



Public Transit Division
2009 – 2011 Biennium

Older Adults and People with Disabilities
Jobs & Transportation Act (JTA) Transit
Program (§5310)

Application Instructions

This document is available in alternative formats upon request.

Overview of the Grant Program

About the Application Instructions:

The purpose of this document is to provide brief information to the applicant sufficient to understand the grant program and its requirements. It also provides instructions for completing the application forms.

Additional information about the program policies and procedures, roles and responsibilities are found in the

- *Instructions for STF Agencies* (the guidebook to managing the discretionary grant program process and procedures)
http://www.oregon.gov/ODOT/PT/PROGRAMS/disc_grant_program.shtml,
- *State Management Plan* (the grant management handbook),
http://www.oregon.gov/ODOT/PT/PROGRAMS/SHARED/MGMT_PLAN/2009_PTD_Mgmt_Plan.pdf
- *Special Transportation Fund Program Guidebook*
http://www.oregon.gov/ODOT/PT/PROGRAMS/STF/STFProgram_guidebook_1107.pdf .

Contacts for more information:

Questions about the program, application forms, project and applicant qualifications may be addressed to the following PTD staff members:

FTA 5310 Program and Capital Projects:

Joni Bramlett – 5310/Capital Program Manager

Phone: 503-986-3416

E-mail address: joni.d.bramlett@odot.state.or.us

STF Program, Operations and Mobility Management Projects:

Jean Palmateer – STF/Special Transportation Program Manager

Phone: 503-986-3472

E-mail address: jean.m.palmateer@odot.state.or.us

Overview of the New Federally-funded JTA §5310 Program

The 2009 Oregon Legislature allocated additional federal funds to the Public Transit Division's §5310 grant program. The §5310 program is for transit projects that benefit older adults and people with disabilities.

Because the funds result from collaboration on a 2009 legislative initiative called the Jobs and Transportation Act, the new program will be called the "Jobs and Transportation Act Transit Program," or JTA §5310 program.

JTA §5310 Funds anticipated to be available for the 09-11 Biennium

- \$10 million of Surface Transportation Program (STP) transferred to the JTA §5310 program by 2009 Oregon Legislative action through HB 5548, ODOT's budget bill.
- Estimated \$10 million of Surface Transportation Program (STP) transferred to the JTA §5310 program through the Oregon Transportation Commission Administrative rule OAR 731-050-0030. The rule dedicates 10% of the multimodal STP funds identified by the commission to projects benefiting older adults and people with disabilities.
- \$.42 million unallocated from 09-11 original §5310 discretionary grant program.
- \$.5 million in deobligated §5310 funds from 07-09 biennium.
- Total is approximately **\$20.9 million**. This is in addition to the \$10 million also available from the STO program (STF for operations).

How to apply for the Older Adults JTA §5310 Program

There are several steps to preparing a grant application:

1. **Very important:** Contact your local STF Agency coordinator. A list of the contacts is in Appendix B of the Application Instructions. Request the following:
 - a. Any special instructions and program priorities defined by the STF Agency for the grant program.
 - b. Local timeline, **including the due date for the applications** to be submitted to the STF Agency.
 - c. A copy of the adopted Coordinated Plan for the STF Agency, if you do not already have it.
2. Review the grant program documents identified above. Understand the obligations of state and federal grant funding.
3. Identify the project's purpose, budget, and match to be provided. In most agencies, grant applications must be approved by the governing board of the applicant agency before being submitted.
4. Be sure that your proposed project is derived from the coordinated plan.
5. Complete the application using the instructions below.
6. STF AGENCIES: Applications are due to Public Transit Division from STF Agencies by October 30, 2009. Applications may be submitted via e-mail, fax or mail. DO NOT submit more than once. We recommend confirmation of receipt.

Submit to: Joni Bramlett – via e-mail: joni.d.bramlett@odot.state.or.us
Via fax at 503-986-4189, via US mail at ODOT Public Transit Division, 555
13th St NE Ste 3, Salem, OR 97301-4179.

Project Selection

STF Agencies or a designated lead agency identified by the STF Agency will lead the local public process to solicit and select projects for funding. See

Instructions for STF Agencies for more information about the process for conducting the application solicitation and local reviews.

The STF Agencies, in consultation with a review committee, will either bring forward unfunded projects from the 2009-2011 Older Adults & People With Disabilities program that were not funded due to lack of funds, and/or will select new projects for funding. There may still be more projects than money available. The STF Agency will choose projects that are identified as meeting priorities identified in the adopted Coordinated Plan. STF Agencies may allocate less money than is requested by the applicant.

Public Transit Division staff will review projects for eligibility. If the applicant (transit provider agency) is eligible and the project meets eligibility criteria, the projects will be funded. There will be a brief time to negotiate and finalize projects if any errors occur or to clarify information during the application open period.

Applicant Eligibility

The following types of agencies are eligible to apply to the JTA §5310 Program:

- Local governments: cities, counties, transit districts and organizations created by ORS 190, such as councils of governments;
- Federally recognized tribal governments; and
- Private non-profit agencies.

Private for profit agencies are not eligible to apply.

Other eligibility requirements:

- All applicants are required to have financial and managerial capacity to perform the project, and must be a good “risk” for either the STF Agency or PTD to enter into an agreement.
- Applicants whose service is not derived from the adopted Coordinated Plan will not be eligible to receive funds. (Applicants do not have to be named in the plan.)
- All applicants are required to participate in transportation coordination activities, including sharing vehicles, with other transportation and human service agencies in their area.
- Applicants whose primary purpose is to provide Medicaid non-emergency medical transportation are not eligible, unless their project is for an eligible purpose other than Medicaid medical transportation services.
- More information about ongoing program eligibility is found in the *State Management Plan* and *STF Guidebook*.

Project Eligibility and Match

JTA §5310 funds will require local match. The grant share and local match is based on the total project cost. The grant share is 89.73% of the total project cost, and the local share is 10.27% for all projects in this grant program.

Project categories are:

- Vehicle replacement
- Expansion vehicles
- Preventive maintenance
- Mobility management
- Purchased Service
- Facilities, shelters and signs
- Other capital, e.g., computer and communications equipment and associated software and installation

About the Project Categories

Please note that it is acceptable to combine items for more than one agency into a single application, as long as the entity accepting the projects is one agency (such as the STF Agency). Coordination of services and resources extends to the grant program.

For certain kinds of projects, more than one application might be required. For example, a service development project could include a mobility management project to develop the concept, as well as a capital project to purchase new vehicles or other equipment. Similarly, a project to develop a central call center would probably include at least two applications: mobility management for the planning and initial staffing of the center, and a capital application for the equipment and computer software.

Operating Projects as a Capital Expense

Only projects eligible as capital expenses are allowed in this funding opportunity. See the State-funded STO program materials to apply for operating projects.

Purchased Service: Purchased service is defined as, “acquisition of transportation services under a contract, lease, or other arrangement.” Purchasing service is in lieu of an agency (such as a county or non-profit) providing the service itself.

The agency buying the service must have an agreement with the service provider that defines the cost to be paid and responsibilities (e.g. regarding fleet and drivers). Typically, the procuring agency pays a unit cost, such as cost per mile, per hour or per ride. Agencies are required to procure the desired services using appropriate procurement practices defined by state or federal law. The

procurement does not need to be completed prior to making application; it does need to be completed to qualify for reimbursement of costs.

The cost to purchase vouchers or tickets/passes is not eligible in this project category.

Mobility Management Projects

Mobility management funded in §5310 includes projects that enhance access to transportation services for older adults, people with disabilities and people with low income. Examples of eligible projects are: coordination planning and policy development; managing specific coordination efforts; travel training and trip planning; development and operation of call centers or central dispatch; planning for intelligent transportation technologies in coordinated systems; and staffing mobility manager positions.

Eligible expenses are limited to administration and planning-related costs. Capital equipment/facilities and service operations are not eligible in this project category.

Also, eligible projects in this category are short-term activities to plan and implement new efforts. Successful grant recipients will need to transition the project to alternative sources of funding (such as operating) in the future.

Capital Projects

All types of capital projects are eligible. To qualify as a capital project, the combined total cost of the purchase must exceed \$5,000. If your agency is purchasing several related items, group the purchase so that the combined total cost exceeds \$5,000. If an applicant is applying on behalf of a group of agencies, it may combine related items for those agencies into a single project. (Examples: computer upgrades, facility or fleet surveillance/security equipment.)

All capital assets purchased with PTD grant funds must be included in an annual inventory of the grant recipient agency and must be included in quarterly reports as long as the assets remain in use.

Vehicle Purchases

Agencies should plan to purchase vehicles utilizing the Department of Administrative Services state price agreement contracts, available to members of Oregon Procurement Information Network (ORPIN) cooperative purchasing program. The ORPIN price agreement contracts provide several vehicle vendors' products. All five vehicle useful life categories are represented in a variety of sizes and types (up to and including 44-passenger buses), some with alternative fuels and other "green" options.

If an agency plans to conduct a Request for Proposals (RFP), please provide a justification in your application that explains why you need a vehicle that is not found in the state price agreement. Your request will be reviewed and a decision will be provided to you prior to the grant agreement being written.

Access to ORPIN is available to member agencies. Private nonprofit agencies may need the STF Agency to access ORPIN. Access requires membership and login authority. The cost is approximately \$200, which is an eligible administrative expense in an operations grant (however, not in the vehicle purchase grant and not in the JTA Transit – 5310 program). Membership in the ORPIN system also allows access to other goods and services on the state bid. The link to the electronic system Web site is:

http://www.oregon.gov/DAS/SSD/SPO/ORPIN_Public_Entity.shtml

Once your membership is current (annual renewal is required), use the ODOT Useful Life / ORPIN Crosswalk document to ensure the vehicle you want to purchase can be reimbursed with 5310 grant funds. Base prices are listed, however, any optional equipment would add to the price of the vehicle. This document is available on the Public Transit Division Web site at:

http://www.oregon.gov/ODOT/PT/PROGRAMS/ARRA/Contract_Crosswalk.pdf

In preparing for cost estimates for applications, please work with the vendor sales representatives to accurately estimate current costs for vehicle purchases.

Vehicle Replacements

Vehicles to be replaced must:

- Meet or exceed one of the following standards: age or mileage for the vehicle (as determined by the useful life category). See Appendix A for the current *Vehicle Descriptions and Useful Life Standards* to determine vehicle categories.
- Be used for public transportation service.
- Be an active service vehicle that has not been replaced or approved for replacement in prior biennia grant programs.
- Be similar in size to the vehicle proposed for purchase.

If a vehicle purchase is proposed with a significant change in vehicle size or type, please apply for an expansion purchase.

In some limited circumstances, a transportation provider serving its own clientele is eligible to receive funds to purchase vehicles. There must be a plan for sharing the vehicle when not in use for the agency's clientele. This can be accomplished by allowing another provider to use the vehicle, or for the applicant agency to provide rides to other older adults and people with disabilities when vehicles are not needed for the agency's clientele. The plan for sharing the applicant's vehicle(s) must be identified in the coordinated plan adopted by the STF Agency and the project must be recommended by the local review process.

Expansion Vehicles

Purchasing vehicle(s) to increase service levels or to add new service is eligible. This project category includes vehicle purchases to increase vehicle capacity by purchasing larger vehicles than currently in service by an agency.

Vehicle Preventive Maintenance

Preventive maintenance is defined as all costs associated with maintaining transit vehicles (for example, oil changes, tires, repairs, and annual inspections).

Several changes were made to the PM category from prior years. The changes are listed below:

1. All maintenance costs are eligible. (In the past, PTD limited grant awards to no more than \$3,000 per vehicle. STF Agencies are advised to monitor expenditures so that agencies do not consistently under-spend grant funds that result in relinquished balances.)
2. Major component rebuilds and replacements are allowed (one per vehicle per biennium). If more than one major component needs to be replaced and the cost of the project equals 20% of the value of the vehicle, apply for a second preventive maintenance project as a "Vehicle Rehab." This project type will require additional info. prior to the grant being written. Some examples of major components are: engine, transmission, and lift equipment.
3. You must submit your vehicle maintenance plan with the application.
4. Accident repairs may be reimbursed that have not been covered by insurance payments.

Equipment

The most popular items purchased in the equipment category are computers, communications equipment and associated software. There are no changes to this category from prior biennia. Be sure to indicate all types of equipment with cost estimates.

Facility Projects

Applicants will need to complete environmental paperwork and **submit it with the grant application** for 5310-funded signs, outdoor equipment, passenger shelters, bus barns and other building projects. The required document, *FTA Categorical Exclusion/Documented Categorical Exclusion Worksheet*, may be accessed at the Public Transit Division Web site at:

http://www.oregon.gov/ODOT/PT/PROGRAMS/disc_grant_program.shtml

Signs and Other Amenities

Be sure to list all of the items needed for the project, such as installation of the signs or bike lock-ups, etc. Benches and other outdoor or facilities equipment should be included in this application form. This form requires the Documented Categorical Exclusion Worksheet to be completed and made a part of the application packet.

Passenger Shelters

Shelter projects require pre-planning and work ahead of the application. For instance, there should be a public process to ensure the locations selected do not create public opposition; sites should be selected and maps of placement locations must be included in the application; permission from landowner(s) and sometimes local permits are required—research regarding site selection should be done and any major issues resolved prior to applying. Also, the project must be derived from the coordinated plan.

Structural Facility Projects

PTD will continue to provide funding for bus barns/shelters and will partially fund maintenance and administrative buildings that also receive funds from other sources, such as a federal earmark in the FTA 5309 Bus and Bus Facilities grant program. A restrictive covenant to the deed must be filed prior to payment.

Large scale projects that require more funding than is available and will require several years to develop and build have several potential options.

- Unless the environmental activities are already completed and paid for with other fund sources, the first stage of the facility project may be a grant application for the environmental work. (This is assuming federal funds are planned to assist in paying for any portion of the project.)
- Current grant funds and prospective future grants may be used to leverage an Oregon Transportation Infrastructure Bank loan from ODOT. For more information about OTIB, please contact Tom Meek at 503.986.3921, and see the website: <http://www.oregon.gov/ODOT/CS/FS/otib.shtml>.
- The project may be phased so that the first phase occurs in the 2009-2011 biennium. After environmental, planning, and design work is completed, a separate application for construction in the next funding cycle may be appropriate.
- BETC funds may be available for energy efficiency measures to be included in a building.
- Partial funding from ConnectOregon or other programs may be leveraged with ODOT Public Transit Division grant funds.

Successful applicants will be expected to build to environmental standards, such as the Leadership in Energy and Environmental Design (LEED) Green Building Rating System, developed by the [U.S. Green Building Council](#) (USGBC). The LEED system provides globally recognized standards for environmentally sustainable construction. LEED certification is not required at this time.

As in passenger shelter projects, applicants must complete and submit environmental worksheets with applications for building projects.

Agencies interested in a facility project should contact Joni Bramlett prior to applying to work on details for this complex project category.

Instructions for Completing Applications

The application forms may be downloaded from the ODOT Public Transit Division Web site at the following address:

http://www.oregon.gov/ODOT/PT/PROGRAMS/disc_grant_program.shtml

Forms may also be accessed by contacting your STF Agency coordinator (see list in Appendix B).

Forms will be in a fillable format. You should be able to complete them and save a copy on your local computer.

Project Application

Section 1. Applicant Information

Any agency applying for projects must complete the Applicant Information chart on the top of Page 1. If a current recipient, skip to page 2.

If an agency has either not been a grant recipient in ODOT Public Transit Division Discretionary grant programs in the past or has not applied since the 2005-2007 biennium or earlier, check the New Applicant or Renewal Applicant box and complete Questions 1 - 4. Attach the New Applicant Additional Information requested on the bottom of Page 1 to your application.

Private nonprofit agencies must be registered to do business in Oregon with the Oregon Secretary of State Corporation Division. Here is a link to the Web site: <http://www.filinginoregon.com/business/index.htm>

STF Agencies will complete a consolidated list of applications and submit all projects to ODOT PTD by the deadline. See *Instructions for STF Agencies* for more information about the grant process, or contact the STF Coordinator in Appendix B of this document.

Section 2. Operating Projects as a Capital Expense

Part A: Operations – Purchased Services

This project category applies to federal funds and requires 10.27 percent local match. Complete the form on Page 2 and the Budget Sheet A on Page 3.

- 1. Project Description:** Please describe the service this project will support. Examples, dial-a-ride service purchased from ABC Nonprofit to serve Town Name, Oregon. If a current contract, include the name of the provider service is being purchased from. An agency may have more than one purchased services project, so this form will need to be completed for each separate project.

2. **Estimated number of unduplicated individuals supported in the grant period (state Fiscal Years 2010 and 2011):** fill in the estimated number.
3. **Estimated number of one-way rides in the grant period (state Fiscal Years 2010 and 2011):** fill in the estimated number.
4. **Project Derived from a Local Coordinated Plan:** Fill in the page number where your project or service is identified. Complete the date the plan was adopted by the lead agency. If you do not know, get assistance from your STF Agency Coordinator. All projects must be derived from a local plan. However, we don't expect to see specifics such as number and titles of employees, names of computer software, but what gaps in access to service the project might be addressing.
5. **Cost information:** Complete the Purchased Services Budget Sheet A on Page 3. Enter the project costs by line item for both fiscal years. The form is set up to calculate your total costs from the Budget Sheet, to deduct the required match and pre-fill the eligible grant amount on the previous page. Be sure to complete both columns of the budget if your request includes both fiscal years of the biennium. Otherwise, the request will only be for one fiscal year of funding. If you do not use the auto-fill form, contact PTD for assistance. Enter the source of match on line 5. b.
6. **Project Part of a Group of Activities/Projects:** Check yes or no. If this project is dependent on another project, such as a Mobility Management start-up project—it could influence whether or not this project will go forward. **Details Box:** Provide identifying information regarding the linked project here. If this request for operations assistance is affected by several other projects, list each associated project here.
7. **Existing Contract for Services:** Check yes or no. If yes, put in the name of the agency contracted with and attach a copy of the contract. If no, describe how your agency plans to procure for the service.

Section 3. Mobility Management

Part B: Mobility Management Project Information

This project category includes administrative and operating start-up costs. Capital purchases are not eligible. Use the capital equipment project form, and link to this project. The local match required is 10.27 percent.

1. **Project Type:** Select the box that best describes the purpose of the project. If more than one applies, you will need to complete this form for every project type. Therefore, you must check only one box and complete the form for that project type and repeat for every project type. If you check "other," please briefly describe the project type in the box provided.

2. **Project Description:** Please describe this project and how it will increase access to transportation services for the elderly and people with disabilities. An agency may have more than one mobility management project, so this form will need to be copied for each separate project.
3. **Number of Estimated Customer Contacts or Customers Trained:** Fill in box. Then describe the method to measure performance in the box provided.
4. **Project Derived from a Local Coordinated Plan:** Fill in the page number where your project or service is identified. Complete the date the plan was adopted by the lead agency. If you do not know, get assistance from your STF Agency Coordinator. All projects must be derived from a local plan. However, we don't expect to see specifics such as number and titles of employees, names of computer software, but what gaps in access to service the project might be addressing.
5. **Cost information:** Complete the Mobility Management Budget Sheet B on Page 5. Enter the project costs by line item for both fiscal years. The form is set up to calculate your total costs from the Budget Sheet, to deduct the required match and fill in the eligible grant amount. Be sure to complete both columns of the budget if your request includes both fiscal years of the biennium. Otherwise, the request will only be for one fiscal year of funding. Enter the source of match on line b.

If you do not use the auto-fill form and need assistance, contact PTD.

6. **Project Part of a Group of Activities/Projects:** Check yes or no. If this project is dependent on another project, such as a capital equipment project—it could influence whether or not the mobility management project will go forward. **Details Box:** Provide identifying information regarding the linked project here. If this project is affected by any other projects, list each associated project here.

Section 4. Capital Projects Information
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Part C: Vehicles – Replacements

This form has not changed except to include the total number of seats in the first chart and to add the date the coordinated plan was adopted.

1. **The following information is required for replacement vehicles:** Complete the chart in item 1 to describe each vehicle to be replaced. The information will be used to confirm that each vehicle meets or exceeds one of the useful life standards for the category. See the list in Appendix A: *Vehicle Description and Useful Life Standards* to help identify which standard applies to a specific vehicle.

2. **Are you planning to access the state price agreement contract?** If no, please state the reason your agency must conduct its own procurement.
3. **Vehicles to be Purchased:** Complete the table for all vehicles to be purchased in your replacement project. The vehicles in this section should correspond to the vehicles listed for replacement in item 1. If not a replacement project, complete the form on Page 7 instead.

Any equipment and bus wraps required to put the vehicle into service should be included in the cost estimates. Most providers will be accessing the state price agreements for vehicle purchases. Continue to work with the vendor representatives for cost estimates and include all options in the cost estimate. Be aware that annual price adjustments will be allowed for new model year vehicles.

4. **Project Derived from a Local Coordinated Plan:** Fill in the page number where your project or service is identified. Complete the date the plan was adopted by the lead agency. If you do not know, get assistance from your STF Agency Coordinator. All projects must be derived from a local plan. However, we don't expect to see specifics such as number and type of vehicles, but what gaps in service or increased needs the vehicles would address.
5. **Describe how this project coordinates with other services: second meaning, how will the vehicle(s) be used:** For instance: describe briefly whether paratransit, elderly and people with disabilities dial-a-ride service, general public demand response, deviated fixed route, etc. If more than one service type with 5 vehicles total, identify how many will be used for what service—such as 2 buses for paratransit, 3 vans for dial-a-ride.

If client-only service (such as a sheltered workshop, resident facility, or other specialized client agency), you must identify how rides are provided to other older adults and people with disabilities in your service area, or where that is not feasible due to the population served, how the vehicles are made available to public service providers when not scheduled for serving your clients. This is critical if the agency's service is not identified specifically in the coordinated human service/transportation plan.

For a vehicle replacement project, describe any changes in use from the purpose of the vehicles being replaced. This is where ridership increases would be described to justify purchasing slightly larger vehicles; or where greater flexibility is needed in dial-a-ride services so several smaller vehicles to replace a large bus better meets the community's needs.

6. **Project Part of a Group of Activities/Projects:** Check yes or no. If your vehicle purchase is dependent on another project, or another project such as preventive maintenance is linked to this one, please provide identifying information in the details box.

- 7. Project Total Cost:** The form is set up to calculate your total costs from the chart in no. 3 above. It will deduct the required match and fill in the eligible grant amount. Enter the source of match on line 7. b.

Part C: Vehicles – Expansions

This form was changed to add the date the coordinated plan was adopted.

- 1. Are you planning to access the state price agreement contract?** If no, please state the reason your agency must conduct its own procurement.
- 2. Vehicles to be Purchased:** Complete items in the table. List all vehicles to be purchased in your capital project. If a replacement project, use the form on Page 6.

Any equipment and bus wraps required for putting the vehicle into service should be included in the cost. Most providers will be accessing the state price agreements for vehicle purchases. Continue to work with vendor representatives for cost estimates and be sure to include all options in the cost estimate. Be aware that annual price adjustments will be allowed for new model year vehicles.

- 3. Project Derived from a Local Coordinated Plan:** Fill in the page number where your project or service is identified. Complete the date the plan was adopted by the lead agency. If you do not know, get assistance from your STF Agency Coordinator. All projects must be derived from a local plan. However, we don't expect to see specifics such as number and type of vehicles, but what gaps in service the vehicles might be addressing.
- 4. Describe how this project coordinates with other services: second meaning, how will the vehicle(s) be used:** For instance: describe briefly whether paratransit, older adults and people with disabilities dial-a-ride service, general public demand response, deviated fixed route, etc. If more than one service type with 5 vehicles total, identify how many will be used for what service—such as 2 buses for paratransit, 3 vans for dial-a-ride.

If client-only service (such as a sheltered workshop, resident facility, or other specialized client agency), you must identify how rides are provided to other older adults and people with disabilities in your service area, or where that is not feasible due to the population served, how the vehicles are made available to public service providers when not scheduled for serving your clients. This is critical if the agency's service is not identified specifically in the coordinated human service/transportation plan.

- 5. Project Part of a Group of Activities/Projects:** Check yes or no. If your vehicle purchase is dependent on another project, or another project such as

preventive maintenance is linked to this one, please provide identifying information about the linked projects in the details box.

- 6. The project total cost:** The form is set up to calculate your total costs from the chart in no. 2 above. It will also deduct the required match and fill in the eligible grant amount. Enter the source of match on line 6. b.

Part D: Capitalized Vehicle Preventive Maintenance

- 1. Number of vehicles:** Enter size of fleet covered by preventive maintenance here. For some agencies, such as those providing general public dial-a-ride service or deviated fixed route, this will be the entire fleet. For others, such as those with fixed route, it will be only the vehicles providing service to the targeted population of elderly and people with disabilities—either paratransit or dial-a-ride.
- 2. Project Derived from a Local Coordinated Plan:** Fill in the page number where your project or service is identified. Complete the date the plan was adopted by the lead agency. If you do not know, get assistance from your STF Agency Coordinator. All projects must be derived from a local plan. However, we don't expect to see specifics such as number and type of vehicles, but what gaps in service the vehicles might be addressing.
- 3. Describe how this project coordinates with other services:** For instance: Service is part of a coordinated system and fills what need; this is the only service provided in the County; or this service brings riders to the city where connections are made to another service.
- 4. Maintenance plan attached?** If yes, please attach the document. If no, you will need to create one prior to the grant agreement being written for the project.
- 5. The project total cost:** Fill in the total costs of preventive maintenance for your project. The match rate will be calculated and auto-filled, as well as the grant amount. Enter the source of match under item 5.b. (for example, STF formula funds, local taxes, etc.).
- 6. Project Part of a Group of Activities/Projects:** Check yes or no. If this project is dependent on another project, such as vehicle purchases—changes to the purchase would influence how much preventive maintenance is requested, and is therefore linked to this project—please provide identifying information in the details box.

Part E: Equipment

- 1. Items requested:** Enter a description of items by type with quantity and cost information. If an item on its own does not meet the \$5,000 capital threshold, but the project total is \$5,000 or more for all items, it will be considered a

capital project. (For example, computers, a server, software and a printer would not individually cost \$5,000 but together would.)

If equipment is needed for several linked projects, all equipment may be entered onto one form. However, please complete a separate line item for the equipment requested for different linked projects. For example, one line item may be computer equipment and software for a Mobility Management Project. Another set of computer equipment and software may be requested for dial-a-ride service already in place. Use the Details Box (No. 3 below) to identify which line items are linked to or contingent on approval of other projects.

2. **Project Derived from a Local Coordinated Plan:** Fill in the page number where your project or service is identified. Complete the date the plan was adopted by the lead agency. If you do not know, get assistance from your STF Agency Coordinator. All projects must be derived from a local plan. However, we don't expect to see specifics such as number and type of equipment to be purchased, but what system or need the equipment purchase might address, or problem it could help solve.
3. **Project Part of a Group of Activities/Projects:** Check yes or no. If this project is dependent on another project, such as a Mobility Management start-up project—it could influence whether or not the equipment project will go forward. If you check yes, in the **Details Box**, provide identifying information regarding the linked project(s). If equipment purchases are derived from several other projects, list and describe each line item.
4. **Total project cost:** The total cost will be auto-filled from the chart in item no. 1 above. The match rate and grant amount will be calculated and auto-filled. Enter source of match (for example, STF formula funds, local taxes, etc.)

Section 4. Capital - Facility Projects Information

Part F: Signs and Other Amenities

1. **Number of signs and/or amenities requested:** Complete a description of items with quantity and costs. For instance, 10 signs at \$15 each would be one line item; another might be bike lock-ups, 3 at \$250 each. Installation may be a line item for both, or the installation may be quoted in the price of the item. The total project cost will be calculated, as well as the required 10.27 percent match. The quantity of all items and the grand total of the project will calculate and auto-fill. Fill in estimated order and delivery dates. This information is needed by PTD but will have no bearing on project selection.
2. **Documented Categorical Exclusion Worksheet.** This is the information required for any project for structures with the potential to impact wildlife, watershed or historical areas. The worksheet is on our Web site at: http://www.oregon.gov/ODOT/PT/PROGRAMS/disc_grant_program.shtml

Signs and some other amenities often meet the criteria for exclusion from environmental issues but the project information must be provided for FTA approval. (Be sure to contact the local ODOT Region office as you plan your project if signs are to be placed in locations visible from State highways and access points.)

3. **Project Derived from a local coordinated plan:** Fill in the page number where your project or service is identified. Complete the date the plan was adopted by the lead agency. If you do not know, get assistance from your STF Agency Coordinator. All projects must be derived from a local plan. However, we don't expect to see specifics such as number and placement of signs or other amenities, but what service will use the structures and what issues placement of signs or amenities are expected to address.
4. **Project Part of a Group of Activities/Projects:** Check yes or no. If this project is dependent on another project, such as sign purchases—changes to one project may influence whether or not one or both projects are funded. If yes, complete the **Details Box:** Provide identifying information regarding the linked project(s).
5. **Total project cost:** The total cost, required match and grant amounts will auto-fill from chart above. Enter the source of match in item 5.b. (For example, STF formula funds, local taxes, etc.)

Part G: Passenger Shelters

1. **Shelters Requested.** Fill in description, number and cost of each. The project grand total will be auto-calculated. Complete the **Estimated Order and Delivery Dates.** This information is needed by PTD but will have no bearing on project selection.
2. **Documented Categorical Exclusion Worksheet.** This is the information required for any project for structures with the potential to impact wildlife, watershed or historical areas. The worksheet may be accessed from our Web site at:
http://www.oregon.gov/ODOT/PT/PROGRAMS/disc_grant_program.shtml
3. **Project Derived from a Local Coordinated Plan:** Fill in the page number where your project or service is identified. Complete the date the plan was adopted by the lead agency. If you do not know, get assistance from your STF Agency Coordinator. All projects must be derived from a local plan. However, we don't expect to see specifics such as number and placement of shelters, but what service will use the structures and what issues placement of shelters are expected to address.
4. **Project Part of a Group of Activities/Projects:** Check yes or no. If this project is dependent on another project, such as sign purchases—changes to

one project may influence whether or not one or both projects are funded. If you checked yes, complete the **Details Box**: Provide identifying information regarding the linked project(s).

- 5. Total project cost:** The total cost, required match and grant amounts will be auto-filled from chart 1 above. Enter the match source under item 5.b. (for example, STF formula funds, local taxes, etc.)

Part H: Facilities (Bus Barns and Other Buildings)

Facility projects are eligible for funding. Bus barns and small structures are well within the program scope. However, for large scale projects, agencies should plan to request partial assistance from ODOT Public Transit Division grant programs with other funding sources contributing as well.

- 1. Facilities Requested: Description of the project.** Fill in a brief description of the project, such as bus barn to shelter vehicles and provide securement against weather and vandalism. Indicate source of match. Complete **Estimated Order and Delivery Dates**. This information will assist PTD staff in writing grants and it may have a bearing on how the project is funded. Please contact Joni Bramlett if you are considering a phased project that will require funding beyond the 2009-2011 biennium.
- 2. Documented Categorical Exclusion Worksheet.** This is the information required for any project for structures with the potential to impact wildlife, watershed or historical areas. The worksheet may be accessed from our Web site at:
http://www.oregon.gov/ODOT/PT/PROGRAMS/disc_grant_program.shtml

Detailed site maps and building plans should be provided.

- 3. Project Derived from a Local Coordinated Plan:** Fill in the page number where your project or service is identified. Complete the date the plan was adopted by the lead agency. If you do not know, get assistance from your STF Agency Coordinator. All projects must be derived from a local plan. We would expect a bus barn or other large facility to be included in a local plan. It should describe how the structure will benefit service provision and what issues the facility would be addressing.
- 4. Project Part of a Group of Activities/Projects:** Check yes or no. If this project is dependent on another project, such as sign purchases—changes to one project may influence whether or not one or both projects are funded. If you checked yes, complete the **Details Box**: Provide identifying information regarding the linked project(s).
- 5. Total project cost:** The total cost, required match, and grant amounts will calculate and auto-fill from chart 1 above. Enter the match source under item 5.b. (For example, STF formula funds, local taxes, etc.)

Appendix A – Vehicle Descriptions and Useful Life Standards

CATEGORY A: Large, Heavy-Duty Transit Bus - ADA

Gross Vehicle Weight Rating (GVWR): 33,000 to 40,000 lbs.
Minimum 2 ADA stations required. (This category includes articulated buses.)
Length: 35' – 40'
Passengers: 35 – 40+
Useful Life: 12 Years or 500,000 miles
Price Range: \$200,000 - \$300,000+

CATEGORY B: Medium-Size, Heavy-Duty Transit Bus - ADA

Gross Vehicle Weight Rating (GVWR): 26,000 to 33,000 lbs.
Minimum 2 ADA stations required.
Length: ~ 30' – 35'
Passengers: 25 – 35
Useful Life: 10 Years or 350,000 miles
Price Range: \$150,000 - \$280,000 (~ \$10,000 more for diesel)

CATEGORY C: Medium-Size Medium-Duty Transit Bus & Truck Chassis Cutaway - ADA

Gross Vehicle Weight Rating (GVWR): 10,000 to 26,000 lbs.
Minimum 2 ADA stations required.
Length: ~ 25 – 30'
Passengers: 16 – 30
Useful Life: 7 Years or 200,000 miles
Price Range: \$70,000 - \$175,000 (~ \$7,000 to \$10,000 more for diesel)

CATEGORY D: Medium-Size, Light-Duty Bus & Van Chassis Cutaway Bus - ADA

Gross Vehicle Weight Rating (GVWR): 10,000 to 16,000 lbs.
Minimum of 2 ADA stations required if 22 ft. or greater in length, 1 ADA station if less than 22 ft.
Length: 20' – 25'
Passengers: 12 – 16
Useful Life: 5 Years or 150,000 miles
Price Range: \$40,000 – \$65,000 (\$5,000 to \$10,000 more for diesel)

CATEGORY E: Small, Light-duty Bus; Vans; Minivans; Station Wagon; Sedan – ADA and Standard

Gross Vehicle Weight Rating (GVWR): 6,000 to 14,000 lbs.
1. ADA accessible: Small, light-duty van chassis cutaway (9-12 passenger)
2. ADA accessible van: Lift- or ramp-equipped, lowered floor/raised roof
3. ADA accessible: Modified minivan

Standard vehicles are not in the ODOT Public Transit Price Agreements, but may be on the Department of Admin. Services statewide contracts:

4. Standard: van
5. Standard: minivan
6. Standard: station wagon
7. Standard: sedan
Passengers: 3 – 14
Useful Life: 4 Years or 100,000 miles
Price Range: \$18,000 - \$55,000

Appendix B – STF Agency Coordinators: Contact Information for Applicants

STF Agency	Contact	Phone	Email	Address
Baker County	Christina Cook	(541) 523-8209	ccook@bakercounty.org	1995 Third St. Suite 140 Baker City OR 97814
Basin Transit Service	Starla Davis	(541) 883-2877	bts@ccountry.net	1130 Adams Street Klamath Falls OR 97601
Benton County	Sharon Fipps	(541) 754-1748	sharon.fipps@ci.corvallis.or.us	PO Box 1083 Corvallis OR 97339
Columbia County	Janet Wright	(503) 397-1035	wrightj@co.columbia.or.us	230 Strand St St Helens OR 97051
Coos County	Bruce Bennett	(541) 269-2013	bbennett@scbec.org	93781 Newport Lane Coos Bay OR 97420
Crook County	Kathy Puckett	(541) 447-6554	kathy.puckett@co.crook.or.us	200 NE Second Street Prineville OR 97754
Curry County	Joanne Wasbauer	(541) 412-8806	jwasbauer@currypublictransit.org	PO Box 1771 Brookings OR 97415
Deschutes County	Judith Ure	(541) 330-4627	judithu@co.deschutes.or.us	1300 NW Wall St # 200 Bend OR 97701
Douglas County	Vicki Nunenkamp	(541) 957-3005	vlunek@co.douglas.or.us	621 W Madrone Roseburg OR 97470
Gilliam County	Delene Durfey	(541) 384-2114	delene.durfey@co.gilliam.or.us	PO Box 427 Condon OR 97823
Grant County Transportation District	Karin Barntish	(541) 575-2721	kbltc@centurytel.net	PO Box 367 John Day OR 97845
Harney County	Ann Lessar	(541) 573-6024	ann.lessar@state.or.us	450 N Buena Vista Ave Burns OR 97220
Hood River County Transportation District	Dan Schwanz	(541) 296-7545	mccogtransnet@gorge.net	201 Federal The Dalles OR 97741
Jefferson County	Kathleen Puckett	(541) 475-4451	Kathy.puckett@co.jefferson.or.us	66 SE D Street Madras OR 97741
Josephine County	Scott Chancey	(541) 474-5441	schancey@co.josephine.or.us	201 River Hights Way Grants Pass OR 97526
Lake County	Bob Pardee	(541) 947-6003	bpardee@co.lake.or.us	513 Center Street, Lakeview OR 97360
Lane Transit District	Terry Parker	(541) 682-3245	terry.parker@lts.org	P O Box 7070 Eugene OR 97401
Lincoln County	Cynda Bruce	(541) 574-1292	cbruce@co.lincoln.or.us	410 Harney Street Newport OR 97365
Linn County	Mark Volmert	(541) 924-8430	mvolmert@ocwcog.org	1400 Queen Ave SE Ste 205A Albany OR 97321
Malheur County	Loni Debban	(541) 889-7651	loni@mcoainfo.com	PO Box 937 Ontario OR 97914
Morrow County	Gayle Guttierrez	(541-676-5667	mctreasurer@morrow.or.us	PO Box 768 Heppner OR 97836

STF Agency	Contact	Phone	Email	Address
Rogue Valley Transit District	Julie Brown	(541) 608-2413	j.brown@rvtd.org	3200 Crater Lake Ave Medford OR 97504
Salem Area Mass Transit District	Mona West	(503) 588-2424	westm@cherriots.org	555 Court St NE # 5230 Salem OR 97301-3776
Sherman County	Marnene Benson	(541) 565-3553	marnenebw@co.sherman.or.us	500 Court Street Moro OR 97039
Sunset Empire Transit District	Cindy Howe	(541) 861-5399	cindy@ridethebus.org	465 Skipanon Drive Warrenton OR 97146
Tillamook County Transit District	Matt Mumford	(503) 842-3115	mmumford@tillamookbus.com	PO Box 188 Tillamook OR 97141
TriMet	Claire Potter	(503) 962-5867	potterc@trimet.org	4012 SE 17th Ave. Portland OR 97202
Umatilla County	Robert Pahl	(531-278-6210)	robertp@co.umatilla.or.us	216 SE 4 th Pendleton OR 97801
Union County	Shelley Burgess	(541) 963-1001	sburgess@union-county.org	1106 K Avenue La Grande OR 97850
Wallowa County	Susan Roberts	(541) 426-4543	sroberts@co.wallowa.or.us	P O Box N St Joseph OR 97846
Wasco County	Dan Schwanz	(541) 386-4202	cat1@gorge.net	PO Box 1147 Hood River OR 97031
Wheeler County	Candy Humphreys	(541) 468-3391	wcct@centurytel.net	P O Box 152 Spray OR 97874
Yamhill County	Tonya Saunders	(503)474-4910	saunders@co.yamhill.or.us	535 NE 5th St. McMinnville OR 97218
Burns Paiute Tribe	Kenton Dick	(541) 573-2088	kenton.dick@burnspaiute-nsn.gov	100 Pasigo Street. Burns OR 97720
Confederated Tribes of Grand Ronde	Kim Rogers	(503) 829-2250	kim.rogers@grandronde.org	9615 Grand Ronde Rd. Grand Ronde OR 97347
Confederated Tribes of Siletz	Pamela Lind	(541) 444-8361	pamelal@ctsi.nsn.us	P O Box 549 Siletz OR 97380
Confederated Tribes of Umatilla	Jim Beard	(541) 966-2599	jimbeard@ctuir.com	PO Box 638 Pendleton OR 97801
Confederated Tribes of Warm Springs	David Conroy	(541) 553-3491	dconroy@wstribe.org	1233 Veterans St. Warm Springs OR 97761
Coquille Indian Tribe	Jack Lennox	(541) 756-0904	jacklennox@coquilletribe.org	PO Box 783 North Bend OR 97459
Cow Creek Tribe of Umpqua Indians	Tonya Theiss-Script	(541) 541-677-5575	theiss@cowcreek.com	2371 NE Stephen Street, Roseburg OR 97470
Confederated Tribes of Coos, et al	Diann Weaver	(541) 888-9577	dweaver@csb.portland.ihs.gov	1245 Fulton Ave, Coos Bay OR 97420
Klamath Tribes	Jana De Garmo	(541) 783-2219	jana.degarmo@klamathtribes.com	501 Chiloquin Blvd. Chiloquin OR 97624