



**LANE TRANSIT SPECIAL-PURPOSE DISTRICT OF OREGON (LTD)  
STIF ADVISORY COMMITTEE MEETING AGENDA**

**Tuesday, April 21, 2026, 5:00 p.m.  
Glenwood Administrative Building | Board Room  
3500 E. 17<sup>th</sup> Ave, Eugene, OR 97403**

LTD Public meetings are also available via web video stream. Anyone can access the broadcast live or view archived meetings at <https://govhub.ompnetwork.org/>

Pursuant to Oregon Administrative Rule (“OAR”) 732-040-0030, the Lane Transit District Board of Directors shall appoint a State Transportation Improvement Fund (STIF) Committee as an advisory committee for the purpose of advising and assisting the District in carrying out the purposes of the Statewide Transportation Improvement Fund and prioritizing projects to be funded by population-based and employer-based STIF moneys received by the District. The Committee may also advise the District regarding the opportunities to coordinate STIF funded Projects with other local or regional transportation programs and services to improve transportation service delivery and reduce gaps in service.

**Members**

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Carmen Yalexia Artiles	Chelsae Miller Joshua
Kelly Clarke	Myatt Cosette Rees
Gino Grimaldi	David Reesor
Joshua Kashinsky (Chair)	Kari Turner (Vice Chair)
Pete Knox	Bill Johnston
Scott Lemons	
Bart Mealer	

**Public Comment:**

Public comment occurs at the beginning of each meeting. In-person sign-up is available on the day of the meeting in the Boardroom. Attendees can participate virtually via Zoom. To join virtually, follow the link provided on LTD’s Events Calendar on the day of the meeting at <https://www.ltd.org/events-calendar/>. In order to provide public comment, participants should use the "Raise Hand" feature on Zoom. For phone participants, press \*9. Speakers will be called by name when it’s their turn. Individual comments are generally limited to three minutes; however, the presiding Board officer will determine the final time limits based on the number of speakers and the time available.

For those unable to attend in person or virtually but who wish to submit written testimony, email [clerk@ltd.org](mailto:clerk@ltd.org). Comments must be received by noon on the day prior to the meeting.

## **STIF ADVISORY COMMITTEE**

1. **CALL TO ORDER & ROLL CALL:** Carmen Yalexia Artiles, Kelly Clarke, Gino Grimaldi, Joshua Kashinsky (Chair), Pete Knox, Scott Lemons, Bart Mealer, Chelsae Miller, Joshua Myatt Cosette Rees, David Reesor, Kari Turner (Vice Chair), Bill Johnston

2. **AGENDA REVIEW**

3. **PUBLIC COMMENT**

4. **AGENDA ITEMS**

- |   | <b>TIME:</b> |
|---|--------------|
| ➤ Introduction to Section 5310 Funding, presented by John Ahlen, Lane Transit District                            | 5:05-5:15    |
| ➤ LTD Proposal for FY28-FY29 Section 5310 Funding, presented by John Ahlen, Lane Transit District                 | 5:15-5:30    |
| ➤ Circle of Friends Proposal for FY28-FY29 Section 5310 Funding, presented by Michael Aguilar, Executive Director | 5:30-5:40    |
| ➤ Committee Discussion of Section 5310 Funding Proposals and Committee Funding Recommendations                    | 5:40-6:25    |
| ➤ Staff Updates and Future Meetings, presented by Kathleen Flynn, Lane Transit District                           | 6:25-6:30    |

5. **ADJOURN**

The facility used for this meeting is accessible for those using mobility devices. 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).

### **UPCOMING STIF ADVISORY COMMITTEE MEETINGS:**

- May 12, 2026
- June 9, 2026



## Lane Transit District Agenda Item Summary (AIS)

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**Presented By: John Ahlen, Mobility Services  
Manager**

**AIS Title: FY28-FY29 Section 5310 Funding  
Recommendation**

**Prepared By: Kathleen Flynn, Grant Specialist**

### **Action: Committee Approval**

**Agenda Item Summary:** The Oregon Department of Transportation's (ODOT) biennial solicitation for Federal Section 5310 funds to enhance mobility for older adults and people with disabilities is currently open, with applications due May 14, 2026. ODOT's estimated allocation of federal §5310 funds for Lane County for the FY28-FY29 biennium is \$2,269,630.

New to this biennium, ODOT has created a separate timeline for §5310 and STIF solicitations. As the designated Lead Agency for Lane County, Lane Transit District (LTD) is required to coordinate a local solicitation for these funds and convene an advisory committee to review applications and make funding recommendations to LTD's Board of Directors. LTD itself is an applicant for these §5310 funds and is eligible to receive up to all funds in the allocation.

LTD has provided the primary application for §5310 funding for the upcoming FY28-FY29 biennium. In addition, a subrecipient application was received by Circle of Friends. Both proposals are attached.

LTD's federally required §5310 Project Management Plan (attached) designates the STIF Advisory Committee as the advisory body to review local proposals for §5310 funding and make recommendations to LTD's Board. There are two documents that guide the advisory committee regarding the allocation of §5310 funds: (1) LTD's §5310 Project Management Plan (PMP), and (2) the 2019 Lane Coordinated Public Transportation Plan (Coordinated Plan). Both these documents are attached. A summary of factors the STIF Advisory Committee should consider as well as the funding prioritization matrix from the Coordinated Plan that the Committee should use are included in the attached Section 5310 Funds Overview.

### **Attachments:**

- (1) Section 5310 Funds Overview
- (2) LTD Proposal, LTD Presentation
- (3) Circle of Friends Proposal
- (4) LTD Section 5310 Project Management Plan
- (5) LTD Coordinated Plan

**I certify that my Department Chief has reviewed and approved this AIS:**



## Lane Transit District Agenda Item Summary (AIS)

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### **Proposed Motion:**

#### Option 1 – As Presented

I move to recommend LTD's FY28–FY29 Section 5310 Formula Fund application, as presented with the staff-recommended fund allocation, to the LTD Board of Directors for approval.

#### Option 2 – With Amendment

I move to recommend LTD's FY28–FY29 Section 5310 Formula Fund application, as amended to include an additional subrecipient program, to the LTD Board of Directors for approval.

# FEDERAL SECTION 5310 FUNDS OVERVIEW

## SECTION 5310 FUNDS OVERVIEW

Funding from the Federal Transit Administration's (FTA) **Section 5310 Program** supports public transportation for older adults and people with disabilities by funding eligible capital, purchased service, and preventive maintenance projects. This funding is distributed to states every two years using a population-based formula in an amount set by Congress. The Oregon Department of Transportation (ODOT) then allocates the funding to regions within Oregon. Additional funding also comes from ODOT's transfer of Federal Highway Administration Surface Transportation Block Grant funds to the Section (§) 5310 program.

ODOT's estimated allocation of federal §5310 funds for Lane County for the FY28-FY29 biennium is \$2,269,630.

## LTD'S ROLE IN §5310 FUNDING FOR LANE COUNTY

Lane Transit District (LTD) has two roles once ODOT opens its solicitation for §5310 funds every two years. First, as the designated Lead Agency in Lane County, LTD coordinates a local solicitation for these funds and convenes an advisory committee to review applications and make funding allocation recommendations to LTD's Board of Directors. Second, LTD itself is an applicant for §5310 funds and is eligible to utilize up to all funds in the allocation.

## STIF ADVISORY COMMITTEE REVIEW OF §5310 FUNDING

LTD's federally required §5310 Project Management Plan (attached) designates the STIF Advisory Committee as the advisory body to review local proposals for §5310 funding and make recommendations to LTD's Board.

The Advisory Committee will review proposals for §5310 funds at their meeting on April 21, 2026. Committee members will hear presentations from the two applicants for use of §5310 funds during the upcoming FY28-FY29 biennium: (1) LTD, and (2) Circle of Friends.

**Lane Transit District** is seeking the full §5310 allocation of \$2,269,630 in order to continue of a number of ongoing programs that are currently funded using §5310 funds, including RideSource ADA paratransit and other RideSource services, preventive maintenance for accessible RideSource and rural service vehicles, behavioral health transportation, travel training, and transportation eligibility assessments. The proposal recommends meeting the §5310 match requirements with STIF formula funds, however those allocations will be determined at a later time during the STIF formula solicitation. LTD's proposed §5310-funded services and budget are attached.

**Circle of Friends** is a nonprofit organization and school based in Cottage Grove that serves children and youth with disabilities across Lane County, with a focus on those with the most complex medical,

behavioral, and developmental needs. Circle of Friends is seeking up to \$197,200 in §5310 funds matched with up to \$125,000 in Circle of Friends resources to purchase a wheelchair-accessible vehicle to provide transportation for their students. Estimates for a new vehicle cost are approximately \$220,000-\$230,000. Circle of Friends' proposal materials are attached.

Factors the Committee should consider while reviewing these proposals as well as the funding prioritization matrix set forth in LTD's 2019 Coordinated Plan and draft 2026 Updated Coordinated Plan are detailed in the following section.

## COMMITTEE §5310 CONSIDERATIONS/PRIORITIZATION

There are two guiding documents for the allocation of §5310 funds, LTD's §5310 Project Management Plan (PMP), and the 2019 Lane Coordinated Public Transportation Plan (Coordinated Plan). The PMP was revised and approved by LTD's Board on June 21, 2023 to specifically designate the STIF Advisory Committee to review projects that are allocated §5310 funds.

Proposed §5310-funded projects should be reviewed to ensure they meet the following 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.

The 2019 Coordinated Plan, as well as the draft 2026 Updated Coordinated Plan, set forth a three-level funding prioritization matrix to follow when determining funding priorities:

- **First Priority: Maintain Current Service.** 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: Expand Existing Service.** Respond to growth within existing services – allow for measured increases where demand points to an unmet need within the available resources.
- **Third Priority: Establish New Service.** Respond to emerging community needs – take action on opportunities to optimize coordination, develop new partnerships and to accommodate newly identified transportation needs and gaps.

# LTD'S PROPOSED §5310 PROJECTS AND BUDGET

## LTD PROPOSED §5310 FUNDING

**Lane Transit District** is seeking the full §5310 allocation of \$2,269,630 in order to support ongoing projects reliant on grant funding, including:

- RideSource ADA paratransit and Shopper Shuttle
- Preventive maintenance for accessible vehicles that serve RideSource and rural areas of the county
- A Behavioral Health Transportation program for riders with behavioral health disabilities
- RideSource's Crucial Connections and veterans' transportation programs, which provides one-time critical transportation needs for passengers with no other transportation options
- Travel training and transit hosts, who support LTD riders with disabilities in riding the LTD system independently
- Transportation eligibility assessments for RideSource services.

These projects and their funding sources are listed in the table below in detail. Projects have been reviewed by staff to ensure that they meet all PMP criteria and are designated as a first priority in the current adopted Coordinated Plan. All of these projects are also included in the draft 2026 Coordinated Plan updates that the STIF Advisory Committee has been working on over the past year.

LTD includes in the recommendation ongoing use of STIF Formula funds to satisfy match requirements for §5310 funding granted to LTD for these projects. The required minimum match rate for §5310 funds ranges from 10.27% to 20%.

**FY28/FY29 COORDINATED PLAN FUNDING**

Project Name	% Out of District	STIF-F	STIF-D	§5310	§5311	Farebox Revenue	Other Match	Total Proposed Plan	Prior STIF Plan	Description
RideSource ADA Paratransit, and Shopper Shuttle	<1%	\$ 8,000,000		\$ 114,630		\$ 625,000		\$ 8,739,630	\$ 7,596,615	Paratransit service is also offered in Florence.
Preventive Maintenance for Specialized Services Fleet	19%	\$ 95,000		\$ 821,000				\$ 916,000	\$ 959,000	54 RideSource, 8 Connector and Rural Shuttle, 3 Oakridge, and 3 Florence vehicles.
Volunteer Mileage Reimbursement	100%	\$ -		\$ -				\$ -	\$ 253,352	Intending for S&DS to fully manage the volunteer program in FY28.
Behavioral Health Transportation	2%	\$ 35,000		\$ 305,000				\$ 340,000	\$ 340,000	
Crucial Connections	100%	\$ 6,000		\$ 44,000				\$ 50,000	\$ 50,000	
Veterans Transportation	100%	\$ 6,000		\$ 44,000				\$ 50,000	\$ 100,000	
Travel Training	0%	\$ 21,000		\$ 179,000				\$ 200,000	\$ 200,000	
Transit Host Program	0%	\$ 21,000		\$ 179,000				\$ 200,000	\$ 209,594	
Transportation Eligibility Assessments	0%	\$ 67,000		\$ 583,000				\$ 650,000	\$ 600,000	
Florence Rhody Express	100%	\$ 550,000			\$ 254,042	\$ 15,000	\$ 64,000	\$ 883,042	\$ 972,752	
Oakridge Diamond Express	50%	\$ 180,000	\$ 720,000			\$ 40,000	\$ 24,000	\$ 964,000	\$ 874,000	
Cottage Grove LTD Connector	0%	\$ 1,650,000			\$ 254,043	\$ 40,000		\$ 1,944,043	\$ 1,260,000	Service levels increased 3/1/26.
<b>TOTAL</b>		<b>\$ 10,631,000</b>	<b>\$ 720,000</b>	<b>\$ 2,269,630</b>	<b>\$ 508,085</b>	<b>\$ 720,000</b>	<b>\$ 88,000</b>	<b>\$ 14,936,715</b>	<b>\$ 13,415,313</b>	



# LTD §5310 Programs

*John Ahlen*



**Lane Transit District**

# §5310 Overview



- Estimated \$2,269,630 available 10/1/27
- Programs benefitting older adults and people with disabilities
- 10.27% match rate
- Guided by LTD Project Management Plan
- Allocation process outlined in LTD Coordinated Plan
- New timeline this biennium
- ODOT published guidance 3/4/26
- Subrecipient applications due 4/10/26
- Initial Recipient applications due 5/14/26
- Final applications due 7/16/26

# Coordinated Plan Funding Prioritization

- First Priority: Maintain Current Service
- Second Priority: Expand Existing Service
- Third Priority: Establish New Service



# §5310 Solicitation



- Staff recommendations
- Subrecipient applications
- Next steps

# LTD Proposed FY28 & FY29 §5310 Allocation

Project Name	% Out of District	STIF-F	STIF-D	§5310	§5311	Farebox Revenue	Other Match	Total Proposed Plan	Prior STIF Plan	Description
RideSource ADA Paratransit, and Shopper Shuttle	<1%	\$ 8,000,000		\$ 114,630		\$ 625,000		\$ 8,739,630	\$ 7,596,615	Paratransit service is also offered in Florence.
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# Questions and Answers





April 9, 2026

**Kathleen Flynn**  
Grant Specialist  
Lane Transit District  
MobilityServices@LTD.org

Dear Ms. Flynn,

On behalf of Circle of Friends, I am pleased to submit our application for Section 5310 funding through Lane Transit District in support of our project, ***Access Without Barriers for Youth With Disabilities: Lane County Inclusive Transportation Initiative.***

Circle of Friends is a nonprofit organization serving children and youth with disabilities across Lane County, with a focus on those with the most complex medical, behavioral, and developmental needs. Our program exists to ensure that students who are often excluded from traditional systems have access to safe, consistent, and meaningful education, as well as the therapeutic and community-based supports that allow them to thrive.

Transportation remains one of the most significant barriers facing the families we serve. Many of our students require wheelchair-accessible vehicles, specialized equipment, and individualized staffing support during transport. Without these accommodations, students miss school, therapies, and critical developmental opportunities. In some cases, students have missed weeks of instruction simply because appropriate transportation was not available.

This project proposes the acquisition of a fully accessible, purpose-built vehicle designed to safely transport youth with disabilities across both rural and urban areas of Lane County. This vehicle will support daily school transportation, access to occupational and physical therapy, behavioral health services, and participation in after-school and community-based programming.

The requested vehicle is a highly specialized, wheelchair-accessible bus equipped to safely transport up to 10 passengers using mobility devices, along with necessary support staff. This level of accessibility and customization is essential to meeting the needs of our students, many of whom require 1:1 or 2:1 support and cannot be served through traditional transit options.

In addition to vehicle acquisition, this project includes preventive maintenance and mobility management components to ensure long-term reliability, safety, and efficient coordination of transportation services. Together, these elements create an integrated transportation model that reduces missed services, improves access, and strengthens outcomes for individuals with disabilities across our region.

Circle of Friends is committed to the long-term sustainability of this project. Our organization operates with a strong financial foundation, with over \$1.2 million in projected annual revenue and diversified funding streams that include district tuition, philanthropy, and community



support. We have secured and planned matching funds through a combination of internal resources and philanthropic partnerships, demonstrating both readiness and commitment to this investment.

This project directly aligns with the goals of the Section 5310 program by expanding transportation access for individuals with disabilities, particularly those living in rural and underserved areas. It also reflects the priorities of the Lane County Coordinated Plan by addressing critical gaps in accessible, reliable transportation.

To help bring this work to life, I have included photos within this cover letter of some of the children who will directly benefit from this investment. Additionally, you will find our Executive Summary and Annual Report included in the attachments section to provide further context on our organization, impact, and growth.

We are grateful for Lane Transit District's leadership in advancing mobility solutions across our region and for your consideration of this request. This investment will not only provide transportation, but will unlock access to education, healthcare, and community for children who too often go without.

If you have any questions or need additional information, I would welcome the opportunity to connect.

With appreciation,

**MICHAEL AGUILAR**

**Executive Director**

**O:** 541.321.0962 // **M:** 801.819.6096

PO Box 2811, Eugene, OR 97402

[www.coforegon.org](http://www.coforegon.org)





# CIRCLE OF FRIENDS

**A MISSION-DRIVEN  
501(C)(3) NONPROFIT  
SERVING CHILDREN  
WITH DISABILITIES IN  
RURAL OREGON.**

## OUR MISSION:

Circle of Friends School's mission is to provide a highly specialized, inclusive educational program for children and youth with complex disabilities whose needs cannot be met in traditional school environments. We exist first and foremost as a school, grounded in the belief that every child, regardless of disability or medical complexity, deserves access to meaningful, high-quality education in a setting designed around their full humanity.

## WHO WE SERVE:

Circle of Friends serves children with significant medical, physical, and developmental disabilities whose educational and health needs exceed what local districts can safely provide. Many of our students would otherwise face prolonged homebound instruction or lack any viable local school option. We partner annually with school districts and provide 172 days of safe, in-person education each year for students who would not otherwise have access to an appropriate learning environment.

## WHAT MAKES CIRCLE OF FRIENDS DIFFERENT:

Circle of Friends is built on an intensive, integrated model that blends education, medical care, and therapeutic support throughout the school day.

### EDUCATION AND INSTRUCTION

- **1,605 instructional hours per year** delivered in one-to-one and small-group settings
- **87 active IEP goals** embedded into daily routines and instruction
- An average of **560 minutes per day per student of individualized instruction** across academics, communication, social skills, and functional learning
- AAC-supported communication integrated into every school routine, with an **estimated 1 to 3 AAC interactions per student per routine** across 11 daily routines

### MEDICAL AND PHYSICAL SUPPORT

- **99 hours per month of nursing** and medically informed care
- **74 hours per month dedicated exclusively to G-tube feeding** and care
- **98 mobility transfers** or positioning supports per day to ensure safety and access
- Daily use of adaptive equipment including standers, walkers, wheelchairs, adaptive seating, trikes, and toileting supports

### FAMILY PARTNERSHIPS

- At least **35 direct coordination touchpoints** with families each week, including daily notes home, texts, and calls related to health, behavior, and care coordination
- **Circle of Friends enables caregivers to maintain employment** and stability by providing a safe, consistent school option for their children

## WHY CIRCLE OF FRIENDS MATTERS:

**Circle of Friends exists because some children do not fit within traditional systems, yet still deserve access to education, community, and opportunity.** Through a highly specialized, student-centered model, we prevent extended homebound instruction, with students avoiding up to 10 months of isolation due to lack of appropriate placement. For families, this means stability, dignity, and true partnership. For school districts, it means a trusted, compliant, and mission-aligned solution for students with the most complex needs.

**Circle of Friends demonstrates that with the right design, expertise, and commitment, even the most medically and educationally complex needs can be met with excellence and humanity.**



2027-2029 5310 Supplemental Grant Project Proposal
Enhanced Mobility for Older Adults and People with Disabilities

GENERAL INFORMATION – PART 1

Agency Name: Circle of Friends School

Agency Name (dba): Circle of Friends

Mailing Address: 514 E Whiteaker Ave., Cottage Grove, OR 97424

Federal Tax ID#: 84-4437766 Agency Website: www.coforegon.org

Contact Name and Title: Michael Aguilar Email: michael@coforegon.org

Telephone Number: (541) 321-0962

- Type of Agency / Business: [X] Private Non-Profit
[F] Federally Recognized Tribal Entity
[F] Local Government (City/County/Other)

Legal Name of Partner Agency (for multi-agency applications; add more pages, if needed)

Contact Name and Title: N/A Email: N/A

Telephone Number: N/A

By my signature below, I certify that the attached proposal, budget, and information is complete and accurate to the best of my knowledge, and that I have been authorized to submit this proposal on behalf of the organization.

Print Name and Title: Michael Ramon Aguilar, Executive Director

Signature: [Handwritten Signature]

Date: 04/09/2026

PROJECT TYPE – PART 2

Capital Projects

- [F] Replacement Vehicles (must replace existing vehicle that has been in service)
[X] New Vehicles (expansion to add capacity to existing fleet or introduce new service)

- Vehicle Preventive Maintenance (oil changes, tune-ups, tires, & routine service)
- Vehicle Component Rehabilitation (replacement / rebuild of engine, transmission)
- Equipment
- Signs and Other Amenities
- Passenger Shelters
- Other (identify) \_\_\_\_\_

**Operations Projects**

- Operating:                       Maintain Service    Expand Service    New Service
- Mobility Management:    Maintain Service    Expand Service    New Service
- Mobility Manager
- One-Stop Referral Center
- Trip / Itinerary Planning
- Travel / Mobility Training
- Internet-based Information System
- Information Materials / Marketing
- Coordinated System Planning

**Agency, Project, and Coordination Information – Part 3**

Does the proposing agency provide transportation services to older adults and/or people with disabilities as a primary or secondary mission of the agency?

- Primary – providing transportation is part of the agency’s mission
- Secondary – agency provides other services and transportation is one part
- Neither – agency provides other services that supports transportation for older adults and/or people with disabilities.

Describe main mission of agency: \_\_\_\_\_

Describe the proposed project (maximum 500 words). For vehicle replacements, include year, make model, and current mileage:

**Circle of Friends is requesting funding to purchase a wheelchair-accessible vehicle to provide safe, reliable, and specialized transportation for children and youth with complex disabilities across Lane County.**

**Transportation is one of the most significant barriers facing the students we serve. Many of our students require mobility supports, medical equipment, or 1:1 and 2:1 staffing to travel safely. Traditional transportation options are often unavailable, inconsistent, or not equipped to meet these needs. As a result, students miss school, therapies, and critical opportunities for social connection.**

Circle of Friends is currently based in Cottage Grove, a rural community where access to public transportation connecting to the Eugene and Springfield urban core is limited. For individuals with disabilities, particularly those who rely on wheelchairs or specialized supports, these limitations are even more pronounced. Existing transit options often do not align with school schedules, lack the necessary accommodations, or require extended travel times that are not feasible for students with complex medical or behavioral needs. This creates a significant access gap for families seeking consistent, high-quality services.

This project will fund the acquisition of a dedicated, ADA-accessible vehicle designed to safely transport students with physical, developmental, and medical complexities. The vehicle will be used daily for student pick-up and drop-off, ensuring consistent access to education and reducing absenteeism caused by transportation gaps.

Beyond daily routes, the vehicle will expand access to essential services and community-based experiences. It will be used to transport students to:

- After-school and summer enrichment programs
- Mental and behavioral health services
- Community-based learning opportunities
- Recreational and social activities
- Field trips that build independence and real-world skills

Currently, transportation limitations restrict participation in these opportunities, particularly for students living in rural areas or those requiring specialized support. This vehicle will directly address those gaps by providing a reliable and flexible transportation solution tailored to our population.

The project aligns with the goals of the FTA Section 5310 program by enhancing mobility for individuals with disabilities, improving access to essential services, and promoting independence and community integration. It also supports priorities outlined in the Lane Coordinated Public Transportation Plan by addressing unmet transportation needs for vulnerable populations and strengthening coordination between human service providers.

By investing in this vehicle, Circle of Friends will increase access, reduce missed services, and improve overall quality of life for students and their families. This is not simply a transportation solution. It is a pathway to education, healthcare, independence, and belonging for some of the most underserved youth in our community.

What is the population to be served by the proposed project?

General Public (service open to anyone in the community or defined service area including older adults and people with disabilities).

Older adults and people with disabilities (designated service only for seniors and people with disabilities).

Agency Clientele (serves a specific clientele determined by program, housing, or activity, such as a senior center or work program). Please specify type of clientele: \_\_\_\_\_

Other: (specify) \_\_\_\_\_

What geographic area within Lane County is covered by the proposed project?

Lane County (county-wide project)

Metro Eugene Springfield

Rural (outside of metro area, please specify): Circle of Friends is based in Rural Cottage Grove, but serves youth with complex disabilities from across Lane County.

Describe how this project is derived from and supports the Lane Coordinated Plan. (Include page references in the Lane Plan that are relevant to the Project. (The Lane Coordinated Plan can be found on the LTD Website at [www.ltd.org/wp-content/uploads/2025/10/Public-Transit-Human-Services-Coordinated-Plan.pdf](http://www.ltd.org/wp-content/uploads/2025/10/Public-Transit-Human-Services-Coordinated-Plan.pdf). List all agencies that will be involved in and are central to the project.

### Project Alignment with the Lane Coordinated Public Transportation Plan

**The proposed Circle of Friends transportation project is directly derived from and aligned with the priorities outlined in the Lane Coordinated Public Transportation Plan (2019 Update), particularly those focused on reducing transportation barriers for people with disabilities, improving access to essential services, and strengthening coordination between transportation providers and human service organizations.**

**The Lane Coordinated Plan identifies individuals with disabilities as a priority population experiencing significant transportation gaps, especially in rural communities such as Cottage Grove (see Sections 3 and 4: Needs Assessment and Priority Populations). The plan highlights that transportation barriers limit access to education, healthcare, and social services, particularly for individuals requiring mobility aids or specialized support.**

**This project directly responds to those identified needs by providing a dedicated, ADA-accessible vehicle to transport children and youth with complex disabilities who are unable to reliably access existing transportation systems.**

**Additionally, the plan emphasizes the need for improved connectivity between rural communities and the Eugene-Springfield urban core (Section 4: Barriers and Gaps). Circle of Friends is based in Cottage Grove, where public transportation options are limited and often not feasible for individuals who rely on wheelchairs or require individualized supervision. This project addresses that gap by ensuring safe, reliable transportation to educational programming, healthcare services, and community-based opportunities.**

*The project also aligns with several of the plan's priority strategies, including:*

- **Expanding accessible transportation options for individuals with disabilities (Section 5: Strategies and Actions)**
- **Supporting partnerships with human service providers to deliver transportation solutions tailored to high-need populations**

- **Improving access to employment, education, and healthcare services through coordinated transportation efforts**
- **Reducing service fragmentation by integrating transportation into broader systems of care**

**By operating transportation internally, Circle of Friends is able to provide a level of consistency, safety, and individualized support that cannot be achieved through traditional fixed-route or paratransit systems alone.**

**Agencies and Partners Involved**

**This project will involve coordination and alignment with several key agencies and partners, including:**

- **Lane Transit District (LTD), as the Lead Agency and regional transportation provider**
- **Oregon Department of Transportation (ODOT) Public Transportation Division, as the administering agency for Section 5310 funds**
- **Local school districts including South Lane, Springfield, Bethel, and Creswell School Districts, which refer and fund student placements**
- **Lane County Human Services Division (Developmental Disabilities Services), as a referral and coordination partner**
- **Healthcare and therapy providers supporting students (including OT, PT, behavioral health providers)**
- **Community-based organizations such as Bridgeway House, Direction Service, and other disability service providers**

**Through this project, Circle of Friends strengthens the coordinated network envisioned in the Lane Plan by bridging transportation gaps for a highly underserved population and ensuring that mobility is integrated into a broader system of education, healthcare, and community support.**

Estimate the number of older adults and/or people with disabilities who will be supported by this project for the grant period and describe how you arrived at this figure.

Year 1: (Oct 1 2027-Sept 30 2028) Older adults **0** People with disabilities **60**

Year 2: (Oct 1 2028-Sept 30 2029) Older adults **0** People with disabilities **85**

Describe how you arrived at these figures:

**These estimates reflect Circle of Friends’ planned expansion from a K–8 school into a comprehensive K–12 disability services hub that includes education, mental health services, Direct Support Professional (DSP) supports, and after-school and summer programming . The requested vehicle will be a shared, core infrastructure asset that supports all program areas, ensuring that transportation is not a barrier to participation at any point across a student’s day or continuum of care.**

**By October 2027, Circle of Friends anticipates serving approximately 25 students in its core K–12 education program. In addition, expanded programming will serve youth through after-school enrichment, summer programming, and disability-informed mental and behavioral health services. This transportation resource will operate throughout the full day**

and year, providing morning and afternoon school routes, mid-day transportation for therapy and appointments, and extended hours for after-school and community-based programming. Because transportation needs vary by service type, timing, and level of support, the same student may require different transportation solutions across programs. Accounting for unduplicated individuals while recognizing multiple access points, we estimate approximately 60 individuals with disabilities served in Year 1.

Critically, this vehicle will allow Circle of Friends to extend its reach beyond Cottage Grove into communities across Lane County, including Eugene, Springfield, Creswell, and surrounding rural areas. For many families, particularly those living in rural parts of the county, transportation is the single greatest barrier to accessing consistent education, healthcare, and support services. This is especially true for youth who rely on wheelchairs, adaptive equipment, or require 1:1 or 2:1 supervision during transport. By providing a reliable, accessible, and program-integrated transportation option, Circle of Friends will ensure that geography does not determine access to care.

By Year 2, continued growth in enrollment, full implementation of 3–5 full-time therapists, and expansion of DSP and community-based services will significantly increase reach. The vehicle will support not only daily school attendance, but also transportation to mental health services, community-based learning, workforce development experiences, and social engagement opportunities. With expanded capacity and deeper community integration, we conservatively estimate 85 unduplicated individuals with disabilities served annually.

These projections prioritize sustainable growth while maintaining the intensive staffing ratios (1:1 and 2:1 when needed) required to safely serve students with complex medical, behavioral, and developmental needs. The addition of this vehicle is essential to ensuring that all services are accessible, coordinated, and equitably available to youth with disabilities across Lane County.

Estimate the number of one-way rides (or other units of service) that the project proposes to provide for the grant period and describe how you arrived at this figure.

Year 1: (Oct 1 2027-Sept 30 2028): One-way rides / Other units of service

**One-way rides: 21,600**

Year 2: (Oct 1 2028-Sept 30 2029): One-way rides / Other units of service

**One-way rides: 30,600**

Describe how you arrived at these figures:

If you used other units of service, please identify those units

**One-way ride estimates reflect the vehicle’s role as shared infrastructure supporting all Circle of Friends program areas, including K–12 education, mental health services, Direct Support Professional (DSP) supports, after-school programming, summer programming, and community-based learning.**

**Transportation demand is not limited to traditional school hours. The vehicle will operate across the full day and calendar year, providing:**

- Morning and afternoon school transportation
- Midday transportation for therapy, medical, and mental health services
- Transportation for after-school and summer programming
- Community-based instruction, field trips, and workforce development experiences
- DSP-supported transportation for skill-building and community integration

**Year 1 Estimate (21,600 one-way rides) is based on:**

- 60 unduplicated participants
- Average of 2 one-way rides per day (pickup and drop-off)
- 180 service days annually

**Year 2 Estimate (30,600 one-way rides) reflects:**

- Growth to 85 participants
- Same baseline utilization assumptions

**These estimates are intentionally conservative and reflect only baseline daily transportation. They do not fully capture additional rides generated by expanded programming, staggered service schedules, or multi-trip days for participants accessing multiple services.**

## **Project Budget – Part 4**

**Project Title: Access Without Barriers: Lane County Inclusive Transportation Initiative**  
**Agency: Circle of Friends**

**PROJECT BUDGET** For the specific project being proposed, complete a line item cost summary along with a full list of other resources that will be used to support the proposed project. If the request is for a project that is currently being funded, include the current year's budget as well as that for Grant Year 1 and Year 2. In addition to this Project Cost Summary, a reconciliation of Current Agency revenue and expenses and an approved Agency budget must be submitted with the application.

**The proposed budget reflects the acquisition and operation of a dedicated, ADA-accessible vehicle that will serve as critical infrastructure supporting transportation access for youth with disabilities across Lane County. Consistent with the intent of the FTA Section 5310 program, the primary request is for capital funding to purchase a specialized vehicle designed to safely transport individuals with mobility, medical, and behavioral support needs.**

**The requested vehicle is a custom-built, wheelchair-accessible bus configured to accommodate both ambulatory passengers and multiple wheelchair users, including securement systems and a commercial-grade lift. Based on manufacturer estimates, the total capital cost is projected at approximately \$225,000, representing a mid-range estimate for a 38-foot vehicle on an F-650 chassis with specialized accessibility features.**

**This project prioritizes maximizing the impact of a single capital investment by utilizing the vehicle across multiple service areas, including daily school transportation, mental and behavioral health services, after-school and summer programming, and community-based**

learning opportunities. By operating the vehicle across multiple service blocks throughout the day and year, Circle of Friends will achieve a high level of utilization, ensuring cost-effective service delivery and broad community benefit.

In alignment with Section 5310 funding requirements, Circle of Friends is leveraging a combination of philanthropic support, program revenue, and agency resources to meet local match expectations and ensure long-term sustainability. Grant funds are primarily allocated toward capital acquisition, while operating costs including staffing, fuel, insurance, and maintenance are supported through diversified revenue streams. This approach demonstrates both financial readiness and the organization’s capacity to sustain the project beyond the grant period.

The budget also reflects a phased growth model, with higher initial costs in Year 1 associated with vehicle acquisition, followed by stabilized operating costs in Year 2. As program enrollment and service delivery expand, cost efficiencies are achieved through increased ridership and multi-use scheduling of the vehicle.

Circle of Friends is committed to coordinating with Lane Transit District and other regional partners to ensure that this project complements existing transportation services rather than duplicating them. The proposed vehicle fills a critical gap by serving individuals whose needs cannot be met through fixed-route or traditional paratransit systems, particularly those requiring specialized equipment, flexible scheduling, and individualized support.

Overall, this budget is designed to be realistic, sustainable, and aligned with regional transportation priorities. It ensures that the requested investment directly translates into increased mobility, improved access to essential services, and expanded opportunities for individuals with disabilities, particularly those living in rural and underserved areas of Lane County.

EXPENSE (By Line Item) Description	Current Year Revised	Grant Year 1 Budget 10/1/27- 9/30/28	Grant Year 2 Budget 10/1/28- 9/30/29	TOTAL Year 1 & Year 2
ADA-Accessible Bus Purchase (Custom Build, F-650 Chassis, 38 ft)	\$0	\$225,000	\$0	\$225,000
Vehicle Upfit & Accessibility Equipment (wheelchair lift, securement, safety systems)	\$0	Included	\$0	\$0
Delivery & Dealer Fees	\$0	Included	\$0	\$0
Licensing, Title, Registration	\$0	\$3,000	\$0	\$3,000
Mobility Management / Coordination (Transportation Scheduling & Access Support)	\$0	\$10,000	\$0	\$10,000
Maintenance & Repairs	\$0	\$5,000	\$6,500	\$11,500
<b>TOTAL PROJECT COST</b>	<b>\$0</b>	<b>\$243,000</b>	<b>\$6,500</b>	<b>\$249,500</b>

Resources	Current Year	Grant Year 1	Grant Year 2	TOTAL Year 1 & Year 2
	Revised	Budget 10/1/27- 9/30/28	Budget 10/1/28- 9/30/29	
<b>LTD Grant funds requested/needed:</b>	\$0	\$197,200	\$0	\$197,200
Other project revenue or resource:	\$0	\$50,000	\$25,000	\$75,000
Other project revenue or resource:	\$0	\$15,000	\$20,000	\$35,000
Your local agency match contribution:	\$0	\$8,000	\$39,000	\$47,000
<b>TOTAL PROJECT RESOURCES</b>	\$0	\$270,200	\$84,000	\$354,200

Will you be charging a fare for the service you offer? **No**

If so, what are your fares? **NA**

Do you offer fares that reduce the barrier for older adults and people with disabilities? Please explain.

**Circle of Friends does not charge fares for transportation services. Transportation is provided as an integrated component of our programming to ensure that cost is not a barrier to access for youth with disabilities and their families.**

**The individuals we serve often experience significant financial, medical, and logistical challenges. Many require specialized equipment, individualized supervision, or support that makes traditional transportation options inaccessible or cost-prohibitive. By embedding transportation into our service model, we remove a critical barrier and ensure consistent access to education, mental health services, and community-based opportunities.**

**Our approach aligns with the intent of the Section 5310 program by prioritizing equitable access for individuals with disabilities, particularly those in rural and underserved areas of Lane County. Rather than implementing a fare structure, we leverage a combination of public funding, philanthropic support, and program revenue to subsidize transportation costs.**

**This model ensures that all participants, regardless of income or level of need, can fully access services without financial burden, while maintaining a sustainable and coordinated transportation system.**

Please list any additional considerations for reviewers:

**Circle of Friends serves a population whose transportation needs are often not fully met through existing systems. Many of the youth we support require wheelchair-accessible transportation, medical equipment accommodations, and individualized supervision, including 1:1 or 2:1 staffing. These needs often exceed the capacity and flexibility of traditional fixed-route and paratransit services, particularly when consistent scheduling and specialized support are required.**

**This project is designed to complement, not duplicate, existing transportation infrastructure. By providing program-integrated transportation, Circle of Friends is able to coordinate routes around education, therapy, and community-based services in a way that maximizes efficiency and ensures continuity of care.**

**We are also a financially strong and growing organization with a demonstrated ability to secure philanthropic and institutional funding. Circle of Friends is well-positioned to sustain this vehicle over its full useful life, including ongoing operating costs such as staffing, fuel, maintenance, and insurance. This request represents a one-time capital investment that will yield long-term impact.**

**In the past year, transportation barriers have directly contributed to missed instructional time and delayed access to services for students we serve, underscoring the urgency of this investment. For many families across Lane County, particularly those in rural communities, the burden of transportation falls entirely on parents and caregivers. Families are often required to drive long distances, multiple times per day, to ensure their child can access education and services. This creates significant strain on employment, household stability, and overall family wellbeing.**

**Additionally, this project advances equity by expanding access for youth with disabilities living in rural communities across Lane County, including Cottage Grove and surrounding areas where transportation options are limited or inaccessible for individuals who rely on wheelchairs or specialized supports**

**The requested vehicle will also support long-term system-level impact by reducing reliance on fragmented transportation solutions, increasing attendance and engagement, and improving overall outcomes for youth with complex needs.**

**This investment represents a high-impact opportunity to leverage a single capital asset across multiple programs, services, and years of operation, ensuring that transportation is no longer a barrier to access, participation, and belonging.**

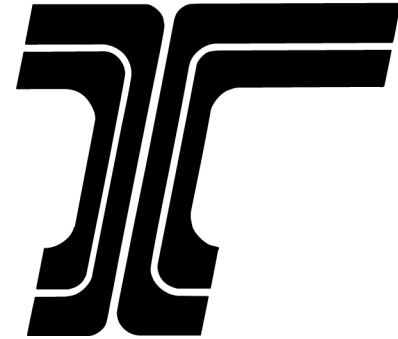
Please indicate:

- Proposer has positive history of past grant management – reports are accurate and on time, match is available as required, etc.
- (If a non-profit agency) Proposer is current in agency incorporation, registration, and annual report submissions to state and federal governments.
- Applicant is fiscally responsible and capable of managing grant funds.
- Agency has a budget which includes all sources and uses of funds; and the budget is adopted, managed, and revised as necessary by the governing board.
- Applicant has adequate staff and resources to manage the project.
- Applicant staff has basic knowledge of transportation and receives training as required for duties
- Project design is for, or benefits, older adults and/or people with disabilities.
- Project design is appropriate to purpose and type of project.
- The project is derived from the adopted Coordinated Plan.
- Service is accessible to people with disabilities in conformance to ADA.
- Vehicles are appropriate for type of service.
- Service is efficient and effective for the type of service.
- Applicant has adequate revenue to maintain services

Checklist of attachments:

- Current Federal Certifications and Assurances
- Current Reconciled Agency Revenue and Expense Budget
- Current Approved Agency Budget executive

# Oregon Department of Transportation



## 2027-2029 Section 5310 Formula Subrecipient Grant Application

This form is for subrecipient agencies to apply to Lead Agencies for Section 5310 funding. If your agency is NOT a Subrecipient, please do not use this form. Instead, use the [5310 application form](#).

Additional information on how to apply can be found in the 5310 application instructions which are available from the Funding Opportunities webpage.

### Agency Details

Select the 5310 funding source applying for this application.

- Small urban apportionment
- Rural apportionment
- Surface Transportation Block Grant funding (STBG)

*Submit one application for each applicable funding source for each subrecipient.*

### Subrecipient Agency Information

**Agency legal name**

Circle of Friends School

**Agency DBA (Doing Business As) name**

Circle of Friends

**Agency provider type**

Non-profit

### Agency legal address

PO Box 2811

Address Line 1

Address Line 2

Eugene

City

Oregon

State

97402

Zip Code

### Application contact name

Michael Aguilar

### Application contact title

Executive Director

### Application contact email address

michael@coforegon.org

### Application contact phone

(541) 321-0962

## Lead Agency Information

### Lead agency legal name

Lane Transit District

### Lead agency DBA (Doing Business As) name

LTD

### Lead agency contact name

Kathleen Flynn

### Lead agency contact title

Grant Specialist

### Lead agency contact email address

MobilityServices@LTD.org

## Risk Assessment Information

### Will administration of the grant be delegated to a separate agency?

Yes

No

## Subrecipient financial and audit information

### Is the agency subject to Single Audit requirements?

Yes

No

*If an agency expends \$1M or more federal assistance funds annually they are required to have a Single Audit.*

### Attach a copy of the most recent financial audit.

Audit Letter.pdf

### Does your agency have established financial management policies and procedures?

Yes

No

**Does your agency have an established accounting system for federal grants?**

Yes

No

**What type of accounting system does your agency use?**

Manual

Automated

Combined

*An example of an Automated accounting system is a program tool such as QuickBooks. A Manual accounting system is a bookkeeping system for recording business activity transactions where financial records are kept without using a computer system with specialized accounting software. A Combined system uses a combination of the two systems.*

**What is the financial software utilized?**

QuickBooks

**Can your system separately identify the federal awards and programs that are recieved?**

Yes

No

**Can your system identify the source and application of awarded funds and support documentation?**

Yes

No

**Does the system account for 100 percent of each employee's time?**

Yes

No

**Does the agency compare expenditure with budget amounts throughout the life of the grant?**

Yes

No

**Does the agency know the guidance on allowable costs associated with this award?**

Yes

No

*2 CFR 200, FTA C 9040.1H*

**Was your agency audited by the State and/or Federal government in the past two years?**

Yes

No

## **Subrecipient staffing and resources**

**Does the agency have adequate staff and resources to deliver the project?**

- We have adequate staff to comply with the terms of this agreement.
- Need to hire new staff for this work.
- Will have to contract a vendor to carry out the program activities.
- We have experienced significant turnover - limited resources.

**Did your agency have any turnover of management staff in the last two years?**

- Yes
- No

**Did your agency have turnover or vacancies in program related key positions in the last two years?**

- Yes
- No

**Does the agency provide ongoing training for program and finance personnel?**

- Yes
- No

## **Subrecipient procurement**

**Does the agency have established procurement policies?**

- Yes
- No
- Will adopt 2 CFR 200 during this grant cycle.

## **Project Information**

### **Project 1**

**Subgrantee legal name**

Circle of Friends School

**Subgrantee DBA (Doing Business As) name**

Circle of Friends

**Does the subgrantee have any existing grant agreements with ODOT?**

- Yes
- No

## **Subgrantee Authorized Representative**

The person authorized to sign the subgrant agreement.

**Authorized representative first and last name**

Michael Aguilar

**authorized representative title**

Executive Director

***Official who has authority to indebted agency or company***

**Authorized representative email**

michael@coforegon.org

**Authorized representative phone**

(541) 321-0962

# Project Details

**Project name**

Access Without Barriers: Lane County Inclusive Transportation Initiative

**Describe project service area and where does the majority of service happen.**

The project serves Lane County, Oregon, including both rural communities and the Eugene–Springfield metropolitan area. Circle of Friends is based in Cottage Grove but serves youth with disabilities from across the county, including Creswell, Eugene, Springfield, and surrounding rural areas.

The majority of service occurs along travel corridors connecting rural communities to the Eugene–Springfield urban core, where students access education, therapy, and community-based programs. Transportation routes will primarily support daily school transportation, as well as access to after-school, mental health, and community-based services throughout the region.

**Select the type(s) of service that will be supported by this award. Select all that apply.**

- Open to the general public at all times
- Open to the general public on a space-available basis
- Open only to seniors and individuals with disabilities
- Limited to defined clientele (e.g. residential home)
- Deviated Fixed Route
- Fixed Route (excluding commuter and intercity routes)
- Demand Response (Excluding ADA complementary Paratransit)
- ADA Complementary Paratransit

**Indicate the type of service area for the proposed project (Rural, Small Urban or Large Urban) to determine funding eligibility.**

Rural

*Large Urban (Over 200,000 population), Small Urban (50,000-200,000 population) and Rural (Under 50,000 population)*

*If the proposed project spans more than one geographic type, use the most appropriate or majority of the project location.*

**Does the majority of the operations occur within one of these areas?**

Not Applicable

*Select "Not Applicable" if operations are not in these areas. This helps PTD determine if additional STIP keys are needed.*

**Select the counties served by this project.**

- |                                    |                                  |  |                                    |
|------------------------------------|----------------------------------|--|------------------------------------|
| <input type="checkbox"/> BAKER     | <input type="checkbox"/> DOUGLAS | <input type="checkbox"/> LAKE            | <input type="checkbox"/> SHERMAN   |
| <input type="checkbox"/> BENTON    | <input type="checkbox"/> GILLIAM | <input checked="" type="checkbox"/> LANE | <input type="checkbox"/> TILLAMOOK |
| <input type="checkbox"/> CLACKAMAS | <input type="checkbox"/> GRANT   | <input type="checkbox"/> LINCOLN         | <input type="checkbox"/> UMATILLA  |
| <input type="checkbox"/> CLATSOP   | <input type="checkbox"/> HARNEY  | <input type="checkbox"/> LINN            | <input type="checkbox"/> UNION     |

- |                                    |                                     |                                    |                                     |
|------------------------------------|-------------------------------------|------------------------------------|-------------------------------------|
| <input type="checkbox"/> COLUMBIA  | <input type="checkbox"/> HOOD RIVER | <input type="checkbox"/> MALHEUR   | <input type="checkbox"/> WALLOWA    |
| <input type="checkbox"/> COOS      | <input type="checkbox"/> JACKSON    | <input type="checkbox"/> MARION    | <input type="checkbox"/> WASCO      |
| <input type="checkbox"/> CROOK     | <input type="checkbox"/> JEFFERSON  | <input type="checkbox"/> MORROW    | <input type="checkbox"/> WASHINGTON |
| <input type="checkbox"/> CURRY     | <input type="checkbox"/> JOSEPHINE  | <input type="checkbox"/> MULTNOMAH | <input type="checkbox"/> WHEELER    |
| <input type="checkbox"/> DESCHUTES | <input type="checkbox"/> KLAMATH    | <input type="checkbox"/> POLK      | <input type="checkbox"/> YAMHILL    |

Select all that apply.

**Select the activity type(s) for this project.**

- |   |  |
|---|--|
| <input checked="" type="checkbox"/> A. Vehicle Acquisition            | <input checked="" type="checkbox"/> D. Preventive Maintenance                  |
| <input type="checkbox"/> B. Equipment, Signs and Amenities, Shelters  | <input checked="" type="checkbox"/> E. Mobility Management                     |
| <input type="checkbox"/> C. Facilities: Bus Barns and Other Buildings | <input type="checkbox"/> F. Purchased Service (competitively procured via RFP) |

Select all that apply. All deliverables and tasks within a single project must be interrelated or dependent on one another. Unrelated activities cannot be grouped together and submitted as one project. The application will open up additional fields depending on the project that was chosen. Make sure that all required fields for each project type are fully completed.

## A. Vehicle Acquisition

### Vehicle acquisition 1

Describe how the vehicle(s) will be used for seniors and individuals with disabilities.

The vehicle will be used to provide safe, reliable, and accessible transportation for children and youth with disabilities across Lane County who require specialized support to travel.

Daily use will include morning and afternoon transportation to and from Circle of Friends' K–12 education program, ensuring consistent access to school for students who would otherwise miss instructional time due to transportation barriers. Many students require mobility supports, medical equipment, or 1:1 or 2:1 staffing during transport, which cannot be accommodated through traditional transit options.

Throughout the day, the vehicle will also support transportation to essential services, including occupational therapy, physical therapy, behavioral health services, and medical appointments.

Beyond the school day, the vehicle will be used for:

- After-school and summer programming
- Community-based learning opportunities
- Recreational and social activities
- Workforce development and transition programming

The vehicle will operate across both rural and urban areas of Lane County, connecting students from communities such as Cottage Grove, Creswell, and other rural areas to services in the Eugene–Springfield region.

This transportation model ensures that individuals with disabilities have equitable access to education, healthcare, and community participation, reducing missed services and supporting independence and quality of life.

**On what page is project listed in the adopted Coordinated Plan?**

11

*Insert page number in blank provided.*

**Coordinate Plan page(s) upload**

Public-Transit-Human-Services-Coordinated-Plan.pdf

*Attach the corresponding page(s) from Coordinated Plan.*

**Attach the required independent cost estimate (ICE) for this project.**

6 10 WC 260 432 FRB (1).pdf

Circle of Friends AS22G1204AAD27\_PriceProposal - Ver 2.docx

*An independent cost estimate (ICE) must be included with all vehicle acquisition projects (vehicle replacement, right-sizing or expansion). Access the ODOT ICE form here:*

<https://www.cognitofrms.com/ODOT2/IndependentCostEstimate>

**Contract Information and Procurement Milestones**

**How will you deliver the proposed project activity?**

- In-house
- Contractor or consultant

*Check all that apply*

**Will you use the ODOT/Department of Administrative Services state price agreement contract?**

Yes

No

**Describe the needs not addressed in state contracts (e.g., no contracts for trolley-style vehicles, no contracts for buses larger than 44 passengers, etc.).**

Circle of Friends will not utilize the ODOT/Department of Administrative Services state price agreement contract because the project requires a highly specialized, wheelchair-accessible vehicle tailored to the needs of children and youth with disabilities, many of whom require mobility supports, medical equipment, and individualized assistance during transport.

Specifically, Circle of Friends is seeking to acquire a highly modified bus designed to safely transport up to 10 students, all of whom use wheelchairs. This requires customized features including securement systems, accessibility configurations, and interior layouts that support safe transport alongside 1:1 and 2:1 staffing models.

State price agreements may not fully accommodate this level of customization or the specific vehicle configuration required. Additionally, the project requires flexibility to procure a vehicle that can safely serve rural routes across Lane County and support multiple program types, including school-day transportation, after-school programming, therapeutic services, and community-based supports.

Circle of Friends will follow all applicable federal and state procurement requirements to ensure a competitive, transparent process and will select a vehicle that best meets safety, accessibility, and programmatic needs.

## **Oregon Public Transportation Division Transit Asset Management (TAM) plan**

**Is the agency that will receive this vehicle(s) a participant in ODOT's Tier II Group TAM Plan?**

Yes

No

**If "no," does the agency have their own TAM Plan?**

Yes

No

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**Is this vehicle acquisition for client-specific service that is not open to the general public?**

Yes

No

**If vehicle(s) will be used for client-specific service, will the agency allow the vehicle(s) to be used by other public transportation providers when the vehicle(s) are not scheduled for client**

services?

Yes

No

If vehicle(s) will be used for client-specific service, will the agency provide rides to non-clients when the vehicles are not scheduled for client services?

Yes

No

Is this project part of a group of activities or projects that are dependent on each other?

Yes

No

*For example, bus washing station dependent on facility.*

Is this a vehicle expansion, replacement, or rightsizing? Select all that apply.

Vehicle Replacement

Vehicle Expansion

Vehicle Right-Sizing

## Vehicle Purchase Information

### Vehicle Purchase 1

Vehicle category of vehicle your agency intends to procure if awarded funding. If applying for more than one vehicle, select "Add Vehicle" at the end of this section to add more.

Category D: medium, light-duty bus and chassis cutaway

[Resource for vehicle category \(A-E\) definitions.](#)

Estimated order date

11/15/2027

Estimated delivery date

5/15/2028

Quantity

1

*For fleet expansion, enter number of type of vehicle to be purchased. For replacement or rightsizing projects, enter 1. To add more vehicles to be purchased for replacement projects or rightsizing, select "Add Vehicle" at the end of this section.*

Unit cost

\$225,000.00

Total seats

14

ex. 24

ADA seats

10

ex. 2

Vehicle length (feet)

36.25

Vehicle propulsion type

Gasoline (Non-Ethanol)

Do existing storage and maintenance facilities have capacity to accommodate the purchased vehicles without the need for new or expanded facilities or equipment?

Yes

No

**Physical location where the vehicle(s) will be stored/maintained.**

Latitude: 43.7979 / Longitude: -123.0597  
Address: 116 N 6th Street, Cottage Grove, OR 97424

The vehicle will be stored and maintained at Circle of Friends' primary facility located at 116 N 6th Street in Cottage Grove, Oregon. This site serves as the central hub for daily operations, including education, therapeutic services, and program coordination.

The location provides secure vehicle storage and access to routine maintenance services through established relationships with local service providers in Cottage Grove and the greater Eugene-Springfield area. Its proximity to major corridors allows for efficient deployment of transportation services across Lane County, including rural communities where access to specialized transportation is limited.

*Please provide the location in longitude and latitude format, address and/or tax lot. Format (Latitude= 45.214940/ Longitude = -123.969360). If you can provide latitude/longitude, address and tax lot, that is ideal.*

**Vehicle purchase 1 cost**  
\$225,000.00

**Project match**

Match source	Match amount	Match percentage	Match status
Other	\$20,000.00	16.00%	Planned
Other	\$25,000.00	20.00%	Planned
Other	\$80,000.00	64.00%	Secured

**\$125,000.00**

**If "other" selected as match source, please explain source.**

Circle of Friends will meet the required match through a combination of philanthropic support and allocated program revenue. The organization has a strong track record of securing foundation funding and will pursue support from trusted partners who have previously invested in our work and have expressed interest in supporting our continued expansion.

Planned philanthropic requests include \$20,000 from the Woodard Family Foundation and \$25,000 from the John and Tami Marick Foundation (JTMF), both of which have demonstrated prior commitment to supporting programs that improve access and outcomes for youth with disabilities.

The remaining \$80,000 represents secured agency resources derived from student tuition revenue. These funds are allocated to support infrastructure and service delivery needs that ensure students can safely access education and related services.

This blended match strategy reflects both strong community investment and internal financial commitment, positioning the project for successful implementation and long-term sustainability.

**Is your agency including in-kind match in the application**

Yes

No

**Task cost and match information**

<b>Total project cost</b>	<b>Match amount</b>	<b>Grant amount</b>
\$225,000.00	\$45,000.00	\$180,000.00

**D. Preventive Maintenance**

**Preventive maintenance 1**

**Task title**

Preventive Maintenance for ADA-Accessible Vehicle

**Please describe the activity in detail and identify how it benefits seniors and individuals with disabilities.**

Preventive maintenance activities will ensure the safe, reliable, and continuous operation of the ADA-accessible vehicle funded through this project. This includes routine servicing such as oil changes, tire replacement, brake inspections, lift maintenance, and other manufacturer-recommended maintenance.

This vehicle will be used to transport children and youth with complex disabilities across Lane County, many of whom rely on wheelchairs, medical equipment, and 1:1 or 2:1 support during transport. Reliable transportation is essential to ensuring consistent access to education, healthcare, and community-based services.

By maintaining the vehicle in optimal condition, Circle of Friends will reduce service disruptions, improve safety, and ensure uninterrupted access for individuals with disabilities, particularly those living in rural and underserved areas.

**On what page is activity or project listed in the adopted Coordinated Plan?**

11

**Coordinate Plan page(s) upload**

Public-Transit-Human-Services-Coordinated-Plan.pdf

**Is this activity part of a group of activities or projects that are dependent on each other?**

Yes

No

**Provide details of dependent tasks.**

This project includes interdependent activities consisting of vehicle acquisition, preventive maintenance, and mobility management. The acquisition of the ADA-accessible vehicle is the foundational component that enables all other activities.

Preventive maintenance is required to ensure the ongoing safety, reliability, and usability of the vehicle over its useful life. Mobility management activities support the coordination and scheduling of transportation services across multiple programs, ensuring efficient use of the vehicle and access for individuals with disabilities.

These activities are dependent on one another and function together as a single, integrated transportation project designed to improve access to services for youth with disabilities across Lane County.

**How will you deliver the proposed project activity?**

In-house

Contractor or consultant

*Check all that apply*

**What will be maintained? Check all that apply.**

A. Revenue service vehicles

B. Shelters or facilities

C. Other assets

## A. Maintaining revenue service vehicles

### Describe vehicle preventive maintenance that will be performed.

Preventive maintenance will include routine servicing and inspections to ensure the safe and reliable operation of the ADA-accessible vehicle. This includes oil changes, tire replacement, brake inspections, wheelchair lift maintenance, fluid checks, and manufacturer-recommended service intervals.

The vehicle will be used daily to transport youth with disabilities, many of whom require mobility supports and specialized equipment. Maintaining the vehicle in optimal condition is essential to ensuring consistent access to education, healthcare, and community-based services while minimizing service disruptions and safety risks.

### Number of vehicles purchased with 5310 funding that will be included in this preventive maintenance project

1

### Number of vehicles NOT purchased with 5310 funding that will be included in this preventive maintenance project.

0

### Cost of preventive maintenance for vehicles purchased with 5310 funding?

\$11,500.00

### Cost of preventive maintenance for revenue service NOT purchased with 5310 funding?

\$0.00

### Will any of these funds be used to maintain electric vehicles, or their charging infrastructure?

Yes

No

*This may require the applicant to successfully get FTA NEPA concurrence before incurring any costs.*

### Attach the current Vehicle Preventive Maintenance Plan

Circle of Friends Vehicle Preventive Maintenance Plan.pdf

*A current plan reflecting current fleet policies, fleet procedures, and vehicle and lift equipment manufacturer's recommended maintenance schedules is required.*

### Total cost of preventive maintenance for revenue service vehicles

\$11,500.00

### Were the assets being maintained purchased with 5310 funds?

Yes  No

## Preventive maintenance budget

Enter the identification number from OPTIS for each asset, which start with the one of the following letters:

V: Vehicle  
 F: Facility  
 E: Equipment  
 S: Signs/Shelters

[OPTIS Link](#)

**OPTIS asset identification number**

**Preventive maintenance amount**

**\$0.00**

## Activity deliverables

Deliverable description	Units	Deliverable date
Vehicles Purchased	1	5/15/2028
Assets Maintained	1	12/31/2028
Services Added	1	12/31/2028

## Project match

Match source	Match amount	Match percentage	Match status
Other	\$20,000.00	16.00%	Planned
Other	\$25,000.00	20.00%	Planned
Other	\$80,000.00	64.00%	Secured

**\$125,000.00**

**If "other" selected as match source, please explain source.**

Circle of Friends will meet the required match through a combination of philanthropic support and allocated program revenue. The organization has a strong track record of securing foundation funding and will pursue support from trusted partners who have previously invested in our work and have expressed interest in supporting our continued expansion.

Planned philanthropic requests include \$20,000 from the Woodard Family Foundation and \$25,000 from the John and Tami Marick Foundation (JTMF), both of which have demonstrated prior commitment to supporting programs that improve access and outcomes for youth with disabilities.

The remaining \$80,000 represents secured agency resources derived from student tuition revenue. These funds are allocated to support infrastructure and service delivery needs that ensure students can safely access education and related services.

This blended match strategy reflects both strong community investment and internal financial commitment, positioning the project for successful implementation and long-term sustainability.

**Is your agency including in-kind match in the application**

- Yes
- No

**Task cost and match information**

Total project cost	Match amount	Grant amount
\$11,500.00	\$2,300.00	\$9,200.00

**E. Mobility Management**

**Mobility management 1**

**Task title**

Transportation Coordination and Mobility Management

**Task type**

- One Stop Referral Operating transportation brokerages to coordinate service providers, funding resources, and customer needs
- Coordinating transportation services for older adults, individuals with disabilities, and individuals with low incomes
- Supporting local partnerships that coordinate transportation services
- Staffing for the development and implementation of coordination plans
- Providing travel training and trip planning activities for customers
- Developing and operating traveler call centers to coordinate travel information, manage eligibility requirements, and arrange customer travel
- Planning and implementing the acquisition and purchase of intelligent transportation technologies to operate a coordinated system (Only purchases under \$5,000)
- Travel Mobility Planning

- Internet Based Information
- Informational Materials/Marketing

**On what page is activity or project listed in the adopted Coordinated Plan?**

11

**Coordinate Plan page(s) upload**

Public-Transit-Human-Services-Coordinated-Plan.pdf

**Describe how this activity benefits seniors and individuals with disabilities.**

Mobility management activities will support the coordination and scheduling of transportation services across Circle of Friends' programs, ensuring efficient and equitable access for youth with disabilities.

Because the individuals we serve often require wheelchair-accessible transportation, medical accommodations, and individualized supervision, transportation must be carefully coordinated across multiple service types, including education, mental and behavioral health services, after-school programming, and community-based learning.

This activity includes route planning, scheduling, communication with families, and coordination with service providers to ensure that transportation aligns with participant needs and program schedules. These efforts will improve system efficiency, reduce missed services, and ensure that individuals with disabilities, particularly those in rural areas, can reliably access essential services.

*i.e. We will host five events at locations in our community to explain the transit services available to seniors.*

**How will you deliver the proposed project activity?**

- In-house
- Contractor or consultant

*Check all that apply*

Identify the estimated number of customer contacts, customers trained, or mobility products/services produced. Describe the method you will use to measure output from the project:

**Description of unit**

**Number of units**

Youth with disabilities served through coordinated transportation services

85

**Describe the method you will use to measure output from the project.**

Circle of Friends will track participation through internal program records and transportation logs. Data will be collected through daily scheduling records, ride logs, and service enrollment documentation to identify unduplicated individuals served.

Because transportation is integrated across multiple programs, including education, mental health services, and community-based programming, we will use a combination of attendance tracking and transportation usage logs to ensure accurate reporting. Data will be reviewed regularly to monitor access, identify service gaps, and ensure efficient coordination of transportation services.

**Cost of mobility management activity**

\$10,000.00

## Activity deliverables

Deliverable description	Units	Deliverable date
Mobility Products/Services Produced	85	12/31/2028
Customer Contacts Created	200	12/31/2028
Paratransit Rides Provided	2,500	12/31/2028

## Project match

Match source	Match amount	Match percentage	Match status
Other	\$20,000.00	16.00%	Planned
Other	\$25,000.00	20.00%	Planned
Other	\$80,000.00	64.00%	Secured

**\$125,000.00**

### If "other" selected as match source, please explain source.

Circle of Friends will meet the required match through a combination of philanthropic support and allocated program revenue. The organization has a strong track record of securing foundation funding and will pursue support from trusted partners who have previously invested in our work and have expressed interest in supporting our continued expansion.

Planned philanthropic requests include \$20,000 from the Woodard Family Foundation and \$25,000 from the John and Tami Marick Foundation (JTMF), both of which have demonstrated prior commitment to supporting programs that improve access and outcomes for youth with disabilities.

The remaining \$80,000 represents secured agency resources derived from student tuition revenue. These funds are allocated to support infrastructure and service delivery needs that ensure students can safely access education and related services.

This blended match strategy reflects both strong community investment and internal financial commitment, positioning the project for successful implementation and long-term sustainability.

### Is your agency including in-kind match in the application

- Yes  
 No

## Task cost and match information:

**Total project cost**  
\$10,000.00

**Match amount**  
\$2,000.00

**Grant amount**  
\$8,000.00

## Environmental Review

### Federal funding/NEPA Applicability

The requirements of the National Environmental Policy Act (NEPA) apply to all projects that receive federal funding. The FTA conducts environmental review for all projects that have identified or planned/programmed FTA funding. Answer the following question to help determine if NEPA requirements apply to the proposed project.

**Will the proposed project involve identified FTA funding? (Not including a grant from the 2027-29 5310 grant program)**

- Yes  
 No

### Project Scope

According to federal regulation, projects evaluated under NEPA must demonstrate “independent utility,” meaning the project must be usable and be a reasonable expenditure even if no additional improvements are made in the area. This does not prohibit the construction of a project in phases.

Answer the following questions to help determine if the proposed project demonstrates independent utility:

**Would the project described above require additional improvements to be usable or to be considered a reasonable expenditure? This includes improvements considered part of another project or improvements funded by another grant or state/local funds.**

- Yes  
 No

**Does the proposed project involve development of property or installation of equipment purchased through a separate project, including property or equipment purchased with state or local funds?**

- Yes  
 No

**Does the proposed project involve acquisition of property, equipment, or vehicles that will be developed, constructed, or installed as part of a separate project?**

- Yes  
 No

### Documentation Requirements

Answer the following questions to help determine if the proposed project would require completion of

FTA's CE Worksheet. Would the project described include any of the following?

**Would the project described above include any of the following?**

- Final design activities – any design beyond 30%
- Property acquisition – includes, but is not limited to, purchase discussions with property owners that imply or are explicitly binding
- Purchase of construction materials – includes, but is not limited to, purchase of any materials used for the activities listed under the definition of project construction below
- Purchase of rolling stock
- Project construction – FTA definition includes construction, alteration, or repair (including dredging, excavating, and painting) of buildings, structures, or other real property; excludes the assembly, alteration, or repair of vessels or other kinds of personal property.

*Answer the following questions to help determine if the proposed project would require completion of FTA's CE Worksheet.*

**If checked any of the options above in this "Documentation Requirements" section, provide details for each of your answers.**

The proposed project involves the purchase of rolling stock in the form of a wheelchair-accessible transit vehicle. The vehicle will be a purpose-built, highly modified bus designed to transport individuals with disabilities, including up to 10 passengers who use wheelchairs, along with necessary support staff.

No construction, ground disturbance, or property acquisition is associated with this project. The vehicle will be delivered fully manufactured and will be stored and maintained at Circle of Friends' existing facility in Cottage Grove, Oregon.

As such, the project qualifies as a vehicle acquisition with no anticipated environmental impacts beyond those associated with standard vehicle operation.

## NEPA Concurrence

**Has the FTA already provided NEPA concurrence for this project or components of this project?**

- Yes
- No
- Not Applicable

*Answer the following questions to help determine if the proposed project would require completion of FTA's CE Worksheet.*

## Indirect Costs

**Does the agency intend to charge any indirect cost to this project?**

- Yes
- No

## Total Project Costs

**Project Title**

Access Without Barriers: Lane County Inclusive Transportation Initiative

**Total Vehicle Acquisition Cost**

\$225,000.00

**Total Equipment, Signs and Amenities, Shelter Cost**

\$0.00

**Total Facilities, Bus Barns, and Other Buildings Cost**

\$0.00

**Total Preventive Maintenance Cost**

\$11,500.00

**Total Mobility Management Cost**

\$10,000.00

**Total Purchased Service Project Cost**

\$0.00

**Total Project Cost**

\$246,500.00

**Total Match Amount**

\$49,300.00

**Total Grant Amount**

\$197,200.00

## Total Application Costs

**Total Project Cost**

\$246,500.00

**Total Match Amount**

\$49,300.00

**Total Grant Amount**

\$197,200.00

**Allocation Amount**

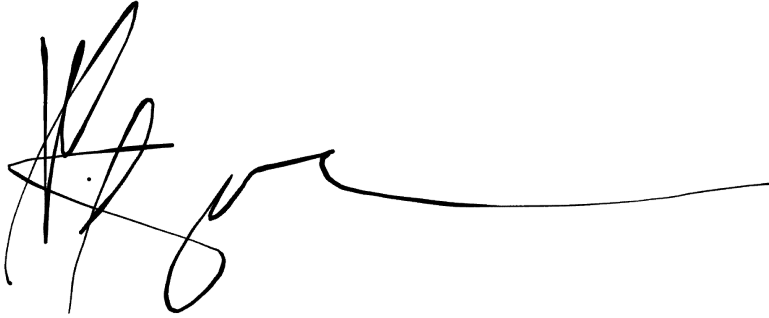
\$249,636.00

## Submitting Your Application

- Click the "Save" button to save your work. A link to the application will appear that you can copy for future reference. Or, you can enter your email address to have the link emailed to you.
- Attach any supporting documents using the "Upload" button or by dragging documents from your computer to the "File Upload" fields.
- Electronically sign your application by using the pen icon. Type your name in the "Printed Name" section.
- Check the box for the certification statement.
- Submit your application by using the "Submit Application" button.
- IF YOU DO NOT RECEIVE AN EMAIL RESPONSE, PLEASE CONTACT US IMMEDIATELY AT 503-986-3300 OR [ODOTPTDReporting@odot.oregon.gov](mailto:ODOTPTDReporting@odot.oregon.gov)

## Certification

**Signature**

A handwritten signature in black ink, appearing to read 'Michael Aguilar', with a long horizontal line extending to the right.

**Printed Name**

Michael Aguilar

I certify to the best of my knowledge and belief that the information provided herein is true, complete, and accurate. I am aware that the provision of false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil, or administrative consequences including, but not limited to violations of U.S. Code Title 18, Sections 2, 1001, 1343 and Title 31, Sections 3729–3730 and 3801–3812

**Submission Date**

4/9/2026

**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 the Federal Transit Administration's (FTA) Enhanced Mobility Program (§5310). The *Lane Coordinated Public Transportation Plan* is the guiding document for the PMP.

**Introduction**

Lane Transit District (LTD) receives §5310 funds from two sources. First, as a large urban public transit agency, LTD applies directly through the Federal Transit Administration (FTA) 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 federal §5310 funds that are awarded through the State of Oregon and designated for Lane County, Oregon. LTD's management of the Federal Enhanced Mobility Program emphasizes the integration of older adults and people with disabilities and the multi-modal nature of the community's transportation programs.

This Program Management Plan (PMP) describes 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.

**Program Goals and Objectives**

LTD has helped develop a range of transportation services within Lane County using a coordinated and integrated approach. Connecting our community by providing transportation for people with limited resources or limited transportation options has long been one of LTD's guiding principles. Efficiency and cost-effectiveness are also key principles, as is offering a range of services that meet different transportation needs. Adhering to these guiding principles has led to the creation of community- and population-based services. In addition, promoting 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 created innovative training and support services intended to benefit older adults and people with disabilities.

LTD has historically used §5310 and STIF Formula Funds together to help fund transportation programs for older adults and people with disabilities. The LTD Statewide Transportation Improvement Fund (STIF) Committee serves as a public process intended to vet and review applications for the use of §5310 funds. LTD staff periodically reviews this Project Management Plan and recommends updates. The STIF Committee is a five to fifteen-member advisory committee made up of riders and providers throughout Lane County. Once the STIF committee completes its review of applications for use of §5310 funds, LTD begins a public review and comment period, which includes gathering feedback from important stakeholders as well as the Metropolitan Planning Organization. The LTD Board of Directors approves the plan once it is completed.

LTD, with guidance from the STIF Committee has established programs and services using the following principles and objectives:

**Respect** – We honor and dignify all individuals by listening intently to their unique contributions and needs — treating others with trust, care, kindness, and courtesy.

**Integrity** - We hold all that we say and do to a high standard of honesty, stewardship, ethics, fairness, and compassion.

**Innovation** - We persist in applying resourcefulness, creativity, and new technology alongside known best practices to best serve our community.

**Equity**- We commit to listening, learning, and including voices from the diverse identities and abilities of our employees and our community — and we take care to consider how our decision-making processes address historic inequities in transportation.

**Safety** - We create a safe environment for our employees, customers, and community – and are always willing to reach out to help, support, and assist others in ways that are safe to all involved.

**Collaboration** - We demonstrate cooperation and excellent team behaviors when working with others — both internally and with our partners in the District — by focusing on common purpose and win-win outcomes.

LTD's Accessible Services focuses on providing transportation services to older adults and people with disabilities who require accommodations and specialized equipment to use public transit effectively, whether using fixed-route service or paratransit. LTD's Accessible Services' reach 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; references relevant needs assessments and local planning information; matches needs with preferred coordination practices and projects; lists projects and resources; and reports 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.

## **Roles and Responsibilities**

Lane Transit District (LTD) is the agency designated by the Governor of Oregon to administer the §5310 Enhanced Mobility Program in the Eugene-Springfield metropolitan area. LTD is also the designated recipient and administrator of the Statewide Transportation Improvement Fund (STIF)<sup>1</sup> for transportation services benefitting older adults and people with disabilities. 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. In addition, it is LTD's role to ensure that not less than 55 percent of §5310

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<sup>1</sup> The Statewide Transportation Improvement Fund (STIF) merges with and replaces Oregon's Special Transportation Fund (STF) on July 1, 2023. STIF was created in 2017 by the Oregon Legislature. In its first two bienniums, STIF funds initially came solely from the Oregon "transit tax," which is a state payroll tax equal to one-tenth of 1 percent, while funds for Oregon's Special Transportation Fund (STF), which was created in 1985 by the Oregon Legislature, came 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. The STIF program will also be funded by ID card fees, non-highway gas tax, and cigarette tax revenues once its merger with the Special Transportation Fund (STF) is effective July 1, 2023. These funds are distributed biannually through a formula based on population to 42 designated entities, called STIF Agencies. These funds typically are used to leverage federal funds. STIF Agencies are required to coordinate distribution of funds for projects that benefit the mobility of older adults and people with disabilities throughout their jurisdictions

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 STIF funds.

The LTD Board has opportunity for review and authority over both the PMP and the Lane Coordinated Plan. The LTD Board appoints a STIF Committee<sup>2</sup> made up of stakeholders knowledgeable about the transportation needs of older adults and people with disabilities. 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. LTD typically convenes the STIF Committee as necessary to recommend grant funding allocations to support programs for older adults and people with disabilities. This Committee provides funding recommendations to the LTD Board based on the priorities stated in the Lane Coordinated Public Transportation Plan. The LTD Board then holds a public review process and forwards its final recommendation to the LTD General Manager, who is authorized by the LTD Board to submit grant applications.

Local governments and stakeholder groups participate in the update of the Lane Coordinated Public Transportation Plan. These entities also provide services to older adults and people with disabilities.

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;
- 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; and
- 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 towards required 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, ADA, Veterans, and Medicaid non-emergency medical transportation trips are managed by the Call Center. LTD

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<sup>2</sup> The STIF Committee is a five to fifteen-member 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 STIF funds.

coordinates service delivery with local DHS agencies and encourages the offering of shared rides between programs along with other efforts to enhance the quality and efficiency of service delivery.

The State of Oregon ensures that projects funds 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 receive funds as subrecipients. As the designated recipient, LTD abides by Federal eligibility requirements. LTD conducts a competitive procurement process to allocate program funds. All applicants must be able to meet the required terms and conditions of grants administered under the Federal Transit Administration (FTA). A signed copy of the FTA's certifications and assurances must be submitted to LTD.

### **Local Share and Local Funding Requirements**

Local matching funds must be assigned to and be included in each project budget. Eligible local and non-U.S. DOT federal funds may be used for local match. 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**

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, governed by formal committee bylaws.

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 Project Development and Approval Process**

The consolidated program of project development and approval for both directly received §5310 funds and funds received from the State of Oregon coincides with ODOT Public Transit Division's grant application process and includes funding under Federal §5310, §5311, §5311(f), and State STIF 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 a public process that 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 process for §5310 projects:

- Notice of Fund Availability (Published Notice)
- Workshops (Technical Assistance)
- Applications due to LTD
- Application Review Committee Meeting(s)
- Funding Recommendations published and forwarded to STIF Committee members and applicants.
- Public Comment / Protest Period
- LTD Board Approval –Board authorizes General Manager to sign applications
- 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 may use the 10 percent administrative allotment allowable under §5310 funding for these support activities.

### **Transfer of Funds**

LTD will not transfer 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 and 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.

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. 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. 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 and Civil Rights activity as well as ensuring that required postings are posted in an accessible location and are 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 meaningful 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 ensure 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, are 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 older adults and individuals with disabilities.
  - Additions or changes to physical infrastructure (e.g., transportation facilities, sidewalks.), technology, and vehicles that impact availability of transportation services for older adults and individuals with disabilities.
  - Actual or estimated number of rides (as measured by one-way trips) provided for older adults 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 quarterly, annually, and as required by LTD and the FTA.

### **Program Management**

This Program Management Plan (PMP) describes 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. The project manager, 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 conducted 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 15<sup>th</sup> 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; and
  - 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 15<sup>th</sup> 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; and
- 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.

# Lane Coordinated Public Transportation Plan

## 2019 UPDATE

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

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# Executive Summary

The *Lane Coordinated Public Transit-Human Services Transportation Plan* (Lane Coordinated Plan) was first prepared by Lane Transit District (LTD) and adopted by the Lane Transit District Board of Directors in January 2007. Because the original plan was developed prior to the issuance of guidance by the Federal Transit Administration (FTA), it was revised in June 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 & Disability 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
- Attachment 10:** Fact Sheet: Oregon Department of Transportation Statewide Transportation Improvement Fund

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.

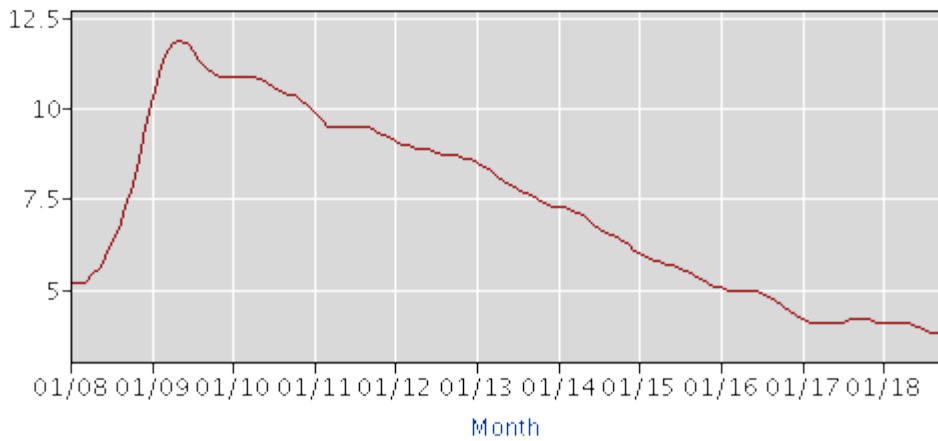
In 2009 a significant LTD service reduction was avoided by the application of federal stimulus funds in support of fixed-route operations. Federal stimulus funds were a one-time infusion, so the need for the service reduction that was averted in 2009 was not eliminated. The poor local economy at the 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](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.

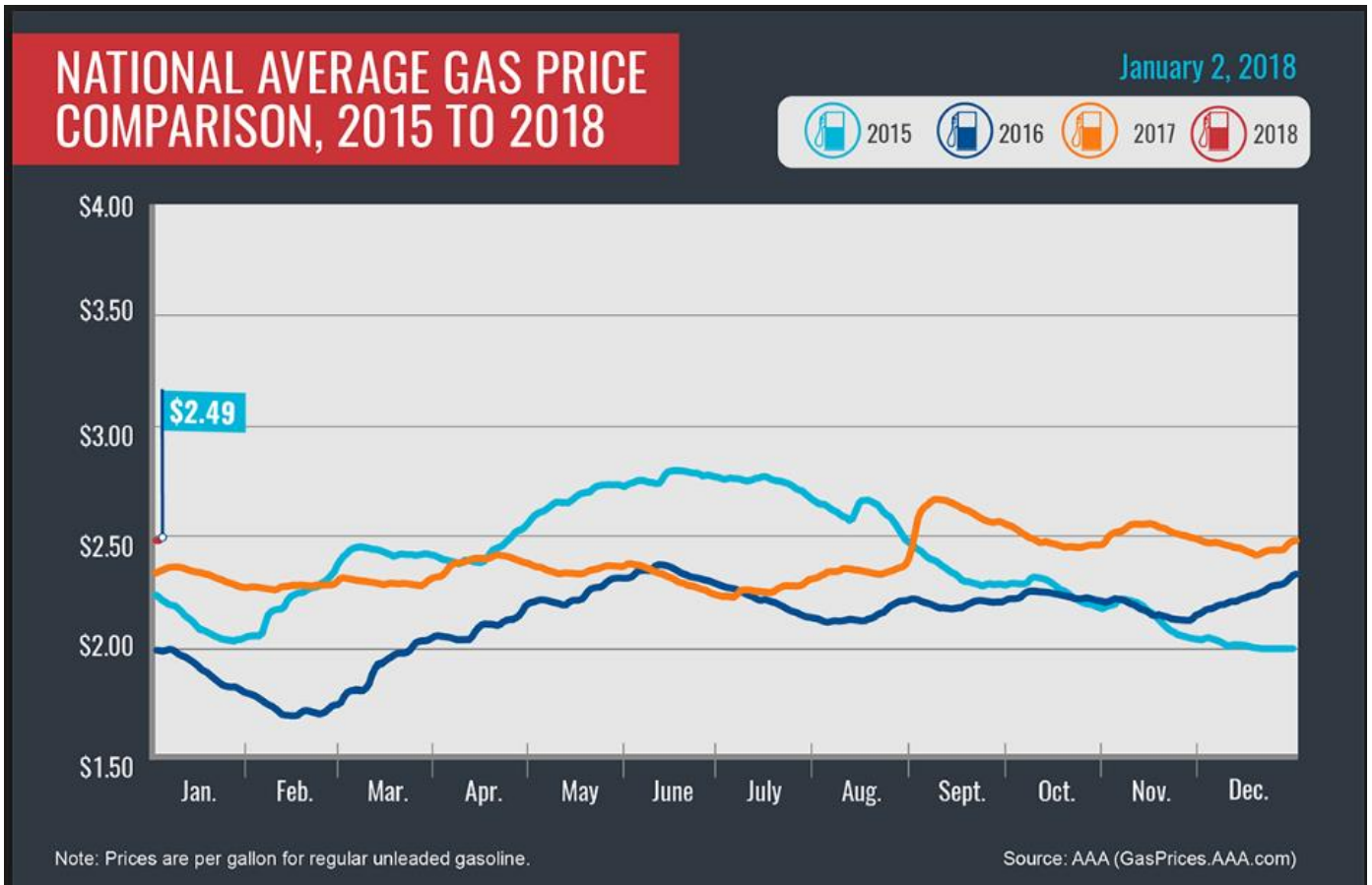


Figure 1 – National Average Gas Price Comparison 2013-2016

## 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](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 & Disability 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 & Disability 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 & Disability 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 2015. 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 6,447 LTD passengers. The survey tracks many of the same factors addressed in previous surveys conducted since 1999. A significantly revised questionnaire was utilized in 2015 to provide expanded origin/destination information.

The biggest change to the survey was presenting the survey in a more graphic format to customers that in years previous. Fewer questions regarding customer satisfaction were asked and more questions arose around information sources related to marketing and communications.

Of all LTD riders, 6.3 percent indicated that they needed some type of assistance in using the bus on the day of the survey and increase from the 2011 result of 4.8%. Conversely, of course, this means that 93.7% 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 (2.6 percent). The second most common need is for a lift or ramp to board the bus (1.9 percent). The needs vary among the rider segments. Further questions regarding assistance needed by riders were not addressed.

Older adults did seem to have a higher level of satisfaction with service, with the top 2 categories being helpfulness of customer service employees and helpfulness of drivers. The lowest satisfaction levels related to comfort while waiting for the bus.

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 2015, 10 percent of all LTD riders were over 60 years of age, which is 4 percent higher than in 2011. The increase may continue to be related to the baby boomers entering their 60s and constituting a larger proportion of the population.

## **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.

It remains a priority for LTD to ensure consistent and reliable service, and plan for economic challenges through establishment of a reserve. In addition to the projects listed below, LTD will establish and fund a reserve to meet this priority.

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.

In the recognition of Priority 2 and Priority 3, LTD will consider opportunities to respond to growth and emerging needs within current projects, and remain flexible to respond to emerging needs within the community, which may not have been specifically identified at the development of this plan.

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"> <li>• Maintain and improve transportation services throughout Lane County</li> <li>• Manage costs</li> </ul>	<ul style="list-style-type: none"> <li>• Consolidated vehicle purchasing</li> <li>• Cost-sharing agreements</li> <li>• Ride sharing</li> <li>• Interagency partnerships</li> <li>• Right-size vehicle type and quantity to provide appropriate service</li> </ul>	<p><b>Replacement/Expansion Vehicles</b>  – 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, but are not limited to:</p> <ul style="list-style-type: none"> <li>• Medical Transportation Management (RideSource)</li> <li>• Pacific Crest Bus Lines (Oakridge)</li> <li>• South Lane Wheels (Cottage Grove/Creswell/South Lane County)</li> <li>• River Cities Taxi (Florence)</li> <li>• Willamalane Senior Center</li> <li>• City of Eugene – Hilyard Community Center Adaptive Recreation Program</li> </ul>
<ul style="list-style-type: none"> <li>• Maintain and improve transportation services throughout Lane County</li> <li>• Manage costs</li> </ul>	<ul style="list-style-type: none"> <li>• Consolidated fleet management and vehicle preventive maintenance</li> <li>• Cost-sharing agreements</li> <li>• Interagency partnerships</li> </ul>	<p><b>Vehicle Preventive Maintenance (PM)</b> – 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"> <li>• Medical Transportation Management (RideSource)</li> <li>• Pacific Crest Bus Lines (Oakridge)</li> <li>• South Lane Wheels (Cottage Grove/Creswell/South Lane County)</li> <li>• River Cities Taxi (Florence)</li> </ul>

Need	Practice (Strategy)	Project Description
<ul style="list-style-type: none"> <li>• Unconventional services</li> <li>• Unique needs and circumstances associated with mental health issues and disabilities</li> </ul>	<ul style="list-style-type: none"> <li>• Interagency partnerships</li> </ul>	<p><b>Mental Health Transportation -</b> 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"> <li>• Lack of awareness</li> <li>• Training</li> <li>• Manage costs</li> </ul>	<ul style="list-style-type: none"> <li>• One-Call Center with a variety of transportation services</li> <li>• Personalized evaluation of needs and capabilities</li> <li>• Interagency partnerships</li> </ul>	<p><b>Transit Training &amp; Hosts –</b> 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"> <li>• Meet demand for Americans with Disabilities Act (ADA) complementary paratransit service</li> </ul>	<ul style="list-style-type: none"> <li>• One-Call Center with multiple transportation providers</li> <li>• Ride sharing</li> <li>• One-Call Center with a variety of transportation services</li> <li>• Personalized evaluation of transportation needs and capabilities</li> <li>• Interagency partnerships</li> </ul>	<p><b>RideSource ADA –</b> 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&amp;DS), and White Bird Clinic perform in-person evaluations to determine eligibility. S&amp;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"> <li>• Unconventional services – riders need assistance with packages</li> <li>• Affordability</li> <li>• Manage costs</li> </ul>	<ul style="list-style-type: none"> <li>• Ride sharing</li> <li>• One-Call Center with a variety of transportation services</li> <li>• Personalized evaluation of transportation needs and capabilities</li> <li>• Interagency partnerships</li> </ul>	<p><b>RideSource Shopper</b> – 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 &amp; Disability Services, and White Bird Clinic make in-person evaluations to determine eligibility.</p>
<ul style="list-style-type: none"> <li>• Unserved or underserved areas</li> <li>• Unconventional services – riders need high level of assistance in order to travel</li> </ul>	<ul style="list-style-type: none"> <li>• One-Call Center with a variety of transportation services</li> <li>• Personalized evaluation of transportation needs and capabilities</li> <li>• Interagency partnerships</li> <li>• Rural and small city services</li> </ul>	<p><b>Volunteer Escort</b> – 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 &amp; Disability Services make in-person evaluations to determine eligibility.</p>

Need	Practice (Strategy)	Project Description
<ul style="list-style-type: none"> <li>• Unconventional services – parents with disabilities who have young children need transportation support to help optimize child development</li> </ul>	<ul style="list-style-type: none"> <li>• Cost-sharing agreements</li> <li>• Ride sharing</li> <li>• One-Call Center with a variety of transportation services</li> <li>• Interagency partnerships</li> </ul>	<p><b>Pearl Buck Center (PBC) Preschool Transportation</b> – 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. <sup>1</sup></p>
<ul style="list-style-type: none"> <li>• Unconventional services</li> <li>• Manage costs</li> </ul>	<ul style="list-style-type: none"> <li>• Cost-sharing agreements</li> <li>• Ride sharing</li> <li>• One-Call Center with a variety of transportation services</li> <li>• Interagency partnerships</li> </ul>	<p><b>Transportation to Work for Persons with Developmental Disabilities</b> – 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"> <li>• Unserved or underserved areas</li> <li>• Unconventional services – riders need high level of assistance in order to travel</li> </ul>	<ul style="list-style-type: none"> <li>• Consolidated vehicle purchasing</li> <li>• Consolidated fleet management and vehicle preventive maintenance</li> <li>• Ride sharing</li> <li>• Interagency partnerships</li> <li>• Rural and small city services</li> <li>• Mobility on Demand</li> <li>• Planning services</li> </ul>	<p><b>South Lane</b> - 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
		<p>better serve residents in the Cottage Grove city limits.</p> <p>Support South Lane to perform a planning assessment to determine opportunities and strategies to meet the needs of southern Lane County.</p>
<ul style="list-style-type: none"> <li>• Unserved or underserved areas</li> <li>• Unconventional services – riders need high level of assistance in order to travel</li> </ul>	<ul style="list-style-type: none"> <li>• Consolidated vehicle purchasing</li> <li>• Consolidated fleet management and vehicle preventive maintenance</li> <li>• Ride sharing</li> <li>• Interagency partnerships</li> <li>• Rural and small city services</li> </ul>	<p><b>West Lane</b> – 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> <p>Evaluate and implement as needed expansion of Rhody Express service to best meet the needs of the community and connect to the broader transportation network.</p>
<ul style="list-style-type: none"> <li>• Unserved or underserved areas</li> </ul>	<ul style="list-style-type: none"> <li>• Consolidated vehicle purchasing</li> <li>• Consolidated fleet management and vehicle preventive maintenance</li> <li>• Ride sharing</li> <li>• Interagency partnerships</li> <li>• Rural and small city services</li> </ul>	<p><b>East Lane</b> – 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> <p>Evaluate and implement as needed expansion of Diamond Express service to best meet the needs of the</p>

Need	Practice (Strategy)	Project Description
		community and connect to the broader transportation network.
<ul style="list-style-type: none"> <li>• Unconventional services – short-term transportation intervention</li> </ul>	<ul style="list-style-type: none"> <li>• One-Call Center with a variety of transportation services</li> <li>• Personalized evaluation of transportation needs and capabilities</li> <li>• Interagency partnerships</li> <li>• Rural and small city services</li> </ul>	<p><b>Crucial Connections -</b> Transportation to relieve an immediate (non-emergency) or evolving situation when no other transportation option can be identified; offers quick relief to allow time to formulate long-term resolution. Crucial Connections pays for a limited number of trips that are situation specific. Service involves cooperation with human service workers and creative problem-solving.</p>
<ul style="list-style-type: none"> <li>• Lack of awareness</li> </ul>	<ul style="list-style-type: none"> <li>• One-Call Center with a variety of transportation services</li> <li>• Personalized evaluation of transportation needs and capabilities</li> <li>• Interagency partnerships</li> </ul>	<p><b>Veterans Services Transportation</b> – 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"> <li>• Unserved or undeserved areas</li> <li>• Unconventional services</li> <li>• Lack of awareness</li> </ul>	<ul style="list-style-type: none"> <li>• Cost-sharing agreements</li> <li>• One-Call Center with a variety of transportation services</li> <li>• Personalized evaluation of needs and capabilities</li> <li>• Interagency partnerships</li> </ul>	<p><b>Mobility Management and Service Coordination</b> – 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 &amp; Disability Services make these evaluations. Results are recorded in a centralized database (TAMS).</p>
<ul style="list-style-type: none"> <li>• Unconventional services</li> <li>• Manage costs</li> </ul>	<ul style="list-style-type: none"> <li>• One-Call Center with multiple transportation providers</li> <li>• Cost-sharing agreements</li> </ul>	<p><b>Medical and Community Non-Medical Transportation under Medicaid</b> – The RideSource Call Center administers three Medicaid programs: (1) Non-Emergency</p>

<b>Need</b>	<b>Practice (Strategy)</b>	<b>Project Description</b>
	<ul style="list-style-type: none"> <li>• One-Call Center with a variety of transportation services</li> <li>• Interagency partnerships</li> </ul>	<p>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 &amp; Disability Services case worker. The latter is based on a cost-sharing agreement between LTD and the Oregon Department of Human Services.</p>

Need	Practice (Strategy)	Project Description
<ul style="list-style-type: none"> <li>• Unconventional services</li> <li>• Manage costs</li> </ul>	<ul style="list-style-type: none"> <li>• One-Call Center with multiple transportation providers</li> <li>• Cost-sharing agreements</li> <li>• Ride sharing</li> <li>• One-Call Center with a variety of transportation services</li> <li>• Personalized evaluation of transportation needs and capabilities</li> <li>• Interagency partnerships</li> <li>• Rural and small city services</li> </ul>	<p><b>Lane County Coordination</b> – 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 & Disability 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 age 60 and over. 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 32 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

<b>Accessible Services Fund Two-Year Revenue Budget FY18 and FY19</b>		
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
<b>TOTAL</b>	<b>\$ 6,379,867.12</b>	<b>\$ 7,755,574.00</b>

<b>Accessible Services Fund Two-Year Project Budget FY18 and FY19</b>		
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
<b>TOTAL</b>	<b>\$ 6,238,781.19</b>	<b>\$ 7,210,945.00</b>

\* 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

<b>Medicaid Fund Two-Year Revenue Budget FY18 and FY19</b>		
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

<b>Medicaid Fund Two-Year Project Budget FY18 and FY19</b>		
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

## Special Transportation Fund Committee Review

### Committee Members

Hoover Chambliss

Lise Schellman

Ed Necker

Alan Baas

Ruth Linoz

Pete Barron

### Public Meeting Schedule

11/20/18

12/11/18

12/18/18

1/8/19

1/15/19

1/24/19

## Community Outreach and Public Comment:

- 04/10/2019          Presentation United Way Human Services Forum Meeting
- 4/12/2019          Plan emailed to United Way Human Services Forum Group List
- 04/15/2019          Email feedback received from Ophelia's Place

\*We enthusiastically support the addition of service hours (especially on holidays) and service areas/routes.

\*Ideally, you would not use a stigmatizing word like "obesity" and would be considering accommodation for larger bodied riders as part of inclusion of body diversity; access to public spaces, activities, outdoors etc. through public transportation supports the physical and mental well-being of riders of all sizes, ages, and abilities.

\*Given this plan's clear commitment to accessibility and support of disabled riders, any ongoing training that helps drivers be supportive and empathetic to disabled riders who deal with harassment from non-disabled riders who have to give up seats or wait for the lift would be very helpful. This could also be some kind of PSA that is more prominent on the interior of buses and in LTD literature.

We appreciate all that LTD offers to our county and community

- 04/16/2019 LTD Comprehensive & Accessible Transportation Committee
- 04/22/2019 Trillium CCO Community Advisory Committee

\*Thank you LTD for all that you do for Trillium members.

\*Please consider changing how rides are scheduled from medical appointments. Requiring a return time is very stressful when we don't know how long an appointment will last and we don't want to miss a ride.

- 05/02/2019 VetNet Conference Call
- 05/09/2019 RideSource Call Center Advisory Committee
- 05/09/2019 Trillium CCO Rural Advisory Committee Conference Call

\*If LTD can look at providing more service to and from rural areas there would be more people who would use the bus in Eugene. I hope to see a bus between Florence and Eugene soon.

- 05/22/2019      Email feedback from Kate Scott at Senior & Disability Services

\*I took a very quick look at the sections that referenced us and have a few suggested edits. Mainly, updating our name to 'Disability' services as I think back when they wrote the original, we had our prior name. {There is] also had a section on OAA, and stated it served younger people with disabilities, so I corrected that and added a comment that it is our Medicaid funds that primarily fund the under 60 adults with disability programs. They quote and will be attaching as reference our most recent needs assessment

## **Adoption by the LTD Board of Directors**

June 19, 2019

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