



LANE TRANSIT DISTRICT BOARD OF DIRECTORS COMPREHENSIVE & ACCESSIBLE TRANSPORTATION COMMITTEE

Tuesday, March 19, 2019
10:00 a.m. – 12:00 p.m.

Next Stop Center
1099 Olive Street, Eugene
(at the Eugene Station)

AGENDA

<u>Time</u>	<u>ITEM</u>	<u>Page</u>
10:00 a.m.	I. CALL TO ORDER	
10:01 a.m.	II. ROLL CALL <input type="checkbox"/> Vacant <input type="checkbox"/> Vacant <input type="checkbox"/> Vacant <input type="checkbox"/> Carl Yeh <input type="checkbox"/> Don Nordin <input type="checkbox"/> Caitlin Vargas <input type="checkbox"/> Dawn Helwig <input type="checkbox"/> Josh Haring <input type="checkbox"/> Jason Higham <input type="checkbox"/> Pete Barron <input type="checkbox"/> Ruth Linoz <input type="checkbox"/> Ed Necker <input type="checkbox"/> Hoover Chambliss <input type="checkbox"/> Rachel Jacobsen <input type="checkbox"/> Stefan Kwiatkowski <input type="checkbox"/> Scott Whetham <input type="checkbox"/> Paul Blaylock	
10:05 a.m.	III. PRELIMINARY REMARKS FROM THE CHAIR	
10:10 a.m.	IV. ANNOUNCEMENTS AND ADDITIONS TO AGENDA <i>This agenda item provides a formal opportunity for the committee chair to announce additions to the agenda, and also for committee members to make announcements.</i>	
10:15 a.m.	V. AUDIENCE PARTICIPATION <ul style="list-style-type: none"> ◆ <i><u>Public Comment Note:</u> This part of the agenda is reserved for members of the public to address the committee on any issue. The person speaking is requested to sign-in on the Audience Participation form. When called upon, please give your name, city of residence, and who you are representing for the audio record.</i> ◆ <i>Community member testimony is limited to three (3) minutes.</i> 	
	VI. ITEMS FOR ACTION AT THIS MEETING	
10:25 a.m.	A. APPROVAL OF MEETING MINUTES Action Needed: Approval <i>Approve minutes from the Click here to enter a date. meeting</i>	
	VII. ITEMS FOR INFORMATION AT THIS MEETING	
10:30 a.m.	B. FARE MANAGEMENT LTD Staff Action Needed: None. Information Only <i>LTD Staff will present information related to upcoming changes to fare management.</i>	
10:45 a.m.	A. LANE COORDINATED AND PROGRAM MANAGEMENT PLANS LTD Staff Action Needed: Discussion	

A review with LTD Staff of updates to the Lane Coordinated Transportation and PMP Plans.

11:15 a.m. VIII. PROGRAM UPDATES

- a. Lane Transit District – Cosette Rees
Action needed: *None. Information only.*
- b. RideSource Call Center Advisory Committee – Kris Lyon
Action needed: *None. Information only.*
- c. RideSource Call Center – Michelle Buie
Action needed: *None. Information only.*
- d. RideSource ADA paratransit – Chris Tovey
Action needed: *None. Information only.*
- e. South Lane Wheels (Cottage Grove) – Ruth Linoz
Action needed: *None. Information only.*
- f. Florence Rhody Express – Josh Haring
Action needed: *None. Information only.*
- g. Oakridge / Diamond Express – Jason Higham
Action needed: *None. Information only.*
- h. White Bird Clinic – Loretta McNally
Action needed: *None. Information only.*
- i. Alternative Work Concepts – Scott Whetham
Action needed: *None. Information only.*
- j. LCOG Senior & Disability Services – Rachel Jacobsen
Action needed: *None. Information only.*
- k. LILA – Tim Shearer
Action needed: *None. Information only.*
- l. Other

11:59 a.m. XI. NEXT MEETING: Monday, April 15, 2019

12:00 p.m. XII. 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).

Lane Coordinated Public Transportation Plan

2019 UPDATE

DRAFT



Lane Transit District, P.O. Box 7070, Springfield, OR 97475

Table of Contents

Executive Summary.....	2
Section 1: Present Conditions.....	4
Local Economy	4
Cost of Fuel	5
State and Federal Revenue	6
Health Care Reform in Oregon	7
LTD Accessible and Customer Services	9
Section 2: Needs Assessment and Local Planning	11
Needs Assessment.....	11
Veterans Transportation Initiative.....	13
Transportation for Lane County Veterans	14
Local Planning	15
LTD Planning	15
Section 3: Coordination Practices and Projects.....	17
Coordination Practices.....	17
Linking Needs and Priorities with Practices and Projects.....	18
Section 4: Resources	26
Funding Sources.....	26
Accessible Services Fund Two-Year Revenue and Expense Budget for FY18 and FY19	28
Medicaid Fund Two-Year Revenue and Expense Budget for FY18 and FY19 ..	29
Section 5: Public Review and Comments	30
Community Outreach Prior to Public Comment:.....	30
Public Comment	31
Public Hearing and Adoption.....	31

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 2009 to include additional information to meet both FTA and State of Oregon planning expectations. An update to the 2009 plan was completed and adopted by the LTD Board of Directors in 2013. Both versions have been incorporated as source documents for this and subsequent updates.

The Lane Coordinated Plan satisfies federal requirements enacted through the passage of the Safe, Accountable, Flexible, and 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.

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 (<https://www.transit.gov/FAST>). 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 crosscutting 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 2019 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. Reference relevant **needs assessment and local planning** information, including LTD service initiatives;
3. Match needs with preferred **coordination practices and projects**;
4. List projects and **resources**; and
5. 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 2018. Volume XXXVIII, No. 3
- Attachment 3:** CCO 2.0 Recommendations of the Oregon Health Policy Board
- 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 updates were adopted, there have been changes and new initiatives that influence local transportation, such as an economic recovery resulting in a very low unemployment rate, continuing fluctuations in fuel costs, and continued uncertainty about federal and state transportation resources. Responding to unmet service needs and increasing demand for new transportation patterns is quite challenging. This plan focuses on transportation linked to health care reform, families and individuals with low incomes, students, 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. In 2008, a 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. When only small improvements in the local economy were noticeable after 2009, there was continued speculation that job recovery would not occur until 2015. As of 2018, the local economy is stronger and the local job market is seeing the lowest level of unemployment in over 10 years.

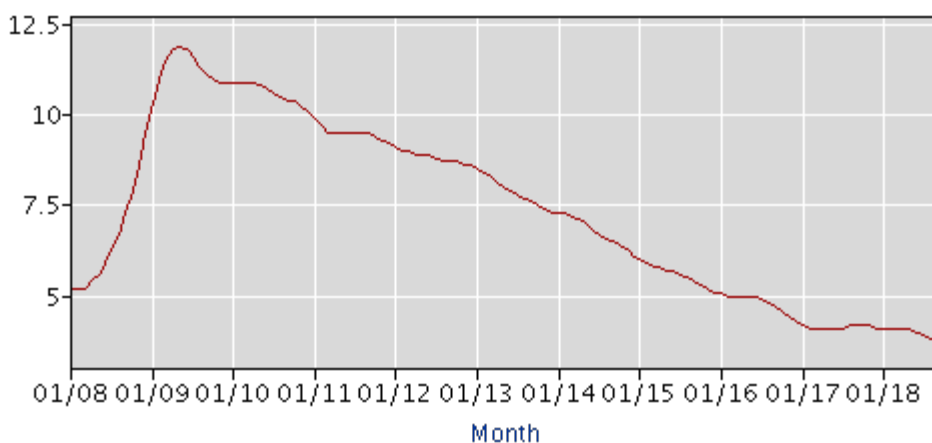
In 2009 a significant LTD service reduction was avoided by the application of federal stimulus funds in support of fixed-route operations. Federal stimulus funds were a one-time infusion, so the need for the service reduction that was averted in 2009 was not eliminated. The poor local economy at the time necessitated a service reduction of 11.2 percent, carried out in September 2010. The health of the local economy remains a critical factor in assessing LTD's ability to preserve and 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 metropolitan 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 Attachment 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 decided to increase the payroll tax beginning in 2016.

In the fall of 2014, another 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 frequency was 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 became finalized in September 2017 with the opening of the EmX West bus rapid transit line.

Currently, the economic forecast for Oregon continues to be positive. Job gains in Oregon have exceeded what is needed for population growth. Wages are growing faster and unemployment continues to drop from its high in 2009, and Oregon is currently seeing the lowest unemployment rates on record since 1976.

unemployment rate



Source: https://data.bls.gov/timeseries/LASST410000000000003?amp%253bdata_tool=XGtable&output_view=data&include_graphs=true

Wages are rising slowly while the need for more skilled workers has increased. The increase in jobs has resulted in higher payroll tax revenues for LTD, further allowing service enhancements. (See Attachment 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 decreased and begun leveling out over the past year. While down from previous years, 2018 did begin the year with the highest gas prices seen since 2014. Previous estimates were for fuel prices to increase by 6 percent per year from Fiscal Year (FY) 2013 through FY 2019. Not only did the gas prices not increase as expected past 2014, prices have dropped significantly from that time. In December 2018, the national gas price average continued to decline to a rate of \$2.37 compared with \$2.31 just one year ago. This is a relief for small operators of taxis or specialized vehicles as just a few years ago they were forced to raise their prices in order to afford the cost of fuel. (See Figure 1 – National Average Gas Price Comparison 2015 to 2018.) Projecting future fuel costs is difficult at best since fuel prices are affected by many factors.

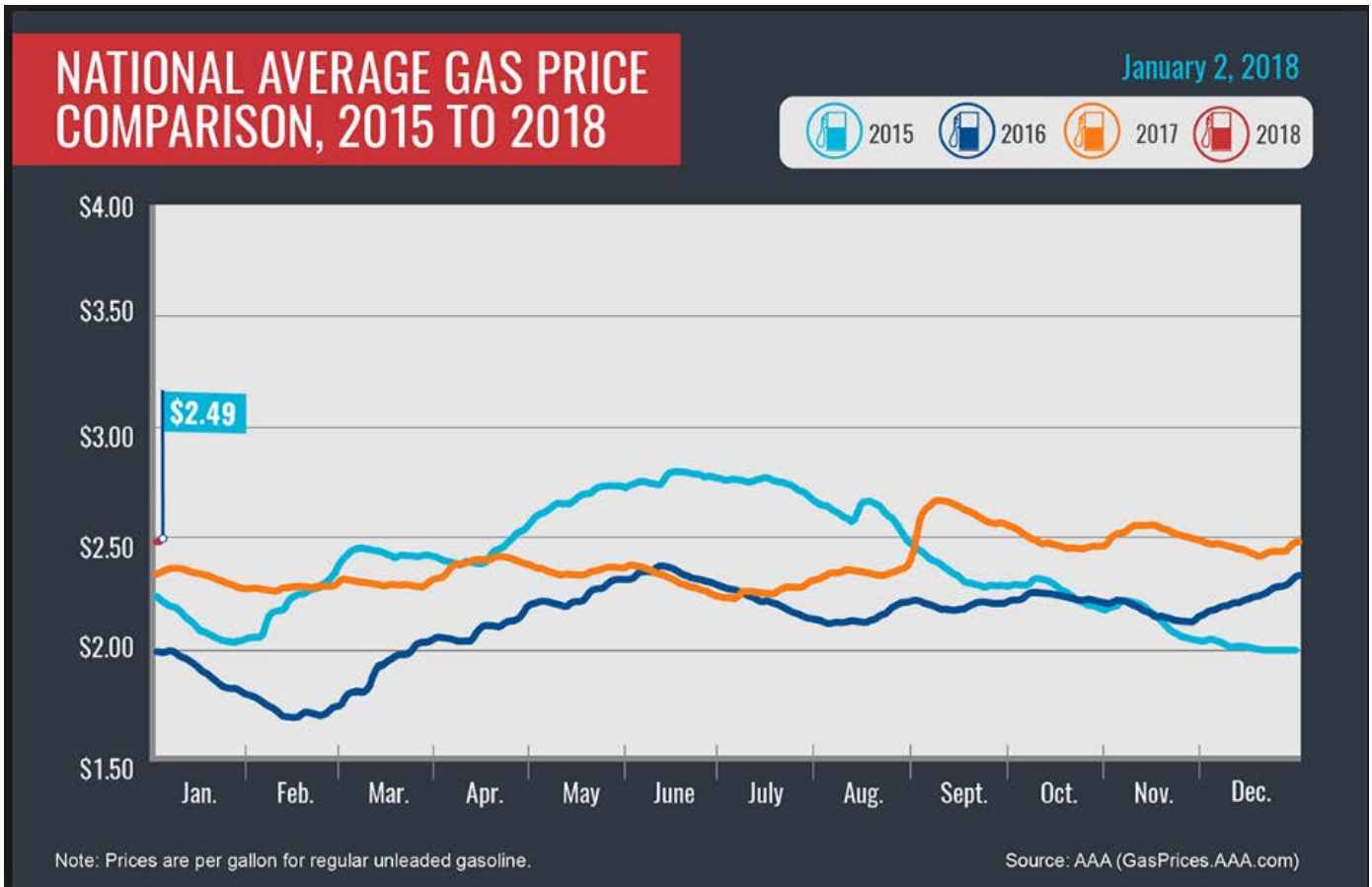


Figure 1 – National Average Gas Price Comparison 2013-2016

State and Federal Revenue

Each year, 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 efficiencies 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. 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 4: Resources, starting on page 25.)

MAP-21 was reauthorized 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 Ladders of Opportunity Initiative (http://www.fta.dot.gov/newsroom/news_releases/12286_16007.html). LTD was successful in receiving funding from this grant opportunity in the amount of \$2 million. This funding supports enhancing access to work, supporting partnerships, and economic opportunities through vehicle replacement and safety enhancements. In December 2015, President Obama established the Fixing America's Surface Transportation (FAST) Act, reauthorizing transportation funding through fiscal year 2020.

In 2017, the Oregon Legislature passed HB-2017, authorizing a payroll tax for all employees in the state to fund public transportation. In 2018, this funding is to be used for new and innovative services focusing on improving and enhancing public transportation services. The Special Transportation Improvement Fund (STIF) Plans have been in development and include recommended services such as a low-income fare program, student bus pass program, Mobility on Demand, and other projects to enhance transportation services in the district.

Funding levels for the 2019-2021 biennium are projected to be relatively stable from the previous biennium.

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 resulting in 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 (OHP) 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. CCOs 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 handles 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 & 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 RSCC 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.

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 to 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.

CCO 2.0 enhances the existing CCO model pushing the focus more from the triple aim of better health, better care, and lower costs into looking at other factors affecting health. CCO 2.0 is the next iteration of coordinated care for Oregon. The four recommended focus areas for the next five years for CCOs include improving the behavioral health system, increasing value and pay for performance, focusing on social determinants of health and health equity, and maintaining sustainable cost growth. (See Attachment 3 – CCO 2.0 Recommendations of the Oregon Health Policy Board.)

LTD Accessible and Customer Services

Co-location of Accessible Services and Customer Services staff has proven to be an improvement in the quality of service to LTD customers with better coordination of services for older adults, people with disabilities, and persons of low income. For example, integrated improvements have been possible for downtown Eugene Station staff responsible for the data management system (LTD's Not-for-Profit, Half-Fare, and other programs that offer assistance to these groups).

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

- **Half-Fare and Honored Rider Programs:** LTD provides free fares to customers age 65 and older, and half-price discounted bus fares to customers with disabilities requiring an accommodation, or who receive Medicare or certain other benefits. The latter is in accordance with and exceeds the FTA half-fare requirements.
- **Private Not-for-Profit Agency Program:** LTD 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. LTD is considering an update to this program with a 75 percent subsidy.

In July 2017, new software was implemented at *RideSource* incorporated the function of 4 databases and 17 different applications and processes that previously managed all the services at *RideSource* from call intake to service delivery and billing. The NOVUS software now provides all these features in a single database.

In September 2017, a new vendor was selected to operate the *RideSource* programs and internal fleet services. Medical Transportation Management, along with their subsidiary Ride Right, took over management of all *RideSource* services. This is the first time in over 30 years that LTD has worked with a different contractor.

In January 2018, LTD changed the design of the half-fare and honored rider cards. Cards are easier to see, and the larger expiration date allows operators to inform customers when they need to get their card renewed. During the 2018 calendar year, nearly 6,000 people received or renewed half-fare and honored rider cards.

Also in January 2018, LTD began an innovative new service animal pilot project. The intention of this voluntary program is to streamline the boarding process for riders who have service animals. LTD now provides the option to include a “paw print” endorsement on rider cards. This informs drivers that the individual has had a conversation with LTD Accessible Services staff to ask if the animal is a service animal and to discuss the tasks the animal performs to assist the person with a disability. This also provides LTD the opportunity to discuss with the rider the expectation of the transit agency. The program is voluntary, is not a certification, and is designed to make boarding procedures easier on riders and drivers alike. Since it began, 115 individuals have participated in the service animal pilot.

LTD, in conjunction with ODOT Rail and Public Transit, assisted in the development of a pilot service between Yachats and Florence. The Florence/Yachats Connector runs four times a day, Monday through Friday, and began service in September 2018. The service is operated by River Cities Taxi, the organization also responsible for operating the Rhody Express fixed-route service in Florence. At the time of this writing, this pilot appears to be successful, and people are accessing the service daily.

Section 2: Needs Assessment and Local Planning

Needs Assessment

Senior & 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 percent 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 percent of those with a disability stated they did not have dependable transportation, just under 30 percent need a different specialized transportation service, and just under 20 percent do not use transportation due to the cost. Community planning, which results in 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. Following 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 percent). The second most common need is for a lift or ramp to board the bus (1.7 percent). 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 percent), 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 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 as follows:

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

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.

The 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.
- Provide technical assistance to selected communities to improve awareness, effectiveness, and coordination of existing transportation resources.

Under this initiative, LTD was 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 was 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 replaced 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 the fall of 2015, and the software began operation in the summer of 2017.

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. During the calendar year 2018, 197 veterans made a total of 2,314 one-way trips.

Local Planning

In an effort to enhance the health of the community, in 2016 four agencies, including Lane County Public Health, PeaceHealth 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 the following:

- Transportation access issues are of particular interest, especially in rural areas of the county.
- Affordable transportation options was an issue. Access to care for rural consumers are greater for those receiving services under the Oregon Health Plan than the general public.
- Key informants (5.8 percent) 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 the following:

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.

Trillium has begun to reach out to area organizations, as they get ready to implement CCO 2.0 and prepare for the next CHA in 2020. LTD is expecting to play a larger role in supporting this process and providing solutions to those identified as transportation disadvantaged.

LTD Planning

In 2017, LTD embarked on a comprehensive operational analysis looking at all aspects of LTD service including Accessible Services. This planning process, now called Transit Tomorrow, is looking at the changing face of public transit and determining, with a lot of public input, the direction of the transit agency in the future. The decisions will come down to selecting services that provide coverage or frequency. Any change in coverage will affect ADA paratransit. As of this writing, planning staff and consultants are using the information they have gathered to date to develop distinct system alternatives for public transportation in the future.

The MovingAhead initiative is a collaborative project between LTD and the City of Eugene, looking at the transportation needs of six corridors within the Eugene city limits. The opportunity here is to improve connections for residents for work, school, shopping, and other activities. The options for most of these include adding bus rapid transit, enhanced corridor, or no build. A focus on increasing bike and pedestrian access is included. Some of these changes may also affect ADA paratransit.

Additional related initiatives include Mobility on Demand (MOD). A pilot project for MOD happening in the community of Cottage Grove began in January 2019. Using a mobile application, residents of the Cottage Grove area are able to request a curbside pick-up within a short time period (up to 30 minutes) and be delivered to their requested destination. Should the results of the pilot project be favorable, other areas in Lane County may see this type of service in their community. MOD is being funded through the STIF program.

Two additional services in development to begin within the next two years include a youth fare and low income programs. The youth fare program will enable youth in middle school and high school to use LTD's fixed-route services for free. STIF funding will be used to subsidize fares for students as well as develop planning for service increases needed to serve student ridership, and marketing and administration of the program. The low-income fare program, also using STIF funding, will enable social service agencies to purchase LTD's fare media at a 75 percent discount to facilitate free access to LTD's fixed-route services for low-income populations.

Section 3: 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
- Supporting an external transportation provider network

Matching a person's needs and capabilities with the most appropriate and least cost service available, reducing service duplication, reaching beyond the metropolitan 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
- Multiple service options for older adults, people with disabilities, and low-income
- 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). This list of unmet transportation remains current and continues to be the focus of current and future services falling within the following categories:

1. Unserved 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)

The priorities established ensure services remain functional at current levels, with growth, expansion, and new service coming as funding opportunities are present.

- **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, 2017, through June 30, 2019, 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 nonprofit 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"> • Medical Transportation Management (<i>RideSource</i>) • Pacific Crest Bus Lines (Oakridge) • South Lane Wheels (Cottage Grove/Creswell/South Lane County) • 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"> • Medical Transportation Management (<i>RideSource</i>) • Pacific Crest Bus Lines (Oakridge) • South Lane Wheels (Cottage Grove/Creswell/South Lane County) • 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 disabilities 	<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 to transitions riders from paratransit to fixed route or Mobility on Demand.</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 Medical Transportation Management. Transportation coordinators from Alternative Work Concepts, Senior and Disability Services (S&DS), and White Bird Clinic perform 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 Medical Transportation Management. Transportation coordinators from Alternative Work Concepts, Senior & Disability Services, and White Bird Clinic make in-person evaluations to determine eligibility.</p>
<ul style="list-style-type: none"> • Unserved 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. Medical Transportation Management (MTM), Senior and Disability 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. MTM volunteers may use agency vehicles. The program serves older adults and people with disabilities throughout Lane County. Transportation coordinators from Senior & Disability 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. ¹</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 who get vocational benefits through Lane County Developmental Disabilities Services. This shared-cost service is 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 • Unconventional services – riders need high level of assistance in order to travel 	<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 • Mobility on Demand 	<p>South Lane - The nonprofit agency, South Lane Wheels (SLW), is supported by the City of Cottage Grove and the Rural General Public Program for areas with a population less than 50,000. SLW provides local Dial-a-Ride services and a metro shuttle to take people into Eugene and Springfield. These services are open to the general public in Cottage Grove, Creswell, and surrounding rural areas. SLW is a provider for the RideSource Call Center. SLW also participates in a one-year pilot program for Mobility on Demand service beginning in January 2019 to</p>

Need	Practice (Strategy)	Project Description
		better serve residents in the Cottage Grove city limits.
<ul style="list-style-type: none"> • Unserved or underserved areas • Unconventional services – riders need high level of assistance in order to travel 	<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>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 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. River Cities Taxi also operates the pilot program for general public service between Florence and Yachats, traveling Monday through Friday, four times per day to connect these two coastal areas.</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>East Lane – Service for the community of Oakridge includes demand-response service and an intercity shuttle called the Diamond Express, both operated by Pacific Crest Bus Lines. 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. 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</p>

Need	Practice (Strategy)	Project Description
		workers and creative problem-solving.
<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"> • Unserved 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, veterans and their families, and people with low incomes. Transportation coordinators from Alternative Work Concepts and Senior & 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 & Disabled Services case worker. The latter is based on a cost-sharing</p>

Need	Practice (Strategy)	Project Description
		agreement between LTD and the Oregon Department of Human Services.
<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 was a necessary upgrade to call taking, scheduling, and dispatch systems. This project involved 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. The initial project is nearly complete, with focus to move to ongoing service and support costs ensuring the system remains up to date with current technologies and services. Future enhancements include providing trip request service via the Internet, better on-time performance information with external providers, notifying customers of upcoming rides via phone, text, or e-mail, and possible connected with Transportation Network Companies (TNCs). Coordination also includes training of external providers and providing the community with information on <i>RideSource</i> services.</p>

Section 4: 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 the following federal programs is anticipated over the next two to three years.

- **Older Americans Act** – Senior & 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 (STF) for Older Adults and People with Disabilities, and further funding for service enhancements for Older Adults, Persons with Disabilities and Low Incomes comes from the Special Transportation Improvement Fund (STIF):

- **Special Transportation Fund (STF)** - 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 biannual basis, there typically are discretionary grant funds that also are available from this program.
- **Special Transportation Improvement Fund (STIF)** - Improving public transportation for Oregonians with the passage of House Bill 2017, Keep Oregon Moving, the Oregon Legislature made a significant investment in transportation to help advance the things that Oregonians value—a vibrant economy, strong communities, high quality of life, a clean environment, and safe, healthy people. This historic investment in Oregon's transportation system will produce benefits for decades to come. Multiple benefits, a centerpiece of Keep Oregon Moving, is the Statewide Transportation Improvement Fund (STIF). This fund provides a new dedicated source of funding to expand public transportation to access jobs, improve mobility, relieve congestion and reduce greenhouse gas emissions around Oregon.

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 the 2017-2019 Biennium (Fiscal Years 2018 and 2019) for LTD's Accessible Service and Medicaid Funds:

Accessible Services Fund Two-Year Revenue and Expense Budget for FY18 and FY19

Accessible Services Fund Two-Year Revenue Budget FY18 and FY19		
Revenue	FY18 Actual	FY19 Budget
Older American Act	\$ 10,200.00	\$ 10,200.00
§5310 Enhanced Mobility	\$ 938,651.32	\$ 1,090,669.00
§5311 Formula Grants for Rural Areas	\$ 77,168.00	\$ 78,328.00
§5311(f) Inncity Transit	\$ 123,049.00	\$ 88,128.00
Developmental Disabilities Services	\$ 888,514.00	\$ 1,188,000.00
Special Transportation Fund (STF)	\$ 785,770.23	\$ 959,150.00
Fares	\$ 310,125.85	\$ 379,290.00
Small City (Cottage Grove/Florence/Oakridge)	\$ 44,000.00	\$ 63,121.00
Agency - Pearl Buck Center	\$ 66,640.00	\$ 67,000.00
Discretionary 5310/STF Grant	\$ -	\$ 185,050.00
LTD General Fund	\$ 3,135,748.72	\$ 3,646,638.00
TOTAL	\$ 6,379,867.12	\$ 7,755,574.00

Accessible Services Fund Two-Year Project Budget FY18 and FY19		
Project	FY18 Actual	FY19 Budget
Vehicle Preventative Maintenance	\$ 179,684.62	\$ 272,809.00
Mental Health Transport - White Bird Clinic	\$ 90,822.99	\$ 98,350.00
Transit Training & Hosts	\$ 118,583.04	\$ 154,439.00
RideSource ADA Paratransit & Shopper	\$ 3,016,541.35	\$ 2,830,371.00
Volunteer Escort	\$ 64,552.14	\$ 94,446.00
Pearl Buck Preschool	\$ 152,387.70	\$ 154,100.00
Developmental Disabilities Services	\$ 1,899,055.79	\$ 2,382,000.00
South Lane - Cottage Grove*	\$ 137,893.49	\$ 152,014.00
West Lane - Florence**	\$ 197,315.58	\$ 222,098.00
East Lane - Oakridge***	\$ 233,366.78	\$ 229,738.00
Lane County Coordination	\$ -	\$ 33,000.00
Crucial Connections & Veterans	\$ 13,104.64	\$ 25,000.00
Mobility Mgmt & Service Coordination	\$ 132,582.43	\$ 189,670.00
Service Animal Pilot	\$ 2,317.86	\$ 86,500.00
Florence/Yachats Pilot	\$ 572.78	\$ 286,410.00
TOTAL	\$ 6,238,781.19	\$ 7,210,945.00

* Includes all South Lane expenses

** Includes all Rhody Express and ADA expenses

*** Includes all Diamond Express and Dial-A-Ride expenses

Medicaid Fund Two-Year Revenue and Expense Budget for FY18 and FY19

Medicaid Fund Two-Year Revenue Budget FY18 and FY19		
Revenue	FY18 Actual	FY19 Budget
Oregon Health Authority NEMT	\$ 327,600.00	\$ 527,175.00
Medicaid Waivered Non-Medical	\$ 1,030,760.00	\$ 1,195,000.00
Trillium CHP NEMT	\$ 8,393,560.69	\$ 10,252,600.00
TOTAL	\$ 9,751,920.69	\$ 11,974,775.00

Medicaid Fund Two-Year Project Budget FY18 and FY19		
Project	FY18 Actual	FY19 Budget
Oregon Health Authority NEMT	\$ 521,831.29	\$ 527,175.00
Medicaid Waivered Non-Medical	\$ 1,071,621.92	\$ 1,063,000.00
Trillium CHP NEMT	\$ 9,974,533.97	\$ 10,252,000.00
TOTAL	\$ 11,567,987.18	\$ 11,842,175.00

Section 5: Public Review and Comments

Community Outreach Prior to Public Comment:

- Accessible Transportation Committee
- S&DS Disability and Senior Services Advisory Committees
- United Way Human Services Forum
- Senior Provider Information Network (SPIN)
- Vet Net
- Trillium CCO Board
- Metropolitan Policy Committee
- Lane ACT
- LILA
- Rural cities – Cottage Grove, Florence, Oakridge
- Neighborhood Groups
- DD Brokerages – Mentor/Full Access

Public Comment

(list comments received with dates)

Public Hearing and Adoption

This document fulfills the necessary requirements for a Coordinated Transit-Human Services Public Transportation Plan.

**Lane Transit District
Project Management Plan
§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 Coordinated Public Transportation Plan, 2019 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 designated for 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 education and employment models for people with disabilities. As a result, LTD has been able to create innovative training and support services. The LTD Special Transportation Fund (STF) Committee periodically reviews the plan and recommends updates. LTD then begins a public review and comment period which includes important stakeholders, and the Metropolitan Planning Organization. The LTD Board of directors approves the plan once it is completed.

LTD, with guidance from the Special Transportation Fund 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 older adults 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 Transportation 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 reviewed biennially 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 §5310 program in the Eugene-Springfield metropolitan area. LTD also is the designated recipient and administrator of the State Special Transportation Fund (STF)¹ for transportation services benefitting older adults and people with disabilities (STF). LTD 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 §5310 projects – those public transportation projects planned, designed, and carried out to meet the specific needs of older adults 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 Board appoints a STF² Committee made up of stakeholders knowledgeable about the transportation needs of older adults and people with disabilities. The STF Committee receives and reviews project applications using the priorities listed in the Lane Coordinated Plan. The STF Committee provides a recommendation of funding to the LTD Board, which holds a public review process. The LTD Board then forwards its final recommendation to the LTD General Manager who is authorized by the LTD Board to submit grant applications.

LTD typically convenes the STF Committee as necessary to recommend grant funding allocations to support programs for older adults and people with disabilities. This Committee provides funding recommendations based on the priorities stated in the Lane Coordinated Public Transportation Plan. There are 5-15 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.

Local governments and stakeholder groups participate in the update of the Lane Coordinated Public Transportation 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:

- Develop and adopt a local transportation coordination plan

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 STF Committee is a 5-15member advisory committee to Lane Transit District made up of riders and providers throughout Lane County. It is a committee that is required by the State to oversee distribution of STF funds.

- Coordinate the project application and public comment processes for the local area
- Review and rank applications for projects benefitting older adults, 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 and 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 funds 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

Eligible 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. 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 are notified that the use of some types of non-cash contributions is allowed but restricted. Applicants are 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.

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 typically a four-

month biennial process that begins in late fall or early winter. A grant review committee is convened that includes members appointed by the LTD Board of Directors. The grant review committee 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 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:

- November - Notice of Fund Availability (Published Notice)
- November/December - Workshops (Technical Assistance)
- December - Applications due to LTD
- December/January - Application Review Committee Meeting(s)
- January - Funding Recommendations published and forwarded to STF Committee members and applicants.
- February - Public Comment / Protest Period
- February - LTD Board Approval –Board authorizes General Manager to sign applications
- March/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 §5310 funding for these support activities.

Transfer of Funds

LTD will not be transferring directly received urban §5310 funds between rural and small urbanized areas. The State has a statewide program for meeting those objectives of §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 §5310 Projects
 - Gaps in service filled
 - Ridership
- Other §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) §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 §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 §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 §5310.

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 §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.

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.