administration Circular 4220.1F regarding conflicts of interest.

ARTICLE VIII
MEETINGS

SECTION 8.1 *Committee Meetings.* The Committee will meet a minimum of two times per year, or a sufficient number of times so as to advise the District in carrying out the purposes of the STF and STO Programs.

The Special Transportation Committee will comply with Oregon's Public Meetings Law, Public Records Law, and all governance procedures and meeting requirements set forth in the LTD Ordinance Providing Rules for Meetings of Lane Transit District Board of Directors, attached hereto as Exhibit A. This Article VII is intended to supplement the law and LTD's Ordinances.

SECTION 8.2 *Quorum Requirements.* A quorum of Committee members is a majority of the Committee members, even if a member is absent or a position is vacant with the intention of being filled. This Committee can have a varying number of members, ranging between five (5) and (15). If a position is vacant because a member appointed pursuant to Section 3.2(c)(v) is no longer a member, that position should be counted in determining whether there is a quorum. If a position is vacant because a member appointed pursuant to Section 3.2 (c)(i)-(iv) is no longer a member, that position should be counted in determining whether there is a quorum. A quorum is required to pass a vote at a public meeting.

- a) By way of example, assume there are 12 Committee members. A member appointed to the Committee pursuant to Section 3.3 (c)(v) resigns so that there are now 11 Committee members and one vacancy. Seven (of twelve) Committee members are required for a quorum.
- b) By way of example, assume there are 12 Committee members. A member appointed to the Committee pursuant to Section 3.3 (c)(i)-(iv) resigns so that there are now 11 Committee members. The General Manager informs the Committee that she/he does not intend to fill the vacancy, so there is no vacancy, meaning there are now 11 Committee members. Six (of eleven) Committee members are required for a quorum.

SECTION 8.3 Meeting Times. The Committee will meet on the third Tuesday of the month on an as needed basis during funding windows. Scheduled meetings may be cancelled by the president, or upon written notice to the Committee by any four (4) members. Special meetings may be called, with reasonable notice. Committee members must respect the scheduled starting and ending times for meetings. The vice president will assist the president with keeping on schedule.

SECTION 8.4 Attendance. All Committee members are expected to regularly attend Committee meetings and be fully engaged with minimal distraction (from cell phones, etc.) at regularly scheduled Committee meetings, unless prevented by illness or an unavoidable cause.

SECTION 8.5 Telephonic Attendance. If a Committee member is unable to attend a meeting, there is an option to attend telephonically. A Committee meeting can also be held telephonically, without any members having to physically attend, so long as all the requirements of the Public Meetings Law are still followed (notice, recording, and a location for the public to attend and listen).

SECTION 8.6 Meeting Preparation. All Committee members should prepare for Committee meetings by reading the materials ahead of the meeting and asking questions of the General Manager prior to the day of the meeting, if possible.

SECTION 8.7 Committee Meeting Discussion. Committee discussions should be thorough yet concise and pertinent to the issues on the agenda.

SECTION 8.8 Public Participation. Although the Public Meetings Law guarantees the public the right to attend all public meetings, it does not provide the public the right to participate. LTD has historically allowed public participation at meetings upon recognition by the president. Public testimony will typically be limited to three (3) minute increments, but it is adjustable at the discretion of the president.

SECTION 8.9 Scheduling. All Committee members are expected to cooperate in scheduling special meetings and/or work sessions for training purposes.

ARTICLE IX **VOTING RULES**

SECTION 9.1 Voting. Committee members are expected to cast a vote on all matters except when a conflict of interest arises.

SECTION 9.2 Conflict of Interest. Committee members should be familiar with Oregon's Government Ethics Law and the Federal Transit Administration Circular 4220.1F regarding conflicts of interest. If a Committee member believes he/she may have a conflict of interest, that concern should be communicated with the Clerk of the Board and/or the General Manager in advance of the Committee meeting. They may consult with legal counsel.

SECTION 9.3 Voting Requirements. The affirmative vote of a majority of all Committee members is required to pass a motion. For example, assume there are ten Committee members. Even if only seven Committee members attend the meeting, six must vote affirmatively to pass the motion.

ARTICLE X **PUBLIC MEETINGS LAW AND PUBLIC RECORDS LAW**

SECTION 10.1 Legal Requirements. The requirements of Oregon's Public Meetings Law must be followed whenever a quorum of Committee members meet to deliberate towards a decision. All Committee communications are subject to the Public Records Law. This Article X is intended to supplement the requirements of the Public Meetings Law and Public Records Law.

SECTION 10.2 Serial Communications. If Committee members have serial communications among a quorum of its members, the requirements of the Public Meetings Law apply. A serial communication occurs when Committee member 1 deliberates towards a decision with Committee member 2; Committee member 2 then deliberates towards a decision with Committee member 3, and so on, until a quorum of Committee members (4) is involved. While serial communications can take place in person or over the phone, they most often occur via email.

SECTION 10.3 Committee email. The following guidelines apply to use of Committee email:

- a. Do not reply to Committee emails to deliberate towards a decision that should occur in public session;
- b. "Deliberation towards a decision" can only occur among Committee members. It is acceptable to reply to an email from the General Manager and/or Clerk of the Board, so long as the General Manager and/or Clerk of the Board do not share your opinion with any other Board members; and
- c. Committee emails are subject to public records request. As a general rule, do not write anything in an email that you would not want printed in the newspaper.

ARTICLE XI **SEVERABILITY**

SECTION 11.1 Severability. If any provision of these Bylaws or its application to any person or circumstances is held invalid, the remainder of these Bylaws, or the application of the provision to other persons or circumstances is not affected.

ARTICLE XII **AMENDMENTS**

SECTION 12.1 Action. These Bylaws, as adopted by the LTD Board of Directors, may be revised or amended at any regular or special meeting of the LTD Board of Directors by a vote of the majority of the whole membership of the Board.

APPENDIX DEFINITIONS

The following definitions apply to rules in chapter 732 divisions 5, 10, 20 and 30:

- a. **“Administration”** means the essential activities incurred by the STF Agency: receiving, disbursing and accounting for STF moneys.
- b. **“Administrative Allotment”** means a fixed amount, disbursed annually to a STF Agency, for Administration.
- c. **“Advisory Committee”** means a committee appointed by a STF Agency to advise and assist the STF Agency in carrying out the purposes of the Special Transportation Fund.
- d. **“Capital equipment”** means tangible property having a useful life of more than one year and with an acquisition cost of more than \$5,000. Examples include and are not limited to: vehicles, buildings, and passenger shelters. Aggregated purchases, e.g., groups of computers and communication equipment purchased as a single procurement, even if delivered and paid for individually, are treated as capital if the total cost exceeds \$5,000.
- e. **“Coordination”** means working cooperatively with Providers and other individuals and agencies representing people unable to drive, low-income, Elderly and People with Disabilities, to more effectively apply funding and other resources to meet common transportation needs. Coordination actions may reduce duplication of service, reduce cost, increase service levels or make services more widely available in a community.
- f. **“Disabled,”** also **“People with Disabilities”** or **“Individual with Disabilities”** means a person or persons who, by reason of illness, injury, advanced age, congenital malfunction, or other permanent or temporary incapacity, have a physical or mental impairment that substantially limits one or more of their major life activities. This definition does not include substance abuse disorders resulting from the current illegal use of drugs.
- g. **“Discretionary Account”** means a Special Transportation Fund account for distribution of the remaining cigarette tax receipts and other revenues contributed to the STF set aside following distribution of the Formula Allocation, Minimum Allocation and Administrative Allotment.
- h. **“Discretionary Grant”** means a grant award from the Discretionary Program.
- i. **“Discretionary Program”** means a program financed by the Discretionary Account that may be offered by the Division to support Projects benefiting the Elderly and People with Disabilities.
- j. **“District”** means a mass transit district organized under ORS 267.010 to 267.390 or a transportation district organized under ORS 267.510 to 267.650.
- k. **“Division”** means the Oregon Department of Transportation, Public Transit Division.
- l. **“Elderly”** also **“Seniors”** means individuals who are 60 years of age or older.
- m. **“Formula Allocation”** means an amount of STF moneys made available to a STF Agency on the basis of the STF Agency’s share of resident population in proportion to the population of the state as a whole.
- n. **“Formula Program”** means the program of regular distribution of STF moneys from the Division to the STF Agencies that is composed of the Formula and Minimum Allocations, plus the Administrative Allotment.

- o. **“Incidental Use”** means a use of a Project that is not the primary purpose of the Project.
- p. **“Indian Tribe”** means a federally recognized Indian Tribe in Oregon that has members residing on a reservation or tribal trust lands in Oregon.
- q. **“Minimum Allocation”** means a minimum annual amount for which each STF Agency will be eligible, composed of the Formula Allocation moneys plus moneys from the Discretionary Account sufficient to equal the Minimum Allocation.
- r. **“Operations”** means provision of transportation services.
- s. **“Operating Expense”** means the costs associated with the provision of transportation services. Operating Expense does not include expense associated with procuring or leasing capital equipment. Common Operating Expenses include, and are not limited to: personnel, insurance, utilities, vehicle and facility maintenance, professional and technical services, security, fuel and tires, purchased transportation services, personnel training, communication and technology maintenance, marketing/public information, and planning integral to the provision of transit services.
- t. **“Oregon Transportation Commission”** means a commission established under ORS 184.612.
- u. **“Project”** means a Public Transportation System or Service, a Capital Item or any associated activity including, but not limited to, planning and needs assessment, training, and research and that falls within the purposes defined in OAR 732-005-0016.
- v. **“Provider”** means a city, county, district, Indian tribe, or any other person or agency, whether public or private, that maintains, operates, or sponsors vehicles and facilities for Public Transportation Services for profit or on a nonprofit or voluntary basis.
- w. **“Public Transportation Services”** means any form of passenger transportation by car, bus, rail or other conveyance, either publicly or privately owned, which provides service to the general public (not including charter or sightseeing or exclusive school bus) on a regular and continuing basis. Such transportation may include services designed to meet the needs of a specific user group, including for the Elderly and People with Disabilities, and for purposes such as health care, shopping, education, employment, public services, personal business or recreation.
- x. **“Recipient”** means a city, county, transportation district, mass transit district, county service district, Indian tribe, public or private non-profit corporation, or other person or agency, that is in receipt of STF moneys to finance in whole or part a Project for the elderly and people with disabilities.
- y. **“Representative of Disabled Persons”** means an individual who is familiar with the needs of People with Disabilities and is knowledgeable or aware of the transportation needs of People with Disabilities.
- z. **“Representative of Elderly Persons”** means an individual who is familiar with the needs of the Elderly and is knowledgeable or aware of the transportation needs of the Elderly.
- aa. **“Special Transportation Fund for Elderly and Disabled”** also **“STF”** means moneys generated by a tax on cigarettes, or from other sources, appropriated to the Division for distribution to STF Agencies for the purpose of financing and improving transportation programs and services for the Elderly and People with Disabilities.
- bb. **“Special Transportation Fund Operating Grants”** also **“STO Grants”** means moneys appropriated from the Oregon General Fund to the Division for distribution to STF Agencies for the

purpose of financing Operating Expenses that provide access to Transportation Systems and Services for Seniors and Individuals with Disabilities.

- cc. **“STF Agency”** means the mass transit district, transportation district, county in which no part of a mass transit or transportation district is located or Indian tribe that is eligible to receive STF and STO moneys directly from the Division.
- dd. **“STF Plan”** means a plan developed by the STF Agency to guide the investment of STF moneys over at least a three year period.
- ee. **“STF Program”** means a set of policies and procedures that guide the expenditure of STF moneys to benefit transportation services for the Elderly and People with Disabilities.
- ff. **“Transportation Service”** means a project that provides rides or improves access to rides for seniors and individuals with disabilities.
- gg. **“Transportation System”** means one or more transit services that are operated in coordination with each other, and when viewed as a whole, offers access to Transportation Service appropriate to the individual.
- hh. **“User of Transportation Services”** means a person who is Elderly or a Person with Disabilities and who makes use of transportation programs and services for the Elderly and People with Disabilities financed in whole or part with STF moneys.

**Lane Transit District
Project Management Plan
Section 5310: Enhanced Mobility of Seniors and Individuals with Disabilities**

The Program Management Plan (PMP) outlines the policies and procedures that Lane Transit District uses to administer FTA's Enhanced Mobility Program (§5310). The *Lane Public Transit-Human Services Coordinated Plan, 2013 Update* is the guiding document for the PMP.

Introduction

Lane Transit District (LTD), as a large urbanized public transit agency, applies directly through the Federal Transit Administration for Federal Enhanced Mobility Program (§5310) funding. In addition, as the State designated Special Transportation Fund Agency for Lane County, LTD also acts as the pass through agency for §5310 funds that are passed through the State for rural and small-urbanized areas of Lane County, Oregon. The management of this program emphasizes integration and the multi-modal nature of the community's transportation programs.

Program Goals and Objectives

LTD has led and participated in the development of a range of transportation services within Lane County using a coordinated and integrated approach. Providing transportation for people with limited resources and options has long been a guiding principle. Efficiency and cost-effectiveness is another tenet, as is offering a range of services that meet different transportation needs. This has led to the creation of community and population-based services. The promotion of independent travel opportunities has supported the broader values of self-empowerment and integration that are consistent with contemporary special education and employment models for people with disabilities. As a result, LTD has been able to create innovative training and support services. Elected officials are included in many aspects of goal and objective setting. The Metropolitan Planning Organization which includes elected official from the local cities and Lane County, as well as the cities and counties themselves inform the planning process that includes the development of the coordinated plan. They also approve the plan once it is completed.

LTD, with guidance from the Accessible Transportation Committee, a consumer-based advisory group, has established programs and services using these principles and objectives:

Resourcefulness – To use a mix of resources (human, monetary, equipment, contractual) to create and sustain services that meet different transportation needs; to apply innovative thinking and cultivate community relationships to address issues.

Independence - To promote and maintain the independence of older adults, people with disabilities, and others with limited resources, by encouraging and supporting the use of transportation options that foster independence and allow for individual choice whenever possible.

Accessibility - To provide access to transportation services throughout Lane County that are open to seniors and people with disabilities and not limited to a specific group of clients or customers; to connect communities and their residents to transportation services that are integrated and open to the general public.

Efficiency - To evaluate services based on productivity and measures of cost effectiveness that exemplify good stewardship of public resources; seek out cost sharing opportunities and partnerships in order to extend the usefulness of transportation resources; develop cost effective solutions and avoid duplication.

Interaction - To utilize the expertise and experience of people who use and rely on accessible public transportation services; encourage open communication and interactive discussions about how resources are distributed, about policies, and about service options; and make connections and communicate with staff,

consumers, advocates, agencies, and other interested parties about changes, emerging developments, opportunities, and challenges.

LTD's Accessible Services Program focuses on the provision of transportation services to older adults and people with disabilities who require accommodations and equipment that make it feasible to use public transit effectively, whether using fixed-route and/or paratransit. Accessible Services extends to rural areas within Lane County through coordination, technical assistance, grant writing, and program administration.

The Lane Coordinated Public Transit Human Services Transportation Plan (Lane Coordinated Plan), prepared by Lane Transit District, was first drafted and adopted by the LTD Board of Directors in January 2007 – prior to the issuance of guidance by the Federal Transit Administration (FTA). The Lane Coordinated Plan is updated biennially in odd numbered years to ensure that it is relevant to present conditions; reference relevant needs assessments and local planning information; match needs with preferred coordination practices and projects; list projects and resources; and report on public review and comments about the Lane Coordinated Plan.

The Lane Coordinated Plan is recognized and referenced in Lane Transit District's Long Range Transit Plan, which also is adopted by the LTD Board of Directors and included in the regional transportation Planning document, *Central Lane MPO Regional Transportation Plan*, which is prepared and adopted by the Metropolitan Policy Organization. In addition, the Lane Coordinated Plan is included in the Central Lane MPO Unified Planning Work Program of 2008.

Roles and Responsibilities

Lane Transit District (LTD) is the agency designated by the Governor to administer the Section 5310 program in the Eugene-Springfield metropolitan area. LTD also is the designated recipient and administrator of the State Special Transportation Fund for the Elderly and People with Disabilities (STF)¹. LTD also coordinates a public process soliciting transportation project applications for the award and distribution of directly received 5310 funds and all funds received through the State of Oregon. LTD also manages the development and update of the area's human services transportation coordinated plan. It is also LTD's role to ensure that not less than 55% of 5310 funds received are used for traditional Section 5310 projects – those public transportation projects planned, designed, and carried out to meet the specific needs of seniors and individuals with disabilities when public transportation is insufficient, unavailable, or inappropriate.

The state of Oregon distributes state, FTA, and ODOT Surface Transportation Program funds biannually for transportation projects that enhance the mobility of older adults and individuals with disabilities that go beyond traditional services. These funds included Federal 5310, 5311, 5311(f), and State STF funds.

The LTD Accessible Transportation Committee (ATC)² appoints a Grant Review Committee made up of members of the ATC as well as a representative of the local Metropolitan Planning Organization. The Grant Review Committee receives and reviews project applications using the priorities listed in the Lane Coordinated Plan. The Grant Review Committee provides a recommendation of funding to the ATC, which holds a public review process and a public hearing. The ATC forwards its final recommendation to the LTD General Manager who is authorized by the LTD Board to submit grant applications.

LTD typically convenes the Accessible Transportation Committee once a month. The Committee has fixed-route riders who have disabilities and paratransit riders, as well as other community representatives of seniors and people with disabilities. This consumer-based group provides comment on service delivery issues, shares their experience on using services, and helps to guide service policy decisions. There are 15 appointed members who serve on the Committee with representation from a variety of disabilities, rural and metro areas of Lane County, and other interested parties who attend regularly. There is a liaison to the City of Eugene's Human Rights Commission Accessibility Committee and to the Area Agency on Aging Senior and Disabled Services, a division of the Lane Council of Governments.

Local governments participate in the update of the Lane Public Transit-Human Services Coordinated Plan. They also provide services to elderly and disabled populations.

Applicants and recipients (including private providers and local applicants) both participate in the coordinated plan update process. Applicants participate in grant workshops to learn what is expected should they choose to apply for funds. Applicants develop program proposals and submit them to the grant review committee. Recipients, as the direct service providers, provide good customer service and provide the required fiscal management and reporting per contract and federal guidelines.

Coordination

LTD serves as the lead agency for public transit and human services transportation coordination in the area. In this capacity, LTD is required to:

¹ Oregon's Special Transportation Fund (STF) was created in 1985 by the Oregon Legislature. STF funds come from a portion of the cigarette tax revenue as well as excess revenue earned from sales of photo ID Cards and other funds from Oregon Department of Transportation. These funds are distributed biannually through a formula based on population to 42 designated entities, called STF Agencies. These funds typically are used to leverage federal funds. STF Agencies are required to coordinate distribution of funds for projects that benefit the mobility of older adults and people with disabilities throughout their jurisdictions.

² The ATC is a 16-member advisory committee to Lane Transit District made up of riders and providers throughout Lane County. It is an expanded version of an STF committee that is required by the State to oversee distribution of STF funds.

- Develop and adopt a local transportation coordination plan
- Coordinate the project application and public comment processes for the local area
- Review and rank applications for projects benefitting seniors, people with low income and people with disabilities and ensure that projects are derived from the Coordinated Plan
- Follow a protest process and procedure to resolve funding decision conflicts

All projects must be reflected in the Coordinated Plan. Local agencies and service providers participate in the update of the plan. Metro area projects are required to complement or alleviate demand for the metro ADA paratransit service. Rural projects must have full support of local jurisdictions, including a contribution to the match.

LTD operates a regional transportation brokerage, The RideSource Call Center, within which most of the funded projects are coordinated through mobility management and dispatching efforts. For example, all ADA, Veterans, and Medicaid non-emergency medical transportation trips are managed by the Call Center. LTD coordinates service delivery with local DHS agencies and encourages the offering of shared rides between programs and other efforts to enhance the quality and efficiency of service delivery.

The State of Oregon ensures that projects they fund are contained within the Coordinated Human Services Transportation Plan. They are a resource for grantees and require coordination when determining which projects to fund with statewide 5310 funds. LTD's process to award directly received 5310 is a component of the coordinated effort to plan and fund projects within Lane County.

Eligible Sub-recipients

State or local government authorities, private for-profit organizations, non-profit organizations, and/or public transit operators are eligible to apply for funds. As the designated recipient, LTD abides by Federal eligibility requirements. LTD conducts a competitive procurement process to allocate program funds. All applicants must be able to meet the required terms and conditions of grants administered under the Federal Transit Administration (FTA). A signed copy of the FTA's certifications and assurances must be submitted to LTD.

Local Share and Local Funding Requirements

Local and non-U.S. DOT federal funds may be used for local match. Local matching funds must be assigned to and be included in the project budget. Different levels of local matching funds are required for different types of projects (see below). LTD verifies all sources of matching funds for eligibility, applicability to eligible program costs, their sole use as match for the defined program, and availability to the project.

Applicants were notified that the use of some types of non-cash contributions is allowed but restricted. Applicants were requested to contact LTD to find out whether volunteer or other in-kind contributions for a project would be allowed as part of the local match contribution to the project. If permitted, the value of the non-cash contributions must be documented and represent a cost which otherwise would be eligible under the program and be included in the project budget.

Where applicable, funds transferred from the Federal Highway Administration, FHWA, will be matched using the allowable sliding scale of 10.27%. Required local match rates for FTA funded projects are:

Project Categories	Local Match Required
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Vehicle Replacement (to comply or maintain compliance with ADA)	15.00%
New Vehicles - to expand fleet or introduce new service (to comply or maintain compliance with ADA)	15.00%
Preventive Maintenance	20.00%
Other capital – any asset of \$5,000 or more; passenger shelters, computer and communications equipment and associated software and installation	20.00%
Operations – transportation services, whether under contract (purchased), leased, or other arrangement; planning projects	50.00%
Mobility Management – projects that increase access to transportation services; enhance coordination; involve multiple agencies, funding sources and/or services; limited duration	20.00%

Project Selection Criteria and Method of Distributing Funds

LTD, as the lead agency, conducts a public, competitive process to solicit project proposals that enhance mobility for older adults and people with disabilities. This is a coordinated process used for project selection for directly received 5310 funds and funds received through the State of Oregon. This process coincides with the announcement of funding availability from the State and is a four-month process that typically begins in November and ends in March. A grant review committee is convened that includes members of the Accessible Transportation Committee (ATC), an advisory committee to LTD staff and the Board of Directors. A staff member of the local Metropolitan Planning Organization (MPO) also is appointed to the grant review committee. The grant review committee provides funding recommendations to the ATC, which holds a public hearing and approves the funding recommendation. The ATC then forwards the recommendation to the LTD Board of Directors for final approval.

Proposed projects are evaluated on these criteria:

- Projects are derived from and support the Lane Coordinated Plan.
- Projects are eligible under the grant program guidelines.
- Agencies have the fiscal and operational expertise needed to comply with administrative and grant reporting requirements.
- Matching funds are clearly identified, come from permissible sources, and are not already committed to another grant-funded project.
- Projects are cost effective.
- Projects do not unnecessarily duplicate existing service.
- The budget is appropriate to the scale of the project.
- Project helps improve coordination and supports the effective use of public resources.

Annual Program of Projects Development and Approval Process

The consolidated program of projects (POP) development and approval process for both directly received 5310 funds and funds received from the State of Oregon coincides with ODOT Public Transit Division's discretionary grant application process and includes funding under Federal 5310, 5311, 5311(f), and State STF programs. The intent is to provide a better opportunity for coordination of projects and funding sources. ODOT operates on a two-year cycle with annual updates.

LTD conducts workshops and provides technical assistance to potential applicants. All interested parties are encouraged to attend the workshops as well as the Grant Review Committee meetings. A sample schedule for §5310 projects:

- October - Notice of Fund Availability (Published Notice)
- October/November - Workshops (Technical Assistance)
- December - Applications due to LTD
- December/January - Application Review Committee Meeting(s)
- January - Funding Recommendations published and forwarded to ATC members and applicants.
- February - Public Comment / Protest Period – Typically 2 to 3 weeks
- March - Accessible Transportation Committee Meeting (Public Hearing and final recommendation for funding to LTD Board) 3rd Tuesday of the month following the comment period.
- March/April - LTD Board Approval –Board authorizes General Manager to sign applications
- April/May/June - Applications are processed with FTA for direct 5310 funded projects and to the state for all other projects

During the grant review process, projects for funding are reviewed to ensure that the recommended project list meets the 55% traditional project requirement. If the recommended list does not meet the requirement, then the committee will reallocate funding to projects to ensure that the requirement is met.

Projects to be funded with direct 5310 funds through application to the Federal Transit Administration are reported to FTA on their own 5310 program of projects. These projects are included in the project list developed through the grant review process.

Administration, Planning, and Technical Assistance

LTD supplies a high level of coordination and technical assistance to area transportation providers and human services agencies. LTD provides grant administration, contract oversight, graphic design, communications and publications support. LTD uses the 10 percent administrative allotment allowable under Section 5310 funding for these support activities.

Transfer of Funds

LTD will not be transferring directly received urban Section 5310 funds between rural and small urbanized areas. The State has a statewide program for meeting those objectives of Section 5310.

Private Sector Participation

LTD's centralized call center dispatches rides to a variety of private providers that provide a variety of human service transportation trips, including ADA paratransit trips.

LTD advertises the availability of funds through legal ads in the regional newspaper, e-mail notifications to a broad spectrum of providers and interested parties that includes private providers. In addition, the notice is posted on the LTD Website.

Civil Rights

LTD uses a variety of methods to disseminate information and to notify interested and affected public members of their rights under Title VI and to keep them informed about specific projects and progress. LTD alerts stakeholders to participation opportunities. Dissemination of project information is timed to coincide with milestone events. At times, LTD project managers issue additional project-related information outside of key project milestones to provide the public with newly surfaced information or encourage increased participation. The following methods are used: project newsletter, project flyers and postcards, media communications, website, public open houses, and speakers' bureau.

LTD also creates ad-hoc advisory committees that provide additional opportunities for involvement and feedback to get a well-rounded representation from communities.

For individuals who are limited English proficient (LEP), the most visible and critical piece of service information (LTD's Rider's Digest) is translated into Spanish. Customers are informed that any information about District operations will be translated upon request. Most written translations are handled through a contract with a local translator. All press releases go to the area's one Spanish radio station, and staff have participated in on-air interviews with this station. Public notices have been posted at one of the key area Spanish-owned grocery stores, and this store also acts as a distribution outlet for District-printed materials.

As part of the Title VI Quality of Service review, LTD works with the Lane Council of Governments (LCOG) to conduct an analysis using the Census Transportation Planning Package of Census 2010. This data has identified the primary block groups with the largest minority populations. Service planning staff uses this data as major service decisions are analyzed.

Lane Transit District has had no restrictions placed on its EEO program approval by the FTA.

Employment-related and Civil Rights complaints are handled through LTD's Human Resources Department. There have been no such complaints in the past three years. Transit Operations and the Customer Service Center use an on-line system to keep track of service-related ADA complaints and appropriate follow-up. The RideSource (ADA paratransit) staff also uses a record keeping system. Employment-related complaints at RideSource are handled by the contractor's local management. Civil Rights complaints are handled by the contractor's administrative office. The contractor uses similar forms and procedures for responding to and tracking complaints, and discloses all complaints to the grantee on a regular basis. Paratransit program complaints are recorded in the paratransit operations database and investigated by the local contractor's management staff.

LTD develops and submits an annual DBE program to FTA for approval, and per FTA Region 10, the program has been approved. LTD develops overall annual DBE goals relative to the availability of DBEs in the area. These calculations are included as documentation in the annual goal submission to FTA. The Uniform Report of DBE Awards or Commitments and Payments has been submitted to FTA semiannually.

LTD monitors sub-recipient contracts on a monthly, quarterly, and annual basis. Monthly monitoring occurs through individual invoices that are received from sub-recipients that include project data, such as ridership counts by population type, etc. Quarterly reports are submitted by the sub-recipients that include vehicle data and Title VI, DBE, and EEO complaint reports. Annual site visits include a review of required Civil Rights documentation, Civil Rights activity as well as ensuring that required postings are posted in an accessible location and up to date. LTD has an aspirational goal for DBE participation, and is race and gender neutral. As such, we are prohibited from requiring contractors (subrecipients of grant funding) to secure any particular DBE goal percentage under LTD contracts. LTD does encourage the use of DBE firms where

possible, but we cannot require it. Subrecipients are asked to provide an estimated level (%) of DBE participation they will be able to obtain under their contracts, and monthly reporting is required.

Title VI, Section 504 and ADA Reporting

LTD requires sub-recipients to document that they distribute FTA funds without regard to race, color, national origin, disability or discrimination against disadvantaged business enterprises among applicable civil rights requirements. Not all applicable civil rights requirements are discussed in the PMP.

LTD complies with FTA's Title VI requirements in the following manner:

- i. Provision of an annual Title VI certification and assurance;
- ii. Development of Title VI complaint procedures;
- iii. Record keeping of all Title VI investigations, complaints and lawsuits;
- iv. Provision of meaning access to persons with Limited English Proficiency;
- v. Notification to beneficiaries of protection under Title VI;
- vi. A requirement that each sub-recipient develops a Title VI program or becomes part of LTD's submittal of its Title VI program to the FTA's regional civil rights officer once every three years.

LTD's promotion, administration and distribution of information and funding relevant to the 5310 programs is consistent with LTD's Title VI Policy.

In order to fulfill Section 504 obligations, LTD plans on working closely with its sub-recipients to ensure the goals of their federal 5310 grants are being met. In order to track this progress, LTD will review each submitted invoice and insure that all required backup material is attached and correct in order to validate funds spent, work to resolve any potential ineligibility issues with any sub-recipient and obtain the return of any funds paid out that have been found to have been ineligible. In addition, LTD will review all quarterly and annual reports to ensure consistency with the terms of the federal grant and contracts. Finally, LTD will make annual site visits to each sub-recipient to ensure purchased items, service and/or training funded by the federal grant are in full service, being maintained as per manufacturer's recommendations and are being used to meet the performance measures set in the contract and in federal guidelines.

LTD will evaluate all projects receiving grant funds for compliance with all relevant ADA laws, regulations and policies. Moreover, LTD will work with sub-recipients to provide technical assistance.

LTD requires all sub-recipients to submit certifications and assurances annually in accordance with the FTA's annual process. When applicable, LTD will obtain and review ADA and Section 504 policies and reports to ensure compliance.

Program Measures

Lane Transit District will gather and report program measures required by federal guidelines. These include:

- Traditional Section 5310 Projects
 - Gaps in service filled
 - Ridership
- Other Section 5310 Projects
 - Increases or enhancements related to geographic coverage, service quality and/or service times that impact the availability of transportation services for seniors and individuals with disabilities.

- Additions or changes to physical infrastructure (e.g., transportation facilities, sidewalks, etc.), technology, and vehicles that impact availability of transportation services for seniors and individuals with disabilities.
- Actual or estimated number of rides (as measured by one-way trips) provided for seniors and individuals with disabilities.

Where applicable, these measures will be reported by the sub-recipient to LTD. LTD will gather all performance measure data and report in total to the FTA on an annual basis or as requested by FTA.

The sub-recipients will also work jointly with LTD to establish other performance indicators that are more specific to their projects to measure relevant outputs, service levels and outcomes. Sub-recipients will be required to report these performance measures on a quarterly basis and on an annual basis and as required by LTD and the FTA.

Program Management

This Program Management Plan (PMP) describes the Lane Transit District's policies and procedures for administering the Federal Transit Administration's (FTA) Section 5310 program. This PMP is designed to meet federal requirements and facilitate LTD's management and administration of the 5310 Programs. It will also serve as a guide to the general public and prospective applicants and to assist FTA in its oversight responsibilities by documenting LTD's policies and procedures for administering these programs.

LTD has assigned a staff person as project manager for its Program Management Plan. This staff person, or their designee, will be responsible for reviewing and processing all reports, plans and certifications required to be submitted under these regulations. LTD will review information provided by the sub-recipients of Section 5310 funds on a quarterly basis, at a minimum. In addition, records will be checked as part of the sub-recipient monitoring plans during site visits.

The LTD project manager will establish and maintain a point of contact with each sub-recipient and will monitor compliance through review of required quarterly reports, telephone inquiries and periodic site visits.

Accounting Systems, Financial Management, and Reporting

LTD as the sole direct recipient, has an established accounting and reporting system that meets or exceeds FTA requirements for financial management. In addition, all sub-recipients must assure LTD that each has fiscal control and accounting procedures that will permit preparation of the required reports as well as a level of expenditures adequate to establish that such funds are used consistent with the rules and requirements of the program.

All sub-recipients receiving operating assistance are required to report financial and operating data on a quarterly and annual basis. Milestone reports are also required for all capital and planning grants. Eligible direct recipients have in place accounting systems, financial management procedures and reporting capabilities adequate to meet the requirements of FTA.

All sub-recipients receiving capital assistance are required to keep appropriate property control records on all equipment and real property. Federal Office of Management and Budget and Federal Transit Administration guidelines are used in meeting this reporting requirement.

Procurement, Property Management, Vehicle Use, Maintenance and Disposition

As the Designated Recipient for Section 5310 funding, LTD will manage capital from procurement until disposition using FTA required processes and management reviews. Sub-recipients do not procure vehicles or equipment. Sub-recipients will be responsible for property management, vehicle use and maintenance. They will be required to follow all federal guidelines that govern these activities. LTD will monitor these activities through monthly/quarterly/annual report review and site visit verifications. LTD will be responsible for all disposition of property procured with federal funds under LTD's management. All dispositions will follow FTA rules under 5010.

Audits and Close-Outs

Sub-recipients are responsible for securing organization-wide or grant specific audits. An annual audit is conducting on all LTD activities, including activities under the Section 5310 program, in accordance with Office of Management and Budget, Circular A-133 or 2 CFR 200 Subpart 500. LTD is responsible for reviewing all audit reports and appropriately resolving and reporting any findings.

LTD will perform a project closeout with sub-recipients within 90 days after all funds are expended and all work activities for the project are completed. LTD will initiate program of project (POP) closeout with FTA within 90 days after all work activities for the POP are completed. LTD will electronically submit a final **Federal Financial Report (SF 425)**, final budget, and final POP via the TEAM system at the time of closeout.

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Subcontractors will be required to submit a project activity report and status reports. Programs status will be reviewed and a comprehensive status report will be prepared quarterly. Program status reports for FTA grants are provided quarterly.

Other Provisions

LTD will require certifications and assurances from sub-recipients that they will comply with other Federal requirements such as environmental protection, Buy America provisions, pre-award and post-delivery reviews, restrictions on lobbying, prohibition on exclusive school transportation, and drug and alcohol testing, as appropriate. Depending on the nature of the project, LTD will require reporting on the relevant actions taken to comply with the federal requirements listed above as part of quarterly reporting.

LTD will monitor project contracts with sub-recipients in the following manner consistent with its own project reporting requirements with the Federal Transit Administration. These requirements include LTD's direct quarterly and annual reporting requirements to FTA in the following areas:

1. Quarterly and annual program of projects reporting on each FTA grant contract
2. Milestone activity reports – filed with quarterly and annual program of project reports
3. Financial status reports – Submitted quarterly and annually
4. Program measures – Submitted quarterly and annually
5. Disadvantaged Business Enterprise (DBE) reports – as required for contracts in excess of \$250,000

Additionally, LTD will structure grant contracts and reporting in the following manner:

1. In the process of executing sub-recipient contracts, LTD will meet with sub-recipients and explain all contract obligations, including financial and non-financial reporting of project status, progress and compliance with contract requirements
2. Sub-recipients will be required to file monthly reports, due by the 15th of the following month. Monthly reports will include:
 - a. a comparative statement of project expenses relative to budget for the month and project to date

- b. a progress report on project implementation, progress, made, problems encountered and proposed resolution, and expected activities in the following month
- c. project progress compared to project implementation timeline

Monthly reports are not required for periods where quarterly reports are required.

- 3. Sub-recipients will be prepared to file quarterly reports by the 15th of April, July, October and January. The quarterly reports will include all required submissions for monthly reporting and include the following additional information:
 - a. A review of contract compliance
 - b. An analysis of the status of the project relative to project obligations in the contract
 - c. Recommendations for corrective actions, as required
 - d. Recommendations for contract amendment, if desired

The fourth quarter report will serve as the annual report of project status.

Since LTD will be handling all procurements of vehicles and other capital items, LTD will manage all environmental processes and ensure Buy America provisions are followed to ensure compliance with FTA requirements [found in FTA Circular 9070.1, 4220.1, and 5010.1](#). Any FTA requirements borne by sub-recipients, like preventive maintenance, will be reviewed during site visits and through periodic reporting. All other federal requirements that sub-recipients are required to meet will be outlined within the contract and reviewed through periodic reporting and site visits.

ODOT Rail and Public Transit Division 2019-2021 Advance Solicitation Notice

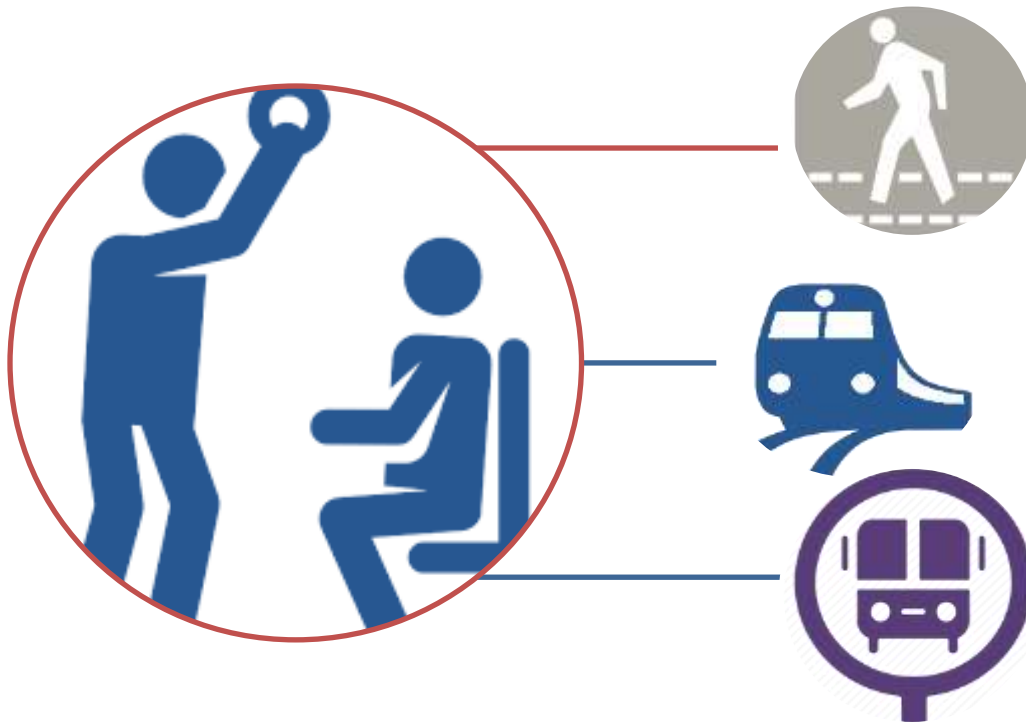


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Introduction



The Oregon Department of Transportation (ODOT) Rail and Public Transit Division (RPTD), with input from the Public Transportation Advisory Committee (PTAC), is gearing up for new investments in public transportation for the 2019-2021 biennium. The following information will help program participants prepare for the next round of grants which will begin later this year with grant solicitation training workshops and the posting of grant applications. Refer to the **Grant Program Schedule** on page 11 to help plan your local application processes, review timelines and find training information.

This notice provides estimated allocations for three formula programs: Federal Transit Administration (FTA) Enhanced Mobility of Seniors and Individuals with Disabilities (Section 5310), FTA Formula Grants for Rural Areas (Section 5311), and State Special Transportation Fund (STF). The table below reflects current funding estimates; the final amount available could vary depending on legislative action during the upcoming session. We are currently anticipating a slight increase in STF funding and a modest increase in Section 5311 funding as compared to the previous biennium. Additional details about anticipated changes in funding levels are found in each program section.

Note: Discretionary funds available for the Statewide Transit Network Program Section 5311(f) combined with the Statewide Transportation Improvement Fund (STIF) Intercommunity sources will be announced at a later date.

Funding Summary

Program	Estimated Allocation
Enhanced Mobility of Seniors and Individuals with Disabilities (Section 5310)	\$24,002,244
Formula Grants for Rural Areas (Section 5311)	\$18,598,284
Special Transportation Fund (STF)	\$21,928,328
Grand Total	\$64,528,856

New This Biennium

Risk Assessment Tool

Federal regulations (2 CFR 200.205) require ODOT to evaluate grant applicants for risk prior to awarding federal transit funds. RPTD has developed a multiple-choice risk assessment tool to evaluate applicants based on a series of factors including financial stability, quality of management systems, history of performance, and findings from previous reviews and audits.

The purpose of the risk assessment is to identify and monitor risks. It is not punitive; instead, the goal is to help transit agencies to be successful and to provide targeted support and training to ensure accountability of funds.

Agencies will be assessed based on the answers to questions listed on each funding application as well as other performance indicators tracked by RPTD. Each agency will then be given a risk assessment classification of high, medium, or low. Agencies identified as moderate or high risk will receive a targeted training and supervision plan from RPTD. The plan will be developed collaboratively with the agency and may include action items such as enhanced invoice scrutiny, scheduled communication with regional transit coordinators, specialized training sessions, or scholarships for additional trainings. Special grant agreement conditions that correspond to the degree of risk assessed may be specified; and intervals between on-site compliance reviews may be adjusted based on risk classification.

Cognito Forms

RPTD is introducing a new online application tool for formula grant applications with this solicitation. *Cognito Forms* is an online form development software that simplifies the application process for the applicant with an easy-to-navigate web-based tool. *Cognito* gives the applicant the ability to view and fill out forms both on desktop and mobile devices. Applicants can save and return to the application at a more convenient time without losing information already entered.

Note: Internet Explorer has intermittent issues with online applications, so we recommend using another browser, such as Google Chrome, to apply.

RPTD will continue to use the *ZoomGrants* tool for the discretionary grants process.

Application Submittal

RPTD will return incomplete or inaccurate applications to the applicant for correction. This includes applications that are missing required attachments.

Helpful Tips

- If you are replacing a vehicle, you must indicate on your application what vehicle in your fleet is being replaced. The vehicle proposed for replacement cannot have been replaced previously. You may view vehicle and asset data in OPTIS to determine asset replacement status as you are completing your application.
- Answer all of the risk assessment questions on both the Section 5310 and Section 5311 applications.
- Submit your application(s) prior to the posted deadlines. Late applications may be rejected and will be delayed while applications submitted on time are processed. Notify your regional transit coordinator no later than two weeks before the published deadline if you believe you will not be able to submit your application on time.



Program Information

Enhanced Mobility of Seniors and Individuals with Disabilities Program (Section 5310)

This program funds eligible capital, contracted service, and preventive maintenance projects for transportation agencies serving seniors and individuals with disabilities. In addition to the federal formula allocation of Section 5310 funds, Oregon has, through the Jobs and Transportation Act (JTA), supplemented Section 5310 funds with flexible Federal Highway Administration (FHWA) Surface Transportation Program (STP) funding. In recent years, as much as 88% of Section 5310 funding distributed by the state was due to ODOT STP funds transferred to the Section 5310 program.

The FTA allocates Section 5310 funds to states in separate rural and small urban area allocations. The allocation ODOT Rail and Public Transit is distributing in this solicitation includes the *small urban* funding specifically designated by the FTA to the seven small urban agencies in Oregon, as well as the FHWA STP funds transferred into Section 5310 for all STF agencies.

RPTD will offer a discretionary solicitation for the federally designated Section 5310 *rural-only* program funding (\$2 million) in 2019, for agreements starting before July 1, 2020.

Per our State Management Plan, and approved by the Oregon Transportation Commission (OTC), Section 5310 small urban funds and State STP funds are distributed by formula to Lead Agencies (STF Agencies), who then conduct a local solicitation process and select projects for funding from their allocated amount. The formula used to allocate funds to Lead Agencies is based on total population and on senior and disabled population.

As noted above, only capital projects, as defined by FTA, are eligible for these funds. Eligible agencies with small urban areas will submit separate applications to the lead agency; one for the

small urban portion of 5310 funds and one for the State STP funds. The FTA 5310 and State STP funds have different match rates (see match below).

Refer to the **5310 FTA Small Urban and ODOT STP Estimated Biennial Targets** table on page 8 for estimated funding details.



Lead agencies are invited to develop and recommend a prioritized project list up to 10% above their allocation for this solicitation. If additional funds become available, RPTD staff may review and award the 110% lists in collaboration with the applicants.

Local Match: 5310 Small Urban Funds 20%; State STP Funds 10.27% – for capital, mobility management, contracted service, and preventive maintenance projects

Formula Grants for Rural Areas Program (Section 5311)

This program provides operating, capital, planning, and administrative assistance to communities with a population of fewer than 50,000. The funds are used to support general public transportation services. The majority of funds are distributed to 35 eligible entities through a formula that was updated this biennium through a PTAC work group process and approved by the OTC. The formula includes a base amount for each participant with additional funds distributed using rides and miles information from the National Transit Database. A modest increase in funding is estimated for 2019-21 as compared to the previous biennium.

Agencies providing or wanting to provide general public transportation services not currently funded by the Section 5311 Program that are interested in participating should contact their regional transit coordinator who can share the “start-up” process.

Refer to the **5311 Biennial Targets** table on page 9 for estimated funding details.

Local Match: 43.92% for operating projects and 10.27% for capital, planning, and project administration projects

Special Transportation Fund (STF) Formula Program

This program provides 42 STF Agencies (transportation districts, county governments where no transportation districts exist, and federally-recognized tribal governments) designated by statute with an annual formula-based allocation of state funds from state cigarette taxes and other sources. Per statute, the formula is based on population. The program funds transportation services benefiting seniors and individuals with disabilities.

STF revenues come from cigarette taxes, sales of ID cards, non-auto gas taxes, and the State of Oregon General Fund. Our biennial targets are based on estimates of each of these revenue sources, including an estimate of the General Fund dollars that depend on legislative approval of the Governor’s Budget. This fund includes three accounts: state administration (up to 10% of total

funds), formula (75% of the remainder after administration is deducted), and discretionary (25% of remainder, if available and at ODOT’s discretion). For this solicitation, uncertainty around STF revenues does not suggest sufficient funding to offer a discretionary project solicitation. If revenues exceed current estimates, an STF Discretionary solicitation may be offered mid-biennium.



The estimated statewide STF Formula funding of \$21.9 million represents a statewide average increase of 1% from FY 2017-19 to FY 2019-21.

Refer to the **STF Biennial Targets** table on page 10 for estimated funding details.

STF Agencies are encouraged to use the information in this advance grant notice to begin working with their local advisory committees to identify investment priorities, taking changes in all fund sources into consideration.

Local Match: No match is required for these funds.

Statewide Transit Network Program

The Statewide Transit Network Program 2019-2021 discretionary grant solicitation materials will be released in late October 2018. Funding for this solicitation will be from FTA 5311(f) and State STIF Intercommunity Discretionary Sources. Grant agreements under this solicitation are expected to be in place by November 1, 2019.

ODOT expects to amend current 2017-2019 Transit Network/Intercity discretionary operating agreements to extend the agreement period and provide funds to close the gap between the current June 30, 2019 grant end and the expected November 1, 2019 start date of new STIF-funded statewide transit network grant agreements.

Additional information and an electronic version of this notice can be found on the Rail and Public Transit Division’s website here: [Rail and Public Transit Division](#).

Regional Transit Coordinators are a valuable resource for questions about this notice. Contact information here: [Link to Regional Transit Coordinators](#)

For information about other Rail and Public Transit Division resources and services contact us at 503-986-3300 or ptd@odot.state.or.us.

FTA Section 5310 Small Urban and ODOT STP Estimated 19-21 Biennial Targets

STF Agency Name	FTA Allocation Estimate	STP Allocation Estimate	Total Allocation Estimate
Baker County		164,947	164,947
Basin Transit Service		487,574	487,574
Benton County	224,047	364,426	588,473
Burns Paiute		90,460	90,460
Columbia County	7,055	333,820	340,875
Confederated Tribes of Coos, Lowe Umpqua and Suislaw		91,509	91,509
Confederated Tribes of Grand Ronde		98,095	98,095
Confederated Tribes of Siletz		97,620	97,620
Confederated Tribes of Umatilla		94,453	94,453
Confederated Tribes of Warm Springs		101,076	101,076
Coos County		498,814	498,814
Coquille Indian Tribe		91,489	91,489
Cow Creek Tribe of Umpqua Indians		91,826	91,826
Crook County		188,431	188,431
Curry County		216,037	216,037
Deschutes County	300,703	914,745	1,215,448
Douglas County		880,994	880,994
Gilliam County		99,419	99,419
Grant County Transportation District		129,990	129,990
Harney		119,831	119,831
Hood River County Transportation District		153,728	153,728
Jefferson County		163,444	163,444
Josephine County	181,296	507,617	688,913
Klamath Tribes		96,570	96,570
Lake County		124,074	124,074
Lane Transit District		2,016,742	2,016,742
Lincoln County		395,209	395,209
Linn County	204,539	623,206	827,745
Malheur County		208,778	208,778
Morrow County		122,342	122,342
Rogue Valley Transportation District	552,935	1,018,383	1,571,318
Salem Area Mass Transit District		2,132,664	2,132,664
Sherman County		97,791	97,791
Sunset Empire Transportation District		277,950	277,950
Tillamook County Transportation District		199,585	199,585
Tri County Metropolitan Transportation District		7,470,832	7,470,832
Umatilla County	31,669	460,678	492,347
Union County		183,789	183,789
Wallowa County		125,588	125,588
Wasco County		185,937	185,937
Wheeler County		98,084	98,084
Yamhill County		681,455	681,455
Grand Total	1,502,244	22,500,000	24,002,244

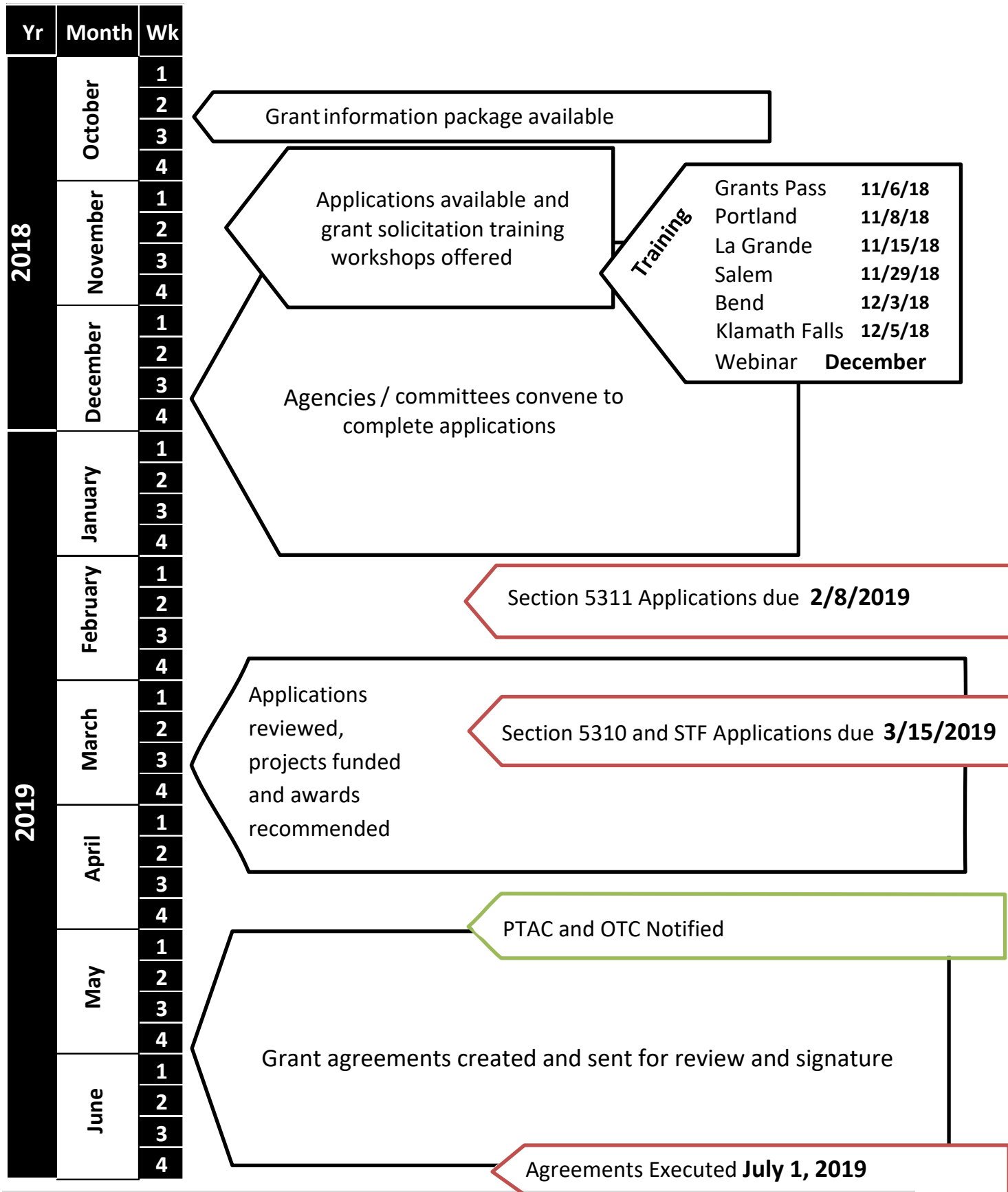
FTA Section 5311 Estimated 19-21 Biennial Targets

Agency Name	Allocation Estimate
Basin Transit Service Transportation District	1,104,664
Benton County	252,312
Central Oregon Intergovernmental Council	1,169,971
City of Canby	561,325
City of Cottage Grove	247,930
City of Lebanon	190,417
City of Pendleton	274,887
City of Sandy	790,281
City of Silverton	134,606
City of Sweet Home	209,030
City of Woodburn	279,992
Clackamas County	235,382
Columbia County	873,502
Community Connection of Northeast Oregon, Inc.	862,294
Confederated Tribes of Grand Ronde Community of Oregon	100,000
Confederated Tribes of the Umatilla Indian Reservation	613,063
Coos County Area Transit Service District	429,533
Curry County	389,143
Douglas County	974,664
Grant County Transportation District	277,464
Harney County	297,575
Hood River County Transportation District	304,536
Josephine County	183,331
Klamath Tribes	259,368
Lane Transit District	176,062
Lincoln County Transportation Service District	1,221,836
Linn County	288,420
Malheur County	434,213
Mid-Columbia Economic Development District	259,498
Ride Connection, Inc.	489,416
Salem Area Mass Transit District	728,310
South Clackamas Transportation District	564,055
Sunset Empire Transportation District	1,002,443
Tillamook County Transportation District	790,716
Yamhill County	1,628,045
Grand Total	\$ 18,598,284

Special Transportation Fund - Formula Estimated 19-21 Biennial Targets

STF Agency Name	Allocation Estimate
Baker County	135,400
Basin Transit Service Transportation District	324,363
Benton County	442,139
Burns Paiute Tribe	135,400
Columbia County	247,006
Confederated Tribes of Coos, Lower Umpqua and Siuslaw	135,400
Confederated Tribes of Grand Ronde Community of Oregon	135,400
Confederated Tribes of Siletz Indians	135,400
Confederated Tribes of the Umatilla Indian Reservation	135,400
Confederated Tribes of Warm Springs	135,400
Coos County	303,634
Coquille Indian Tribe	135,400
Cow Creek Band of Umpqua Tribe of Indians	135,400
Crook County	135,400
Curry County	135,400
Deschutes County	869,772
Douglas County	530,193
Gilliam County	135,400
Grant County Transportation District	135,400
Harney County	135,400
Hood River County Transportation District	135,400
Jefferson County	135,400
Josephine County	409,365
Klamath Tribes	135,400
Lake County	135,400
Lane Transit District	1,757,977
Lincoln County	230,985
Linn County	590,915
Malheur County	154,716
Morrow County	135,400
Rogue Valley Transportation District	1,030,545
Salem Area Mass Transit District	1,992,724
Sherman County	135,400
Sunset Empire Transportation District	187,727
Tillamook County Transportation District	135,400
Tri County Metropolitan Transportation District	8,579,178
Umatilla County	384,991
Union County	135,400
Wallowa County	135,400
Wasco County	135,400
Wheeler County	135,400
Yamhill County	507,097
Grand Total	21,928,328

2018-2019 Grant Program Schedule



ACCESSIBLE SERVICES AND STF COMMITTEE

October 2018 – March 2019

PROPOSED PROCESS SCHEDULE

October 16	Advance Grant Notification made available.
November 20	Initial STF Committee Meeting.
November 29	ODOT Grant Solicitation Training for Transit Employees
November 30	Grant Notice published in <i>The Register-Guard</i> .
December 7	Grant Workshop/Open House Held.
December 11	STF Committee Meeting.
December 18	STF Committee Meeting.
December 31	Project applications due.
January 8	STF Committee Meeting: applicant presentations.
January 15	STF Committee Meeting: applicant presentations.
January 18	LTD Board Meeting: 5311 and 5311f recommendations presented for review and approval.
January 22	STF Committee Meeting, draft recommendations.
February 1	STF Committee holds public hearing on 5310 and STF recommendations; makes final recommendations.
February 8	Submittal of 5311 and 5311f applications to State.
February 20	LTD Board Meeting: 5310 and STF recommendations presented for review and approval.
March 15	Submittal of 5310 and STF applications to State.

Lane Coordinated Public Transit - Human Services Transportation Plan

2017 UPDATE

DRAFT



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Executive Summary

The *Lane Coordinated Public Transit-Human Services Transportation Plan* (Lane Coordinated Plan) was first prepared by Lane Transit District (LTD) and adopted by the Lane Transit District Board of Directors in January 2007. Because the original plan was developed prior to the issuance of guidance by the Federal Transit Administration (FTA), it was revised in June 2008 to include additional information to meet both FTA and State of Oregon planning expectations. Both versions are incorporated by reference as source documents for this and subsequent updates.¹

The Lane Coordinated Plan satisfies federal requirements enacted through the passage of the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU). It is specific to funds administered through the FTA and the Oregon Department of Transportation (ODOT) Public Transit Division with expectations for planning and coordination of these resources. The federal requirements for the coordinated transportation planning process are retained under legislation signed into law on July 6, 2012, by President Barack Obama titled *Moving Ahead for Progress in the 21st Century* (MAP-21). In December 2015, President Obama reauthorized transportation programs through Fiscal Year (FY) 2020 with the passage of the Fixing America's Surface Transportation (FAST) Act.

¹ The *Lane Coordinated Public Transit-Human Services Transportation Plan* is posted on LTD's website at ltd.org under **EZ Access/Accessible Services -?**. Copies in print or alternate formats are available on request by contacting LTD's Administration office at 541-682-6100 (voice) or 7-1-1 (TTY).

The FAST Act took effect October 1, 2015, and made some changes to federal grant programs. The FAST Act is the new five-year surface transportation authorization that provides FTA an authorization level of \$11.78 billion in FY 2016 and a total of \$61.56 billion from FY 2016 through FY 2020. The FAST Act realigns several transit programs, provides significant funding increases specifically for bus and bus facilities, creates several new discretionary programs, and changes several cross-cutting requirements. The law continues and expands FTA authority to strengthen the safety of public transportation systems (<https://www.transit.dot.gov/regulations-and-guidance/regulations-and-guidance>).

This 2017 update to the Lane Coordinated Plan will:

1. Update important information in order to ensure that the Lane Coordinated Plan is relevant to **present conditions**;
2. Include **transportation needs of veterans** and their families and how these are identified;
3. Reference relevant **needs assessment and local planning** information;
4. Match needs with preferred **coordination practices and projects**;
5. List projects and **resources**; and
6. Report on **public review and comments** about the Lane Coordinated Plan.

Additional resource documents are:

- Attachment 1:** ECONorthwest Report – Recent Economic Performance of the Eugene-Springfield Metropolitan Statistical Area (MSA), April 2014
- Attachment 2:** Oregon Economic and Revenue Forecast, September 2016. Volume XXXVI, No. 3
- Attachment 3:** Legislative Task Force on Veterans’ Transportation Final Report, October 2010
- Attachment 4:** National Center for Transit Research: Improving Veteran Mobility in Small Urban and Rural Areas, February 2014
- Attachment 5:** Senior & Disabled Services 2016 Community Needs Assessment
- Attachment 6:** 2015-2016 Lane County Regional Community Health Needs Assessment
- Attachment 7:** 2016-2019 Lane County Regional Community Health Improvement Plan
- Attachment 8:** Fact Sheet: Enhanced Mobility for Seniors and Individuals with Disabilities Section 5310, U.S. Department of Transportation Federal Transit Administration
- Attachment 9:** Fact Sheet: Formula Grants for Rural Areas Section 5311, U.S. Department of Transportation Federal Transit Administration

Since the initial Plan and subsequent update were adopted, there have been significant changes and new initiatives that impact local transportation, such as a sluggish state and local economy with a very slow recovery from recession, fluctuations in fuel costs, uncertainty about federal and state transportation resources, and fixed-route service reductions along with increased use. Responding to unmet service needs and more demand is quite challenging under these circumstances; so, too, is taking on new initiatives to serve veterans and military families, transportation linked to health care reform, and providing transportation to the growing number of older adults in need of transportation services to help sustain, support, or enhance personal independence.

Section 1: Present Conditions

Local Economy

Lane Transit District (LTD) was founded in 1970 under the laws of the State of Oregon that allowed the formation of transit districts as special taxing entities. LTD was empowered by State Statutes to impose an excise tax on employers to fund local transit. The recent downturn in the local economy, with associated job losses, led to a significant reduction in LTD's payroll tax revenues. The State of Oregon Economic and Revenue Forecast, published in September 2009, predicted that Oregon jobs lost since 2007 would not be regained until 2013. Since there have been only small improvements in the local economy since 2009, there was continued speculation that job recovery would not occur until 2015. The local economy is not likely to regain lost jobs any sooner.

In 2009 a significant LTD service reduction was avoided by the application of federal stimulus funds in support of fixed-route operations. Federal stimulus funds were a one-time infusion, so the need for the service reduction that was averted in 2009 was not eliminated. With the continued poor local economy, a service reduction of 11.2 percent was carried out in September 2010. The health of the local economy remains a critical factor in assessing Lane Transit District's ability to preserve and potentially improve service. The economy began to improve in 2012 and 2013, earlier than originally anticipated.

Economic recovery began to emerge in Lane County during the 2013/14 period. This was evident through increases in payroll tax revenues and job growth in the Eugene-Springfield Metro area. The perceived beginnings of economic recovery led the LTD Board of Directors to commission a study in 2014 to determine if local economic conditions supported an increase in the payroll tax (see Appendix 1, ECONorthwest Report). The previous increase was in 2003 when the Oregon Legislature provided LTD with the authority to incrementally raise the rate over 10 years from .006 to .007. The 2014 Study found that economic conditions in Lane County had improved and were expected to continue to improve. The unemployment numbers had decreased and personal income had increased; however, the income increase was not near pre-2007 levels. While the report itself did not provide any recommendations, the LTD Board determined that while the economy was improving, it was not yet stable enough to handle a payroll tax increase.

In the fall of 2014, a first step was taken to restore service in the District. One of the most impactful changes was adding back service on four national holidays, including New Year's Day, Memorial Day, the Fourth of July, and Labor Day. Additionally, some routes were expanded and times increased. In the fall of 2016, a service enhancement of 14,000 hours was added, increasing service along LTD's most used routes and corridors. A third service enhancement is expected to take place in the fall of 2017 with the introduction of the third leg of LTD's Bus Rapid Transit (BRT) system, EmX.

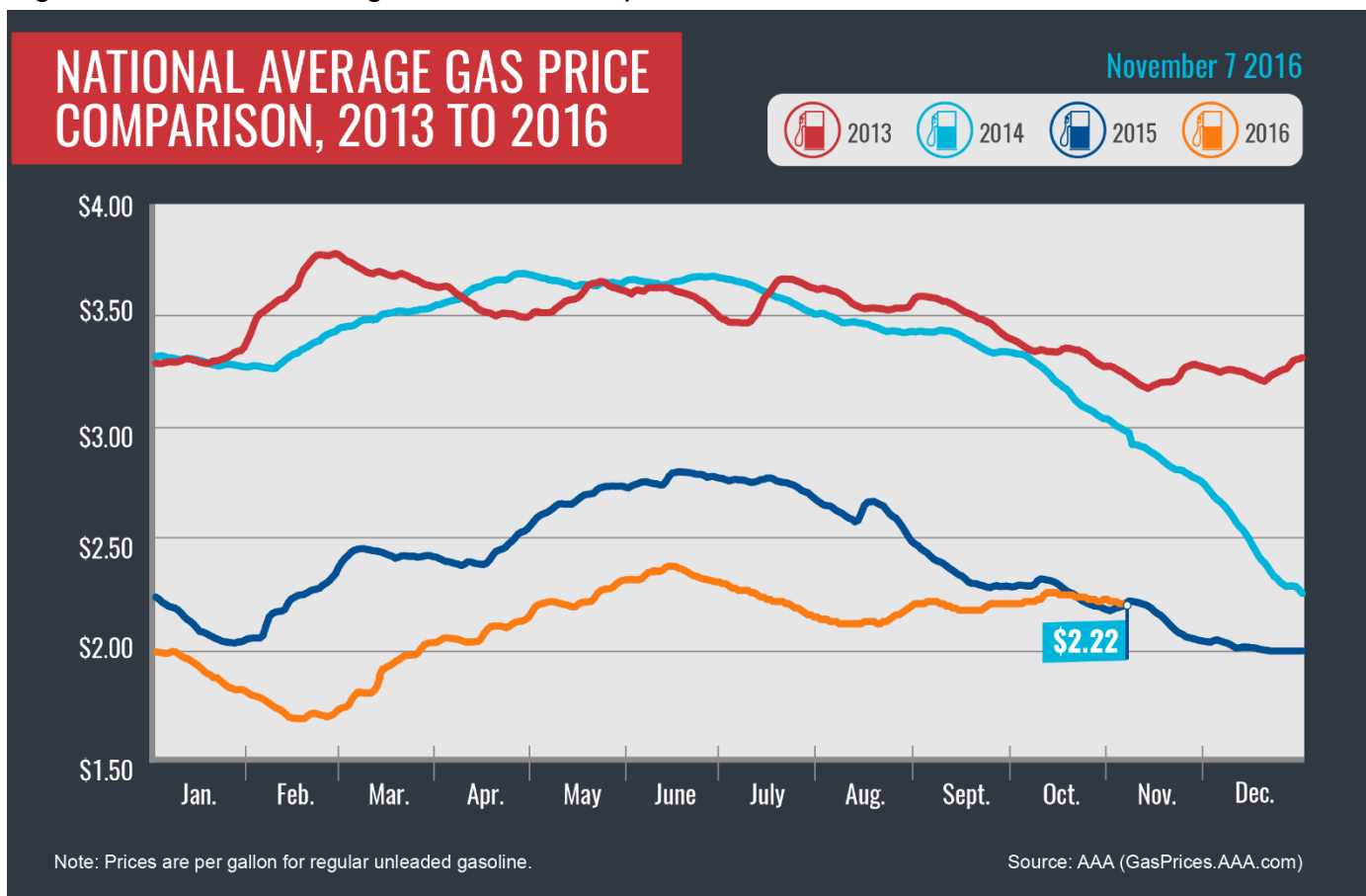
Currently, the economic forecast for Oregon is positive. Job gains in Oregon have exceeded what is needed for population growth. Unemployment continues to drop from its high in 2009. Wages are rising as are the need for more skilled workers. This increase in jobs has resulted in higher

payroll tax revenues for LTD, further allowing service expansions in 2016 and beyond (see Appendix 2, Oregon Economic Forecast Report).

Cost of Fuel

The rising cost of fuel was a significant concern as of the 2013 Plan update. As of this publication, the cost of fuel has begun to significantly decrease. Previous estimates were for fuel prices to increase by 6 percent per year from Fiscal Year (FY) 2013 through FY 2019. What has become a reality since 2013 is a decrease in the price per gallon. In June 2016, the AAA Daily Fuel Gauge Report stated that the national average was \$2.39 per gallon. As of the October 2016 report, the average continues to increase slightly, approaching 2015 levels. With gas prices the highest on the west coast, this could indicate a potential increase in the costs for transportation, which could cause small operators of taxis or specialized vehicles concern about fueling their fleets. (See Figure 1 – National Average Gas Price Comparison 2013-2016). This being said, however, projecting future fuel costs is difficult at best since fuel prices are affected by many factors.

Figure 1 – National Average Gas Price Comparison 2013-2016



State and Federal Revenue

Congress passes legislation which, when signed by the President, appropriates funds for the U.S. Department of Transportation and associated agencies. MAP-21, the two-year transportation authorization that took effect in 2012, consolidated certain transit programs to improve their efficiency and provided significant funding increases specifically for improving the state of good repair of transit systems. It placed new emphasis on restoring and replacing aging transportation infrastructure and streamlined processes for large capital project eligibility and development. The bill highlighted safety by granting FTA the authority to strengthen the safety of public transportation throughout the country. Most significant to this Plan is the consolidation of some programs.

Two programs, §5316 Job Access and Reverse Commute (JARC) and §5317 New Freedom were repealed and expired on September 30, 2012. No new funding was authorized beyond 2012 for these programs--although LTD can continue to use up previous authorizations. JARC activities are now eligible under the Urbanized Area Formula program (§5307) as well as the Rural Area Formula program (§ 5311). Activities eligible under the former New Freedom program are now eligible under the Enhanced Mobility Program (§ 5310). (More information about these programs is provided in Section 5: Resources, starting on page 26.)

MAP-21 has current re-authorization through May 31, 2015, but did not provide any funding increases over the 2013-14 levels. In June 2014, U.S. Transportation Secretary Anthony Foxx announced the availability of additional funding through a new Ladders of Opportunity Initiative (http://www.fta.dot.gov/newsroom/news_releases/12286_16007.html), accessed 12/30/14). LTD was successful in receiving funding from this grant opportunity in the amount of \$2.0 million. This funding supports enhancing access to work, supporting partnerships, and economic opportunities through vehicle replacement and safety enhancements.

Also in 2014, the Oregon State Legislature appropriated funds on two separate occasions to Elderly and Disabled (E&D) Funding for transit projects and continue to look for a long-term solution to funding for these populations. The funding appropriated to LTD during this legislative short session were \$702,257 and \$134,340 from previously unspent funding allocations. With this additional allocation, programs have been funded at close to previous 2009 levels.

Anticipated E&D funding levels for the 2017-19 biennium are projected to be lower due to decreased funding availabilities. At this time, the estimated decrease for LTD will be approximately 9 percent for state-distributed 5310 funding and nearly 18 percent in the Special Transportation Fund allocation.

Health Care Reform in Oregon

A growing body of evidence supports the connection between successful health outcomes and access to affordable and appropriate transportation options--that there is synergy between health and transportation availability.

Oregon began carrying out a significant change to provide health care services for people who receive health care coverage under the Oregon Health Plan (Medicaid) by creating coordinated care organizations (CCOs) in 2012. As described by the Oregon Health Authority (OHA), CCOs are:

Replacing managed care organizations, mental health organizations, and dental care organizations for Oregon Health Plan members. The CCOs will focus on improved wellness, prevention, and integration of behavioral and physical health care. These local health entities will deliver health care and coverage for people eligible for the Oregon Health Plan (Medicaid), including those also covered by Medicare. Coordinated care organizations are a new way of doing business for the Oregon Health Authority. They will be the umbrella organizations that govern and administer care for OHP members in their local communities.

CCOs must be accountable for health outcomes of the populations they serve. They will have one budget that grows at a fixed rate for mental, physical, and ultimately, dental care. CCOs will bring forward new models of care that are patient centered and team focused. They will have flexibility within the budget to deliver defined outcomes. They will be governed by a partnership among health care providers, community members, and stakeholders in the health systems that have financial responsibility and risk.

The RideSource Call Center (RSCC) is one of eight regional call centers within Oregon that handled transportation services for Medicaid recipients through an agreement with the Oregon Health Authority. Unique to the RSCC are features that offer a comprehensive approach to coordinating local transportation services:

- Approved cost allocation methodology
- Cost sharing and integration of human service transportation
- Personal in-the-home interviews by trained transportation coordinators from Senior and Disabled Services (S&DS) and Alternative Work Concepts (AWC)
- Interagency collaboration with case managers
- Innovative program development using a community care model
- Sophisticated application of technology and software

Development of the RideSource Call Center has been the overarching strategic and accountability model for coordinating transportation services for older adults and people with disabilities in Lane County. In essence, the RSCC serves as a one-call center for different transportation services using an assortment of resources and providers. Since 2008 the RideSource Call Center has provided Non-Emergency Medical Transportation (NEMT) for people eligible under the Oregon Health Plan. Under Oregon's emerging CCO structure, these newly formed entities will now be primarily responsible for NEMT transportation.

In July 2013, LTD began a relationship with the local CCO, Trillium Community Health Plans to provide NEMT services for their members. The service area for the CCO expanded slightly outside of Lane County into small rural areas of Linn, Benton, and Douglas Counties. The partnership with the CCO has brought unique challenges to the RideSource Call Center, including the formalization of partnerships with other agencies and the introduction of strong HIPAA requirements as a Business Associate of the CCO.

Under the fee for service model utilized by OHA, RSCC functioned as a gatekeeper to transportation services by ensuring the customer was receiving services only when all other resources had been exhausted. With the focus of the CCOs on health outcomes for members, many (including Trillium) are working to enhance access to transportation. In effect, RSCC is evolving into a service to enhance access to health care services with respect to NEMT.

This new focus on health outcomes and CCO independence is changing the landscape of transportation brokerages throughout Oregon. Some CCOs (such as Trillium) have chosen to work with the existing brokerage in their area. Some CCOs have chosen not to work with the existing brokerage system. At least two new entities have entered the NEMT brokerage business in Oregon, one beginning service in October 2014 and the other beginning service in January 2015. The first company is a newly developed operation called Ready Ride located in Southern Oregon. The second company was awarded the RFP for services in the Tri-County region in the Portland metro area. This has resulted in Tri-Met Transportation District's Medical Transportation Program disbanding as of December 31, 2014. The services for customers in this area will continue to be served by local transportation companies but the call intake and provider service components will be handled out of a regional call center located in the state of Idaho.

In the summer of 2015, Trillium was purchased by The Centene Corporation, and now operates as a wholly-owned subsidiary. To date, minimal changes have taken place with regard to service provision and have been more behind the scenes consisting of data exchange and new procedures for inquiries and service approvals.

The introduction of this new relationship changes the landscape of NEMT coordination across Lane County, and also to some degree within the state of Oregon. To what degree the changes will continue be and if those changes are positive or negative remains to be seen. In any event, RSCC remains well positioned to continue providing NEMT transportation services, enhancing individual opportunities for accessing multiple transportation programs from a single location.

LTD Accessible and Customer Services

LTD has changed its internal structure to better align the work of Accessible Services and Customer Services staff. Already this change has revealed new ideas for improving service to customers and better coordination of services for older adults, people with disabilities, and persons of low income. For example, integrated improvements to the data management system and co-location at the downtown Eugene Station of staff responsible for LTD's Not-for-Profit, Reduced Fare, and other programs that offer assistance to these groups.

LTD has two discount fare programs aimed at providing lower cost fixed-route public transportation:

EZ Access Half-Fare and Honored Rider Programs: LTD's EZ Access program provides free fares to customers age 65 and older, and half-price discounted bus fares to customers with disabilities. The latter is in accordance with and exceeds the FTA half-fare requirements.

Private Not-for-Profit Agency Program: The District offers private, not-for-profit agencies the opportunity to purchase LTD fare media at a 50 percent discount. This discount is granted in recognition of a community need for transportation services for low-income individuals and families who are working with an agency(s) to seek employment, housing, and medical services.

At present these programs are managed separately and without a communication or data connection to other services such as in person assessments, transit training and host services, and ADA paratransit. Now is a great time to build upon and improve coordination across a wider spectrum of services and make better connections with the people who need and use a variety of these options. New operations software is expected to be in use for RSCC customers and will provide an opportunity to enhance the data collection and management of these programs in a more coordinated seamless manner. The software is expected to be in use by late summer 2017.

A comprehensive evaluation of LTD's fare-based programs will be conducted with oversight and accountability incorporated into the overall management of the collection of services referenced in the Lane Coordinated Plan.

Section 2: Transportation for Veterans and Military Families

Transportation Needs of Oregon Veterans

This summary from the *Legislative Task Force on Veterans' Transportation Final Report October 2010*, follows the work conducted at the State level to identify the transportation needs of Oregon veterans:

In 2008, Governor Ted Kulongoski commissioned the Governor's Task Force on Veterans' Services with the mission of identifying issues facing Oregon veterans and providing recommendations to improve service delivery to those veterans. During its work, the Task Force traveled to 24 cities throughout the state and met with more than 500 veterans. In every city the Task Force visited, veterans identified lack of transportation to and from VA medical appointments as a major barrier to veterans receiving their earned benefits.

In response, the Governor's Task Force recommended that the 2009 Legislature create a task force on veterans' transportation that could more deeply examine the current veterans' transportation system and provide recommendations for enhancements that would meet the concerns of Oregon veterans. The Legislature passed Senate Bill 98 creating the Legislative Task Force on Veterans' Transportation.

The Task Force made a number of recommendations. During the course of its work, the Task Force was cognizant of Oregon's current economic crisis and noted that it worked diligently to provide recommendations with the least amount of fiscal impact. And, it acknowledged that transporting veterans did have a cost. The goal of the Task Force was to recommend creative ways to leverage existing resources to meet veteran transportation needs, as well as find creative financing through existing federal monies (such as VA mileage, grants, pilot projects, etc.) to establish a consistent and efficient veteran medical transportation system in Oregon.

For a full copy of the report refer to Attachment 3: Legislative Task Force on Veterans' Transportation Final Report October 2010.

Veterans Transportation Initiative

President Obama called on Federal agencies to support veterans and military families through a coordinated network of support systems. Staff members of the Federal Interagency Coordinating Council on Access and Mobility (CCAM), which includes the U.S. Departments of Transportation, Veterans Affairs (VA), Labor, and Health and Human Services worked with the Defense Department's Office of Wounded Warrior Care and Transition Policy to move this initiative forward.

CCAM acknowledges that:

Access to reliable and affordable transportation is an essential ingredient to empower today's service members, veterans, and their families to participate fully and successfully

in their communities and achieve economic stability. Many families are struggling to meet mobility needs with one or more family members deployed overseas. Moreover, our fighting forces returning from overseas face a range of physical, mental health, and economic challenges that directly affect their families as they strive to rejoin their communities.

A new Veterans Transportation and Community Living Initiative (VTCLI) focused on these challenges:

- Support the creation or expansion of community-based "one-call" transportation centers and mobility management strategies to include veteran and military family-directed resources;
- Target outreach efforts to the military and veteran communities through veterans service organizations and military family support organizations; and
- Provide technical assistance to selected communities to improve awareness, effectiveness, and coordination of existing transportation resources.

Under this initiative, LTD has been awarded a capital grant to replace and augment the 25-year-old communications structure and systems used in the RideSource Call Center with current technology. The software system is being replaced to (1) ensure seamless interaction with modern software technologies, (2) allow for growth and adding new services, and (3) take into account significant data security needs for privacy and asset protection. A new telephone system with advanced capabilities will replace the old service. Along with the capital elements of the project, a Work Group has convened to explore transportation options and choices for local veterans and military families. The new phone system became operational in fall 2015, and the software is expected to be operational in the late summer of 2016.

Transportation for Lane County Veterans

LTD teamed up with Lane County Veteran's Services to offer transportation to and from VA medical and Lane County Veterans Services appointments. Funding from LTD's Accessible Services Fund was reprogrammed to pay and arrange for trips through the RideSource Call Center.

In calendar year 2010 (before starting the Veterans' Transportation Program), 76 veterans made a total of 548 one-way trips for total average of 45 trips per month through the RideSource Call Center. Service was incidental with no special attempt to identify veterans within the system or to promote transportation specifically to veterans. Transportation is now offered to veterans for medical and local Veteran's Services appointments at no cost. Non-veteran family members needing to get to service appointments also can use the service. Veterans are now identified through the assessment process as well as self-identification upon requesting services and can get rides through this and other programs offered through the Call Center. Most trips funded are for critical medical needs or to provide a short term stop gap solution while a permanent transportation plan is implemented in conjunction with the VA Hospitals, Disabled American's Veteran's transportation program, and volunteers.

Over the last six months (April 1 through September 30, 2016) 1289 one-way trips have been provided. Most but not all trips are local. This is an increase in trips over 200% during the same time period provided in the last plan update. This chart shows trips by destination:

Number of One-Way Trips to Veterans by Facility from April through September 2016

Trip Destination	April	May	June	July	August	September	Total
VA Clinic Eugene	158	180	167	160	135	130	930
VA Clinic Eugene (former)	0	0	2	0	0	0	2
VA Mental Health	23	48	29	27	72	66	265
VA Services of Lane County	0	2	6	1	4	0	13
Veterans Center	4	3	0	0	0	0	7
McDonald's Rest (VA bus stop)	7	7	3	4	3	3	27
VA Hospital Roseburg	0	1	2	6	4	12	25
VA Clinic Lincoln County	0	0	4	0	0	0	4
VA Clinic North Bend	2	0	4	0	6	0	12
VA Clinic Salem	2	2	0	0	0	0	4
	196	243	217	198	224	211	1289

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This chart shows trips by transportation program type:

Number of One-Way Trips to Veterans by Program Type from April through September 2016

Program Type	April	May	June	July	August	September	Total
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ADA	81	68	77	54	84	49	413
Medicaid medical	108	165	122	134	130	155	814
Medicaid waiver	0	2	0	0	0	0	2
VET program	7	8	18	10	10	7	60
	196	243	217	198	224	211	1289

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This update to the Plan responds directly to the Task Force on Veterans’ Transportation recommendation to:

Ensure that transportation for veterans is included in all local Public Transit-Human Services Coordinated Transportation Plans

To further improve coordination and follow-up on other Task Force recommendations veterans are identified during initial contact and follow-up interviews by Transportation Coordinators with the goal of making sure that veterans are aware of transportation options available in the area.

LTD is a regular participant with the annual Lane County Stand Down, providing transportation service information to all attendees, including regular bus service, half-fare programs, transportation options, bicycle, pedestrian and RideSource services.

Stand Down was a term first used to describe the relief of a military unit on the front lines. By moving the unit to the comparative safety of the rear, it could rest, eat hot food, train, and re-equip before going back into action.

Today, Stand Down is the annual celebration where local veterans are exposed to a variety of exhibits, and programs, many of which are unknown by the average veteran. A Stand Down operates at several levels; for Veterans and their families, a variety of programs from the VA, local support organizations, and fraternal organizations are exhibited and; for veterans who are homeless, there are basic services, haircuts, clothes, and a hot meal.

A study by the National Center for Transit Research shows how coordination between Veteran’s Administration medical centers and public transportation can lower costs and increase access to services for Veteran’s living in rural areas. This is applicable to Lane County Veteran’s who currently must travel in some cases up to three hours for care at one of the two hospitals located in Oregon. A large Community Based Outpatient Care Clinic has been built in Eugene and is now served by the regular LTD fixed route. However, the building sits back quite a ways from the main road. To enable veteran’s with disabilities to use the fixed route, the Clinic has instituted a volunteer assistance service using golf carts to take people not just to and from the bus, but also

to and from parking lots. While this is helpful in the Eugene/Springfield Metro area, the issues continue to exist for veteran's living in rural Lane County.

For more information on the NCTR report please refer to Attachment 4: Improving Veteran Mobility in Small Urban and Rural Areas.

Section 3: Needs Assessment and Local Planning

Needs Assessment

Senior and Disabled Services (S&DS) a division of the Lane Council of Governments periodically conducts research in conjunction with their responsibility as the Area Agency on Aging:

Based on population estimates from the US Census Bureau, 2010 - 2014 American Community Survey 5-Year Estimates, 105,618 adults age 60+ and individuals with reported disabilities age 18 – 59 reside in Lane County. Based on this, a total of 1,030 surveys needed to be returned to make a statistically valid survey with a 99% confidence level and a margin of error confidence interval of plus or minus 4. A total of 1,409 useable surveys were returned.

Among the stated concerns identified in the needs assessment is not only a lack of transportation (particularly in rural areas) but also the availability of affordable specialized transportation services. Of all survey respondents, over 30% of those with a disability stated they did not have dependable transportation, just under 30% need a different specialized transportation service, and just under 20% do not use transportation due to the cost. Community planning which results placing new living facilities near bus lines has shown to increase access for medical and shopping needs.

More information can be found in Attachment 5: Senior & Disabled Services 2016 Community Needs Assessment.

Lane Transit District also conducts research. LTD uses origin and destination surveys to ask riders about various elements of LTD fixed-route service that is not working for them and where they would like to see improvements. A new survey was conducted in October 2011. An on-board survey was administered to riders on a random sampling of LTD buses. Surveyors provided self-administered questionnaires to every rider on those runs.

The report presents results of a survey of 6,647 LTD passengers. The survey tracks many of the same factors addressed in previous surveys conducted since 1999. A significantly revised questionnaire was utilized in 2011 to provide expanded origin/destination information.

This question was new to the survey:

What type of assistance, if any, did you need to use the bus today?

These follow-up options were provided:

- No assistance
- Lift/Ramp
- Stop announcements
- Driver assistance
- Travel training

- Personal assistance
- Service Animal
- Other: fill in the blank

Other questions like, “In the past 30 days, how well has LTD met your transportation needs,” helped identify specific needs of riders who reported needing some assistance when using the bus. Here are some of the findings reported by CJI Research:

Of all LTD riders, 4.8 percent indicated that they needed some type of assistance in using the bus on the day of the survey. Conversely, of course, this means that 95.2 percent did not need assistance. While relatively few riders need assistance, some of those, particularly those in need of travel training, those who use service animals, and those who require a personal assistant, all have very small subsamples within the study.

Among those who needed assistance, the most common need is for bus stop announcements (2.2%). The second most common need is for a lift or ramp to board the bus (1.7%). The needs vary among the rider segments. For example, those who ride only occasionally, from one to three days a week, are more likely to need a lift or ramp, while those who ride seven days a week are more likely to rely on stop announcements.

Do those who need assistance feel that their needs are being met? Generally, the answer was yes. However, there were some exceptions. Those who need a lift or ramp to board a bus were more likely than others to say that their needs were not being met very well. Specifically, 6 percent gave a rating of one, and another 17 percent gave a rating of two, for a total of 23 percent giving a negative rating. This compares to only 10 percent of the total LTD sample who gave such low ratings. Although the subsample is extremely small ($n = 27$), those who rely on a service animal appeared to give the most negative rating of all in terms of their needs being met. A total of 51 percent of this small group gave a rating of only one or two, more than five times the negativity of the total sample.

Of course, these are perceptions, and this result does not mean that LTD is not doing all it can to meet the needs of those who need assistance. However, the results may indicate a need to further examine these aspects of service to those needing assistance. In spite of the relative dissatisfaction in terms of having their needs met by current LTD service, those who need special assistance actually are more likely than others to indicate that they are likely to use LTD more often in 2012 than they were in 2011. It is unclear from the data why this specific sub-population would expect to use LTD more rather than to the same extent they now use it.

With the exception of those who needed a lift or ramp to board the bus, most of those who indicated a need for assistance tended to follow the same general age profile as the total ridership. Those who needed a lift or ramp to board the bus, however, tended to be older than the norm for other riders. Of those who needed a lift or ramp, 40 percent were over 60 years of age compared to only 6 percent of the total ridership sample. Those who required driver assistance also were more likely than others to be over 60 years of age (12%), but the difference is much less than for those who required a lift or ramp.

The other groups, however, were similar in profile to the general ridership in terms of age. For example, of those who rely on stop announcements, 37 percent were under 20 years of age compared to 33 percent of the total ridership.

Such findings provide insight into the service needs and satisfaction of current LTD riders who say they need some type of assistance and illuminates system characteristics that are important to these older adults and younger people with disabilities.

Looking at age in general:

LTD ridership tends to fall in a relatively younger, economically active age group. That is, riders are primarily employed or preparing for employment. In 2011, only 6 percent of all LTD riders were over 60 years of age. However, this is 2 percent higher than in 2007 and 2004. The increase may have to do with the fact that the baby-boomers are entering their 60s and constitute a larger proportion of the population.

Riders were asked to rate the importance of a wide variety of potential service improvements and then to select those most important to them personally. While not appreciably different, there were some slight variations between the expressed preferences of riders needing assistance compared to the general ridership.

Top ranked improvements for riders needing assistance were:

1. More frequent weekend service
2. Schedule information at more bus stops
3. Later evening service
4. More bus stop seating
5. More frequent weekday service

For total ridership the ranking went like this:

1. Later evening service
2. More frequent weekend service
3. Schedule information at more bus stops
4. More frequent weekday service
5. More bus stop shelters

Local Planning

In an effort to enhance the health of the community, four agencies including Lane County Public Health, Peace Health Oregon West, Trillium CCO, and the United Way of Lane County teamed up to perform and complete a comprehensive Community Health Assessment (CHA) and from that assessment develop a Community Health Improvement Plan (CHIP). The focus of the study

was to determine strategies for improving health outcomes of Lane County residents. (See Appendix 6 and 7 for the CHA and CHIP).

Some transportation related findings include:

- Transportation access issues are of particular interest, especially in rural areas of the county.
- Affordable transportation options, access to care for rural consumers are greater for those receiving services under the Oregon Health Plan than the general public.
- 5.8% of key informants felt transportation was a barrier to improving health and quality of life in Lane County (total number of informants = 36).

The CHA provided support for the development of the CHIP. The CHIP identified five priorities for Lane County agencies to focus on to improve the health of Lane County Residents. Health priorities with a transportation strategy included:

- Priority 3, Strategy 6: Prevent and reduce obesity by supporting statewide efforts to secure funds and support active transportation projects
- Priority 5, Strategy 5. Improve access to care by improving access to health care for rural Lane County residents.

Section 4: Coordination Practices and Projects

Coordination Practices

As noted in the 2009 Lane Coordinated Plan (pages 1-5 and 1-6):

From the 1970s to the mid-1980s, a number of administrative and service changes within local public transit and human services laid the groundwork for the expansion of a human services transportation network. During this period, a protracted economic recession in Lane County forced the consolidation of services through coordination and cost savings measures.

The coming together of a consortium of small, human services agencies to pool resources and make agreements to use Dial-a-Ride service rather than competing with each other for limited grant dollars was a significant development. These individual agencies no longer had to purchase and maintain their own vehicles, employ driving staff or obtain insurance. The foundation of that enterprise is present today in the RideSource program that includes multiple relationships, contracts, and understandings that represent 25 years of coordination between public transportation and human service agencies in Lane County.

Cost savings through grouped purchasing, cost sharing, ride sharing, and creating economies of scale are the underpinnings of these core practices:

- One-Call Center with multiple transportation providers
- Consolidated vehicle purchasing and equipment acquisition
- Consolidated fleet management and vehicle preventive maintenance
- Cost sharing agreements
- Ride sharing

Matching a person's needs and capabilities with the most appropriate and least cost service available, reducing service duplication, reaching beyond the metro area, and offering a range of options through a single contact happens through:

- One-Call Center with a variety of transportation services
- Personalized evaluation of transportation needs and capabilities
- Interagency partnerships
- Rural and small city services

Linking Needs and Priorities with Practices and Projects

A number of unmet transportation needs were identified in the 2009 Lane Coordinated Plan (pages 5-1 through 6-3). Generally, these fell into the following categories:

1. Un-served or underserved areas (service not available where it is needed)
2. Lack of availability (service not available when it is needed)
3. Unconventional services (people need services different than traditional fixed route and paratransit)
4. Affordability (cost of public transportation is difficult for some)
5. Lack of awareness (need additional information about transportation services)
6. Training (need assistance using transportation services)

These priorities were established in the 2009 Lane Coordinated Plan (pages 6-4 and 6-5) to help guide the selection of projects. The wording was updated to maintain relevancy:

First Priority: Maintain sustainable service levels of viable operations – ensure transportation services and connections remain at a sustainable level for people who depend on public transportation services in Lane County.

Second Priority: Respond to growth within existing services – Allow for measured increases where demand points to an unmet need within the available resources.

Third Priority: Respond to emerging community needs – Take action on opportunities to optimize coordination, develop new partnerships and to accommodate newly identified transportation needs and gaps.

For the period of July 1, 2015 through June 30, 2017, a variety of transportation projects were supported. All were considered high priority projects because of helping to maintain the established transportation service network. Projects dealt with a previously identified service need and contributed to an integrated service approach.

The following table connects service needs and system goals with coordination practices or strategies and specific projects:

Need	Practice (Strategy)	Project Description
<ul style="list-style-type: none"> • Maintain and improve transportation services throughout Lane County • Manage costs 	<ul style="list-style-type: none"> • Consolidated vehicle purchasing • Cost sharing agreements • Ride sharing • Interagency partnerships 	<p>Replacement Vehicles – LTD buys and then leases accessible vehicles to non-profit and for-profit businesses and local government agencies that serve older adults or people with disabilities and operate in Lane County. These agencies include:</p> <ul style="list-style-type: none"> • Special Mobility Services (RideSource and Oakridge) • South Lane Wheels (Cottage Grove/Creswell) • River Cities Taxi (Florence) • Willamalane Senior Center • City of Eugene – Hilyard Community Center Adaptive Recreation Program
<ul style="list-style-type: none"> • Maintain and improve transportation services throughout Lane County • Manage costs 	<ul style="list-style-type: none"> • Consolidated fleet management and vehicle preventive maintenance • Cost sharing agreements • Interagency partnerships 	<p>Vehicle Preventive Maintenance (PM) – This covers some costs for preventive maintenance for the fleet of accessible vehicles that serve older adults and people with disabilities in Lane County. These agencies include:</p> <ul style="list-style-type: none"> • Special Mobility Services (RideSource and Oakridge) • South Lane Wheels (Cottage Grove/Creswell) • River Cities Taxi (Florence)

Need	Practice (Strategy)	Project Description
<ul style="list-style-type: none"> • Unconventional services • Unique needs and circumstances associated with mental health issues and disability 	<ul style="list-style-type: none"> • Interagency partnerships 	<p>Mental Health Transportation - White Bird Clinic (WBC) is a crisis intervention, mental health counseling and information and referral center. The Counseling Program serves adults on the Oregon Health Plan (Medicaid). Grants fund low-income and homeless individuals. WBC arranges transportation primarily to mental health treatment and other essential activities.</p>
<ul style="list-style-type: none"> • Lack of awareness • Training • Manage costs 	<ul style="list-style-type: none"> • One-Call Center with a variety of transportation services • Personalized evaluation of needs and capabilities • Interagency partnerships 	<p>Transit Training & Hosts – Alternative Work Concepts (AWC) provides one-on-one training on how to effectively use TheBus! and EmX. AWC employs Transit Hosts who assist with prescheduled transfers, support training activities, and provide ride and schedule information at the downtown Eugene Station each weekday. AWC also conducts in person visits to evaluate transportation needs and capabilities. Transitions riders from paratransit to fixed-route</p>
<ul style="list-style-type: none"> • Meet demand for Americans with Disabilities Act (ADA) complementary paratransit service 	<ul style="list-style-type: none"> • One-Call Center with multiple transportation providers • Ride sharing • One-Call Center with a variety of transportation services • Personalized evaluation of transportation needs and capabilities • Interagency partnerships 	<p>RideSource ADA – This is origin to destination service within the metro area for people unable to use regular bus service (some or all of the time) because of a disabling condition. RideSource ADA meets ADA requirements. It is operated by Special Mobility Services, Inc. a non-profit agency. Transportation Coordinators from Alternative Work Concepts and Senior and Disabled Services (S&DS) make in person evaluations to determine eligibility. S&DS is a division of the Lane Council of Governments and the local Area Agency on Aging.</p>

Need	Practice (Strategy)	Project Description
<ul style="list-style-type: none"> • Unconventional services – riders need assistance with packages • Affordability • Manage costs 	<ul style="list-style-type: none"> • Ride sharing • One-Call Center with a variety of transportation services • Personalized evaluation of transportation needs and capabilities • Interagency partnerships 	<p>RideSource Shopper – The Shopper is a low cost, once a week neighborhood shopping shuttle operating within the metro area. The driver assists people with their groceries and packages. It is operated by Special Mobility Services, Inc. a non-profit agency. Transportation Coordinators from Alternative Work Concepts and Senior and Disabled Services make in person evaluations to determine eligibility.</p>
<ul style="list-style-type: none"> • Un-served or underserved areas • Unconventional services – riders need high level of assistance in order to travel 	<ul style="list-style-type: none"> • One-Call Center with a variety of transportation services • Personalized evaluation of transportation needs and capabilities • Interagency partnerships • Rural and small city services 	<p>Volunteer Escort – This is a door-through-door service for people who need a high level of assistance and do not have other transportation options. Special Mobility Services (SMS), Senior and Disabled Services, and the Senior Companion Program all participate in the support and recruitment of volunteers. Volunteer drivers using their own cars receive a per mile reimbursement. SMS volunteers often use agency vehicles. The program serves older adults and people with disabilities throughout Lane County. Transportation Coordinators from Senior and Disabled Services make in person evaluations to determine eligibility.</p>

Need	Practice (Strategy)	Project Description
<ul style="list-style-type: none"> • Unconventional services – parents with disabilities who have young children need transportation support to help optimize child development 	<ul style="list-style-type: none"> • Cost sharing agreements • Ride sharing • One-Call Center with a variety of transportation services • Interagency partnerships 	<p>Pearl Buck Center (PBC) Preschool Transportation – PBC’s preschool program is designed to support parents with disabilities and foster optimal development in their children. Most children whose parents have special needs are born with the potential for average and above-average intelligence. Preschool transportation is a shared cost, dedicated service offered through the RideSource Call Center and the children do better when they are able to participate regularly. ²</p>
<ul style="list-style-type: none"> • Unconventional services • Manage costs 	<ul style="list-style-type: none"> • Cost sharing agreements • Ride sharing • One-Call Center with a variety of transportation services • Interagency partnerships 	<p>Transportation to Work for Persons with Developmental Disabilities – Transportation for eligible individuals that get vocational benefits through Lane County Developmental Disabilities Services. This is shared cost service offered through the RideSource Call Center. Service is managed through an intergovernmental agreement with the Oregon Department of Human Services.</p>
<ul style="list-style-type: none"> • Unserved or underserved areas 	<ul style="list-style-type: none"> • Consolidated vehicle purchasing • Consolidated fleet management and vehicle preventive maintenance • Ride sharing • Interagency partnerships • Rural and small city services 	<p>South Lane - The non-profit agency, South Lane Wheels (SLW) provides local Dial-a-Ride services that are open to the general public in Cottage Grove, Creswell, and surrounding rural areas. SLW takes people into Eugene and Springfield for medical appointments and is a provider for the RideSource Call Center. The agency also operates a local shuttle supported by the City of Cottage Grove and the Rural General Public Program for areas with a population less than 50,000.</p>
<ul style="list-style-type: none"> • Un-served or underserved areas • Unconventional services – riders 	<ul style="list-style-type: none"> • Consolidated vehicle purchasing 	<p>West Lane – The Rhody Express is a local shuttle service within the City of Florence that is operated by River Cities Taxi. The shuttle is supported</p>

² This is a long-standing relationship established when PBC agreed to join a newly created transportation consortium. In 1992, the Lane Council of Governments (under the direction of LTD) submitted the first coordinated vehicle grant applications thereby consolidating ownership of vehicles and oversight of services.

Need	Practice (Strategy)	Project Description
<p>need high level of assistance in order to travel</p>	<ul style="list-style-type: none"> • Consolidated fleet management and vehicle preventive maintenance • Ride sharing • Interagency partnerships • Rural and small city services 	<p>by the City of Florence and the Rural General Public Program for areas with a population less than 50,000. River Cities Taxi is also a provider for the RideSource Call Center.</p>
<ul style="list-style-type: none"> • Un-served or underserved areas 	<ul style="list-style-type: none"> • Consolidated vehicle purchasing • Consolidated fleet management and vehicle preventive maintenance • Ride sharing • Interagency partnerships • Rural and small city services 	<p>East Lane – Service for the community of Oakridge includes demand response service as a provider for the RideSource Call Center and an intercity shuttle called the Diamond Express, both operated by Special Mobility Services. The Diamond Express makes three runs each weekday between Oakridge and the metro area as an intercity connection and is open to the general public. The midday run provides curb-to-curb assistance in the metro area to better serve older adults and people with disabilities. It is supported by the City of Oakridge and the Intercity Passenger Program that connects communities with a population of 2,500 to the next larger market economy and to other transportation services.</p>
<ul style="list-style-type: none"> • Unconventional services - short term transportation intervention 	<ul style="list-style-type: none"> • One-Call Center with a variety of transportation services • Personalized evaluation of transportation needs and capabilities • Interagency partnerships • Rural and small city services 	<p>Crucial Connections - Transportation to relieve an immediate (non-emergency) or evolving situation when no other transportation option can be identified; offers quick relief to allow time to formulate long-term resolution. Crucial Connections pays for a limited number of trips that are situation specific. Service involves cooperation with human service workers and creative problem-solving.</p>

Need	Practice (Strategy)	Project Description
<ul style="list-style-type: none"> • Lack of awareness 	<ul style="list-style-type: none"> • One-Call Center with a variety of transportation services • Personalized evaluation of transportation needs and capabilities • Interagency partnerships 	<p>Veterans Services Transportation – Transportation for veterans to get to VA medical and local Veteran’s Services appointments at no cost. Non-veteran family members needing to get to service appointments can also use the service.</p>
<ul style="list-style-type: none"> • Un-served or undeserved areas • Unconventional services • Lack of awareness 	<ul style="list-style-type: none"> • Cost sharing agreements • One-Call Center with a variety of transportation services • Personalized evaluation of needs and capabilities • Interagency partnerships 	<p>Mobility Management and Service Coordination – In person (most often in the home) transportation assessments to determine the transportation needs and capabilities of older adults, people with disabilities and people with low incomes. Transportation Coordinators from Alternative Work Concepts and Senior and Disabled Services make these evaluations. Results are recorded in a centralized database - TAMS</p>
<ul style="list-style-type: none"> • Unconventional services • Manage costs 	<ul style="list-style-type: none"> • One-Call Center with multiple transportation providers • Cost sharing agreements • One-Call Center with a variety of transportation services • Interagency partnerships 	<p>Medical and Community Non-Medical Transportation under Medicaid – The RideSource Call Center administers three Medicaid programs: (1) Non-Emergency Medical Transportation (NEMT) for the Oregon Health Authority; (2) NEMT for Trillium Community Health Plan; and (3) Community Non-Medical transportation. Medicaid NEMT is for people who qualify for Oregon Health Plan (OHP) medical coverage and receive that service either directly through the Oregon Health Authority or through Trillium. In addition, some non-medical trips are arranged for Medicaid recipients who have a qualifying care plan that is managed through a Senior and Disabled Services Case Worker. The latter is based on a cost sharing agreement between LTD and the Oregon Department of Human Services.</p>

Need	Practice (Strategy)	Project Description
<ul style="list-style-type: none"> • Unconventional services • Manage costs 	<ul style="list-style-type: none"> • One-Call Center with multiple transportation providers • Cost sharing agreements • Ride sharing • One-Call Center with a variety of transportation services • Personalized evaluation of transportation needs and capabilities • Interagency partnerships • Rural and small city services 	<p>Lane County Coordination – The <i>RideSource Call Center System Improvement</i> project is a necessary upgrade to call taking, scheduling, and dispatch systems. This project involves replacing and augmenting a 30 year old structure and systems with current technology. LTD determined the software system must be replaced for effective operations and continuity to (1) ensure seamless interaction with modern software technologies, (2) allow for growth and adding new services, and (3) take into account significant data security needs for privacy and asset protection.</p>

Section 5: Resources

Funding Sources

There is a mix of federal, state, and local funds that pay for transportation projects that help meet mobility needs of older adults and people with disabilities and are managed through LTD's Accessible Services Fund.

Money coming from these federal programs is anticipated over the next two to three years.

Older Americans Act – Senior and Disabled Services (S&DS) is the local Area Agency on Aging and is authorized by the Older Americans Act to receive funds to develop, coordinate, and arrange for services. Older Americans Act programs serve older adults and adults with disabilities, age 18-64. Transportation remains a priority in the Area Plan and there is an annual allocation that supports Volunteer Transportation.

§5310 Enhanced Mobility of Seniors and Individuals with Disabilities - This program is intended to enhance mobility for older adults and persons with disabilities by providing funds for programs to serve the special needs of transit-dependent populations beyond traditional public transportation services and Americans with Disabilities Act (ADA) complementary paratransit services. MAP-21 combined the §5317 New Freedom funding with §5310. For more information, refer to Attachment 4: Fact Sheet: Enhanced Mobility of Seniors and Individuals with Disabilities Section 5310, U.S. Department of Transportation, Federal Transit Administration.

§5311 Formula Grants for Rural Areas – This funding goes to States for the purpose of supporting public transportation in rural areas with population of less than 50,000. In 2012, MAP-21 combined §5316 Job Access Reverse Commute with §5311 funding. For more information, refer to Attachment 5: Fact Sheet: Formula Grants for Rural Areas Section 5311, U.S. Department of Transportation Federal Transit Administration.

dedicated to projects that meet formerly established program criteria. For more information, refer to Attachment 6: Fact Sheet: Program Consolidation, U.S. Department of Transportation Federal Transit Administration.

Medicaid Non-Emergency Medical (NEMT), Community Transportation and Vocational Transportation for Persons with Developmental Disabilities - NEMT is a benefit for some people who are eligible for Medicaid to make sure that they can get to covered medical appointments and treatment. In Oregon, people who qualify for Oregon Health Plan (OHP) medical coverage and do not have any other transportation are provided with the least cost, most appropriate transportation option available. Oregon is known for having developed community-based residential options under Medicaid using *waivered services* as an alternative to nursing home placements. Transportation for trips other than to medical services is provided as an important support service for community-based housing choices. Under a

different type of waiver program for eligible individuals with developmental disabilities transportation to and from work is provided. These latter two programs are under cost sharing agreements with local matching resources covering approximately 50 percent of the full cost of these trips.

The sole dedicated resource from the State of Oregon to support public transportation comes from the Special Transportation Fund for the Elderly and People with Disabilities (STF):

Special Transportation Fund - Agencies designated by statute (transportation districts, county governments, and Native American tribal governments) are given an annual formula-based allocation from the cigarette tax and other state resources approved by the Legislature that go into the Fund. This money often is used as local match for federal grants. A portion of the STF funds that are allocated for Lane County are dedicated to projects that operate within LTD's service district (In-District), and the remaining funds are distributed to providers who operate outside of LTD's service district (Out-of-District). On a bi-annual basis, there typically are discretionary grant funds that also are available from this program.

Other resources include fares collected from passengers, local contributions from small cities and agencies to support specific projects of interest, and a significant contribution from the LTD General Fund. These local revenues help pay for ADA complementary paratransit and associated services and meet local match requirements for federal and state grants, as needed.

The following charts show revenues and project budgets for FY 16 and FY17 from LTD's Accessible Services Fund:³

Accessible Services Fund Two Year Revenue Budget for FY16 and FY17

³ LTD's Medicaid Fund revenue and expenses and capital projects are not included.

Revenue	FY12 Actual	FY13 Budget
Older American Act	10,222	10,200
§5310 Enhanced Mobility	1,136,784	1,460,300
§5311 Formula Grants for Rural Areas	142,382	154,900
§5316 Job Access Reverse Commute	187,838	91,500
§5317 New Freedom	15,588	152,000
Medicaid Non-Emergency Medical (NEMT)	28,382	0
Developmental Disabilities Services	430,979	488,300
Special Transportation Fund	585,708	473,000
Fares	317,948	319,500
Small City - Florence and Oakridge	40,000	41,800
Agency - Pearl Buck Center	52,700	48,500
LTD General Fund	1,906,946	2,563,300
Total	\$ 4,855,477	\$ 5,803,300

Accessible Services Fund Two Year Project Budget for FY16 and FY1

Project	FY12 Actual	FY13 Budget
Vehicle Preventive Maintenance	164,580	180,500
Mental Health Transport - White Bird Clinic	79,466	86,600
Transit Training & Hosts	122,188	130,000
RideSource ADA	2,754,779	3,525,000
RideSource Shopper	94,628	98,000
Volunteer Escort	88,769	128,500
Pearl Buck Preschool	143,825	152,000
Developmental Disabilities Services	702,760	700,000
South Lane - Cottage Grove	94,779	104,000
West Lane - Florence	156,323	172,000
East Lane - Oakridge	183,852	188,000
Lane County Coordination	29,439	45,000
Crucial Connections & Veterans	2,973	18,200
Mobility Mgt & Service Coordination	237,116	275,500
Total	\$ 4,855,477	\$ 5,803,300

Section 6: Public Review and Comments

Community Outreach Prior to Public Comment:

Outreach Activity – Public Hearing and Adoption