

Oregon Department of Transportation  
Rail and Public Transit  
**STIF Discretionary and Statewide Transit Network**  
2/1/2019 deadline

SMART-City of Wilsonville  
**SMART Intelligent Transportation System**

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**Provider Information**

**1. Transit Agency Type**

- City
- County
- Mass Transit District
- Transportation District
- Special District
- Intergovernmental Entity
- Municipal/Public Corporation or other political subdivision
- Indian Tribe
- Non-Profit
- Private For-Profit

**2. What is the main type of service that will be supported by this grant?**

- Fixed Route
- Demand Response
- Deviated Fixed Route

**Risk Assessment Information**

This risk assessment section contains a subset of the entire risk assessment. The entire risk assessment will be populated with the answers you provide in this section and data already reported to RPTD. Please contact Andrew.S.Keefe@odot.state.or.us for assistance.

**3. Did your agency have any turnover of management or financial staff in the last 2 years?**

- Yes
- No

**4. Does your agency have an accounting system that allows you to completely and accurately track the receipt and disbursement of funds related to the award?**

- Yes
- No

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

- Manual
- Automated
- Combined

**6. Does your agency have a system in place that will account for 100% of each employee's time?**

- Yes
- No

**7. Did your staff members attend required training and meetings during prior grant awards?**

- Yes
- No

**8. Was your agency audited by the Federal government in the past 2 years?**

- Yes
- No

**9. If yes, did the audit result in one or more audit findings?**

- Yes
- No
- N/A

**10. Did your agency stay on budget in the past two years?**

- Yes
- No

## Applicant Qualifications

### 11. Describe how your agency has legal, managerial and operational capacity to perform and report on project progress within the scope, schedule and budget. (Operational capacity specifically for workload of projects in this application.)

Enter response in text box or upload your response on the Document Upload tab of the application and write "See Upload."

SMART directly employs 30 bus operators, 7 maintenance personnel, 3 supervisors, 2 dispatchers, and 6 administrative staff, including an award winning Transit Director and Fleet Manager. An Operations Manager, Grants & Programs Manager, and Transit Management Analyst round out the core leadership team. SMART's professional transit management staff is supported by the City of Wilsonville's Finance, Legal, Community Development and Project Management staff. These City Departments work together with SMART to ensure the transit system has the necessary technical, financial, and legal capacity to manage, administer, and successfully implement major projects and meet federal and state grant obligations.

SMART and the City of Wilsonville have no outstanding legal, technical or financial issues that would put this project at risk. It should be noted that the City undergoes an independent annual financial audit, and has received an "unqualified opinion" from the auditor. Since 1997, the City's Finance Department has been recognized annually by the Governmental Finance Officers Association (GFOA) for producing award-level comprehensive annual financial reports. The department has also received the annual award for outstanding budget documents every year since 1998, The City of Wilsonville has an "AA" bond rating as issued by both Moody's and Standard & Poors.

Operations Manager Eric Loomis has maintained oversight of SMART's current GPS fleet tracking vendor, ETA Transit, for going on five years. Grants and Programs Manager Elli Work has over 20 years experience in grant oversight and project evaluation. Finally, Transit Management Analyst Nicole Hendrix is well-versed on automated technology data collecting, especially as it relates to National Transit Database (NTD) reporting.

### 12. Capacity to Maintain Compliance

- By checking this box, the applicant certifies that if they are awarded funding they are able to meet or will have the capacity to maintain compliance with applicable federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health.

### 13. Does the applicant plan to use a Sub-Recipient or contractor to implement the grant supported activity?

- Yes
- No

### 14. If Yes, please list the Sub-Recipient(s) and describe how the applicant will provide sufficient Sub-Recipient/contractor oversight to ensure eligibility is maintained while receiving STIF Discretionary or Statewide Transit Network moneys.

If Yes, enter response in text box or upload response on the Document Upload tab and write "See Upload." If No, write N/A.

ITS will be acquired through a 3rd party vendor. A contractor/vendor will be selected after a stringent procurement process to provide on-vehicle technology to enhance SMART's ability to monitor operational performance, provide timely rider information, and improve data collection for planning, reporting, and scheduling. The 3rd party vendor will provide a cloud-based suite of state-of-the-art technologies, from automatic passenger counting (APC) to a web-based announcement system, that will bring SMART into the 21st Century.

Oversight will be provided by Operations Manager Eric Loomis with ongoing support from SMART's core administrative and managerial team.

## Project Information

Try to answer all questions, even if your project does not fit neatly within a category. No answer means a zero score.

### 15. Describe the project to be funded.

See application instructions for required content. Enter response in text box or upload response as an attachment in the Document Upload tab and write "See Upload."

This grant opportunity comes on the eve of the end of SMART's contract with the current vendor -- ETA Transit -- supplying limited automated transit technology. When these services were first implemented, SMART was not a full NTD reporter. As a full NTD reporter for the past year, SMART has found the current system woefully inadequate and the upgrade financially daunting. The past five years, however, has allowed SMART staff to learn, grow, and come to understand what works and -- perhaps most importantly -- what does not work for the transit agency. Being dedicated to smart and responsible oversight of public funds, SMART will insist on a vendor that can produce customized deliverables, be flexible in meeting demands, and be on time, every time.

This project harnesses a suite of new technology worthy of being termed state of the art Intelligent Transportation System.

Timeline: FY20-21

RFP released: 10/15/2019

Contract awarded: 11/25/2019

Grant deliverables completed:

Deliverables: SMART will implement the following automated transit technology to include:

Tracking and Live Dispatch -- tracks on-time performance and allows dispatchers to respond quickly and solve problems.

Automatic Passenger Counting (APC) -- tracks where and when people are riding, providing critical information for making service changes, establishing budgets, securing funding, and responding to changing ridership patterns.

Real-Time Passenger Information -- pushes info to SMART's website, mobile site, mobile application, IVR system, SMS messages, and signs.

Reporting and Analytics -- provides reports that include on-time performance, route, run, and block performance, passenger data, NTD reporting, vehicle health monitoring, and public usage statistics.

WiFi -- provide free WiFi on all SMART fixed route buses

Partners: Our ongoing partners in this project include other City departments and the 3rd party vendor selected to provide ITS.

Performance metrics: Performance metrics include 95% accuracy on APCs, 95% accuracy for real time arrival predictions, and live dispatch. The core set of reports must include on-time performance, driver performance, route, run, and block performance, passenger data, NTD reporting, vehicle health monitoring, and public usage statistics.

Other benefits: ITS increases the ability of all people to travel by public transportation quickly, reliably, and comfortably to their desired destination.

### 16. What Local Plans include this project and elements of the project?

See guidance for exemptions to this requirement.

1. Local plan name: 2018 Regional Transportation Plan

Governing body that adopted the plan: Metro Council

Plan adoption date: December 7, 2018

Plan web site address: oregonmetro.gov

Page number: Chapter 3, page 30

URL for plan: [https://www.oregonmetro.gov/sites/default/files/2018/07/02/draft2018RTP\\_publicreviewweb.pdf](https://www.oregonmetro.gov/sites/default/files/2018/07/02/draft2018RTP_publicreviewweb.pdf)

2. Local plan name: Transit Master Plan

Governing body that adopted the plan: City of Wilsonville City Council

Plan adoption date: June 19, 2017

Plan web site address: www.ridesmart.com

Page number: 62

URL for plan: [https://www.ridesmart.com/sites/default/files/fileattachments/smart\\_transit/page/10376/final\\_tmp\\_with\\_hb2017\\_amendments\\_oct\\_2018.pdf](https://www.ridesmart.com/sites/default/files/fileattachments/smart_transit/page/10376/final_tmp_with_hb2017_amendments_oct_2018.pdf)

3. Local plan name: Transit Master Plan Amendment

Governing body that adopted the plan: City of Wilsonville City Council

Plan adoption date: October 15, 2018

Plan web site address: www.ridesmart.com

Page number: 155

URL for plan: [https://www.ridesmart.com/sites/default/files/fileattachments/smart\\_transit/page/10376/final\\_tmp\\_with\\_hb2017\\_amendments\\_oct\\_2018.pdf](https://www.ridesmart.com/sites/default/files/fileattachments/smart_transit/page/10376/final_tmp_with_hb2017_amendments_oct_2018.pdf)

### 17. What is the minimum award amount that will still allow your project to proceed?

Enter an amount in dollars.

\$349,000 This amount would allow for the full implementation of ITS minus the WiFi amenity for passengers. Although this would be an unfortunate omission, it is preferred over not acquiring any ITS.

### 18. Select the fund source(s) that you think best aligns with your application.

Check all that apply

- STIF Discretionary
- STIF Intercommunity Discretionary
- FTA Section 5311 (f) Intercity Discretionary

## Equity and Public Transportation Service to Low Income Households

(Score weights: Discretionary = 20%, STN = 10%)

### 19. Describe how the project supports and improves access for vulnerable populations.

ITS improves access to public transportation for vulnerable populations by removing barriers such as inaccurate information or a lack of information entirely. ITS improves access through real-time updates and rider alerts; increases rider awareness by utilizing annunciators and LED signage; reduces wait times; and improves amenities by providing free WiFi for the comfort and enjoyment of all passengers.

ITS also positively impacts route planning through data collection, ultimately informing the decisions that benefit vulnerable groups such as students, seniors, and low-income households.

## Coordination of Public Transportation Services

(Score weights: Discretionary = 10%, STN = 30%)

### 20. Describe how the project is a collaboration of multiple agencies or involves consolidation, coordination, or resource sharing between agencies.

This project is being collaborated between different departments within the City of Wilsonville, including Information Systems, Fleet, Finance, and Legal. Implementing ITS will be accomplished through a collaborative process between City staff and the contractor with oversight provided by SMART.

SMART is ready and fully capable of implementing this project and will be able to assist other transit agencies in Oregon when they are ready to acquire ITS.

## Statewide Transit Network

(Score weights: Discretionary = 10%, STN = 30%)

### 21. Describe how the project supports and improves the utility of the statewide transit network, improves the passenger experience, benefits multiple transit providers, and/or creates a foundation for future statewide transit network improvements.

Deploying ITS facilitates a more interconnected system that enables economic growth and development. This project improves the passenger experience by providing real-time bus information, rider alerts, clearly enunciated stop call-outs, LED signage, and WiFi. These technology improvements make the most of short and long-term transit funds that support ridership, reliability, economic growth, and environmental stewardship.

As ridership dips nationwide due to the relatively low cost of owning a vehicle, state of the art rider amenities, such as free WiFi, can attract and keep passengers on public transit. In SMART's 2018 Annual Ridership Survey, in answering, "What is your reason for riding the SMART bus?" the top three answers were:

1. I don't own a vehicle
2. Saves money
3. It's convenient

The 2018 survey highlights are attached.

SMART, using ITS and surveys, can make informed decisions and continue to attract and keep a more savvy ridership.

## Funding and Strategic Investment

(Score weights: Discretionary = 20%, STN = 10%)

### 22. Describe how project match requirements will be met or exceeded. If this project will last beyond the 19-21 biennium, describe the plan for ongoing funding including match.

*Describe why investment in this project makes sense both from the perspective of current need and long term Oregon transit needs.*

The initial transition would be covered by the grant. Ongoing costs would be covered by Section 5307 formula funding (as it is now for ETA Transit). Ongoing monthly maintenance and licensing is estimated to cost between \$2,500 to \$3,000 per month.

As a small urban transit agency, SMART has hit numerous milestones in its 30-year history:

Building a transit facility without federal funds, implementing a Dial-a-Ride service made up of four programs, and securing funding for numerous CNG cutaways and electric buses -- just to name a few. SMART has long served as a model small urban transit agency, not only for the south metro area but for all of Oregon. SMART has been happy to help guide and assist rural transit agencies as they continue to grow and evolve. This project is one of many that SMART is ready to implement and will be able to assist others in when they too are ready to acquire ITS.

### 23. Does this project depend on other funding sources including other discretionary grant processes whose outcomes are uncertain?

*If yes, identify the fund source and anticipated timing of funding certainty. If no, write N/A.*

N/A

## Environmental and Public Health

(Score weights: Discretionary = 15%, STN = 10%)

### 24. Describe how the project reduces greenhouse gas emissions, reduces pollution, and/or supports positive health outcomes.

SMART is dedicated to implementing green projects. SMART is installing digital, real-time bus schedules at the Transit Center, lighting bus stops with solar panels, expanding CNG capabilities, and putting electric buses into service. SMART has set the goal to convert its fleet to zero emissions by 2028. SMART is a recent full NTD reporter and, as such, has learned that APCs are not just a nice to have addition but rather a desperately needed tool; a tool that will be key in gathering data, informing decisions, and -- ultimately -- saving staff time and taxpayer money.

This project promotes transportation solutions that enhance and protect the natural environment by increasing public transportation ridership and active transportation options and decreasing single occupancy vehicles (SOV) and air pollution. ITS can greatly reduce travel time and distance, effectively reducing greenhouse gasses.

## Safety, Security, and Community Livability

(Score weights: Discretionary = 25%, STN = 10%)

### 25. Describe how the project increases use and participation in active transportation, including public transportation.

WiFi increases the use of public transportation because it is a highly desirable rider amenity, especially for students on the 1X to Salem, 2X to Portland, and 3X to Canby. When students and commuters have the option to be connected en route to their destination, public transit becomes a more attractive option.

SMART has a robust Transportation Options (TO) Program, offering a large suite of services to, ultimately, improve ridership and active transportation and reduce SOV and greenhouse emissions. More riders can equate to more opportunities to reach these passengers with TO information. This is done in a number of ways and can include web site information, Facebook, and channel cards in the buses. ITS can provide more outreach opportunities through the mobile application.

### 26. Describe how the project supports and improves safety of passengers in transit vehicles and safety of other roadway users.

ITS supports safety by reducing traffic congestion and vehicle accidents through a reduction in SOV. ITS also promotes security by providing a safe and secure transportation system, ready to respond to emergencies and natural disasters.

## Capital Assets

Capital assets are items that cost at least \$5,000 and have a useful life of at least 3 years.

### 27. Describe proposed capital purchases. Enter asset details in the Budget and Project Tables tab.

*For capital construction projects, additional documentation will be required in the Document Upload tab. See guidance for more information. If no capital assets are included in your application, write N/A.*

ITS hardware includes:

CAD/AVL base system \$120,000 -- MDT hardware, installation & software license  
Annunciator \$105,000 -- Hardware, installation & software license  
APCs \$105,000 - Hardware, installation & software license  
Vehicle Network Gateway (4G WiFi) \$60,000 -- Hardware, installation & management portal  
(The remaining costs are for signage integration and project management)

### Project Category and Fund Source

Project Category	Project Cost	Other Fund Source (Federal)	Other Fund Source (State)	Other Fund Source (Local)	Other Fund Source (Other)	Project Category Totals
Vehicle Purchase - Expansion	\$	\$	\$	\$	\$	\$ 0
Vehicle Purchase - Replacement or Right-Sizing	\$	\$	\$	\$	\$	\$ 0
Equipment Purchase	\$	\$	\$ 312,000	\$ 78,000	\$	\$ 390,000
Facility Purchase	\$	\$	\$	\$	\$	\$ 0
Signs/Shelters Purchase	\$	\$	\$	\$	\$	\$ 0
Planning	\$	\$	\$	\$	\$	\$ 0
Project Administration	\$	\$	\$ 112,000	\$ 28,000	\$	\$ 140,000
Operating	\$	\$	\$	\$	\$	\$ 0
Preventive Maintenance	\$	\$	\$	\$	\$	\$ 0
Mobility Management	\$	\$	\$	\$	\$	\$ 0
<b>Total</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 424,000</b>	<b>\$ 106,000</b>	<b>\$ 0</b>	<b>\$530,000</b>

### Project Totals and Match Rate

Fund Source	Total Project Amount (Grant Amount + Match Amount)	Match Rate	Grant Amount	Match Amount	Match Sources	Overmatch Amount (If Any)	Match Funding is available if project is awarded?	Date match available	% of Funds used for Demand Response Transportation	% of Funds used for Fixed Route Transportation
STIF Discretionary - All Project Categories (20% Match)	\$ 530,000	20 %	\$ 424,000	\$ 106,000	.005 transit tax Text	\$	Yes Yes/No	02/01/2019 xx/xx/xxxx	%	100 %
STIF Discretionary - All Project Categories, Qualified Projects (10% Match)	\$	%	\$ 0	\$ 0	Text	\$	Yes/No	xx/xx/xxxx	%	100 %
STIF Intercommunity Discretionary - All Project Categories (20% Match)	\$ 530,000	20 %	\$ 424,000	\$ 106,000	.005 transit tax Text	\$	Yes Yes/No	02/01/2019 xx/xx/xxxx	%	100 %
STIF Intercommunity Discretionary - All Project Categories, Qualified Projects (10% Match)	\$	%	\$ 0	\$ 0	Text	\$	Yes/No	xx/xx/xxxx	%	100 %
5311 (f) Intercity - Operating (50% Match)	\$	%	\$ 0	\$ 0	Text	\$	Yes/No	xx/xx/xxxx	%	100 %
5311 (f) Intercity - Capital, Planning, Project Administration, Preventive Maintenance, Mobility Management (20% Match)	\$	%	\$ 0	\$ 0	Text	\$	Yes/No	xx/xx/xxxx	%	100 %

### Vehicle Purchase

Vehicle Purchase	Vehicle Purchase Type	VIN of vehicle being replaced	Make	Model	Vehicle Category	Quantity	Unit Cost	Total Cost	Seats	ADA Stations	Seats w/ADA Stations Deployed	Fuel Type	Estimated Order Date	Estimated Delivery Date	Mileage	Date of Reading	Seller	Vehicle Condition
Vehicle Purchase 1	Expansion/Replacement	Only answer if replacing vehicle	Text	Text	Select Letter (A-E)	#	\$	\$ 0	#	#	#	G/D/BD/E/HG/CNG/OF	xx/xx/xxxx	xx/xx/xxxx	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle
Vehicle Purchase 2	Expansion/Replacement	Only answer if replacing vehicle	Text	Text	Select Letter (A-E)	#	\$	\$ 0	#	#	#	G/D/BD/E/HG/CNG/OF	xx/xx/xxxx	xx/xx/xxxx	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle
Vehicle Purchase 3	Expansion/Replacement	Only answer if replacing vehicle	Text	Text	Select Letter (A-E)	#	\$	\$ 0	#	#	#	G/D/BD/E/HG/CNG/OF	xx/xx/xxxx	xx/xx/xxxx	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle
Vehicle Purchase 4	Expansion/Replacement	Only answer if replacing vehicle	Text	Text	Select Letter (A-E)	#	\$	\$ 0	#	#	#	G/D/BD/E/HG/CNG/OF	xx/xx/xxxx	xx/xx/xxxx	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle
Vehicle Purchase 5	Expansion/Replacement	Only answer if replacing vehicle	Text	Text	Select Letter (A-E)	#	\$	\$ 0	#	#	#	G/D/BD/E/HG/CNG/OF	xx/xx/xxxx	xx/xx/xxxx	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle
Vehicle Purchase 6	Expansion/Replacement	Only answer if replacing vehicle	Text	Text	Select Letter (A-E)	#	\$	\$ 0	#	#	#	G/D/BD/E/HG/CNG/OF	xx/xx/xxxx	xx/xx/xxxx	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle
Vehicle Purchase 7	Expansion/Replacement	Only answer if replacing vehicle	Text	Text	Select Letter (A-E)	#	\$	\$ 0	#	#	#	G/D/BD/E/HG/CNG/OF	xx/xx/xxxx	xx/xx/xxxx	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle
Vehicle Purchase 8	Expansion/Replacement	Only answer if replacing vehicle	Text	Text	Select Letter (A-E)	#	\$	\$ 0	#	#	#	G/D/BD/E/HG/CNG/OF	xx/xx/xxxx	xx/xx/xxxx	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle
Vehicle Purchase 9	Expansion/Replacement	Only answer if replacing vehicle	Text	Text	Select Letter (A-E)	#	\$	\$ 0	#	#	#	G/D/BD/E/HG/CNG/OF	xx/xx/xxxx	xx/xx/xxxx	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle	Only answer if purchasing used vehicle
Vehicle Purchase	Expansion/Replacement	Only answer if	Text	Text	Select Letter (A-	#	\$	\$ 0	#	#	#	G/D/BD/E/HG/CNG/OF	xx/xx/xxxx	xx/xx/xxxx	Only answer if	Only answer if	Only answer if	Only answer if

