



# IDAHO TRANSPORTATION DEPARTMENT PUBLIC TRANSPORTATION OFFICE



## CARES PROGRAM COMBINED APPLICATION PACKET 2024 - 2026



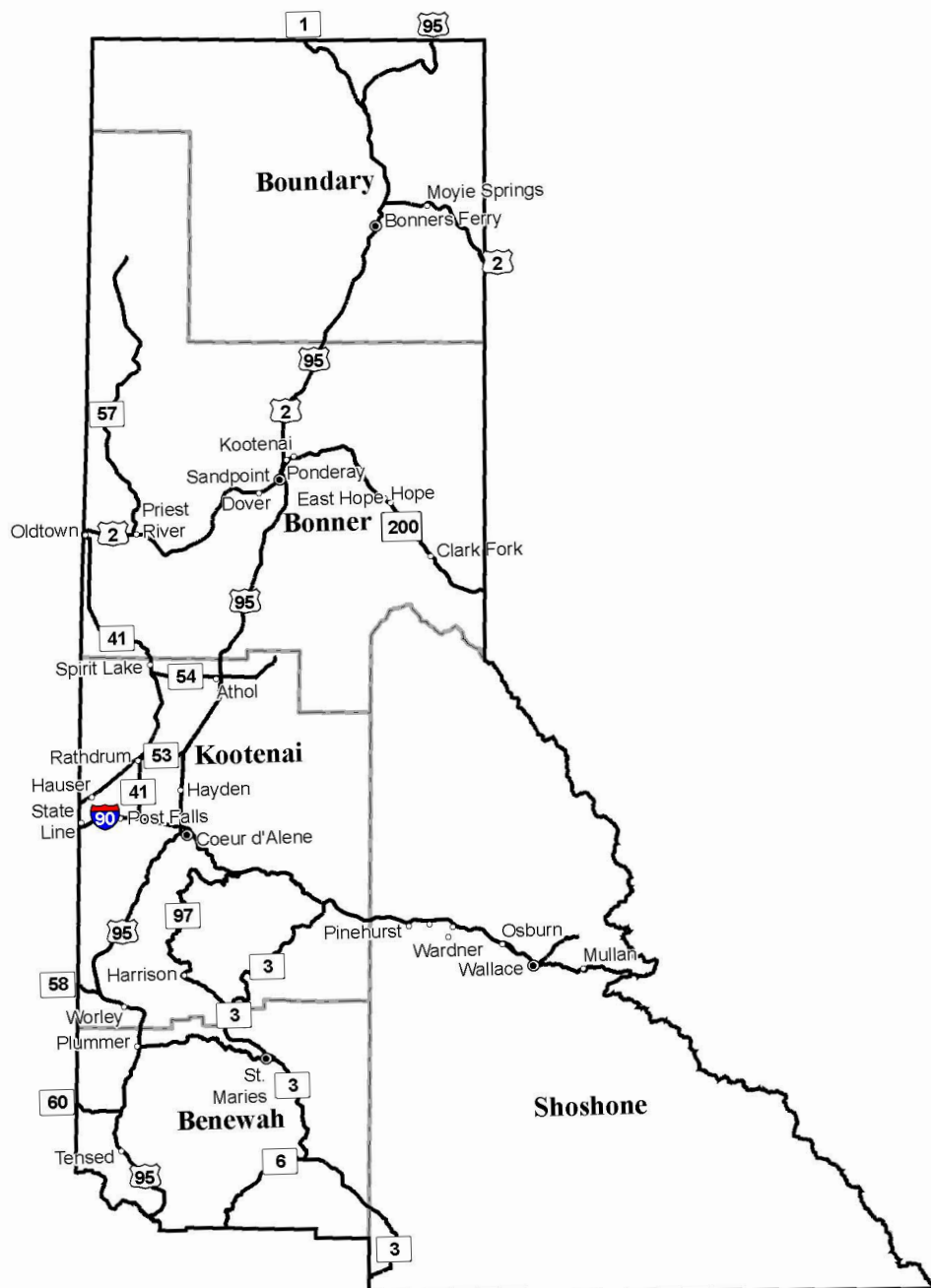
# CARES COMBINED APPLICATION

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# District 1: North Idaho





**Selkirks - Pend Oreille Transit Authority**  
31656 HWY 200, Box 8 Ponderay, ID 83852 (mailing address)  
31656 HWY 200, Suite 102 Ponderay, ID 83852 (physical address)  
**208-263-3774**

January 10, 2024

Attn: Sam Carroll, Grants & Contracts Officer  
Public Transportation Office  
Idaho Transportation Department  
PO 7129  
Boise, ID 83707

[PTCares@itd.idaho.gov](mailto:PTCares@itd.idaho.gov)

**Re: One-Time CARES Application – Replace Four Buses.**

Dear Mr. Carroll,

Attached is an application for One-Time CARES funds and the required attachments.

Please contact us if you need any additional information.

Respectfully Submitted,

*Donna Griffin*

Donna Griffin  
Executive Director  
Selkirks- Pend Oreille Transit Authority



## CARES Act One-Time Application

Thank you for your interest in this grant application and advancing transportation for the State of Idaho. Questions regarding content within the application will be accepted up to 10 business days before the close of the application. If you have any questions on the application or the submittal process, please feel free to contact the application contact listed below.

### Application Contact:

Sam Carroll, Grants & Contracts Officer  
[PTCares@itd.idaho.gov](mailto:PTCares@itd.idaho.gov)  
208 334-8139

### Timeline/Review Process

1. October 13, 2023: Application Release
2. January 12, 2024: Application Close
3. February 05 – March 08, 2024: Technical Assistance
4. March 11 – April 10, 2024: Public Comment
5. April 2024: PTAC reviews ITD-PT recommendations and public comments and may concur or recommend changes to projects and/or funding levels.
6. May 2024: Idaho Transportation Board reviews ITD-PT recommendations, PTAC response, and public comment in their determination of final project award and funding levels.
7. Summer 2024: ITD-PT Office programs with FTA
8. October 1, 2024: Funding begins. Please note, capital projects have the possibility of start sooner if funding is programmed with FTA before this date.

### Application Submittal Checklist

- ☒ Cover Sheet
- ☒ Sections 1-5
- ☒ Section 6-7 (ITD-PT Internal Review of Application)
- ☒ Attachments
  - ☒ Attachment A: Budget Sheet
  - ☒ Attachment B: Milestone Reporting
  - ☒ Attachment C: NEPA/SSA/Rolling Stock Worksheet
  - ☒ Attachment D: Demonstration of Need
- ☒ Back-Up Documentation
- ☒ Letters of Support (specific to the project)

### Application Specifications

- Font: Black, Times New Roman, size 12-14
- Paper: 8 1/2 x 11, drawings may be larger
- Format: pdf or word (Attachment A and budget sheets may be in excel)
- Pages must be numbered

### Application Submission

Please submit all items in the submittal checklist formatted as outlined in the application specifications to:

- ITD – Public Transportation Office, Attn: Sam Carroll, PO 7129, Boise, ID 83707
- Or email to: [PTCares@itd.idaho.gov](mailto:PTCares@itd.idaho.gov)



**YOUR Safety •••▶ YOUR Mobility •••▶ YOUR Economic Opportunity**

**Application Information Form**

Applicant: Selkirks - Pend Oreille Transit Authority (SPOT Bus)

Authorized Representative: Donna Griffin

Address: 31656 Hwy 200, Suite 102, Box 8, Ponderay ID 83852

Phone: 208-263-3774

Email Address: dgriffin@spotbus.org

DUNS #: 082358452

Architect/Engineer/Planner if applicable: (Contact Name): NA

Phone: NA

Address: NA

**Project Description:**

Replace four high mileage/high maintenance buses used for existing services. Purchase three new fixed route buses, and one new demand response bus to replace buses. Our region continues to grow and demand for our services continues to increase. Funding will allow SPOT Bus to purchase buses so we can continue providing safe, reliable public transit services in the two most northern counties in Idaho - Bonner County and Boundary County.

**TOTAL PROJECT COST:** \$679,046.00

**FEDERAL SHARE:** \$679,046.00 **LOCAL MATCH:** \$0.00



## Section 1: Project Description

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### Concise Project Description

For this project we request grant funding in the amount of \$679,046.00 that will allow SPOT Bus to purchase three Fixed Route buses (\$515,815.00) and one Demand Route bus (\$163,231.00) that will replace buses in our fleet and allow us to continue providing safe, reliable, public transit services in the two most northern counties in Idaho – Bonner County and Boundary County. This CARES One-Time funding does not require match. Specifically, the total project amount = \$679,046.00 to purchase vehicles, will directly support the operation of three fixed routes and Paratransit service in Bonner County, demand response service in Boundary County, demand response service between Boundary County and Bonner County, as well as public special event service.

#### a. FTA Program Eligibility:

This project meets the FTA funding source program as this bus replacement project is a capital activity normally eligible under Sections 5311. The Coronavirus Aid, Relief, and Economic Security (CARES) Act provides emergency assistance and health care response for individuals, families and businesses affected by the COVID-19 pandemic. Selkirks Pend Oreille Transit is an existing 5311 grant sub recipient, providing fixed route, paratransit service, and demand service in a rural area, and is an eligible recipient for this grant. And, according to the 2024-2026 5311 Rural Congressional Application, Federal program details and related Federal Circulars <https://www.transit.dot.gov/rural-formula-grants-5311purpose>. Selkirks- Pend Oreille Transit Authority (SPOT) is eligible to apply for funding because our service fulfills the purpose of the Section 5311 Program. The project components meet the FTA guidelines for CARES Act funds by providing capital assistance to support public transportation in rural areas with populations with less than 50,000 people where many residents rely on public transit to reach their destination.

In addition, our operating expenses have skyrocketed. We currently depend on CARES funding to bridge the gap between our current funding level and our actual operating expenses. We expect to exhaust that (greatly appreciated) awarded source of funding next year as we provide transit service. This funding for this purchase will get us up to date on our bus fleet and set us up financially as our ridership continues to increase. We have exceeded our pre-COVID numbers, and we expect to exceed 140,000 rides in 2023. Please see our ridership numbers, through November 2023 attached.

The Section 5311 Program supports both the maintenance of existing public transportation services and the expansion of those services through the following program goals:

*a. Enhancing access in rural areas to health care, shopping, education, employment, public services, and recreation:* SPOT has fixed and demand routes servicing all the above categories.

*b. Assisting in the maintenance, development, improvement, and use of public transportation systems in rural areas:* SPOT uses the FTA funding for these exact purposes. In addition to the work of the Board and Executive Director, SPOT utilizes service development committees to help assess transportation needs in the area and recommend service changes and improvements to the SPOT Board.

*c. Encouraging and facilitating the most efficient use of all transportation funds used to provide passenger transportation in rural areas through the coordination of programs and services:* SPOT diligently looks for ways to increase ridership and increase our operational efficiencies. SPOT is a member of the Bonner County Area Transportation Team (BCATT) and the Boundary Area Transportation Team (BATT). We partner as often as practical on projects and purchases ensuring that we are good stewards of the funding we are entrusted with. We participated in the Urban Area Transportation Plan and in the development of a Multi-Modal Transportation Plan for the city of Sandpoint, which included public transit elements. Please see attached letters of support.

*d. Providing financial assistance to help carry out national goals related to mobility for all, including seniors, individuals with disabilities, and low-income individuals:* SPOT has taken steps to serve the above categories of riders. The Idaho Area Agency on Aging approves and financially supports SPOT's services in both Bonner and Boundary Counties. In ***the third quarter 2023***, SPOT buses ***provided 5,752 rides for seniors and 1,419 rides for riders with disabilities, and 2,829 youth rides.***

*e. Increasing availability of transportation options through investments in intercity bus services:* SPOT does not provide service in this area. However, Intercity Service is in our Master Plan. SPOT has met with Citylink and Spokane Transit to discuss future connectivity. All three agencies support the concept. SPOT does provide transportation between Boundary County/Bonniers Ferry and Sandpoint with its demand service.

*f. Assisting in the development and support of intercity bus transportation:* Same response as given to item e above. SPOT continues working with Kootenai County Public Transportation gaining information with our involvement in the regional mobility platform.

*g. Encourage mobility management, employment-related transportation alternatives, joint development practices, and transit-oriented development:* We are currently partners with Schweitzer Mountain Resort in providing public transportation from the local communities to the base of the mountain and service from the base to the village, serving both customers of the ski resort and their employees. SPOT is a member of the Bonner County Area Transportation Team (BCATT) and the Boundary Area Transportation Team (BATT). Agencies involved in transportation at all levels meet monthly to provide updates about area transportation projects. SPOT participated in the development of a Multi-Modal Transportation Plan for the city of Sandpoint, which included public transit elements. SPOT works with the City of Ponderay to include transit facilities in new developments in Ponderay. SPOT has worked with the cities of Dover, Sandpoint, and Kootenai to install bus pads, shelters, and benches in their cities. Property developers now use the availability of our services in the traffic impact analyses as required when new developments are planned and permitted, demonstrating the positive impact of our services to the overall transportation system.

*h. Providing for the participation of private transportation providers in rural public transportation:* We are currently partners with Schweitzer Mountain Resort in providing public transportation. SPOT contracts with Schweitzer Mountain Resort to provide mountain route services. SPOT buses provide service from the communities to the base of the mountain and the bulk of service from the base of the mountain up to the village.

## **b. ITD Call for Project Priorities**

This project meets the ITD-PT call for project priorities. Program Priorities:

1. Existing 5311 Services (Capital, Preventative Maintenance).

With this application, SPOT is applying for funds in ITD's number 1 priority to support Existing 5311 Services. The funds will be used to purchase three fixed route buses and one demand route bus that will allow SPOT to continue operating SPOT Bus existing transit solutions including fixed routes, Paratransit, and demand options as public transportation services. Our service requires funding assistance to support public transportation in our rural area with populations less than 50,000. Many residents rely on public transit to reach their destinations. SPOT expects to provide more than 140,000 rides in 2023 filling a crucial role in safe, reliable transportation services. Ridership continues to increase.

SPOT is an eligible recipient. SPOT was created and operates under a Joint Powers Agreement of six local government authorities. SPOT serves both Bonner and Boundary Counties with transit service.

SPOT has strong support in raising the required match from the seven partner municipalities including Boundary County as well as the cities of Bonners Ferry, Dover, Kootenai, Moyie Springs, Ponderay, and Sandpoint. Additional contributors include Schweitzer Mountain Resort, Schweitzer Mountain Homeowners Association, Idaho Area Agency on Aging, Festival at Sandpoint, and a handful of private contributors.

SPOT endeavors to comply with all required regulations: SPOT gathers community input with appointed Board Members from each joint powers partner; SPOT has a Service Development Committee in each county with members from social service agencies, economic development corporations, municipalities, businesses, and the general public; SPOT adheres to all administration requirements; SPOT applies for NEPA determination when required; SPOT follows ADA regulations. We agree with the terms outlined in the Grant Project Funding Agreement with ITD and Uniform Administrative Requirements (2 CFR 200). The NEPA requirements do not apply to this project.

### **c. Application Scope of Work**

The scope of work entails SPOT purchasing buses that will replace buses and will allow SPOT Bus to continue providing safe, reliable, public transit services in the two most northern counties in Idaho – Bonner County and Boundary County. For this project we request grant funding in the amount of \$679,046.00 that will fund the purchase of three Fixed Route buses (\$515,815.00) and one Demand Route bus (\$163,231.00). This CARES One-Time funding does not require match. Specifically, the total project amount = \$679,046.00 to purchase vehicles, will directly support the operation of our existing service - three fixed routes and Paratransit service in Bonner County, demand response service in Boundary County, demand response service between Boundary County and Bonner County, as well as public special event service. This estimated budget takes into account a possible 15% increase between the time of submission of this application and when we place the order.

Due to delays in building the buses we've ordered ("COVID related"), our existing fleet continues racking up miles and costly repairs. We are currently two years behind on our replacement cycle. We have experienced extreme increases in bus costs and delays with parts to build them. After weighing many options and consulting our attorney, we decided to terminate one order for three buses and the Washington contract due to three price increases and delivery delays since we placed the order in March 2022. After much input and consideration, we plan to take advantage of the purchasing power provided in the Georgia contract and with another company. Among many positive points, the takeaway is that we will not experience cost increases after we place the order, and they will hold tight to their delivery estimates due to their position in the market. That order will replace buses that have been out of service. Please see our rolling stock information attached.

This proposed bus purchase will replace one bus (2007 ) that we pulled out of service last September due to a rusted (through) frame. The others will replace buses that we continue to run but are reaching the end of their life. As far as our existing vehicles are concerned, we have some workhorses and lower mileage vehicles (continuing to drive 10,000 miles per month). We drove 152,000 miles last year. Our mechanic, local repair shops and fleet struggle to keep up. Tonight (Sunday at 5:30), we are scrambling to assign one more bus to operate Monday morning. Backlogs at repair shops and sometimes shotty repairs that cost additional time and money, have SPOT staff spending numerous hours to keep our service running. Please see our attached rolling stock document.

We continue maintaining our vehicles at a high standard for passenger comfort and dependability. Our drivers have a vested interest in helping with vehicle reliability by reporting mechanical issues before they become problems. They must report deficiencies immediately and shall not use a vehicle unless authorized by our mechanic. Our mechanic responds promptly to issues by either fixing them (sometimes immediately) or directing staff to have another authorized mechanical repair provider fix the problem. Please see our Daily Vehicle Inspection form attached as well as our Vehicle Maintenance Program attached.



## Section 2: Project Planning

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This project was developed out of necessity. We rely on dependable vehicles to win support and increase ridership. When we break down, we lose the community's confidence in providing reliable service. Dependable vehicles also allow drivers to focus on driving conditions and passenger care. In dependable vehicles they worry less about vehicle condition and can focus on transporting passengers safely.

### **a. Project ties to specific goals in the ITD Statewide Transportation Plan**

#### ***Goal: Ensure the Safety and Security of Public Transportation***

1. SPOT strives to ensure the safety and security of the public.
2. SPOT holds regular training meetings with the staff to review procedures and policies. Guest speakers are sometimes brought in. The police have spoken to review the gun policies and give the drivers directions on how to handle situations involving guns.
3. SPOT now orders all buses with multiple cameras on both the inside and outside.
4. SPOT is up to date in training drivers on how to operate the lifts safely.
5. SPOT buses provide safe transportation services.

#### ***Goal: Encourage Public Transportation as an Important Element of an Effective Multi-Modal Transportation System in Idaho***

1. SPOT equips all our buses with bike racks and posts training videos on the website instructing riders on their use.
2. SPOT participated in the development of Sandpoint's Multi Modal Transportation Plan and the Urban Area Transportation Plan.
3. Property developers use the availability of our services in the traffic impact analyses as required when new developments are planned and permitted, demonstrating the positive impact of our services to the overall transportation system.

#### ***Goal: Preserve the Existing Public Transportation Network***

1. SPOT continues to look to the future. Growth is our goal. SPOT has no intention of maintaining the status quo.
2. SPOT continues to cultivate resourceful partnerships to efficiently provide excellent service in accordance with, and respectful of various organizations missions, goals, objectives, plans, policies, and procedures.
3. SPOT is dedicated to continuing operations for the benefit of the public indefinitely.

#### ***Goal: Provide a Transportation System that Drives Economic Opportunity***

1. The economy of the service area of SPOT is largely based on tourism. SPOT has a financial partnership with Schweitzer Mountain Resort driven by the desire to move both locals and tourists between the resort and the communities below. The hotels, restaurants, and shops are major benefactors of this partnership.

2. SPOT is the sole source of transportation for many riders, providing daily access to employment, doctors, services, and recreation. City planning departments report that developers chose to invest in the Sandpoint area because it has public transportation. The Chamber of Commerce reports people visit our area because there is public transportation.
3. Project planning and coordination is a continuous ongoing effort. SPOT provides public transportation services in two counties and is a sub-jurisdiction of six Idaho government entities. In addition to the work of the Board and Executive Director, SPOT utilizes service development committees to help assess transportation needs in the area and recommend service changes and improvements to the SPOT Board.

***SPOT requires funding to achieve our operational benefits stated below:***

**Improve Efficiency and Increase Ridership**

We expect this grant to accomplish both improved efficiency and increased ridership. The continuation of reliable fixed route and demand service will continue to increase SPOT's ridership and lower our overall cost per ride.

**Improve Safety**

As with any public transportation system, the roads are always safer with less vehicles on them. Safety also increases when vehicles are operated by professional drivers. The new buses will require less repairs. We will maintain them at a high standard to maximize their useful life. We have attached our Vehicle Maintenance Program that details daily, weekly, monthly, and annual schedules. Due to the newness and quality of these vehicles, putting them on the road will improve the safety of other vehicles and our riders.

**Improve Mobility**

SPOT continues to explore new avenues of service to the communities in which we operate. We always have the attitude of "come join us". Whenever someone suggests new service options, the response of SPOT to have them help us work out how that idea can become a reality. Growth does not happen by just responding "We can't do that". There are a lot of creative people that can help SPOT provide new and better service to Bonner and Boundary Counties.

**b. Project Development Process**

**1. Describe coordination with local stakeholders**

A primary source of our project development process is relying on our Strategic Plan. The Strategic Plan was developed with a broad range of community input. The Strategic Plan outlines the goals of SPOT. Our Strategic Plan is included as an attachment.

**SPOT Mission Statement**

A COOPERATIVE EFFORT OF AREA MUNICIPALITIES TO PROVIDE CONVENIENT, SAFE AND RELIABLE PUBLIC TRANSPORTATION FOR RESIDENTS AND VISITORS TO EMPLOYMENT, RECREATION AND SERVICE DESTINATIONS.

This mission statement is the result of a community visioning process which resulted in the following vision statement:

### **SPOT Vision Statement**

SPOT is the people's choice for travel throughout North Idaho.

We will continue to help preserve North Idaho's human and natural environments for generations to come.

We are innovative, taking advantage of new technology to stay cost effective and affordable.

SPOT is recognized and leveraged as a valuable asset for economic development and community vitality.

Our partnerships and strategies for self-reliance are a national model.

Our Marketing and Public Outreach Plan outlines a clear path towards growing ridership and building community support. SPOT continues to grow its awareness, usage, and impact Bonner and Boundary Counties in a positive manner. We included our Marketing and Public Outreach Plan as an attachment.

SPOT also commissioned Shift Community Solutions to produce "See SPOT Run, A Comprehensive Success Guide". This guide included a survey of riders to help guide route development, service improvements, and marketing efforts. "See SPOT Run, A Comprehensive Success Guide" is included as an attachment.

The SPOT Board of Directors is comprised of representatives from the cities of Dover, Sandpoint, Kootenai, Ponderay, Bonners Ferry, and Boundary County. This ensures that the needs of each community are represented in the decision-making process. SPOT also utilizes local service development advisory committees that include a range of community stakeholders. Based on input from our Boundary County service development committee and the Boundary County Commissioners, SPOT has expanded its service area in Boundary County over the last four years to include the City of Moyie Springs, the Three Mile area and the Paradise Valley area.

SPOT enjoys enormous and continued support in the communities that we serve. Due to the support, we secured the match required to support our 5311-grant request. Match funds are provided by the Cities of Bonners Ferry, Dover, Kootenai, Moyie Springs, Ponderay, and Sandpoint, the Area Agency on Aging, Boundary County, Festival at Sandpoint, Schweitzer Mountain Resort, as well as the Schweitzer Mountain Homeowners Association and private donations. We also receive and continue to explore in-kind donations including radio ads, construction materials, planning resources, and site accesses.

## **2. Describe efforts undertaken to coordinate and include Minority and Low-Income populations (Title VI)**

North Idaho is an area of the state with very few minorities. There is minority representation on the Service Development Committees.

There is representation from social service agencies that work with low-income populations on the community development committees. Input on service needs have been given by the Bonner Community Food Bank, the Sandpoint Senior Center, the Bonners Ferry Senior Center, the Bonners Ferry Food Bank, riders from low-income housing, and local elected officials regarding their constituents. This input represents the low-income population.

**3. What is your plan to include Disadvantaged Business Enterprises (DBE's) in this project?**

SPOT utilizes ITD's DBE program and submits reports to ITD as requested.

**4. Identify any local Labor Unions (if applicable) as identified by the Department of Labor**

There are no local labor unions covering workers employed under this grant application.

SPOT Authority does not discriminate in any way and provides transportation services to all of those who need it. We provide transportation to various stops that allow riders to access many businesses for personal care, shopping, and work.

**c. Provide Attachment B: Milestone Reporting**

Attachment B is attached.



## Section 3: Project Benefits/Evaluation

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**Project Benefits:** The key benefit of this project is to continue providing safe, reliable, transit service in North Idaho that takes people where they want and need to go. The strategic planning team established goals (and objectives). Please see our goals and several objectives below that relate directly to our service:

Goal 1: To increase ridership

- Implement our marketing and public information plan to expanding SPOT's customer base, improving information on how to ride, and protecting/enhancing SPOT's brand.
- Perform community and rider surveys to identify barriers for current and potential customers, and to gauge the popularity of potential expansion options.
- Increase public awareness through various options including press release about SPOT activities.

Goal 2: Improve rider access, convenience, and amenities

- Evaluate routes and requests for service according to location and access to destinations
- Add shelters and benches to stop locations
- Expand on-board bicycle accommodation on all coaches
- Work to increase frequency of fixed route services (ongoing).

Goal 3: Leverage partnerships to expand service and improve the system

- Integrate SPOT with Schweitzer Mountain Resort's transportation needs and funding.
- Coordinate with Bonner County and/or other partners to become active participants in SPOT.
- As roadway projects are proposed, coordinate with BCATT, BATT, ITD, local cities and counties, to include stop furnishings, pedestrian access and safety features, and other transit infrastructure needs.
- Develop a sponsorship program for stop furnishings ("adopt a stop")
- Coordinate with land use agencies to incorporate SPOT needs in development reviews.
- Coordinate with social services agencies to implement Demand-Response service within in the Sandpoint area
- Provide regular (annual) updates to local government agencies and civic groups.

Goal 4: Increase organizational financial stability

- We evaluated alternate governance structures and revised current governance structure to reduce political risks and allow for easier service area expansion.
- On an ongoing basis, develop and expand SPOT's internal capacity and resources through training and grant opportunities.
- Create an endowment or other long-term donation opportunity for SPOT.

Goal 5: Promote environmental stewardship

- Explore other public transportation services including park and ride, vanpool and rideshare, as program champions are found.
- Add a seat on the TAC for a designated environmental advocate.

**Vehicles are tools of the operating program. SPOT requires vehicles to achieve our operational benefits as stated below:**

**a. Improve safety**

The general population benefits by having a public transit service in the region. As with any public transportation system, the roads are always safer with fewer vehicles on them and more so, when the vehicles on the roadways are reliable. When people use our transit service, the riders as well as the general public are safer on the roadways. Another factor in Noth Idaho is the lack of daylight in the Wintertime. For those who find it difficult to see in the dark, we provide a safe option for people to get to where they need to go before 7:00 a.m. and after 4:00 p.m. Our Paratransit and Demand route ridership continues to grow the fastest. Between our mechanic and the local repair shops, our buses continue driving miles to get people where they want to go. We require safe reliable vehicles to accommodate the increased ridership.

We continue working with local jurisdictions to improve the safety of our riders as they wait for the bus. SPOT consciously included safety considerations in all our decisions. SPOT utilizes RTAP funding for first aid and CPR training for the drivers. We also remove snow at bus stops to increase safety. SPOT also includes instructional videos on our website to increase rider safety.

**b. Improve mobility**

SPOT continues to explore new avenues service to the community. We always have the attitude of “come join us”. Whenever someone suggests new service options, SPOT responds by working with them to help us work out how that idea can become a reality. Growth does not happen with a response of “We can’t do that”. There are a lot of creative people that help SPOT provide new and better service to Bonner and Boundary County. SPOT participated in Sandpoint’s multi-modal transportation plan. As a member of the Bonner County Area Transit Team (BCATT) and Boundary Area Transportation Team (BATT), we receive the first word on all area transportation projects. We have the opportunity to share our perspective and request inclusion - that they accommodate public transit in the projects.

We also expect this grant to accomplish both improved efficiency and increases in ridership to increase mobility. The continuation of reliable fixed route and demand route service will continue to increase SPOT’s ridership and lower our overall cost per ride. In some places we serve, there is limited or no parking and traffic congestion as a result. The general population benefits because of access to various venues, expedited ingress and egress from events, as well as improved efficiency, increased ridership, improved mobility, and improved service times/areas.

**c. Support local economic development and expand economic opportunity**

SPOT strives to increase economic opportunity in its service area. First, we shop locally and employ local citizens. We buy our supplies and parts from local vendors as practical. We utilize local services such as local repair shops, our attorney, and our CPA. Routes such as the Festival at Sandpoint service and the Schweitzer service support tourism and recreation in our area. These services have had high ridership counts and a very positive effect on our local economy while increasing convenience for riders and reducing vehicle and parking congestion.

In both counties, we transport people so they can have some independence and spend money at their destination. We transport people from Boundary County to Bonner County and we transport people between cities. Riders use public transportation services to get to shopping and medical appointments. In Bonner County, both our fixed route service and our paratransit service are used by employees to get to work. Property developers use the availability of our services in the traffic impact analyses as required when new developments are planned and permitted, demonstrating the positive impact of our services to the overall transportation system.

Our community and businesses benefit because workers and those with appointments show up on time. Our hours cater to many who need prompt access to their appointments. Our businesses strive to in turn, accommodate our riders with their schedules.

### **Project Evaluation:**

#### **a. Describe how the applicant intends to continually evaluate success of the project.**

SPOT will maintain and sustain the vehicles through our high standard of upkeep and maintenance. Our buses and equipment continuously have a long productive life as shown by the vehicles we strive to replace. Maintenance costs for each bus are evaluated monthly. Changes to the maintenance program will occur based on evaluations to ensure the safety of the vehicles and to extend the life of the vehicles. We also receive daily reports if something malfunctions on each vehicle. This allows us to address concerns and fix problems immediately. Please see our Vehicle Inspection Form.

#### **b. The following data will be collected and evaluated:**

- ✓ Ridership is collected and tabulated weekly and evaluated monthly by our Board and Committees. Ridership data includes general boardings, youth, senior and disabled. Stop utilization is also recorded and regularly evaluated. In calendar year 2022, SPOT's total ridership was 136,253. The pandemic reduced ridership in 2020 to 90,609.
- ✓ Ridership by Youth and Young Adults. SPOT has identified these two groups of riders as having large growth potential. We have targeted a 20% growth in this ridership. Many of our riders on the Mountain Route, up and down Schweitzer Mountain Road fall in these categories.
- ✓ Vehicle mileage and tire wear/replacement.
- ✓ Website and Social Media Usage. SPOT monitors its website traffic and social media reach.

#### **c. The following data will also be collected and evaluated regularly as follows:**

- ✓ Cost "Dashboard". SPOT has developed a cost "dashboard" to monitor the cost per ride and cost per mile for our fixed route and paratransit routes. This enables us to monitor and increase our operating efficiencies monthly.
- ✓ Website and Social Media Use. SPOT monitors its website traffic and social media reach.
- ✓ We collect and tabulate mileage sheets weekly.
- ✓ Budgets are evaluated weekly or more by staff and monthly by the Finance Committee and the SPOT Board.

**SPOT will sustain the project after the end of the grant period.**

The maintenance of the asset purchased under this grant will be covered by the operating budget, and the bus will have a useful life beyond the end of the grant period. Future 5311 grants will fund continued maintenance and operation costs for the bus. SPOT plans to continue to apply for operating funds after this grant period in order to continue the project. Our partners have agreed to continue with the Joint Powers agreement.

We continue maintaining our vehicles at a high standard for passenger comfort and dependability. Our drivers have a vested interest in helping with vehicle reliability by reporting mechanical issues before they become problems. They must report deficiencies immediately and shall not use a vehicle unless authorized by our mechanic. Our mechanic responds promptly to issues by either fixing them (sometimes immediately) or directing staff to have another authorized mechanical repair provider fix the problem. Please see our Daily Vehicle Inspection form attached as well as our Vehicle Maintenance Program attached.

**SPOT has the capacity to carry out the project as proposed**

The reorganization of the SPOT administration team has brought a higher level of management capability to the organization. The creation of a Finance Committee provides excellent financial oversight. The SPOT bookkeeper provides detailed monthly financial statements. Copies of the latest income statement and balance statement are attached.

SPOT has demonstrated its ability to manage the grant funding by having a technical rating of “Low” by ITD’s Public Transportation Division.

While the governmental agencies that provide match cannot commit to match amounts beyond the current fiscal year, all are strongly supportive of the system and are expected to continue to financially support SPOT.



## Section 4: Project Budget

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### a. Budget Narrative:

The cost estimates for the budget are based on quotes from a bus sales company (ABC Co.) and our area/local communications company (RACOM). Please see them attached. For this project we request grant funding in the amount of \$679,046.00 that will allow SPOT Bus to purchase three Fixed Route buses (\$515,815.00) and one Demand Route bus (\$163,231.00). These new buses will allow us to continue providing safe, reliable, public transit services in the two most northern counties in Idaho – Bonner County and Boundary County. This CARES One-Time funding does not require match. Specifically, the total project amount = \$679,046.00 to purchase vehicles, will directly support the operation of three fixed routes and Paratransit service in Bonner County, demand response service in Boundary County, demand response service between Boundary County and Bonner County, as well as public special event service.

ABC Co. anticipates delivery of buses 8 to 10 months after we place our order. We currently plan to piggyback on the Georgia Statewide Contract for Public Mass Transit Vehicles and Related Options, Equipment, and Accessories. We continue to explore alternatives though and will go with the option that fits our needs best.

Please note that SPOT currently depends on CARES Funding to cover current operating shortfalls. We expect to exhaust our CARES operating grant this fiscal year.

SPOT receives strong financial support from the joint powers agreement partners and other supporters. The list includes the Cities of Bonners Ferry, Moyie Springs, Dover, Sandpoint, Ponderay and Kootenai; Boundary County, Area Agency on Aging; Schweitzer Mountain Resort; and the Schweitzer Mountain Homeowners Association. While the governmental agencies that provide match cannot commit to match amounts beyond the current fiscal year, all are strongly supportive of the system and are expected to continue to financially support SPOT.

1) This project is scalable as we will purchase one less (demand) bus equal to \$162,252.00. The project cost for three buses equals \$516,795.00. I also included a 15% possible increase based on my past experiences with bus orders. The ABC Bus Co. stated that 8% would probably cover it.

2) SPOT Bus has the financial capability to operate on a reimbursement basis. See the Balance Sheet portion of the attached financial statement.

### b. Provide an Itemized and Broken Down Estimated Project Budget

The total project budget for this CARES One-Time project is \$679,046.00. An estimated detailed project budget is attached. Please see the quotes attached as well. I am requesting an additional \$2,500.00 to cover additional costs for lift inspections, registration, DOT inspections, and decals. Communication equipment supplies, programming and installation will cost \$2,636.00 per bus. We also anticipate a 15% increase overall by the time we order the buses late next year. We are assured by ABC Co. that after we order the buses, the prices will not increase.

### Estimated Detailed Project Budget

Description	Quantity	Price Each unit + Additional Cost**	Total Price	Service Area
Turtle Top E450	3	\$144,660 + \$2,500	\$441,480.00	Fixed Route
Turtle Top E450	1	\$135,952 + \$2,500	\$138,452.00	Demand Service
Communication Equipment/ Radios	4	\$2,636.00	\$10,542.00	North Idaho
Estimated 15% Possible cost increase	4	Approximately = \$22,143 each.	\$88,572.00	
Total	4		<b>\$679,046.00</b>	

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Replacing Four Buses

## Attachments

**Attachment A: Budget Sheet** This is a picture. Please see the excel version attached to this application.

Project Budget Request									
				Subrecipient		Selkirks-Pend Oreille Transit Authority			
				Agreement Term		October 1, 2024 - September 30, 2025			
				Contact Name		Donna Griffin			
				Address		31656 Hwy 200, Suite 102, Box 8 Ponderay, ID 83852			
				Phone Number		208-263-3774			
FTA Grant		100/0							
5311	Total	Federal	Match						
CARES	\$679,046.00	\$679,046.00	\$ -						
Total Project Cost		Total Federal Request		Total Match Needed					
\$ 679,046.00		\$ 679,046.00		\$ -					
				<p>Donna Griffin</p> <p>Subrecipient Printed Name</p> <p><i>Donna Griffin</i></p> <p>Subrecipient Signature</p> <p>1/8/2024</p> <p>Date</p>					
				<p>Scope of Work</p> <p>Purchase four buses that will allow us to continue operation of three fixed routes and Paratransit service in Bonner County, demand response service in Boundary County, demand response service between Boundary County and Bonner County, as well as public special event service.</p>					
				<p>Local Match Source(s) for Project:</p> <p>Cities of Bonners Ferry, Dover, Kootenai, Moyie Springs, Ponderay, and Sandpoint, the Area Agency on Aging, Boundary County, Festival at Sandpoint, Schweitzer Mountain Resort, as well as the Schweitzer Mountain Homeowners Association.</p>					

**Attachment B: Milestone Reporting**  
**CARES One-Time Application**  
**Attachment B: Milestone Reporting**

Agency Name	Selkirks-Pend Oreille Transit Authority (SPOT Bus)		
Agency Contact	Donna Griffin		
Phone #	208-263-3774	Email	dgriffin@SPOTBus.org
Grant Program	5311 CARES	Rural	One Time
Federal Award Amount	\$679,046.00		

Scope of Work: Purchase four buses that will replace four buses and allow SPOT to continue operation of three fixed routes and Paratransit service in Bonner County, demand response service in Boundary County, demand response service between Boundary County and Bonner County, as well as public special event service.

**Milestone Progress Report:** Target of major tasks to be achieved by specific dates.

The report should include information such as: data for each activity line item within the approved project; a discussion of all

- budget or schedule changes; original, estimated and actual estimated completion date
- description of projects, status, specification preparation, bid solicitation, resolution of protests, and contract awards;
- breakout of the costs incurred and those costs required to complete the project; reasons why any scheduled milestone or completion dates were not met, identifying problem areas and discussing how the problems will be solved; and discuss the expected impacts of delays and the steps planned to minimize these impacts.

Add additional milestones to the table below as needed.

Name	Estimated Completion Date	Description
ITD-PT Application Award timeline.	May 2024 ITD Board will determine project awards and funding levels.	Hopefully, we will be awarded our request for this project. We continue to explore options to fill our needs and determine vehicle spec's.
Prepare Vehicle Specifications	June 2024	Evaluate and finalize Vehicle Specifications based on needs and availability.
RFP/RFQ Issue Date	NA	At this time, we plan to purchase buses through the Georgia Statewide Contract but are still exploring options.
Award Date	August 15, 2024	Solidify our purchase source to confirm that we will purchase buses through the Georgia Statewide Contract.
ITD PT Funding Begins	October 1, 2024	
Start Date or Order Date for Rolling Stock, Equipment, and Technology Purchases	November 15, 2024	Place the order for buses.
Construction Completion Date or Delivery Date for Rolling Stock, Equipment, or Technology Purchases	May 15, 2025, through May 15, 2026	Take delivery of buses. Register buses, conduct lift inspections, DOT inspections, and place decals. Install and program communication equipment.
Contract Completion Date	September 15, 2026	Complete paperwork and close the contract.

[illegible]

NEPA does not apply to this project



## Selkirks Pend Oreille Transit Authority (SPOT) One-Time CARES Application for Replacing Four Buses

[illegible]

the International Trade & Development Commission. The Commission is an inter-governmental body that is made up of the different states. It has been set up to encourage trade and investment between the different states and to help them to develop their economies. It also helps them to solve any problems that they may have. The Commission has a number of different committees and working groups that deal with different aspects of trade and development. It also has a secretariat that provides technical assistance to the different states. The Commission has been very successful in its work and has helped many states to develop their economies and to improve their standards of living.

**Multiple choice**

1. In the past, people used to travel around in a (1) way. (2) of the way, they used to go by (3) ship. (4) of the way, they used to go by (5) train. (6) of the way, they used to go by (7) car. (8) of the way, they used to go by (9) plane. (10) of the way, they used to go by (11) boat. (12) of the way, they used to go by (13) bus. (14) of the way, they used to go by (15) taxi. (16) of the way, they used to go by (17) motorcycle. (18) of the way, they used to go by (19) bicycle. (20) of the way, they used to go by (21) foot. (22) of the way, they used to go by (23) horse. (24) of the way, they used to go by (25) elephant. (26) of the way, they used to go by (27) camel. (28) of the way, they used to go by (29) ostrich. (30) of the way, they used to go by (31) kangaroo. (32) of the way, they used to go by (33) platypus. (34) of the way, they used to go by (35) koala. (36) of the way, they used to go by (37) wombat. (38) of the way, they used to go by (39) possum. 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## Selkirks Pend Oreille Transit Authority (SPOT) One-Time CARES Application for Replacing Four Buses

[illegible][illegible][illegible][illegible]

Phone: 1 800 333 3964  
Email: [info@rsc.org](mailto:info@rsc.org)  
Web: [www.rsc.org](http://www.rsc.org)

## **Attachment C: NEPA/SSA/Rolling Stock Worksheet, Cont.**

### **Sole Source Aquifer Checklist**

**PROJECT NAME:** Bus Replacement for SPOT Service. This does not apply to the request.

#### **NAME OF SOLE SOURCE AQUIFER OR SOURCE AREA:**

- 1. Location of project:**
- 2. Project description.**
- 3. Is there any increase of impervious surface? If so, what is the area?**
- 4. Describe how storm water is currently treated on the site?**
- 5. How will storm water be treated on this site during construction and after the project is complete?**
- 6. Are there any underground storage tanks present or to be installed? Include details of such tanks.**
- 7. Will there be any liquid or solid waste generated? If so how will it be disposed of?**
- 8. What is the depth of excavation?**
- 9. Are there any wells in the area that may provide direct routes for contaminants to access the aquifer and how close are they to the project?**
- 10. Are there any hazardous waste sites in the project area....especially if the waste site has an underground plume with monitoring wells that may be disturbed? Include details.**
- 11. Are there any deep pilings that may provide access to the aquifer?**



**12. Are Best Management Practices planned to address any possible risks or concerns?**

**13. Is there any other information that could be helpful in determining if this project may have an effect on the aquifer?**

**14. Does this Project include any improvements that may be beneficial to the aquifer, such as improvements to the wastewater treatment plan?**

The EPA Sole Source Aquifer Program may request additional information if impacts to the aquifer are questionable after this information is submitted for review.

## Attachment C: NEPA/SSA/Rolling Stock Worksheet, Cont.

### Rolling Stock Worksheet

Subrecipient	Vehicle #	Year	Make/Model/Description	In Service	Out of Service	Current Mileage	Award ID	Fed Share	VIP FUNDS
Example	1FTNS2EL0DD802363	2022	E250 Van	11/04/22	05/01/23	5,600	C2376XX	\$ 42,238.00	
SPOT Bus	1FDWE35L67DB26555	2007	FORD Starcraft Starlite	6/1/2011	Not yet	236,324	FINDING	\$ 35,232.00	
SPOT Bus	1FDE4FS6ADA55814	2010	FORD Starcraft Allstar	3/1/2011	Not yet	247,557	FINDING	\$ 55,443.00	
SPOT Bus	1FDDE4FS3EDA48325	2014	FORD CHAMPION Challenger	05/01/14	Not yet	292,830	FINDING		\$ 69,059.00
SPOT Bus	1FDDE4FS3FDA14905	2015	FORD Elkhart ECII	5/1/2015	Not yet	315,031	FINDING	\$ 46,732.00	

## Attachment D: Demonstration of Need

### Congressional Application Attachment D: Demonstration of Need

1. Type of Service (Check all that apply):

- ☒ Fixed Route  
☐ Deviated Fixed Route  
☒ Demand/ Response

2. Service Area (Check one)

- ☐ City  
☐ County  
☒ Multi-County  
☐ Other (Please Specify):

3. Connectivity:

Do you connect with other modes of transportation? Check all that apply.

- ☐ Urban Public Systems  
☐ Intercity Carriers  
☐ Airports/ Trains  
☐ Other transit operators in your region (please list below):

4. Ridership:

Estimate the average number of rides: Per Day \_\_\_\_\_ Per Year 138,000

Briefly describe your ridership over the last two years: -

Our ridership in Bonner County continues to increase. We will exceed 138,000 rides this year based on a very conservative estimate. We actually expect to reach this year's goal of 150,000 rides. We surpassed one million rides in February 2023.

5. Days/ Hours of Service:

List days of the week and hours transit provider is in service

Seven days a week, 12 hours day in Bonner County. Four days per week, 7 hours each day in Boundary County.

## Back up Documentation

### **SPOT Ridership**

<b><u>2023</u></b>	<b><u>Fixed</u></b>	<b><u>Para</u></b>	<b><u>Bonnors Ferry</u></b>	<b><u>Mountain Route</u></b>	<b><u>Total</u></b>
23-Jan	4672	563	230	22489	27954
23-Feb	4200	509	204	19502	24415
23-March	4835	600	261	19601	25297
23 April	4197	477	152	4612	9438
23 May	4489	548	139	0	5176
23 June	4199	565	190	0	4,954
23 July	5986	489	129	628	7232
23 August	6820	536	216	0	7572
23 September	4231	547	149	2810	7737
23 October	4185	511	152	0	4848
23 November	4079	565	145	1214	6003
<b>2023 TOTAL</b>	<b>51,893</b>	<b>5,910</b>	<b>1,967</b>	<b>70,856</b>	<b>130,626</b>
<b><u>2022</u></b>	<b><u>Fixed</u></b>	<b><u>Para</u></b>	<b><u>Bonnors Ferry</u></b>	<b><u>Mountain Route</u></b>	<b><u>Total</u></b>
22-Jan	3986	365	136	20650	25137
22-Feb	3795	447	187	16777	21206
22-Mar	4399	538	277	12794	18008
22-Apr	3639	482	189	3470	7780
22-May	3752	467	191		4410
22-Jun	3827	588	185		4600
22-Jul	4417	480	202	494	5593
22-Aug	5132	596	217		5945
22-Sep	3888	545	223	2419	7075
22-Oct	4027	509	179		4715
22-Nov	3577	498	195	1815	6085
22-Dec	3776	478	237	21208	25699
<b>2022 TOTAL</b>	<b>48,215</b>	<b>5,993</b>	<b>2,418</b>	<b>79,627</b>	<b>136, 253</b>
<b><u>2021</u></b>	<b><u>Fixed</u></b>	<b><u>Para</u></b>	<b><u>Bonnors Ferry</u></b>	<b><u>Mountain Route</u></b>	<b><u>Total</u></b>
January	3334	270	111	9300	13015
February	3278	311	96	7894	11579
March	4345	414	111	6715	11585
April	3513	331	97	1531	5472
May	3949	299	69		4317
June	3782	375	119		4276
July	4420	388	169	524	5501
August	3965	460	139		4564
September	3392	459	123	3382	7356
October	3471	425	190		4086
November	3478	429	200	562	4669
December	3873	401	256	14,413	18943
<b>2021 TOTAL</b>	<b>44,800</b>	<b>4,562</b>	<b>1,680</b>	<b>44,321</b>	<b>95,363</b>
<b><u>2019</u></b>	<b><u>Fixed</u></b>	<b><u>Para</u></b>	<b><u>Bonnors Ferry</u></b>	<b><u>Mountain Route</u></b>	<b><u>Total</u></b>
September	4042	401	230	1269	5,942
October	4310	457	239		5,006
November	4473	395	226	393	5,487
December	4806	383	258	13013	18,460
<b>2019 TOTAL</b>	<b>56,599</b>	<b>5,019</b>	<b>2,924</b>	<b>35,514</b>	<b>100,056</b>

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Replacing Four Buses

5:27 PM  
10/13/23  
Accrual Basis

**Selkirks-Pend Oreille Transit Authority**  
**Summarized Balance Sheet**  
**As of September 30, 2023**

ASSETS	Bonner County	Boundary County	Total
<b>Current Assets</b>			
Checking/Savings	227,569.74	15,406.48	242,976.22
Accounts Receivable	1,038.00	342.00	1,380.00
Grant Funds Receivable	182,246.01	10,767.00	193,013.01
Total Other Current Assets	40,997.33	3,078.67	44,076.00
<b>Total Current Assets</b>	<b>451,851.08</b>	<b>29,594.15</b>	<b>481,445.23</b>
<b>Total Fixed Assets</b>	<b>1,427,011.11</b>	<b>72,360.37</b>	<b>1,499,371.48</b>
<b>TOTAL ASSETS</b>	<b>1,878,862.19</b>	<b>101,954.52</b>	<b>1,980,816.71</b>
<b>LIABILITIES &amp; EQUITY</b>			
<b>Liabilities</b>			
Current Liabilities	19,503.10	620.93	20,124.03
<b>Equity</b>	<b>1,859,359.09</b>	<b>101,333.59</b>	<b>1,960,692.68</b>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>1,878,862.19</b>	<b>101,954.52</b>	<b>1,980,816.71</b>

5:27 PM  
10/13/23  
Accrual Basis

**Selkirks-Pend Oreille Transit Authority**  
**Summary Profit & Loss Budget vs. Actual**  
**September 2023**

	Bonner County		Boundary County		Mountain Route		Total	
	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget
Total Income	92,150.00	126,206.82	7,168.00	6,297.00	13,029.00	7,464.88	112,347.00	139,968.70
Expenses:								
Administration	9,616.07	11,760.26	732.11	609.78	244.09	1,189.70	10,592.27	13,559.74
Operations	57,127.34	75,087.49	4,854.64	7,005.29	10,833.19	10,314.95	72,815.17	92,407.73
Preventative Maintenance	6,465.79	6,518.00	0.00	515.45	688.39	0.00	7,154.18	7,033.45
<b>Total Expenses</b>	<b>73,209.20</b>	<b>93,365.75</b>	<b>5,586.75</b>	<b>8,130.52</b>	<b>11,765.67</b>	<b>11,504.65</b>	<b>90,561.62</b>	<b>113,000.92</b>
<b>Net Ordinary Income</b>	<b>18,940.80</b>	<b>32,841.07</b>	<b>1,581.25</b>	<b>-1,833.52</b>	<b>1,263.33</b>	<b>-4,039.77</b>	<b>21,785.38</b>	<b>26,967.78</b>
Other Income/Expense	85.47	-74,060.08	0.00	0.00	0.00	0.00	85.47	-74,060.08
<b>Net Income</b>	<b>19,026.27</b>	<b>-41,219.01</b>	<b>1,581.25</b>	<b>-1,833.52</b>	<b>1,263.33</b>	<b>-4,039.77</b>	<b>21,870.85</b>	<b>-47,092.30</b>

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Replacing Four Buses

5:27 PM  
10/13/23  
Accrual Basis

**Selkirks-Pend Oreille Transit Authority**  
**Summary Profit & Loss Budget vs. Actual**  
**September 2023**

	Bonner County		Boundary County		Mountain Route		Total	
	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget
Total Income	92,150.00	126,206.82	7,168.00	6,297.00	13,029.00	7,464.88	112,347.00	139,968.70
Expenses:								
Administration	9,616.07	11,760.26	732.11	609.78	244.09	1,189.70	10,592.27	13,559.74
Operations	57,127.34	75,087.49	4,854.64	7,005.29	10,833.19	10,314.95	72,815.17	92,407.73
Preventative Maintenance	6,465.79	6,518.00	0.00	515.45	688.39	0.00	7,154.18	7,033.45
Total Expenses	73,209.20	93,365.75	5,586.75	8,130.52	11,765.67	11,504.65	90,561.62	113,000.92
Net Ordinary Income	18,940.80	32,841.07	1,581.25	-1,833.52	1,263.33	-4,039.77	21,785.38	26,967.78
Other Income/Expense	85.47	-74,060.08	0.00	0.00	0.00	0.00	85.47	-74,060.08
Net Income	19,026.27	-41,219.01	1,581.25	-1,833.52	1,263.33	-4,039.77	21,870.85	-47,092.30

5:27 PM  
10/13/23  
Accrual Basis

**Selkirks-Pend Oreille Transit Authority**  
**Summary Profit & Loss Budget vs. Actual**  
**October 2022-September 2023**

	Bonner County		Boundary County		Mountain Route		Total	
	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget
Total Income	811,519.10	1,120,732.30	74,685.18	82,303.82	555,672.40	329,254.86	1,441,876.68	1,532,290.98
Expenses:								
Administration	146,053.04	151,923.06	16,320.98	8,377.40	10,377.50	24,088.00	172,751.52	184,388.46
Operations	482,525.48	621,816.34	47,468.68	69,012.64	166,107.10	184,550.70	696,101.26	875,379.68
Preventative Maintenance	106,943.79	80,935.72	4,598.25	6,785.42	39,613.95	105,740.71	151,155.99	193,461.85
Total Expenses	735,522.31	854,675.12	68,387.91	84,175.46	216,098.55	314,379.41	1,020,008.77	1,253,229.99
Net Ordinary Income	75,996.79	266,057.18	6,297.27	-1,871.64	339,573.85	14,875.45	421,867.91	279,060.99
Other Income/Expense	-20,400.69	-392,481.00	-171.33	0.00	-329,382.60	0.00	-349,954.62	-392,481.00
Net Income	55,596.10	-126,423.82	6,125.94	-1,871.64	10,191.25	14,875.45	71,913.29	-113,420.01



**MEETING MINUTES  
SPOT**



**SELKIRK PEND OREILLE TRANSIT  
November 16, 2023**

**Nancy Lewis CALLED THE MEETING TO ORDER AT 11:00 A.M.**

**PRESENT:** Clif Warren, Colleen Culwell, Donna Griffin, Gary Kunzeman, Nancy Lewis, Ron Smith, Shannon Pittman, Zale Palmer

**Absent:** Wally Cossairt

**Public Comment Period:** No comments.

**MINUTES:** Approve minutes of the October 19, 2023 regular meeting as presented.

**Motion to approve the minutes of the October 19, 2023 regular meeting as presented. Zale Palmer/ Gary Kunzeman. All in favor. Approved**

**FINANCIAL REPORTS:**

Accept Financial Reports for October.

**Motion to accept the financial reports for October. Clif Warren/ Zale Palmer. All in favor. Approved**

Approve payment of prepaid bills and outstanding bills.

**Motion to approve payment of prepaid bills and outstanding bills. Zale Palmer/ Ron Smith. All in favor. Approved**

**STAFF REPORTS:**

**Ridership:** Donna Griffin reported that ridership for the fixed route overall is on track to exceed last year's ridership. Same for the para transit. Boundary County ridership is still lower. Ridership might come out to match last year. Donna is still working on more marketing – meeting in person with groups that may utilize the service. Schweitzer is planning to open for the season November 24<sup>th</sup>.

**Operations:** Donna Griffin reported AAA sent a contract extension that includes \$10,500 more in funding than the original contract. Disposing of three old buses that have previously been declared surplus property. They are not worth stripping for parts. Attorney has provided a checklist to follow. Buses to be disposed of are 107, 111, 106. Received approval to install a bench at the fairgrounds. The fairgrounds is removing their porta potty that our drivers use. Drivers will be told to utilize the facilities at the Red Barn once ski season opens. Feds are requiring that we use the GTSF system to upload our fixed route stop locations into their system.

**COMMITTEE REPORTS:**

- A. Boundary County Service Development Committee:** Ron Smith reported they are watching the ridership numbers. Discussing discontinuing the Tuesday trips to Sandpoint. May possibly change it to an in-town day.

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Replacing Four Buses

- B. Finance Committee Update:** The financial reports were reviewed and approved. Zale reported the committee discussed mechanic pay increase not covered last month's discussions of driver & admin pay increases. Committee recommends an increase. It has been one year since the krugerrand was placed in lost and found, however the prosecutors office has not released it to us yet. Committee reviewed the shelter grant balance. ITD approved to remove the installation of bike racks from the scope of work. Eureka is requesting additional funds for shelter construction due to increased cost of materials.

**ACTION & DISCUSSION ITEMS:**

- A. Action Item: Executive Session. Tabled.**
- B. Action Item: Authorize advertisement for Safety and Operations Manager position.** Donna distributed the job description for review. Board discussed various points. A special meeting has been scheduled for 10am November 28, 2023 to discuss further.  
No action taken.
- C. Action Item: SPOT staff pay increase**
- a. Mechanic.** Donna presented school district rate for entry level mechanic is \$23.39 up to \$29.63 for skilled mechanic. Looking for pay increase to \$24.50. An 8% pay increase for SPOT's mechanic would bring him to \$22.60/hr plus \$1 hazard pay.  
Motion to increase mechanic base pay rate to \$22.60 effective October 1, 2023 plus \$1 hazard pay already in place. Zale Palmer/ Gary Kunzeman. All in favor. Passed.
- b. Assistant Director.** Donna presented Shannon was awarded a 5% pay increase as approved for admin staff, but drivers were awarded an 8% pay increase. She does occasionally drive vehicles and assist with moving them for repair purposes. The Finance Committee recommends not awarding the additional 3%. This would raise her pay rate to \$24.50/hr including hazard pay.  
No action taken.
- D. Action Item: Consider a Christmas Bonus for employees.**  
Donna mentioned drivers would prefer gift cards instead of cash bonuses.  
Motion to award \$50 Christmas bonus for all employees via gift cards. Zale Palmer/ Gary Kunzeman. All in favor. Approved.

**E. Action Item: Grant Applications 2024 - 2026.**

- a. Two Year Congressional Application suggestions**
- i. Existing Services –** Donna plans to apply for funding for existing services, including Mountain Route which Schweitzer expects to continue past this current ski season.
- ii. Capital/Asset Replacement – Buses (replacement for existing services) –** Would include two Mountain buses, two Fixed Route buses, two Para Transit buses.
- iii. Add Demand Service in Bonner County –** Need county participation before this can move forward.
- iv. Transit facility –** Need a place where buses can be worked on, parked, etc. Donna is discussing various options with Bonner County and with City of Ponderay.
- Motion to authorize Donna to proceed with 5311 grant request for 2024-2026 and 5339 grant for capital/asset replacement. Gary Kunzeman/ Zale Palmer. All in favor. Passed.  
Grant requests for Bonner County demand service and transit facility tabled.
- b. One-time CARES Application suggestions –** Available in October 2024 and no match requirements.
- i. Communication Equipment**
- ii. Office Equipment**
- 1. Computers, phones, printer/scanner, and operating system.**



Motion to apply for one-time CARES grant for communication and office equipment. Zale Palmer/ Ron Smith. All in favor. Passed.

- c. VIP or CARES funding Bus replacement or rehab (fixed) – Available in October 2024 and no match requirements for CARES grant. Bus 219 requires a new engine and other substantial work. Or it may need to be replaced.

Motion to apply for funding via either VIP or CARES grants for replacement or rehab. Zale Palmer/ Ron Smith. All in favor. Passed.

- F. Action Item: Schweitzer Mountain Route. Contract received back from Schweitzer with federally required wording removed. ITD stated the wording is required. Wording was added back and ITD has approved the contract. Clif and Donna will deliver the contract to Schweitzer for signature.

Motion to authorize Nancy Lewis to sign the contract if it meets all requirements. Zale Palmer/ Gary Kunzeman. All in favor. Passed.



- G. Action Item: Boundary County Service. Discussed changing Tuesday service to Sandpoint. Motion to discontinue Tuesday service to Sandpoint and change it to local service day effective January 1, 2024. Ron Smith/ Zale Palmer. All in favor. Approved.

- H. Action Item: Financial Considerations.  
None.

COMMENTS FROM THE CHAIR AND BOARD MEMBERS: No comments.

Meeting adjourned 12:26 p.m.



**SPECIAL MEETING MINUTES  
SPOT**



**SELKIRK PEND OREILLE TRANSIT  
December 12, 2023**

Gary Kunzeman CALLED THE MEETING TO ORDER AT 8:20 A.M.

**PRESENT:** Clif Warren, Colleen Culwell, Donna Griffin, Gary Kunzeman, Nancy Lewis, Ron Smith, Shannon Pittman, Zale Palmer

**Absent:** Wally Cossairt

**Public Comment Period:** No comments.

**MINUTES:** Approve minutes of the November 16, 2023 regular meeting as corrected.

Motion to approve the minutes of the November 16, 2023 regular meeting as corrected. Clif Warren/ Ron Smith. All in favor. Approved

Approve minutes of the November 28, 2023 special meeting as presented.

Motion to approve the minutes of the November 28, 2023 special meeting as presented. Zale Palmer/ Gary Kunzeman. All in favor. Approved

**FINANCIAL REPORTS:**

Approve payment of prepaid bills and outstanding bills.

Motion to approve payment of prepaid bills and outstanding bills. Zale Palmer/ Clif Warren. All in favor. Approved

**STAFF REPORTS:**

**Ridership:** Donna Griffin reported that ridership for the Fixed and Para Transit routes for this year should exceed pre-Covid levels and also last year. Boundary County ridership is still lower. Mountain Route ridership for November was good even with little snow.

**Operations:** Donna Griffin reported 15 applications have been received so far for the Safety and Operations Manager position. There are 4-5 that look good. The hiring committee should plan to meet towards the end of December. The Mountain bus repair costs are still running high. Two of the rear engine buses are being worked on at RWC. The 2019 route buses are also encountering high repairs - mainly ball joints, brakes, etc. The drivers appreciated the holiday gathering and gift cards.

**COMMITTEE REPORTS:**

A. Boundary County Service Development Committee: Nothing to report.

B. Finance Committee: Nothing to report.

**ACTION & DISCUSSION ITEMS:**

- A. **Action and Discussion Item: Approve an option for funding for the cost of buses.** Revisited numerous cost increases from Northwest Bus Sales on three buses on order. ITD has approved an additional \$50,000 of funding to cover latest cost increase. This is sufficient to cover the \$24,000 additional cost of the bodies. Donna and Clif met with the attorney to review the options. Because the contract is with the WA purchasing group, we have no standing. The WA contract allows for cost increases up to 50%. The latest proposed cost of these buses is comparable to other recent purchases of similar items. Another option is to order under the GA contract. This contract allows for August/September 2023 delivery date with no price increases after the PO's are issued. GA quoted Turtle Top buses, which also have a heavy-duty AC. Donna needs to confirm change of scope with ITD changing from three buses to two buses. Noted quotes do not include interior cameras, which need to be added.

Motion to cancel the PO with the WA group, purchase two Turtle Top buses per GA contract with changes discussed, and also contingent on ITD approval of change of scope. Clif Warren/ Zale Palmer. All in favor. Approved.

**B. Action Item: Grant Applications 2024 - 2026.**

- i. **One-time CARES Application** – Donna plans to apply for funding for updating office computers and phone system, purchase AC compressor diagnostic machine, and scanning tool for codes. Total still to be determined.
- ii. **VIP or CARES or Two-Year Congressional Application** – VIP grant does not have enough available funds to cover the purchase of an additional demand bus. CARES has \$795k for the District and no match funds required. The 2-year congressional has \$1.1M available with match as a 5339. According to Donna, we don't have to decide on which funding path – can leave that up to ITD to decide which one would be a best fit. Will have a total of six buses under grant applications.

Motion to authorize Donna to proceed with applying for grants for six buses (2 Mountain buses + 4 Regular buses), marking the grant applications as scalable. Clif Warren/ Zale Palmer. All in favor. Passed.

- C. **Action Item: Financial Considerations.**  
None.

**COMMENTS FROM THE CHAIR AND BOARD MEMBERS:** No comments.

Meeting adjourned 9:21 a.m.



December 11, 2023

Donna Griffin  
Executive Director  
Selkirks-Pend Oreille Transit Authority  
31656 Highway 200, Box 8  
Ponderay, ID 83852

Ms. Griffin:

ABC Companies is presenting Selkirks-Pend Oreille Transit Authority a quotation for Turtle Top Terra Transit, Ford E450 cutaway shuttles. This quotation is based on the Georgia DOAS contract 99999-SPD-SPD0000212-0010.

Within this package you will find a quotation based on the requested specifications that were provided by your agency, this will include detailed contract options as well as requested options.

If there are any questions regarding this quotation, please do not hesitate to contact me directly. Thank you once again for your time and consideration.

Regards,

A handwritten signature in black ink, appearing to read "Geo Altevogt", with a stylized flourish at the end.

George Altevogt  
Vice President, SVT  
ABC Companies  
(410) 353-5353  
[galtvogt@abc-companies.com](mailto:galtvogt@abc-companies.com)  
[www.abc-companies.com](http://www.abc-companies.com)



**Turtle Top Terra Transit MD – Ford E450**  
**Selkirks-Pend Oreille Transit Authority (SPOT Bus)**  
**Georgia DOAS Contract #99999-SPD-SPD0000212-0010**

**Chassis Specifications:**

2025 Ford E450  
7.3L V8 gasoline  
6-Speed automatic transmission  
Wheelbase: 158"  
Tires: 225/75R16E BSW  
Valve extensions for dual inner wheels  
Nitrogen tire inflation  
14,500# GVWR  
Alternator: 240amp  
Fuel tank: 55 gallons  
MorRyde RS rear suspension system  
Front end alignment post production  
OnSpot tire chains  
Rear tow hooks

**Body Conversion:**

Five-sided roll cage with rust inhibitor  
Underbody foam sealed and undercoated  
Nobel Select composite exterior sidewalls  
Fiberglass front & rear caps  
Tinted t-slide windows 31" x 36"  
Interior height: 76"  
Entrance door: 30" clear opening  
Rear emergency door with upper and lower windows  
Diamond plate driver running board  
Fuel sender access panel in floor

**Flooring:**

Coosa composite 3/4" subfloor  
Altro 2.2mm, black floor covering  
Flooring cove-molded to seat rail



**Passenger Seating:**

Freedman Featherweight Mid High seating as per floorplan  
Molded black grab rail, top mounted (6)  
Under Seat Retractable lap belts – USR (13)  
Freedman Level #4 seat covers – TBD by SPOT Bus

**Driver Seating:**

Freedman Sport 2.0 driver seat with right hand arm rest  
Adnak power seat base  
Seat covered in Level #1 fabric, TBD by SPOT Bus

**Safety:**

Interior driver mirror, 6" x 16"  
Stanchion pole w/ modesty panel located behind driver with safety shield  
Stanchion pole with 36" right hand assist safety rail  
Stanchion pole with left hand assist located to left of entrance door  
Dual overhead grab rails, stainless steel  
Velvac remote/heated driver's mirrors  
White step nosing  
Rear backup camera with (2) blind-spot cameras, 7" LCD monitor  
First aid kit, 25 unit  
Fire extinguisher, 5lbs  
Road triangle kit  
Blood bone pathogen kit  
Rear backup alarm  
Exit warning light & alarm, all exits  
Roof escape hatch, low profile  
Seat belt cutter, shipped loose

**Electrical:**

Side mounted battery box with stainless steel tray  
Master body disconnect switch in battery box  
OEM AM/FM/BT radio with 4 speakers  
Transign 12V front destination sign  
As built wiring diagrams, USB flash drive  
Color coded high temp GXL wiring harness, with positive lock weatherproof connectors



LED overhead entry lighting  
LED interior dome lighting  
LED clearance/marker lighting  
Exterior midship turn signals

**Climate Control:**

Valeo 90k BTU A/C system  
Rear evaporator - 23047  
Roof mounted condenser - 25055  
TM-21 compressor  
65k BTU rear heater  
Heater booster pump  
Electric water shut off valves

**ADA Equipment:**

Braun Century II, 800lb lift, 34" wide platform with lift belt  
Double wheelchair door with window  
Q-Straint Max w/ 30" L track front/back per position (2)  
Wheelchair restraint storage bag (2)  
Wheelchair lift belt

**Warranty:**

Turtle Top Conversion: 5yrs/100,000 miles  
Ford Basic Vehicle: 3yrs/36,000 miles  
Ford Powertrain: 5yrs/100,000 miles  
Valeo A/C: 3yrs/unlimited miles

<b>TOTAL COST OF BUS</b>	<b>\$135,952.00</b>
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**Turtle Top Terra Transit MD – Ford E450**  
**Selkirks-Pend Oreille Transit Authority (SPOT Bus)**  
**Georgia DOAS Contract #99999-SPD-SPD0000212-0010**

**Chassis Specifications:**

2025 Ford E450  
7.3L V8 gasoline  
6-Speed automatic transmission  
Wheelbase: 176"  
Tires: 22575R 16E BSW  
Valve extensions for dual inner wheels  
Nitrogen tire inflation  
14,500# GVWR  
Alternator: 240amp  
Fuel tank: 55 gallons  
MorRyde RS rear suspension system  
Front end alignment post production  
Rear tow hooks

**Body Conversion:**

Five-sided roll cage with rust inhibitor  
Underbody foam sealed and undercoated  
Nobel Select composite exterior sidewalls  
Fiberglass front & rear caps  
Tinted t-slide windows 31" x 36"  
Interior height: 76"  
Entrance door: 30" clear opening  
Rear emergency door with upper and lower windows  
Diamond plate driver running board  
Fuel sender access panel in floor  
Sportworks DL2 bike rack  
Stop request system – pull cords, dual buttons & sign

**Flooring:**

Coosa composite ¾" subfloor  
Altro 2.2mm, black floor covering  
Flooring cove-molded to seat rail





**Passenger Seating:**

Freedman Featherweight Mid High seating as per floorplan  
Molded black grab rail, top mounted (8)  
Under Seat Retractable lap belts – USR (18)  
Freedman Level #4 seat covers – TBD by SPOT Bus

**Driver Seating:**

Freedman Sport 2.0 driver seat with right hand arm rest  
Adnik power seat base  
Seat covered in Level #1 fabric, TBD by SPOT Bus

**Safety:**

Interior driver mirror, 6" x 16"  
Stanchion pole w/ modesty panel located behind driver with safety shield  
Stanchion pole with 36" right hand assist safety rail  
Stanchion pole with left hand assist located to left of entrance door  
Dual overhead grab rails, stainless steel  
Velvac remote/heated driver's mirrors  
White step nosing  
Rear backup camera with (2) blind-spot cameras, 7" LCD monitor  
First aid kit, 25 unit  
Fire extinguisher, 5lbs  
Road triangle kit  
Blood bone pathogen kit  
Rear backup alarm  
Exit warning light & alarm, all exits  
Roof escape hatch, low profile  
Seat belt cutter, shipped loose

**Electrical:**

Side mounted battery box with stainless steel tray  
Master body disconnect switch in battery box  
OEM AM/FM/BT radio with 4 speakers  
Transign 12V destination – front only  
As built wiring diagrams, USB flash drive  
Color coded high temp GXL wiring harness, with positive lock weatherproof connectors





LED overhead entry lighting  
LED interior dome lighting  
LED clearance/marker lighting  
Exterior midship turn signals  
Safety Vision 4 camera system w/ sound

**Climate Control:**

Valeo 90k BTU A/C system  
Rear evaporator - 23047  
Roof mounted condenser - 25055  
TM-21 compressor  
65k BTU rear heater  
Heater booster pump  
Electric water shut off valves

**ADA Equipment:**

Braun Century II, 800lb lift, 34" wide platform with lift belt  
Double wheelchair door with window  
Q-Straint Max w/ 30" L track front/back per position (2)  
Wheelchair restraint storage bag (2)  
Wheelchair lift belt

**Warranty:**

Turtle Top Conversion: 5yrs/100,000 miles  
Ford Basic Vehicle: 3yrs/36,000 miles  
Ford Powertrain: 5yrs/100,000 miles  
Valeo A/C: 3yrs/unlimited miles

**TOTAL COST OF BUS**

**\$144,660.00**

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Replacing Four Buses



Quote

To: SPOT - Selkirks-Pend Oreille Transit  
Donna Griffin  
Director  
31656 Hwy 200 P.O. Box 8  
Ponderay, ID 83852  
208.263.3774

Quote Date: 1/5/2024  
Quote #: 24-AC01050914  
Revision: 1  
Quote Validity: 60 Days  
Estimated Lead-Time: TBD  
Payment Terms: Net 30  
Freight: TBD

Project		Quoted By	
SPOT Bus Mobiles, Base and Portable Radio Equipment		Adam Crippen	Ofc/Mobile: 509.789.0703
		E-Mail: adam.crippen@racom.net	
Item	Description	Ext Price	
<b>SPOT DMR System &amp; Subscribers</b>			
1	<b>SPOT Subscribers</b> <ul style="list-style-type: none"><li>• (9) TM9300 Mobiles, 40W, UHF, Dash Mount, DMR Tier II License, Antenna, Coaxial Cable, 5 Year Warranty</li><li>• (1) TM9300 Base Radio, 40W, UHF, Desktop Mount w/ Power Supply, DMR Tier II License, 5 Year Warranty</li><li>• (1) TP9300 Portable, Black, PKP, UHF, DMR Tier II License, High-Cap Battery, Antenna, Belt Clip, Single Bay Charger, 5 Year Warranty</li></ul>	\$	9,957.06
		\$	1,320.62
		\$	990.58
2	<b>Technical Services</b> RACOM Engineering and Project Management Services to include the following: <ul style="list-style-type: none"><li>• Programming and Installation of 9 Mobile Radios, 1 Base Radio, and 1 Portable Radio</li><li>• Base Antenna/coax for Office Desktop Radio requires physical attachment of antenna, routing of coax &amp; grounding to building. Building penetration will be required to complete installation as proposed.</li></ul>	\$	11,450.00
		<b>SPOT Sub-Total</b>	<b>\$ 23,718.26</b>
		Sales Tax 0.000%	\$ -
		<b>Freight</b>	<b>Included</b>
		<b>Project Total</b>	<b>\$ 23,718.26</b>
There will be a 3% convenience fee added to the total for using a credit/debit card as payment method.			
<b>Notes / Assumptions</b>			
1) NASPO Contract Pricing Applied, per NASPO Contract #00318 State of Idaho Participating Addendum			
2) This quotation is for a Tait DMR Tier II Subscribers & DMR Tier II Repeater System for SPOT. Equipment is software upgradable to support DMR Tier III operations.			
3) This quotation includes installation of the Tait Radios, no additional services provided			
4) Requires Schweitzer Ski Resort to allow access to desired installation site.			
5) Repeater does not include battery backup in the event of AC power loss.			
6) Proposal does not include radio system coverage drive testing or coverage guarantee.			
7) Proof of Idaho Sales Tax Exemption Required at time of signed contract			
8) Requires FCC Frequency Coordination and Licensing from "Repeater Project" Quote			
Proposal Accepted By: _____		Date: _____	

## Letters of Support

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### BONNER COUNTY EMERGENCY MANAGEMENT AGENCY

1500 Highway 2, Suite 101  
Sandpoint, ID 83864

Phone: 208-255-5681  
E-mail: [em@bonnercountyid.gov](mailto:em@bonnercountyid.gov)

January 4, 2024

Idaho Transportation Department  
Public Transit Office  
3311 W. State St.  
Boise, ID 83706

RE: Letter of Support –  
Replace High Mileage & High Maintenance Buses

To whom it may concern:

I am writing to express our agency's support for Selkirks-Pend Oreille Transit Authority (SPOT Bus). SPOT Bus is and has been an excellent resource for the citizens and the communities within Bonner County.

I recommend you consider SPOT Bus for the CARES Act One-Time Application to replace high mileage and high maintenance cost buses used for existing services.

This funding will allow for the purchase of three new fixed route buses, and one new demand response bus. These new buses will replace existing buses and provide safe, reliable public transit services in the two most northern counties in Idaho, Bonner, and Boundary County.

Bonner County Emergency Management has recently updated our Memorandum of Understanding with SPOT Bus as an emergency transportation resource for the citizens of Bonner County and allow SPOT Bus to sustain its existing capabilities.

Sincerely,

Bob Howard  
Director  
Bonner County Emergency Management



## CITY OF BONNERS FERRY

7232 Main Street  
P.O. Box 149  
Bonners Ferry, Idaho 83805  
Phone: 208-267-3105 Fax: 208-267-4375

---

January 11, 2024

Idaho Transportation Department  
Public Transportation Office

**RE: Grant Application for Replacing High Mileage/High Maintenance SPOT Buses**

To Whom It May Concern:

The City of Bonners Ferry wholeheartedly supports the Selkirks-Pend Oreille Transit Authority (SPOT) application for grant funding for new buses for the SPOT bus service. The City understands that the replacement of high mileage rolling stock is very important the reliable operation of a transit system.

Our City residents, and the entire community, benefit greatly from the services offered by SPOT. Currently, a demand service is offered in Bonners Ferry and Moyie Springs where people call in and are picked up at their homes and taken to requested destinations. They are then transported back to their homes a few hours later. It is a much-needed service for people in our community. SPOT also offers a route from Bonners Ferry to Sandpoint that is very popular, since many Bonners Ferry residents have doctor appointments or need to shop in Sandpoint.

A significant portion of our population does not have the ability to drive. And we have heard specifically from Bonners Ferry City residents that the SPOT bus service has been a tremendous help to them in getting to doctor appointments, shopping, and performing other errands. Please approve the request for grant funding for SPOT from now through September 2026, so these services can continue in our area.

Sincerely,

A handwritten signature in blue ink, appearing to read "Rick Alonzo".

Rick Alonzo  
Mayor

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Replacing Four Buses



Boundary Area Transportation Team  
P.O. Box 1418  
Bonners Ferry, ID 83805  
208-267-3838

01/05/2024

Idaho Transportation Department Public Transportation Office  
311 W State St  
Boise, ID 83706

Attention: Cares Act- One-Time Application

To Whom It May Concern:

This Letter will serve to endorse the Cares Act- One Time Application for replacing high mileage/high maintenance buses being submitted by SPOT (Selkirks- Pend Oreille Transit). Boundary Area Transportation Team members have discussed supporting all applications submitted by jurisdictions for support and are in full support of this project. This Project meets BATT's mission statement of "promoting the coordination, planning, development and maintenance of the transportation infrastructure inf Boundary County."

SPOT is looking at purchasing three fixed route buses and one demand response (curb to curb) bus to replace the current high mileage and high maintenance cost buses that SPOT has. Purchasing these buses will provide those in Bonner County and Boundary County continued safe and reliable transportation while keeping the buses on the road rather than in the repair shop.

The Boundary Area Transportation Team would appreciate your consideration of this project.

Thank You,

  
Commissioner Wally Cossairt  
Chairman Boundary Area Transportation Team

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Replacing Four Buses



KOOTENAI MAYOR  
Nancy Lewis

CITY Clerk-Treasurer  
Manda R. Corbett

COUNCIL  
MEMBERS  
David Sundquist  
Stephen Ferris  
Joseph Hafferty  
Daniel Schock

January 04, 2024

Federal Transit Administration  
Boise, ID

Re: Rural Transit System Award

To Whom It May Concern,

Mayor Lewis of the City of Kootenai would like to support the Selkirk Pend Oreille Transit Service (SPOT) as a consideration for the 2024-2026 5311 Rural Congressional Application supporting the following:

- Continuation of existing services
- Office and Support Equipment
- Communication Equipment
- CARES Act one-time application (3 new fixed route buses)
- 2024-2026 Rural Congressional Application (Purchase of two new mountain buses)

I, Nancy Lewis Mayor of the city of Kootenai have always held SPOT in the highest of standards.

The city of Kootenai has a long and proud history of collaboration between the City and SPOT. I recognize the importance of SPOT's commitment to provide efficient and responsive public transportation services that are coordinated in a manner to encourage ease of ridership and quality services.

The SPOT system is a very valued resource. SPOT services supply public transportation for resident visitors, and workers not only commuting to employment and medical centers but ensure connectivity to other surrounding city resources.

I, Nancy Lewis Mayor of the City of Kootenai am excited for the opportunity to help support this award. Please consider SPOT for the Rural Transit System of the Year Award.

Sincerely,

  
Nancy Lewis, Mayor





January 10, 2024

Idaho Transportation Department  
Public Transportation Office  
PO Box 7129  
Boise, ID 83709-1129

Re: SPOT CARES Grant Application for replacement busses

Public Transportation Team:

As the Director of the Boundary Economic Development Council, I would like to express strong support for the CARES grant application submitted for Selkirks Pend Oreille Transit Authority (SPOT).

The mission of the BEDC is to promote public infrastructure improvements that will lend themselves to the future growth and development of our community and its people. The services provided by SPOT are vital for the growth of our community and the well-being of our citizens, and contribute to the economic vitality of our county.

I understand that this grant will provide funds to replace four high mileage busses. This grant money is essential for the operation of SPOT, as it will reduce operating costs and help ensure the safety of the passengers.

Thank you for giving their grant application your full consideration.

Sincerely,

A handwritten signature in blue ink, appearing to read "David Sims", is written over a light blue horizontal line.

David Sims  
Director

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Replacing Four Buses



**BOUNDARY COUNTY**  
**P. O. Box 419**  
**Bonnors Ferry, ID 83805**

01/09/2024

Idaho Transportation Department Public Transportation Office  
311 W State St  
Boise, ID 83706

Attention: Cares Act- One-Time Application

To Whom It May Concern:

This Letter will serve to endorse the Cares Act- One Time Application for replacing high mileage/high maintenance buses being submitted by SPOT (Selkirks- Pend Oreille Transit). The Boundary County Board of Commissioners has discussed supporting all applications submitted by jurisdictions for support and are in full support of this project. This Project promotes the coordination, planning, development and maintenance of the transportation infrastructure in Boundary County."

SPOT is looking at purchasing three fixed route buses and one demand response (curb to curb) bus to replace the current high mileage and high maintenance cost buses that SPOT has. Purchasing these buses will provide those in Bonner County and Boundary County continued safe and reliable transportation while keeping the buses on the road rather than in the repair shop.

The Boundary County Board of Commissioners would appreciate your consideration of this project.

Thank You,

**BOUNDARY COUNTY**  
**BOARD OF COMMISSIONERS**



Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Replacing Four Buses

  
\_\_\_\_\_  
Tim Bertling, Chairman

  
\_\_\_\_\_  
Wally Cossaint, Commissioner

  
\_\_\_\_\_  
Ben Robertson, Commissioner



Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Replacing Four Buses



January 4, 2024

Idaho Transportation Department  
PO Box 7129  
Boise, Idaho 83707-1129

RE: *Letter of Support for Public Transportation Funding- SPOT (Selkirk Pend Oreille Transit)*

Dear ITD Reviewers:

The Bonner County Area Transportation Team (BCATT), which is one of the longest-standing coordination groups in Idaho, is made up of member jurisdictions and local coordination groups which are dedicated to the planning, development, and maintenance of multi-modal transportation in northern Idaho. Membership includes ITD-D1, LHTAC, Bonner County, Sandpoint Independent Highway District, ten local communities, two school-districts, the non-vehicular trails/pathways group, and Selkirk Pend Oreille Public Transit (SPOT). This group's membership regularly seeks sources for transportation funding from all available entities- public and private, at the state and federal levels due to the ever-present statewide growth rate in ridership.

As longtime advocates for the development and advancement of public transit services to serve the ever-growing population in northern Idaho, BCATT is proud to comment on the status of this regional provider who has successfully woven public transit into all types of transportation planning throughout the geographic area. Our support covers five distinct areas of need which are briefly described below in terms of utilization and funding source(s):

- 1) Operations, Admin., Preventive Maintenance for Existing Services- (5311 Rural Congressional)  
This category of funding covers the continuation of existing services, including three fixed routes and paratransit services in Bonner County; demand response service in Boundary County; and the same service category between Boundary and Bonner counties.
- 2) Office and Support Equipment for Operations- (CARES Act One-Time Application)  
This category covers replacement of outdated systems, including telephone, updated operating systems and software; purchase of diagnostic tools for needed bus repairs.
- 3) Communication Equipment (CARES Act One-Time Application)- These funds will be used to purchase Nine-TM9300 40 W UHF Dash-mount mobile radios, one base-radio, as well as the programming and installation of the same.
- 4) Purchase of three new buses (fixed route) and one new demand-response bus; replace the outdated/high-maintenance vehicles for use in the two-county service area. (Cares Act One-Time Application)
- 5) Replace high mileage/ high maintenance **Mountain Route buses** with two new heavy-duty vehicles which will transport larger groups of passengers on mountainous route to and from Schweitzer Mountain ski destination (2024-2026 / 5339 Rural Congressional Application)

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Replacing Four Buses

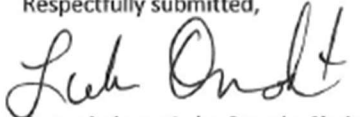
(2)

BCATT is very proud of the dedication and sincere perseverance that the Selkirk-Pend Oreille Transit Authority (SPOT), exudes in every action it has taken in serving the people who live, shop and recreate in the two Northern-most counties of Idaho.

Over the decade of growth, and cooperation with the other local jurisdictions/organizations that value their innovative approach to public service, SPOT has manifest a model community- partnership with the entire geographic area that North Idaho occupies. Its involvement with the local jurisdictions, service groups, and individual riders has rendered it a Community Star.

BCATT will continue to support this outstanding model of community service and outreach and urge your positive consideration of this request for funding.

Respectfully submitted,



Commissioner Luke Omodt, Chair

## City of Moyie Springs



TELEPHONE (208) 267-5161  
POST OFFICE BOX 573  
MOYIE SPRINGS, IDAHO 83845  
FAX (208) 267-5161

January 10<sup>th</sup>, 2024

### **Idaho Transportation Public Transit Office**

**RE: Selkirks – Pend Oreille Transit Authority (SPOT Bus)**

**Project : CARES ACT One-Time Application**

To Whom It May Concern,

The City of Moyie Springs would like to give our total support for the Selkirks -Pend Orielle Transit Authority (SPOT Bus) in their 2024-2026 5311 Rural Congressional Applications. The service they are providing to our City and community in assisting residents in their transportation needs and is very welcomed. This service in our rural area providing transportation for groceries, and doctor or other appointments is a necessity for some residents and the City appreciates the SPOT Bus including our area in their routes. The City benefits as well as the riders.

Please consider the Selkirk -Pend Orielle Transit Authority (SPOT Bus) for grant funding to continue to provide their services. The City of Moyie Springs acknowledges the costs associated with these systems for maintenance and operations and we support the SPOT Bus in their efforts of find funding solutions to make our community a better place to live.

Thank you for your consideration,

Donna Wilson-Funkhouser, City Clerk/Treasurer

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Replacing Four Buses



January 3, 2024

RE: Selkirk – Pend Oreille Transit

To Whom It May Concern:

The Area Agency on Aging of North Idaho (AAANI) has a vested interest in transportation for the senior population in the northern five counties of Idaho. In accordance with Section 306 of the Older American's Act, we are required to assure that continuing efforts are made to make transportation services available to older individuals residing within the geographical boundaries of our Area. We are also mandated to provide transportation services by the Idaho Senior Services Act, which states: "Transportation Services (IDAPA 15.01.01.013.03.l) designed to transport eligible clients to and from community facilities/resources for the purposes of applying for and receiving services, reducing isolation, or otherwise promoting independence."

AAANI clients are provided transportation to healthcare services, pharmacies, shopping (including grocery stores), senior centers, and miscellaneous excursions to help maintain their independence. The populations that we primarily serve include seniors aged 60 and over. Our goal is to enable older adults to live in their own homes as long as they can, safely and with independence.

The Selkirk-Pend Oreille Transit (SPOT) is critical to our goal of helping seniors maintain their independence and enjoy an increased quality of life. SPOT services have significantly helped address the need for public transportation with fixed route buses for many seniors in the Sandpoint area in Bonner County, and curb to curb service in Bonners Ferry area in Boundary County. SPOT's paratransit service for individuals with disabilities is essential for homebound seniors to access needed services, such as for medical services or social assistance agencies. The SPOT transportation service is an intricate and necessary process for the senior population to achieve their goals of remaining safely in their own homes.

Please let me know if you have any questions or need further clarification regarding transportation for seniors. It is a vital service that we need to provide in our state.

Sincerely,

Sage Stoddard  
Director  
Area Agency on Aging of North Idaho

## **Selkirk Pend Oreille Transit VEHICLE MAINTENANCE PROGRAM**

A schedule for vehicle maintenance on all every transportation vehicle is kept to maintain all vehicles in good operating condition.

### **Schedule -**

**Daily** – Pre trip and Post trip inspections will be performed on all vehicles that will be in service that day

**Monthly** – Maintenance inspection and lubrication for wheelchair lifts, wheelchair ramps and all vehicles door tracts, hinges and latches.

**Quarterly** – A vehicle inventory report is conducted. This report is done to check to see if equipment is missing or needs replace in each transit vehicle.

**Six Months** – This includes but is not limited to: Change seasonal tires and replace as needed; Inspect Brake Pads; Inspect Shocks / Struts; Inspect Front and Back suspension; and inspect lug bolts.

**Annually** – The following will be performed at least annually or every 35,000 – 45,000 miles, whichever comes first. This includes but is not limited to: Inspect and/or replace Air filter; Flush radiator and replace anti-freeze; Inspect and/or replace battery and cables; replace Spark Plugs, spark plug wires, distributor cap / ignition rotor; inspect and/or replace power steering fluid, belts, fuel pressure regulator, hoses, and cabin air filter.

**As Needed** – This will includes but is not limited to: oil changes (see requirements for services to be performed during an oil change) to be performed every 3,000 –5000 miles or sooner if needed; windshield repair; upholstery repair and chaise repairs.

A Service record (Appendix6) is kept on an ongoing basis to record all services performed and vehicles. This report is kept by vehicle with the receipts following in the vehicle binder.

### **DAILY MAINTENANCE SCHEDULE**

Prior to putting a vehicle into service each day a pre-inspection will be performed by the driver on the vehicle. At the end of that vehicle's service day the driver will perform a post-inspection on the vehicle. This inspection includes under the hood fuel levels and hoses and/or belts.

## **MONTHLY MAINTENANCE AND LUBRICATION INSPECTION**

This inspection is to check and lubricate wheelchair lifts, ramps, door tracts, hinges and latches.

## **TWICE A YEAR MAINTENANCE SCHEDULE – Typically spring and fall**

- Change and/or Replace Tires
- Inspect Brakes-Pads
- Inspect Shocks / Struts
- Inspect Front and Back suspension
- Inspect Lug bolts

## **ANNUAL MAINTENANCE SCHEDULE**

The following services will be performed on each vehicle annually or every 35,000 to 45,000 miles, whichever comes first.

- Inspect and/or Replace Air filter
- Flush radiator and Replace Anti-freeze
- Inspect and/or Replace Battery and Cables
- Replace Spark plugs
- Replace Spark plug wires
- Replace Distributor cap / Ignition rotor
- Inspect and/or replace Power steering fluid
- Inspect CV boots/joints or Drive shaft/U-joints
- Inspect/Replace Belts
- Inspect/ Replace Fuel pressure regulator
- Inspect and/or Replace Hoses
- Inspect and/or Replace Cabin air filter

**AS NEEDED** - OIL CHANGE will be performed on each vehicle every 3,000-5,000 miles or sooner if needed. The following will be included during each oil change.

- Check Coolant fluid & level
- Inspect Lug bolt
- Top off Washer fluid
- Check/Top off Power steering fluid & level
- Check/ Top off Brake fluid & level
- Check differential fluids & level
- Check Transmission fluids & level
- Check transfer case fluids & levels
- Replace Oil filter
- Change engine oil
- Perform a 14 Point inspection
- Test Drive



Lube Chassis fittings  
Wash Windows inside & out  
Dust interior  
Vacuum interior  
Check/ Replace Wiper blades  
Check? Replace Air filter  
Check/ Replace Battery  
Check Exhaust system  
Check Tires  
Check Air Pressure in tires  
Lube Fittings on Steering linkages  
Lube Ball joints  
Lube Drive shaft  
Check all Gas filters  
Install next Oil change sticker  
Lube Drive shaft  
Check all Gas filters  
Install next Oil change sticker

## **EVERY SPRING AND FALL**

Change and/or Replace Tires  
Inspect Brakes-Pads  
Inspect Shocks / Struts  
Inspect Front and Back suspension  
Inspect Lug bolts



# SELKIRKS-PEND OREILLE TRANSIT STRATEGIC PLAN

*NOVEMBER, 2015*



## Table of Contents

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## ACKNOWLEDGMENTS

The following people contributed to the development of this strategic plan:

Erik Brubaker, City of Ponderay

George Eskridge, Idaho Public Transportation Advisory Council

Marion Johnson, SPOT Manager

Susan Kiebert

Carol Kunzeman, City of Ponderay

Nancy Lewis, City of Kootenai

Carrie Logan, City of Sandpoint

Devin Marks, Schweitzer Mountain Resort

Saegen Neiman, Bonner County

Carole Richardson, Plangineering

Annie Shaha, City of Dover

Clif Warren

Bill Williamson, Schweitzer Mountain Resort

Bill Wright, SPOT Driver

Jared Yost, City of Sandpoint

## 1. INTRODUCTION

In 2011, the cities of Dover, Sandpoint, Ponderay and Kootenai launched a public transportation system offering fixed route service connecting each of the four cities. The City of Dover assumed the role of operator for the community transit system, using Federal Transit Administration funding with matching funds provided by Sandpoint and Ponderay.

The Selkirk-Pend Oreille Transit (SPOT) system was an immediate success, and ridership has grown steadily over the past four years. SPOT's early achievements are a testament to the effectiveness of our collaborative approach. SPOT successes and lessons learned offer a valuable statewide model for other transit systems in Idaho, demonstrating the power of partnerships in addressing critical community needs.

Our transit system's success has caught the attention of the Idaho Transportation Department and other organizations who are interested in seeing the system expand to serve new geographic areas. Recently, SPOT was encouraged to initiate demand-response service to serve a critical transportation need in Boundary County. SPOT has stepped to the plate and is currently providing limited demand response service within Boundary County, with a weekly inter-city connection between Bonners Ferry and Sandpoint.

Looking ahead, SPOT's leadership team desires a deliberate, informed approach to future expansion opportunities, so that the system's growth does not outpace available resources.

## PLANNING PROCESS

In the summer of 2015, SPOT's leadership team developed this strategic plan to set priorities, focus energy and resources, validate investment decisions, and enhance the organization's legitimacy in the eyes of funders, customers and stakeholders.

In discussing a vision for the organization, our team recognized that forward momentum would require sustained motivation and commitment by SPOT's leaders and partners.

Understanding that each person is motivated by his or her own values, identifying common values for our leadership team and the communities we serve was a critical first step.

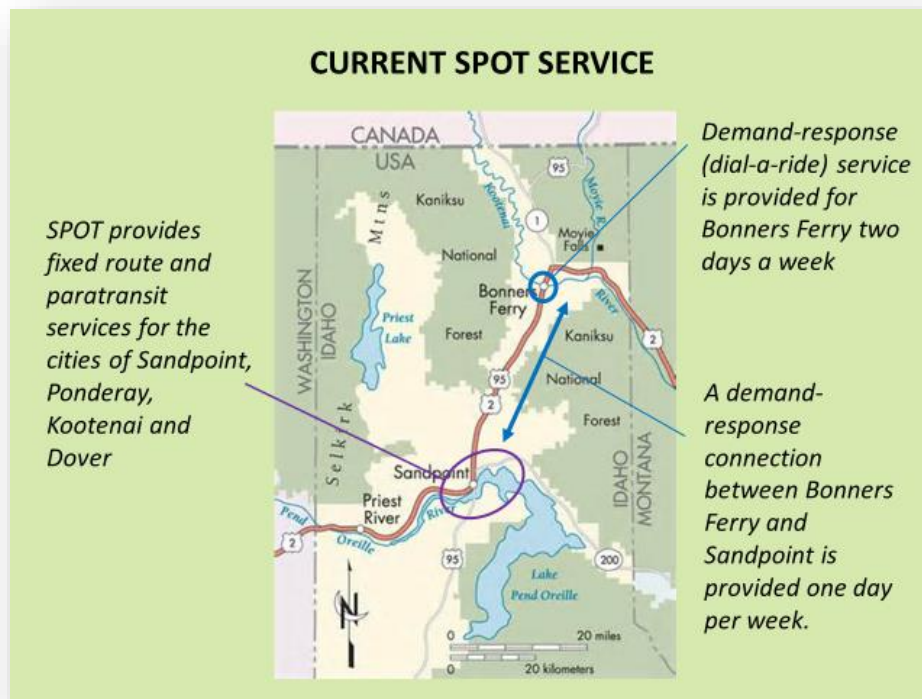
Values that could be positively influenced by SPOT led to the development of SPOT's vision statement. We then established a set of goals and objectives to be accomplished within the next five years to support the vision, and confirmed that SPOT's current mission provides a solid footing on which to start.





## 2. CURRENT ORGANIZATION, MISSION AND SERVICE

SPOT is a cooperative effort, formed through a memorandum of understanding between the cities of Dover, Sandpoint, Ponderay and Kootenai. Our oversight board, which includes the mayors of each city and an ex-officio member at large, is supported by a technical committee of staff members from each city plus a representative from Schweitzer Mountain Resort.



### MISSION

A COOPERATIVE EFFORT OF AREA MUNICIPALITIES TO PROVIDE CONVENIENT, SAFE AND RELIABLE PUBLIC TRANSPORTATION FOR RESIDENTS AND VISITORS TO EMPLOYMENT, RECREATION AND SERVICE DESTINATIONS.

Our mission is to provide convenient, safe and reliable public transportation for residents and visitors to employment, recreation and service destinations in the area.

Currently, fixed route service in the Sandpoint Area includes two routes connecting the four cities, with hourly service seven days per week. SPOT also provides paratransit service within the four city area.

For residents of Boundary County, SPOT recently initiated essential demand-response service within Bonners Ferry two days per week. We also offer a connection from Bonners Ferry to Sandpoint one day per week, which allows access to critical health care services, shopping and other basic needs.

### 3. WHAT WE VALUE

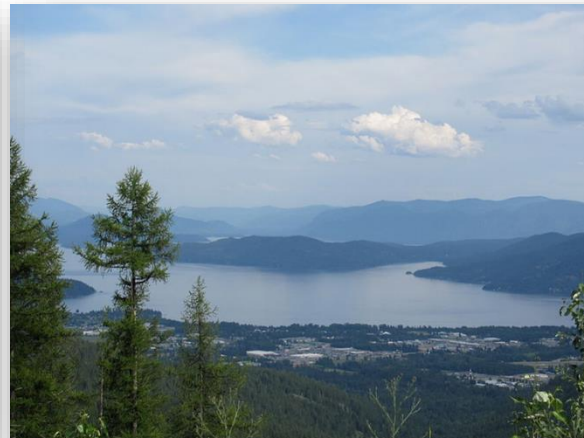
#### PEOPLE

SPOT riders inspire us! Coming from all walks of life, their appreciation for SPOT is a source of pride for us. We work hard to earn their trust and to keep it through friendly, excellent service. Hearing customers refer to SPOT as “my” bus, not just “the” bus, is music to our ears.



#### PLACES

From the Pend Oreille River to the scenic Selkirk Mountains, a ride with SPOT showcases magnificent natural beauty, clean air and water, and artistic, livable communities with a small-town feel. SPOT is privileged to help preserve these advantages for future generations, by reducing traffic congestion and fossil fuel emissions.





## PROSPERITY

Prosperity has many faces. SPOT fosters economic prosperity by providing businesses with access to the regional workforce, and helping to reduce employee commuting costs.

Elderly, disabled, low income and other socio-economically disadvantaged people depend on affordable, accessible transportation. Without it, many could not access medical services, shop for necessities, or get to work, and may become isolated in their homes. SPOT provides essential travel options to reduce these serious health and safety risks.



## PASSION

There is no better feeling than helping others. We get a big charge out of solving problems for people, and sharing lessons learned so that other transit systems can also succeed.

## 4. OUR VISION



### Vision Statement

- SPOT is the people's choice for travel throughout North Idaho.
- We will continue to help preserve North Idaho's human and natural environments for generations to come.
- We are innovative, taking advantage of new technology to stay cost-effective and affordable.
- SPOT is recognized and leveraged as a valuable asset for economic development and community vitality.
- Our strong partnerships and strategies for self-reliance are a national model.

## 5. STRATEGIC PLAN

SPOT's strategic plan covers goals and objectives for these five areas, to support SPOT's ultimate vision:

- Ridership
- Rider Access and Convenience
- Partnerships
- Stability and Sustainability
- Environmental Stewardship.

The strategic planning team established long-range goals for each of these areas, and developed objectives to be accomplished over the next five years. The "SMART" principle was used to make goals and objectives *specific, measurable, achievable, realistic and time-bound*. Table 1 lists goals and objectives along with the anticipated year for action. SPOT's technical advisory committee will maintain an action plan (Appendix C) to monitor progress and accomplishments.



Table 1. SPOT Strategic Plan

SPOT STRATEGIC PLAN		2015	2016	2017	2018	2019
<b>GOAL 1: INCREASE RIDERSHIP</b>						
1A	Prepare and implement a marketing and public information plan by December, 2016, aimed at expanding SPOT's customer base, improving information on how to ride, and protecting/enhancing SPOT's brand.		◆			
1B	Get SPOT's routes and stops on Google Transit by December, 2015.	◆				
1C	Fully implement the Double Map app by December, 2015.	◆				
1D	Perform community and rider surveys in 2016 to identify barriers for current and potential customers, and to gauge the popularity of potential expansion options.		◆			
1E	Work to increase public awareness by issuing regular press releases about SPOT activities.		◆	◆	◆	◆
<b>GOAL 2: IMPROVE RIDER ACCESS, CONVENIENCE AND AMENITIES</b>						
2A	Add third route to serve airport, food bank, residential and medical area.		◆			
2B	Perform an annual review of routes, stop frequencies, and operating hours; make adjustments if appropriate to improve convenience for riders.	◆	◆	◆	◆	◆
2C	Add shelters and bicycle racks to 10% of stop locations by 2016 and an additional 10% by 2018.		◆		◆	



SPOT STRATEGIC PLAN		2015	2016	2017	2018	2019
2D	Expand on-board bicycle accommodation on all coaches by 2018.				◆	
2E	Work to increase frequency of fixed route services (ongoing).	◆	◆	◆	◆	◆
<b>GOAL 3: LEVERAGE PARTNERSHIPS TO EXPAND SERVICE AND IMPROVE THE SYSTEM</b>						
3A	Integrate SPOT with Schweitzer Mountain Resort's transportation needs and funding. Implement a new route serving the mountain beginning November 2016.		◆			
3B	Coordinate with Bonner County and/or other partners to become active participants in SPOT by 2017.			◆		
3D	As roadway projects are proposed, coordinate with BCATT, BATT, ITD, local cities and counties, to include stop furnishings, pedestrian access and safety features, and other transit infrastructure needs.	◆				
3E	Develop a sponsorship program for stop furnishings ("adopt a stop") by 2016.		◆			
3F	Coordinate with land use agencies to incorporate SPOT needs in development reviews by December 2015.	◆				
3G	Coordinate with social services agencies to implement Demand-Response service within in the Sandpoint area by 2016.		◆			
3H	Provide regular (annual) updates to local government agencies and civic groups.	◆	◆	◆	◆	◆

SPOT STRATEGIC PLAN		2015	2016	2017	2018	2019
<b>GOAL 4: INCREASE ORGANIZATIONAL AND FINANCIAL STABILITY</b>						
4A	Evaluate alternate governance structures and select desired approach by 2017.	◆				
4B	By 2017, revise current governance structure to reduce political risks and allow for easier service area expansion.			◆		
4C	On an ongoing basis, develop and expand SPOT's internal capacity and resources through training and grant opportunities.	◆	◆	◆	◆	◆
4D	Update this list of objectives and action items quarterly.	◆	◆	◆	◆	◆
4E	Identify and select performance measures for SPOT and report on them annually		◆			
4F	Create an endowment or other long-term donation opportunity for SPOT, after Objective 4B is complete.				◆	
<b>GOAL 5: PROMOTE ENVIRONMENTAL STEWARDSHIP</b>						
5A	Explore other public transportation services including park and ride, vanpool and rideshare, as program champions are found.					◆
5B	Report annual emission reductions due to rides on SPOT on the SPOT website, beginning in 2017.			◆	◆	◆
5C	Add a seat on the TAC for a designated environmental advocate.	◆				





SPOT STRATEGIC PLAN		2015	2016	2017	2018	2019
5D	Consider energy efficiency options with next bus purchase.					◆
5E	Consider solar technology and other energy efficient options for shelters with next significant installation project.					◆

## APPENDICES

## APPENDIX A – FUNDING INVENTORY

## STATE AND FEDERAL FUNDING SOURCES

In 2012, Congress enacted new federal transportation funding legislation known as “MAP-21” (Moving Ahead for Progress in the 21<sup>st</sup> Century). The majority of funding for transit systems and services in the country comes from this federal transportation act.

MAP-21 contains provisions for funding programs administered by the Federal Transit Administration (FTA), and the Federal Highway Administration (FHWA), which are found in Chapter 53 and 23 of the Code of Federal Regulations respectively. While the lion’s share

of transit funding is contained in Chapter 53, there are some transit funding opportunities within the Highway program in Chapter 23.

Much of the federal transportation funding that is available to rural areas in Idaho State will flow through the Idaho Transportation Department (ITD), however there are several direct-federal programs that SPOT could explore; specifically direct-federal funding that is available to tribes and for projects that improve access to federal lands. A summary of MAP-21 programs for which transit activities may be eligible follows.

---

### *FEDERAL TRANSIT PROGRAMS ADMINISTERED BY ITD*

#### **5310 Enhanced Mobility of Seniors and Individuals with Disabilities**

- Former New Freedom program has been rolled into the 5310 program
- At least 55% of Idaho’s program funds must be spent on capital project planning, design and implementation specifically for seniors and individuals with disabilities when public transportation is insufficient, inappropriate or unavailable.
- Remaining 45% can be used for projects that improve access to fixed route service and decrease reliance by individuals with disabilities on paratransit.
- Capital 80% federal funding; 20% match
- Operating 50% federal funding; 50% match
- Projects must be identified within a Coordinated Public Transportation Human Services Transportation Plan

#### **5311 Rural Formula Funding**

- Eligible recipients are states and Indian tribes. Subrecipients may be state or local governments, nonprofits, public transportation operators or intercity bus services.
- Eligible activities are planning, capital, operating, JARC projects, and acquisition of public transportation services.
- Amount that comes to Idaho is dependent on vehicle revenue miles. SPOT can help increase Idaho’s share by increasing ridership.

- Low-income populations in rural areas is also a formula factor.
- Data collection required
  - Annual revenue
  - Sources of revenue
  - Total annual operating costs
  - Total annual capital costs
  - Fleet size and type, related facilities
  - Vehicle revenue miles
  - Ridership
- Capital 80% federal funding; 20% match
- Operating 50% federal funding; 50% match

**5311(f) Intercity**

- 15% of the state's 5311 funds have to go to intercity service
- Planning and marketing for intercity transportation
- Capital
- Operating through purchase of service agreements, etc
- Coordinating rural connections between small public transportation operations and intercity bus carriers

**5319 Bicycle Facilities**

- Providing shelters and parking facilities for bikes near transit facilities
- Installing equipment for bikes on buses
- 90% federal funding; 10% local match

**5324 Emergency Relief**

- Capital projects to protect, repair, reconstruct or replace equipment and facilities after a governor-declared disaster
- Transit agency operating costs related to evacuation, rescue, temporary service or changing routes before, during or after an emergency in an a directly-affected area.

**5326 Transit Asset Management**

- Will be a future requirement for recipients to manage capital assets and prioritize investments.
- There will likely be a technical assistance program.

**5339 Bus and Bus Facilities Formula grants**

- Capital 80% federal funding; 20% local match

**RTAP**

- Supports a variety of technical services and training opportunities for transit operators in rural areas.
- Includes scholarships to cover tuition and expenses for individuals to attend training courses, workshops and conferences.

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**OTHER FEDERAL FUNDING****5311(c) Tribal Transit Program** (\$25M for tribes by formula and \$5M discretionary nationally)

- This program is administered directly by the Federal Transit Administration (FTA), not ITD.
- \$25 million annually is available nationally, and is allocated to tribes by formula. There is no match required for the formula funds.
- A recipient that is an Indian tribe may use funds apportioned under this subsection to finance public transportation services provided by a non-tribal provider of public transportation that connects residents of tribal lands with surrounding communities, improves access to employment or health care, or otherwise addresses the mobility needs of tribal members.
- Award amounts are based on revenue miles and number of low-income individuals residing on tribal lands
- There has been no formula allocation for the Kootenai Tribe in Idaho under this program, however other neighboring tribes do receive apportionments. 2015 apportionments included:
  - Confederated Salish and Kootenai Tribes (Montana) \$473,565
  - Coeur d'Alene Tribe/Citylink (Idaho) \$302,689
  - Kalispel Tribe (Washington) \$40,998
- An additional \$5 million annually is available nationally for competitive application. (The Idaho Kootenais should be eligible applicants for this portion of the program.) There is a 10% match required for the competitively awarded funds.



**Tribal Transportation Program**

- Separate from the Tribal Transit Program
- This program is jointly administered by the Federal Highway Administration and Bureau of Indian Affairs.
- Historically used for roadways, but eligible activities include planning, design and construction of transit and non-motorized transportation projects.

**Transportation Investment Generating Economic Recovery (TIGER)**

- TIGER is a nationally competitive funding program for transportation projects that have a significant national or regional impact. A broad array of projects are eligible for TIGER funding.
- Competition is typically fierce, however, and projects must demonstrate significant benefits for safety, economic competitiveness, state of good repair, livability and/or environmental sustainability.
- Most of SPOT's smaller capital improvements and bus purchases would not have the broader regional or national significance to compete well in this program. However, as the SPOT team continues to collaborate, the team may identify larger initiatives requiring the participation of multiple partners, for which the TIGER program could be considered.
- This is a direct federal program that is not administered by ITD.

**Surface Transportation Program (STP)**

- \$10 billion nationally in STP flexible funding. Non-motorized transportation facilities, transit capital projects and public bus terminals and facilities are eligible.
- In Idaho, STP funding for local agencies is administered by the Local Highway Technical Assistance Council (LHTAC). Projects within Bonner County are prioritized by the Bonner County Area Transportation Team (BCATT) and within Boundary County by the Boundary Area Transportation Team (BATT).

**Transportation Alternatives Program (TAP)**

- Construction, planning, and design of on-road and off-road trail facilities for pedestrians, bicyclists, and other non-motorized forms of transportation, including sidewalks, bicycle infrastructure, pedestrian and bicycle signals, traffic calming techniques, lighting and other safety-related infrastructure, and transportation projects to achieve compliance with the Americans with Disabilities Act of 1990.
- Construction, planning, and design of infrastructure-related projects and systems that will provide safe routes for non-drivers, including children, older adults, and individuals with disabilities to access daily needs.
- This program is administered by ITD.

**Federal Lands Access Program**

- This program is administered by the Federal Highway Administration, although ITD participates in project selection.
- Eligible recipients: State, county, town, township, tribal, municipal, or local government
- Eligible projects must address access to or within federal lands:
  - Preventive maintenance, rehabilitation, restoration, construction and reconstruction
  - Adjacent vehicular parking areas
  - Acquisition of necessary scenic easements and scenic or historic sites
  - Provisions for pedestrian and bicycles
  - Environmental mitigation in or adjacent to Federal land to improve public safety and reduce vehicle-wildlife mortality while maintaining habitat connectivity
  - Construction and reconstruction of roadside rest areas, including sanitary and water facilities.
  - Operation and maintenance of transit facilities

**Federal Lands Transportation Program**

- Only federal land management agencies are eligible for this program. Includes National Parks, US Forest Service, US Fish and Wildlife Service, Bureau of Land Management and Corps of Engineers.
- Operation and maintenance of transit programs are eligible.

**USDA Rural Development - Community Facilities Programs**

- Administered by the Idaho office of the US Department of Agriculture Rural Development Division
- Provide low-interest loans, grants and loan guarantees for projects to develop essential community facilities for public use in rural areas. An essential community facility is defined as a facility that provides an essential service to the local community for the orderly development of the community in a primarily rural area, and does not include private, commercial or business undertakings.
- Eligible borrowers include public bodies, community-based non-profit corporations, federally-recognized Tribes.
- Rural areas including cities, villages, townships and towns including Federally Recognized Tribal Lands with no more than 20,000 residents according to the latest [U.S. Census Data](#) are eligible for this program.
- Funds can be used to purchase, construct, and / or improve essential community facilities, purchase equipment and pay related project expenses.

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*COMMUNITY DEVELOPMENT BLOCK GRANTS***CDBG Public Facilities and Downtown Revitalization Grants**

- Eligible agencies are incorporated cities with a population under 50,000, or counties. Special service providers must be sponsored by a city or county.
- Funds public utility systems, fire stations, removal of architectural barriers and other public infrastructure.

**CDBG Job Creation Grant**

- Eligible agencies are incorporated cities with a population under 50,000, or counties. Special service providers must be sponsored by a city or county.
- Funds public facility construction and improvements that support companies who are expanding, or new companies that will be creating jobs.

## PRIVATE FUNDING SOURCES

Most private sources of funds grant small amounts. As many federal funding sources require a local match amount, private funding can be important as a source for required match amounts. Many private foundation grants require a nonprofit (non-government) recipient.

### *UNION PACIFIC FOUNDATION*

The UP Foundation provides grants to public charities or municipalities located in communities that are served by Union Pacific Railroad. Grants are typically modest – in 2015 grants made in Idaho totaled \$180,000, with an average individual award of roughly \$5,000.

### *STATE FARM COMMUNITY GRANTS*

Nationally, State Farm supports communities through social investments and countrywide relationships. At a local level, the company grants focus on two areas: safety and education.

#### Safety Grants

- Auto and roadway safety
- Teen Driver Education
- Home safety and fire prevention
- Disaster preparedness
- Disaster recovery

#### Education Grants

- Basic Economics
- Budget Counseling
- Employable Skills Training
- First Time Homebuyers Workshop
- Foreclosure Prevention Counseling

### *FORD FOUNDATION*

<http://www.fordfoundation.org/grants/organizations-seeking-grants>

Each year the Ford Foundation receives about 40,000 proposals and makes about 1,400 grants. Requests range from a few thousand to millions of dollars and are accepted in categories such as project planning and support; general support; and endowments. Grant applications are reviewed at our New York headquarters and in our regional offices.

Grant types include:

- General/core support
- Project
- Planning

- Competition
- Matching
- Recoverable
- Individual
- Endowment
- Foundation-administered project

The foundation has numerous grant interest areas. Those most applicable to SPOT will likely be found under the categories of Economic Fairness, Democratic and Accountable Government, and Sustainable Development. Inquiries can be submitted on-line throughout the year.

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*MJ MURDOCK CHARITABLE TRUST*

<http://www.murdock-trust.org/grants/index.php>

Description and Eligible Activities

The trust provides grants for a broad range of activities. These generally include education, culture and the arts, health and human services, scientific research, and youth leadership. The trust does not fund normal ongoing operations, including existing staff, or for the continuation of existing projects, or the continuation of programs previously financed from other external sources.

Amount and Match Requirement

Grant award size varies depending upon organization and project; however, past practices inform future decisions. Because the Trust's application and evaluation process is rigorous, thorough, and time intensive, requests for less than \$50,000 are generally discouraged.

Eligibility

To be eligible to apply for a grant, organizations must:

- Be a 501(c)(3) organization
- Operate in the Alaska, Idaho, Montana, Oregon, or Washington

Organizations must submit a letter of inquiry.

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*THE ROBERT WOOD JOHNSON FOUNDATION: MULTIPLE PROGRAMS*

[http://www.rwjf.org/applications/solicited/cfp.jsp?ID=21390&cid=XEM\\_A5734](http://www.rwjf.org/applications/solicited/cfp.jsp?ID=21390&cid=XEM_A5734)

Description and Eligible Activities

The Robert Wood Johnson foundation has multiple funding programs focusing on improving health and health care for Americans. Specific programs and funding initiatives vary year to year. Access to health care may be funded under various initiatives by this foundation.

Amount and Match Requirement

To be eligible for funding, applicants must typically secure 100 percent matching support. Matching funds may come from private organizations, or from city, county, state and federal funds. Usually, at least 50 percent of the match must be a cash match from one or more local, state, regional or national funding partners. The balance may be in-kind support provided by organizations other than the applicant organization.

Timing

Proposals are solicited at various time throughout the year. Watch the website for applicable opportunities.

Eligibility

To be eligible, an applicant organization must be located in the United States or its territories and be a:

- Nonprofit organization that is tax-exempt under Section 501(c)(3) of the Internal Revenue Code;
- Tribal group recognized by the U.S. federal government; or
- State or local agency.

In addition, grantees must be organizations that participate in established coalitions or networks that span multiple sectors and perspectives and may include representatives from business; education; public health; health care; community organizations; community members; policy advocates; foundations; and policy-makers.

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*STATE FARM COMPANY GRANTS*

<http://www.statefarm.com/aboutus/community/grants/company/company.asp>

Description and Eligible Activities

The grants focus on three areas: safety, community development and education.

- Safety Grants—Auto and Roadway Safety, Home Safety and Fire Prevention, Disaster Preparedness, Disaster Recovery, Personal Financial Safety/Security
- Community Development Grants—Affordable Housing, 1st Time Homeowners, Community Revitalization, Economic Development



- Education—Grants for K-12 public schools

Amount and Match Requirement

N/A.

Timing

Applications for 2016 funding were available from Tuesday, September 1 through Friday, October 30, 2015. Expect a similar timeframe for 2017.

Eligibility

The applicant must be an educational Institution, government entity, 501(c)(3) charitable nonprofit organizations, a 501(c)(4) volunteer fire companies, or a 501(c)(6) chambers of commerce.

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*TOM'S OF MAINE 50 STATES FOR GOOD*

<http://www.tomsofmaine.com/community-involvement/living-well/project-sponsorships>

Description and Eligible Activities

Tom's of Maine 50 States for Good initiative supports grassroots organizations throughout the country working to do good in their communities. Eligible projects must have a positive impact on the community in one of the following areas:

- Environmental Goodness
- Healthy Goodness
- Human Goodness

An internal panel narrows applications down to the top 100. An external panel narrows the 100 nominees down to 51 finalists (one from each state and the District of Columbia). 15 Final awards are made based on a consumer vote on Tom's of Maine's Facebook page.

Amount and Match Requirement

\$150,000 is available nationally; individual grants are \$10,000.

Eligibility

To be eligible to apply for a grant, organizations must:

- Nonprofit 501(c)(3) organizations, in good standing, for funding requests related to community events, projects or program support

- Nonprofit must have an operating budget of less than \$2 million

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#### *WALMART FOUNDATION*

<http://foundation.walmart.com/apply-for-grants/>

#### Description and Eligible Activities

Walmart has national, state and community grant programs. Funding requests should align with the Foundation's areas of focus. Current focus areas are:

- Hunger Relief and Healthy Eating
- Sustainability
- Women's Economic Empowerment
- Career Opportunity

The Community Grant Program considers additional focus areas.

#### Amount and Match Requirement

The Community Grants Program awards grants of \$250 to \$2,500.

Larger grants - \$25,000 minimum -- are possible through Walmart's National and State Giving Programs.

#### Eligibility

Organizations must be described as one of the following:

- An organization holding a current tax-exempt status under Section 501(c)(3), (4), (6) or (19) of the Internal Revenue Code;
- A recognized government entity: state, county, or city agency, including law enforcement or fire departments, that are requesting funds exclusively for public purposes;
- A K-12 public or private school, charter school, community/junior college, state/private college or university; or
- A church or other faith-based organization with a proposed project that benefits the community at large.

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*US BANCORP FOUNDATION*

<http://www.usbank.com/community/index.html>

Description and Eligible Activities

The U.S. Bancorp Foundation offers grants for unrestricted general operating support, program support, capital support, and contributions of equipment and property.

The Foundation has the following funding priorities:

- Affordable Housing
- Self-Sufficiency for low and moderate income populations
- Economic Development
- Education
- Cultural and Artistic Enrichment
- United Way

Eligibility

Only nonprofit organizations are funded. Organizations receiving primary funding support from a United Way organization are not eligible for a direct grant from the Foundation.

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*BULLITT FOUNDATION*

<http://www.bullitt.org/>

Description and Eligible Activities

The mission of the Bullitt Foundation is to safeguard the natural environment by promoting responsible human activities and sustainable communities in the Pacific Northwest. The Foundation supports nonprofit organizations that serve Idaho, Oregon, Washington, western Montana (including the Rocky Mountain range), coastal Alaska from Cook Inlet to the Canadian border, and British Columbia, Canada.

The Foundation's current focus is on the following areas:

- Urban Ecology
- Ecosystem Services

- Energy, Industry, and Technology
- Leadership and Civic Engagement

The Foundation will consider special requests in response to unforeseen emergencies or time- sensitive needs. However, funds for such grants are limited, and approval standards are high. Interested applicants should contact a program officer to determine eligibility. The Foundation does not fund capital projects or university overhead costs, nor does it fund candidates for political office or lobbying activities.

Applicants must begin the application process by completing an online proposal inquiry form available on the Foundation's website.

#### Amount and Match Requirement

Total Annual Giving: \$5,394,000; Grant Range: \$5,000 - \$200,000; Average Grant: \$25,000 - \$50,000

#### Timing

Proposal inquiry forms are available annually on March 15 and September 15, annually. Invited proposals are solicited May 1 and November 1, annually

#### Eligibility

Applicants must have a 501(c)(3) determination letter, or identify themselves as a validly organized and operating municipal corporation, public agency, or Native American tribe.

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#### *PEOPLE FOR BIKES GRANT PROGRAM*

<http://www.peopleforbikes.org/pages/grant-guidelines>

#### Description and Eligible Activities

Formerly the Bikes Belong Grant Program, People for Bikes is aimed at providing funding to those who strive to improve bicycling in America through efforts such as the building of trails and paths, or through promoting general bicycling advocacy and awareness. Fundable projects include paved bike paths, lanes, and rail-trails as well as mountain bike trails, bike parks, BMX facilities, and large-scale bicycle advocacy initiatives. A key goal of the Bikes Belong grants program is to support bicycling in as many places as possible.

Amount and Match Requirement

People for Bikes will accept requests for funding of up to \$10,000 for facility and advocacy projects. It does not require a specific percentage match, but prefers leverage and funding partnerships. The fund does not consider grant requests in which its funding would amount to 50 percent or more of the project budget.

Timing

People for Bikes generally holds 1-2 open grant cycles every year, historically in the spring and fall.

Eligibility

While SPOT is not specifically eligible for this funding program, it is included here for informational purposes as the planning team looks to partner with bicycling groups in the future. The program funds end-of-trip facilities for bicycles, such as bike racks, bike parking, and bike storage. Applications are accepted from nonprofit organizations whose missions are bicycle and/or trail specific. They also accept applications from public agencies and departments at the national, state, regional, and local levels; however, they encourage these municipalities to align with a local bicycle advocacy group that will help develop and advance the project or program. Because of its limited funds, People for Bikes rarely awards grants to organizations and communities that have received People for Bikes funding within the past three years.

## TECHNICAL ASSISTANCE, TRAINING AND OTHER RESOURCES

Technical assistance grants can help SPOT to build their internal knowledge and capacity. Grants are typically small, and usually in the form of time donated by technical experts rather than cash. The following programs may be of interest.

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### *AMERICAN PLANNING ASSOCIATION'S COMMUNITY PLANNING ASSISTANCE TEAM PROGRAM—PLANNING ASSISTANCE*

<http://www.planning.org/communityassistance/teams/>

#### Description

APA's Community Planning Assistance Team program considers applications from communities seeking pro bono planning assistance. If you live in or know of a community that lacks planning resources and could benefit from a team of planning experts, you're encouraged to apply. There is a \$50 application fee.

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### *GOOGLE GRANTS—FREE ADVERTISING*

<http://www.google.com/grants/>

#### Description

Google Grants provides \$10,000 per month in in-kind AdWords™ advertising (Google's online advertising tool), to nonprofit organizations to promote their missions and initiatives on Google.com. Grantees build and manage their own AdWords accounts just like paying advertisers, but participate with the following restrictions:

- A daily budget set to \$330, which is equivalent to about \$10,000 per month
- A maximum cost-per-click (CPC) limit of \$1.00 USD
- Only run keyword-targeted campaigns
- Only appear on Google.com
- Only run text ads

#### Timing

Google will run the ads for as long as the organization remains actively engaged with their Grants AdWords account.



Eligibility

Only registered 501(c)(3) nonprofit organizations are eligible. Applicants must register on “Google for Nonprofits.”

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*MJ MURDOCK CHARITABLE TRUST FUNDRAISING & CAPACITY BUILDING ESSENTIALS OF DEVELOPMENT SEMINAR—FUNDRAISING SEMINARS*

<http://www.murdock-trust.org/enrichment-programs/essentials-development-seminar.php>

Description

The Essentials of Development Seminar helps organizations create a diversified funding development structure. Designed for smaller or start-up organizations, the program’s goal is to help these groups sustain the long-term accomplishment of their mission. The seminar is a pair of two-day workshops in Vancouver, Washington.

Among the topics covered in the seminar are:

- Principles of Fundraising
- Development of a case for support
- Donor list segmentation and management
- Donor contact and care
- Multiple approaches to fundraising

Participants

Each year, a group of about ten organizations is invited to participate in this program. Each organization brings its executive director, development personnel, and at least two board members

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*BENEVON—FUNDRAISING FROM INDIVIDUALS*

<http://www.benevon.com/welcome>

Description

Benevon trains and coaches nonprofit organizations in its system for developing individual donor programs. Benevon programs and services provide step-by-step process and the tools—training, templates, scripts, and rigorous coaching—to put non-profit organizations on the pathway

to financial sustainability. Benevon offers free 17-minute and 55-minute video training sessions on its website. It also offers free seminars and conference calls.

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*COMMUNITY TRANSPORTATION ASSOCIATION OF AMERICA*

The Community Transportation Association of America (CTAA) provides technical assistance for a wide variety of alternative transportation issues and activities. [www.ctaa.org](http://www.ctaa.org)

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*THE CHRONICLE OF PHILANTHROPY*

<http://philanthropy.com/section/Home/172/>

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*ASSOCIATION OF FUNDRAISING PROFESSIONALS*

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

## APPENDIX B – STAKEHOLDER ASSESSMENT

The SPOT strategic planning team brainstormed potential stakeholders in order to identify potential partners, and also discuss key outreach tactics that may be useful to consider as a marketing plan is prepared.

SPOT STRATEGIC PLAN: STAKEHOLDER ASSESSMENT NOTES							
Stakeholder or Stakeholder Group	Interests or “Stake”	Outreach Tactics/Key Messages	Possible Source of:				Best Team Contacts(s)
			Money	Time	Materials or Equipment	Political/ Moral Support	
Tourists	Ease of use Hassle factor Want to spend their time doing, not figuring out how to get around.	Sightsee with SPOT PR Campaign Educational Materials Provide info at hotels, chamber of commerce/visitor center, Schweitzer, and on line travel sites	X			X	Devon
Seniors	Access to essential shopping and services Safety Independence Combat Social isolation	Education Promote SPOT’s understanding of senior needs and issues Convenience Outreach through assisted living facilities, medical offices, and area aging agency	X			X	Susan
ITD (Upper Levels)	Funding levels Impacts on roads	Economic benefits of transit Private/public partnerships Safety					
Anti-Government	Cost/taxes	Economic return to community and benefits of getting people to employment and medical care in a cost-effective way					

SPOT STRATEGIC PLAN: STAKEHOLDER ASSESSMENT NOTES							
Stakeholder or Stakeholder Group	Interests or “Stake”	Outreach Tactics/Key Messages	Possible Source of:				Best Team Contacts(s)
			Money	Time	Materials or Equipment	Political/ Moral Support	
Rural Residents	Cost of travel Commuting	Drive in, park once and take SPOT Use mailers and advertising to reach this group					
Un-served Residents	Funding (taxpayer dollars going to services that they do not benefit from) General lack of awareness about the service						
Private Transportation Providers (Taxi’s)	Effects on their income	Partner with taxis for off-hour service needs Consider SPOT as a complementary service		X	X		Clif
Taxpayers	They pay the bill – can that be reduced by reduced costs for roads	Need clear statement of benefits.	X			X	All Team Members
Environmentalists/EPA	Clean air and water	Highlight SPOT’s environmental goals	X		X	X	
Government Agencies (All)	Financial impacts	Bring local elected officials into the “inner circle” – give them first-to-know status on SPOT’s activities	X			X	Mayors on SPOT Board
City Governments	Service to citizens / public welfare Cost-effectiveness Increased visitors to cities for business, shopping, entertainment; school	Keep them updated – presentations Encourage participation in SPOT advisory board	X	X	X	X	

SPOT STRATEGIC PLAN: STAKEHOLDER ASSESSMENT NOTES							
Stakeholder or Stakeholder Group	Interests or “Stake”	Outreach Tactics/Key Messages	Possible Source of:				Best Team Contacts(s)
			Money	Time	Materials or Equipment	Political/ Moral Support	
Road Departments	Road construction and maintenance	Benefits of transit for helping to reduce traffic Teaming with SPOT on road projects helps make the multi-modal case – may help to increase competitive position for funding	X			X	
SPOT Staff, Board and Committees	Ability to operate the system well Sustainability of the system Providing quality service		X	X	X	X	
Bus Riders	Expanded travel options Get to work Get to recreation	Use social media Provide info about SPOT at places of employment and recreational destinations	X			X	
Retailers	Impacts on business revenues; access to workforce; parking for customers	Reach them through DBA. Communicate benefits of transit for recruiting/retaining employees. Be seen as an environmentally friendly/ socially responsible/ community caring business.	X			X	
Cyclists	Safe commuting Access to recreation/nature/outdoors	Take the bus on days when you can’t have helmet hair. Reach them through cycle clubs	X	X		X	



SPOT STRATEGIC PLAN: STAKEHOLDER ASSESSMENT NOTES							
Stakeholder or Stakeholder Group	Interests or “Stake”	Outreach Tactics/Key Messages	Possible Source of:				Best Team Contacts(s)
			Money	Time	Materials or Equipment	Political/ Moral Support	
Pedestrians	Aesthetics/pleasant walking environment Avoiding car trips	SPOT is a great option for long distances or inclement weather Make buses, stops, signs easily identifiable Make schedule info available at stops	X			X	
Children (and Parents)	Independence Safety	Provide info on SPOT to teachers, PTA’s, libraries, child care businesses, recreational/sports/after school programs					
Low Income	Transportation affordability Access to jobs, medical and essential shopping	Outreach through health and welfare/social services agencies		X		X	
Disabled	Independence Transportation affordability	Outreach through medical offices		X		X	
Public At-Large	Traffic congestion Travel options/automobile dependence May not know much about SPOT	Advertising/radio/TV Word of mouth	X	X	X	X	

## APPENDIX C – ACTION PLAN

## SPOT ACTION PLAN 2015-2017

To be updated quarterly by the SPOT Technical Advisory Committee

Date of Last Update: \_\_\_\_\_

GOALS AND OBJECTIVES		2015	2016	2017	2018	2019	ACTION ITEMS
<b>GOAL 1: INCREASE RIDERSHIP</b>							
1A	Prepare and implement a marketing and public information plan by December, 2016, aimed at expanding SPOT's customer base, improving information on how to ride, and protecting/enhancing SPOT's brand.		X				<b>Marion</b> - secure funding <b>SPOT Board</b> - work on increasing budget for marketing <b>Jared and TAC</b> – Develop and analyze market info using Census and other available demographic data <b>Annie</b> – look for a marketing coordinator
1B	Get SPOT's routes and stops on Google Transit by December, 2015.	X					<b>Jared</b>
1C	Fully implement the Double Map app by December, 2015.	X					<b>Jared</b>
1D	Perform community and rider surveys in 2016 to identify barriers for current and potential customers, and to gauge the popularity of potential expansion options.		X				<b>Clif, Marion and Bill Wright</b> - design survey questions <b>Jared</b> - provide online survey <b>Marion and Bill</b> - Administer on-board survey <b>TAC</b> - Synthesize results for Board
1E	Work to increase public awareness by issuing regular press releases about SPOT activities.	X	X	X	X	X	<b>Annie</b> – add standing item to Board agenda to decide whether to issue a press release each month and agree on key messages.

GOALS AND OBJECTIVES		2015	2016	2017	2018	2019	ACTION ITEMS
<b>GOAL 2: IMPROVE RIDER ACCESS, CONVENIENCE AND AMENITIES</b>							
2A	Add third route to serve airport, food bank, residential and medical area.		X				<b>Marion</b> - submit grant applications for operations funding and capital funding in 2015
2B	Perform an annual review of routes, stop frequencies, and operating hours; make adjustments if appropriate to improve convenience for riders.	X	X	X	X	X	<b>Marion, Bill Wright and TAC</b>
2C	Add shelters and bicycle racks to 10% of stop locations by 2016, and an additional 10% by 2018.		X		X		<b>Marion</b> - submit grant application in 2015 and 2017
2D	Expand on-board bicycle accommodation on all coaches by 2018.				X		<b>Marion</b> - look for grant opportunity in 2016
2E	Work to increase frequency of fixed route services. (On-going objective.)	X	X	X	X	X	<b>TAC</b> – begin with peak hour frequencies in 2016.
<b>GOAL 3: LEVERAGE PARTNERSHIPS TO EXPAND SERVICE AND IMPROVE THE SYSTEM</b>							
3A	Integrate SPOT with Schweitzer Mountain Resort's transportation needs and funding. Implement a new route serving the mountain beginning November 2016.		X				<b>Clif and Devon</b> - negotiate service and payment schedule <b>Clif</b> - draft agreement for Board and Schweitzer approval.
3B	Coordinate with Bonner County and/or other partners to become active participants in SPOT by 2017.			X			<b>Saegen, Annie and George</b> - begin dialogue with county commissioners after community survey (Objective 1D) is complete.
3D	As roadway projects are proposed, coordinate with BCATT, BATT, ITD, local cities and counties, to include stop furnishings, pedestrian access and safety features, and other transit infrastructure needs.	X					<b>Susan</b> - discuss with BCATT and BATT members; implement a transit checkoff process for LHTAC projects starting this fall.

GOALS AND OBJECTIVES		2015	2016	2017	2018	2019	ACTION ITEMS
3E	Develop a sponsorship program for stop furnishings ("adopt a stop") by 2016.		X				<b>Erik</b> – Develop the program and secure initial sponsors. Consider a “top SPOT stop adopter” award.
3F	Coordinate with land use agencies to incorporate SPOT needs in development reviews by December 2015.	X					Implement a process for SPOT feedback prior to subdivision and commercial building permit approvals: <b>Carrie</b> (Sandpoint), <b>Carol K/Erik</b> (Ponderay), <b>Nancy</b> (Kootenai), <b>Annie</b> (Dover), <b>Saegen</b> (County).
3G	Coordinate with social services agencies to implement Demand-Response service within in the Sandpoint area by 2016.		X				<b>TAC</b> to make assignments for this task.
3H	Provide regular (annual) updates to local government agencies and civic groups.	X	X	X	X	X	<b>Plangineering</b> - prepare initial powerpoint for SPOT team's use <b>Marion and Clif</b> - update the powerpoint annually <b>Carrie, Annie, Carol K, and Nancy</b> – present the strategic plan to the Idaho Transportation Board <b>TAC</b> – schedule presentations to SURA, SDBA and PCDC
<b>GOAL 4: INCREASE ORGANIZATIONAL AND FINANCIAL STABILITY</b>							
4A	Evaluate alternate governance structures and select desired approach by 2017.	X	X	X			<b>Clif and Annie</b> - Compare pros and cons of: Joint Powers Agreement, 501(c)(3) or(4); Regional Public Transportation Authority; for-profit structure; or refinements to current structure. Provide information for Board discussion.

GOALS AND OBJECTIVES		2015	2016	2017	2018	2019	ACTION ITEMS
4B	By 2017, revise current governance structure to reduce political risks and allow for easier service area expansion.			X			Lead person for this action item to be decided after Objective 3A is complete.
4C	On an ongoing basis, develop and expand SPOT's internal capacity and resources through training and grant opportunities.	X	X	X	X	X	<b>Marion</b> - watch for RTAP training
4D	Update this list of objectives and action items quarterly.	X	X	X	X	X	<b>Marion</b> or designated TAC member
4E	Identify and select performance measures for SPOT and report on them annually		X				<b>Clif and Erik</b>
4F	Create an endowment or other long-term donation opportunity for SPOT after governance structure has been revised (see Objective 4B).				X		Action items to be assigned after 4B is complete.
<b>GOAL 5: PROMOTE ENVIRONMENTAL STEWARDSHIP</b>							
5A	Explore other public transportation services including park and ride, vanpool and rideshare, as program champions are found.					X	<b>TAC</b> – look for potential program champions/volunteer coordinators. Action items to be assigned after coordinators are found.
5B	Report annual emission reductions due to rides on SPOT on the SPOT website, beginning in 2017.			X	X	X	<b>Plangineering</b> - Provide simple spreadsheet tool for SPOT to estimate fossil fuel savings due to transit use.
5C	Add a seat on the TAC for a designated environmental advocate	X					<b>Erik</b> – Recruit a person for this position in consultation with other TAC members and the Board.
5D	Consider energy efficiency options with next bus purchase					X	<b>Marion, Clif and TAC</b>
5E	Consider solar technology and other energy efficient options for shelters with next significant installation project.				X		<b>Marion, Clif and TAC</b>





# See SPOT Engage

## OVERVIEW

The goal of this SPOT Marketing and Public Outreach Plan is to provide a clear path towards continuing to grow ridership and build community support. SPOT has a solid foundation on which to build increased marketing and public outreach efforts. It has a strong brand, solid ridership, enthusiastic community support, and positive political momentum. This plan will leverage all of these assets in a thoughtful and strategic way.

The Marketing and Public Outreach Plan addresses the following:

- Current marketing efforts
- Who is riding today, why they ride, and how to get them to ride more
- Who isn't riding much today and how to get them onboard
- A toolkit of strategies, rated by cost and complexity, and mapped to target audiences
- A three-year approach to implementation
- Partnerships required to successfully implement this plan

Informing this plan are stakeholder interviews, two community surveys – from riders and stakeholders, and market research performed by SHIFT. This plan uses industry best practices, opportunities unique to SPOT and the communities it serves, and successful efforts from other communities.

Implementation of this plan will result in a stronger SPOT that continues to weave itself more tightly into the fabric of the community. In several of our community interviews, the idea of making SPOT “just the way you get around” and “what our community does” and “a community institution” were expressed and embody exactly what a good marketing and public outreach plan can do for SPOT, along with strategic implementation.

## SPOT MARKETING EFFORTS TO DATE

The SPOT brand is very strong for a small transit system. SPOT's brand reflects the community and is easily identifiable. The logo, bus graphics and generally positive community perception of SPOT are tremendous assets that can be leveraged towards a new infusion of energy, excitement, and growth.

As SPOT moves forward with the marketing and outreach efforts of this plan, the brand and what it represents should be infused into all the various outputs. The brand should remain the same and be adapted and leveraged to connect more people to the bus and get more people on board. The main goal of this plan is for the community to view the SPOT brand synonymously with economic vitality and development.



*The SPOT Brand = fun, interesting, community-oriented*

SPOT has gone through a common cycle for new services in rural areas with a limited budget. Initially, SPOT had a lot of buzz, the awareness of SPOT grew quickly, there was initial money to market the service, and ridership grew quickly. Now, SPOT has hit a 5-year plateau where ridership is steady but not growing, awareness among non-riders has dropped, money for marketing is very limited, and customer information needs improvement. SPOT must invest more in marketing in order to reverse this trend. The baseline budget for marketing is very small:

*The current SPOT marketing and advertising budget is only \$1500-\$2000 per year.*

This current spend consists of limited print advertising, printed brochures, and website costs. Bus graphics and bus stop signage are not included in this total, but are included as part of the Capital Improvement Plan (bus graphics are included in the cost of a new bus and bus stop signage project already funded and slated for 2017). The advertising budget is so limited that SPOT is not able to build awareness or grow ridership through marketing or outreach.

SPOT should start planning for how to grow funding for these marketing investments. This is a challenge that will be addressed later in this plan with ideas on how to partner and trade for market exposure. The good news is that SPOT has strong brand fundamentals and is ready to build on this foundation to renew itself and look for more support and use in the coming three years.

## COMMUNITY SURVEYS

SHIFT conducted two similar surveys, from two distinct community groups – existing riders and community stakeholders. The goal of the surveys was to understand a variety of aspects including the markets and identify marketing opportunities, service improvement needs and perceptions of SPOT. Only a portion of the questions from each survey were asked of both groups, the rest were tailored specifically to either existing riders or community stakeholders.

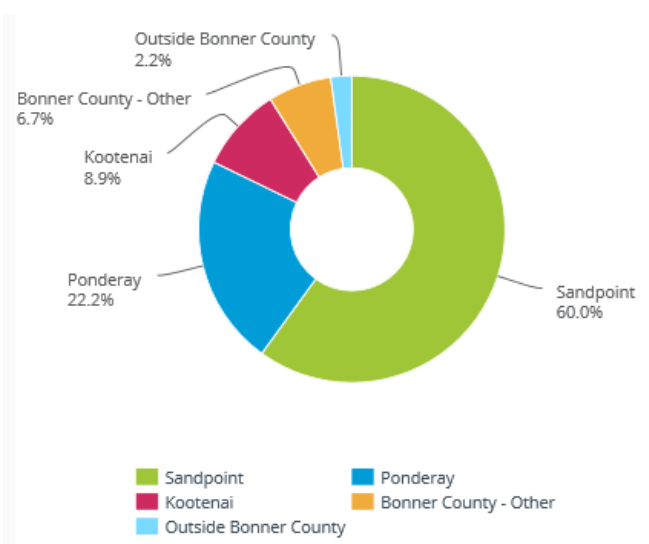
This plan focuses only on the survey responses that inform the markets and marketing opportunities. The existing riders group responded to marketing questions about how they use SPOT and why, how they plan their trip, and where they get their SPOT and other community information. The stakeholder group represented key decision makers and responded to some rider questions, such as why they ride or don't ride and what could get them to ride or ride more frequently, as well as marketing ideas for increasing ridership.

### Existing Riders Survey - Results

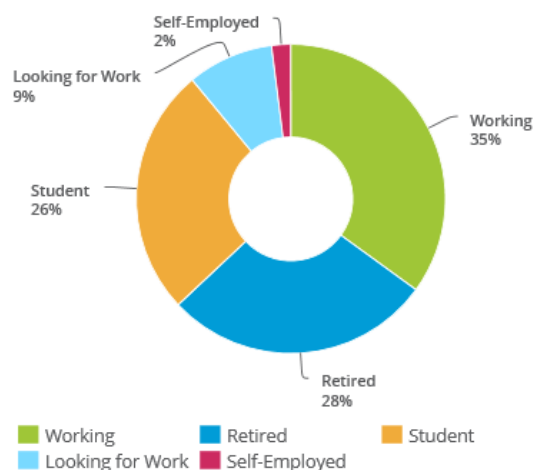
SHIFT conducted a survey of existing riders to understand who is using SPOT, why they are riding, and how they use the bus. 45 riders responded to the survey, which represents approximately 3% of the average weekly ridership, and 21% of the average daily ridership.

The survey shows 25% of respondents use SPOT 10 or more times a week, while 50% of respondents use it between 1-5 times a week. All respondents ride on weekdays and almost all ride on weekends too. The large majority live in Sandpoint, and most are employed, followed closely by retirees (retirees includes those no longer working, not necessarily retirement age).

Rider Residency

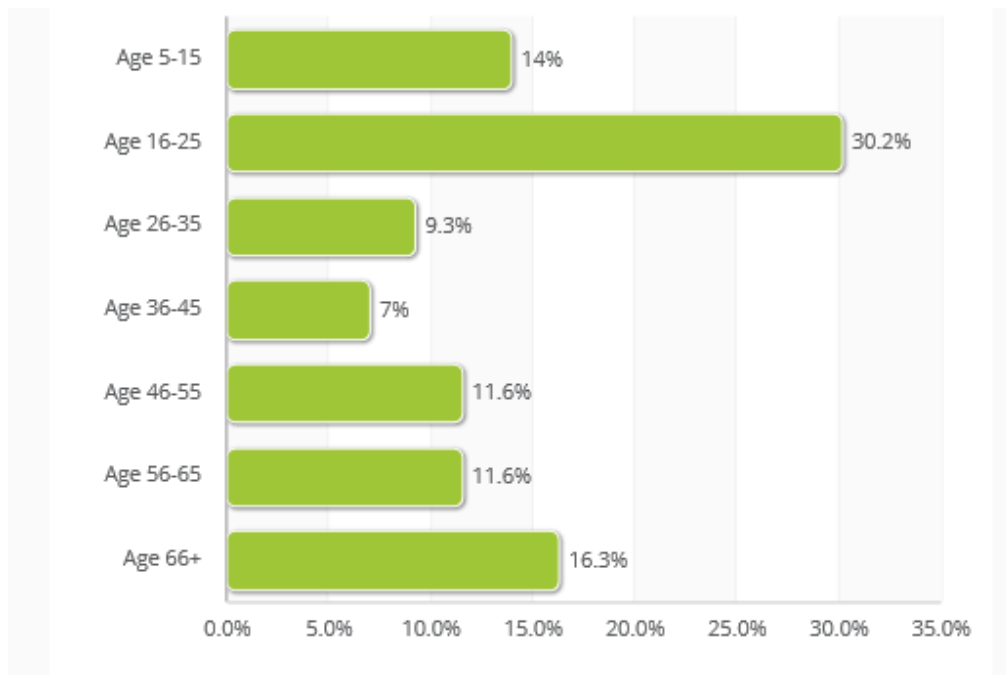


Employment Status



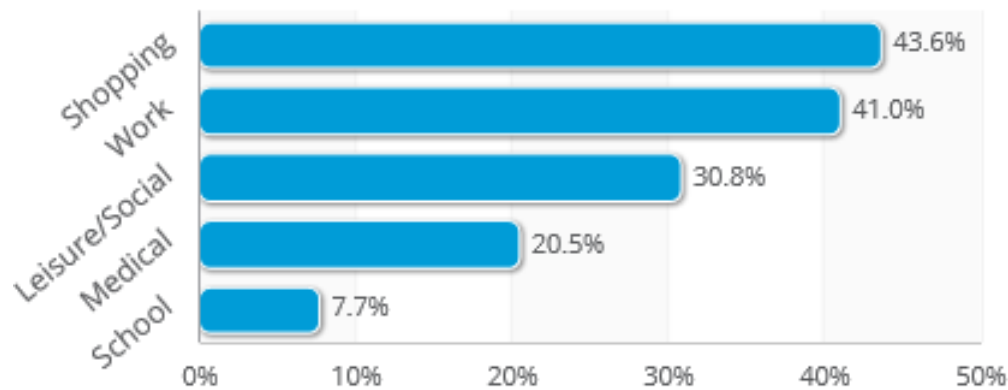
In terms of age, SPOT riders tend to be either younger riders, with 44% of riders aged 25 or younger, or older riders, with 28% of riders aged 56 or older. Middle-aged riders make up the smallest percentage of riders.

Rider Age



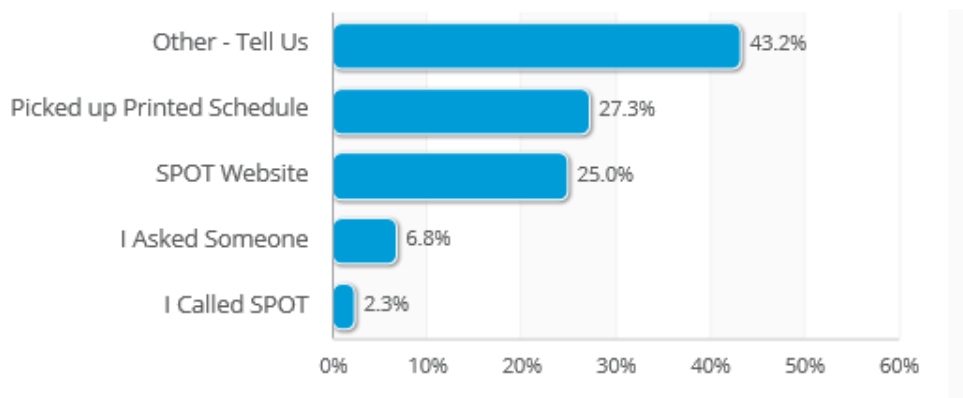
When asked about trip purpose, SHIFT found that most SPOT riders were using the bus for shopping, followed closely by work, but the results show that SPOT is being used for a wide variety of trip purposes. The data show that SPOT has a diverse ridership that counts on the service for all types of trips:

Reason for Trip



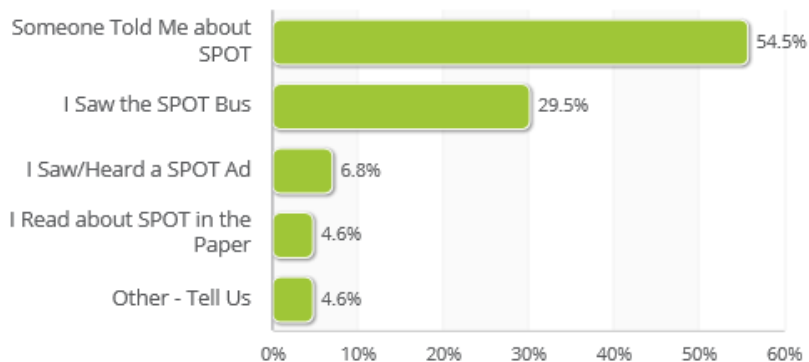
Another goal of the survey was to find out how riders are doing their trip planning, how they originally found out about the bus, and why they ride:

### How Did You Plan Your Trip Today?

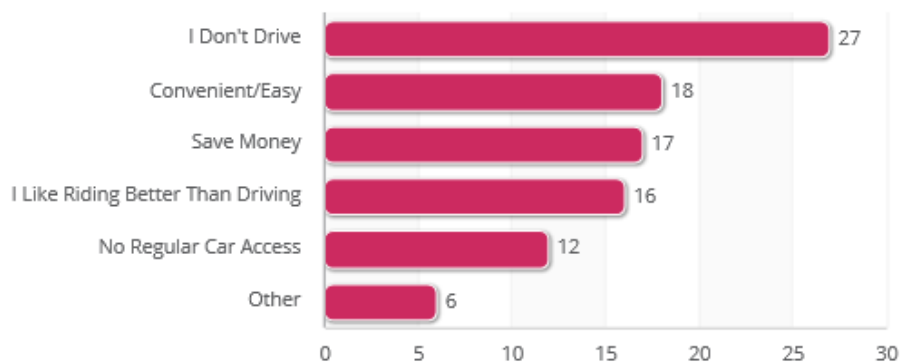


The “other” responses were predominately that the rider knows the schedule and doesn’t need to pre-plan their trip. The two additional responses received as “other” are: 1) schedule on phone; 2) called paratransit.

### How Did You Hear about SPOT?



### Why Do You Ride SPOT?



## Existing Riders Survey - Discussion

SPOT is used by a diverse group of people, representing many age groups with varying reasons for using SPOT. There were a few patterns identified in the responses received that lead to assumptions regarding who the majority of riders are today and what groups of riders are not as prevalent. The survey results highlight three target market opportunities:



- 1) Youth/young adults
- 2) Seniors
- 3) Employees (middle ages)

The youth/young adult segment of SPOT respondents can be summarized as follows:

- They form the majority of riders responding to the survey
- They don't drive or have access to a vehicle
- They are almost solely use SPOT for shopping and work trips
- 70% live in Sandpoint
- They use both routes equally
- They predominately get their information from the SPOT website

The survey was conducted in August; therefore, youth respondents were not in school and no responses were collected reflecting that this age demographic is using SPOT for school transportation. Additional information or survey data would need to be collected to identify whether they are using SPOT for transportation to and from school. Without knowing the results, assumptions can be made that this is likely occurring during the school year. Gaining more youth ridership during the school year is certainly a marketing opportunity through outreach and promotion at the schools.

Riders greater than 65 in age made up 16% of respondents. This group's responses can be summarized as follows:

- They use SPOT primarily for shopping and leisure trips
- 50% live in Ponderay
- They get their SPOT information from a variety of places – website, brochures around town, newspaper, and at community centers

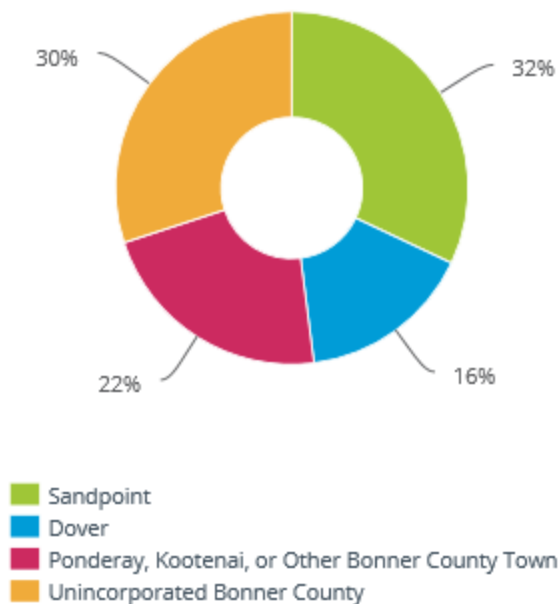
- Their trips tend to be longer in miles, which might be because 50% of the respondents from this demographic reported to live in Ponderay and are likely traveling to Sandpoint or another location outside of Ponderay for their shopping and leisure trips
- They ride SPOT predominately because they would rather not drive and because it's easy and convenient

Almost 56% of all respondents heard about SPOT from someone (word of mouth), with about 30% finding out about SPOT by seeing the bus. This leaves about 14% of respondents learning about SPOT from other forms of marketing. This is an indicator that either SPOT has invested little in advertising or riders are not receptive to the types of advertising that SPOT has pursued. The former is likely the primary reason, but strategically selecting the type of advertising is also an important consideration.

### Stakeholder Survey (Riders and Non-Riders) - Results and Discussion

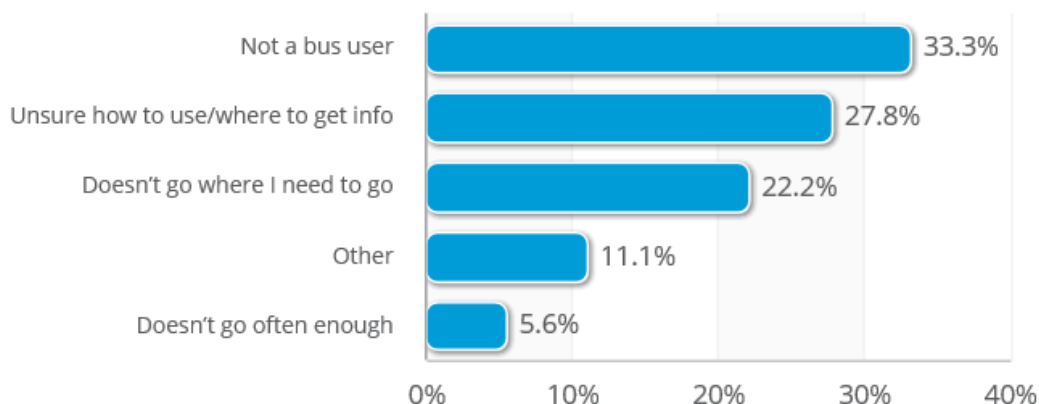
SHIFT polled community stakeholders by designing an online survey and distributing it electronically through a variety of means including the Sandpoint Chamber, city and county electronic mailing lists, a link on the SPOT website, a feature in the Bonner County Bee, and a feature on Sandpoint Online. Here are the results of 49 respondents who took the survey.

#### Rider Residency

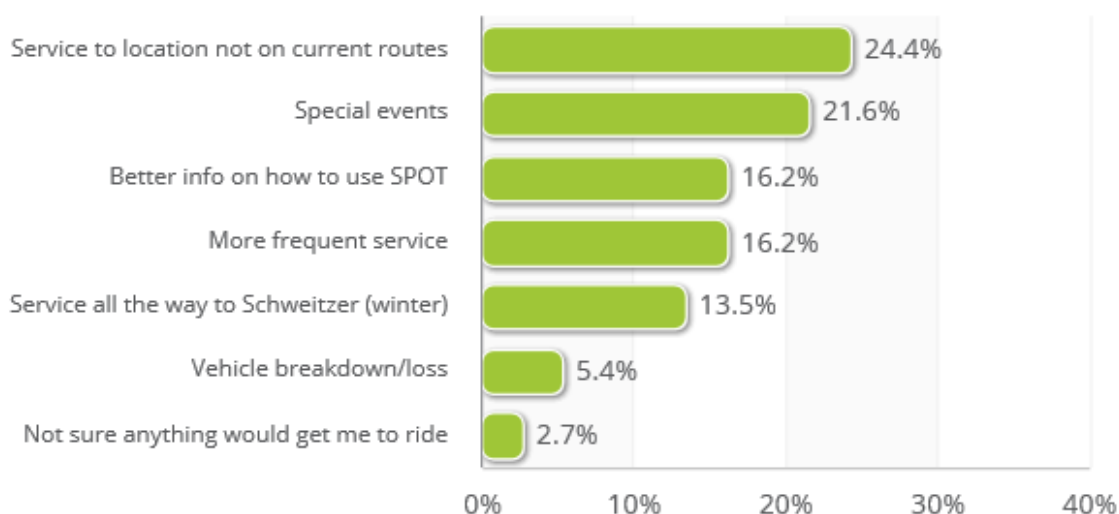




43.5% have never taken SPOT before. Of these respondents, the following reasons for not riding were received:



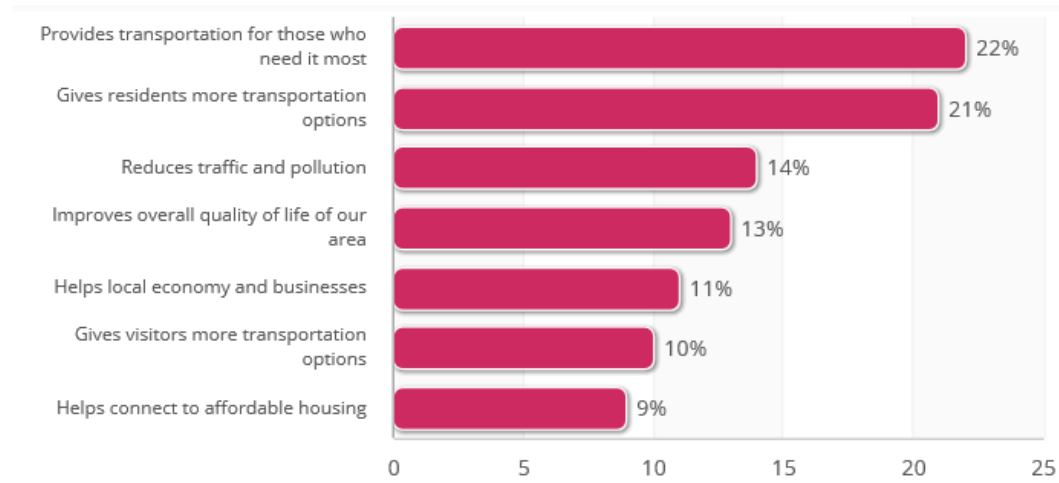
When this group was asked what could get them to ride spot, they responded as follows:



In addition to the choices provided above, the group was also given the option to write in their own ideas that might get them to ride SPOT. Their feedback was predominately split between two responses: 1) clearer information and route maps; 2) expanded service to Sagle, Baldy Road, and shuttle service between parking areas and City Beach/downtown during the weekends.

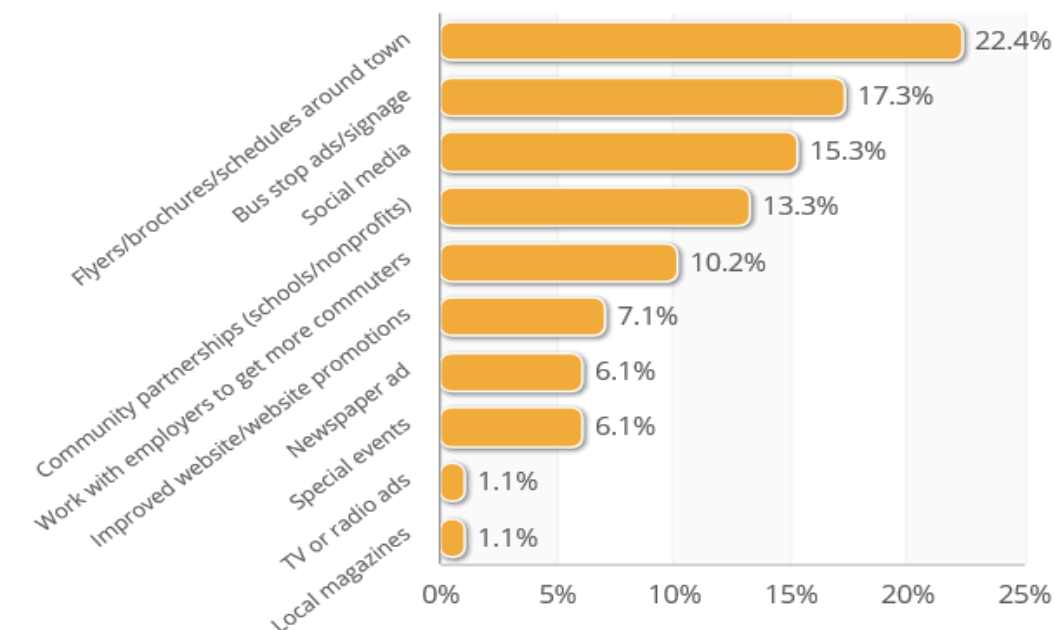
56.5% of the stakeholder group has taken SPOT. When asked their reasons for riding, the top three responses among respondents were: 1) transportation while their car was repaired; 2) leisure or social activity; 3) shopping. These results are consistent with the results of the rider survey; few middle-age respondents are using SPOT for transportation to and from work. The stakeholder group likely uses SPOT for infrequent trips, on occasion, not for daily commuting.

The stakeholder group was asked to respond to what the perception of SPOT is and its role in the community. Here were the responses:



These results indicate that stakeholders perceive SPOT as a necessary service for those that need it and as a benefit to residents to allow them more transportation options. They see SPOT less as helping the local economy and businesses and even less as giving visitors more transportation options. These are two areas where more targeted marketing can change the community's perception of SPOT from offering limited, but necessary, transportation benefits to SPOT being "a community institution" and "just the way we get around," as heard during several stakeholder interviews.

The stakeholder group was asked what the most cost effective marketing strategies/tools are to attract more riders and improve awareness of SPOT and the following responses were received:



Getting more information out about SPOT around town is a common theme in the results of both community surveys that could help increase ridership with the general community as well as visitors and establish SPOT as beneficial to the economy and businesses.

There can be a relationship between increased ridership and economic and community vitality. SPOT riders walk or bike to and from each bus stop when they begin and end their trip. Walking by businesses creates opportunities for more economic activity around these bus stops. When parking is limited people may decide not to visit downtown areas at all, whereas SPOT could provide a hassle free and easy way to get people to a location without the stress and inconvenience of parking.

## Marketing for Boundary County, Paratransit, and Vanpool

Much of the research, discussion, and tools in this plan are focused on riders of the fixed route system – Blue and Green Route riders. This market represents one of the largest opportunities for growth through marketing and outreach. Many of the marketing ideas in the toolkit section of the plan can be used for these services, but it is important to discuss specific marketing tactics for Boundary County, paratransit and vanpool and the communities they serve. These groups weren't specifically surveyed, but SHIFT conducted many interviews and drew on best practices when marketing to these groups.

### Boundary County-Bonner's Ferry Demand Response Service

This service is still relatively new, running less than eighteen months, and has done a good job of attracting a base of riders that need the service. It routinely runs at better than two riders per hour, which is good for a demand response service.

In a small community such as Bonner's Ferry, word of mouth and grassroots marketing are the best approach. As a new service, SPOT needs to educate the community about what SPOT is, how it operates, and why it's good for everyone.

The first step is creating a simple marketing piece that can be printed and distributed in several forms including as a rack card, a flyer, and electronically. The purpose of this would be two-fold: to promote the service itself and how to use it (hours of service, destinations, etc.), and to educate on what public transportation is.



The educational message should be:

- Public transportation is a public service and is open to everyone
- The city and county support and sponsor SPOT services
- With more demand and use, SPOT could add more service to the Bonner's Ferry area
- Public transportation is good for the community – it provides vital mobility, saves riders money, and provides more independence to those who use SPOT



*SPOT strengthens the community by providing mobility and independence*

*Credit: Bonner's Ferry Herald*

Recommended distribution of this marketing piece is:

- posting around town
- city mailings
- local businesses
- hospital
- assisted living facilities (e.g. Restorium)
- visitor center
- city hall

SPOT should also consider being interviewed on the local radio show and presenting to as many community groups as possible. It should also be distributed electronically through Bonner's Ferry online, Facebook groups, and city and county online resources.

## Bonner County Paratransit Service

Paratransit service is a federal requirement of a fixed route service, when federally funded. SPOT should consider marketing this service in conjunction with marketing the fixed route service. There are numerous benefits to increased awareness of paratransit service:

- 1) providing mobility to those that need it most
- 2) increasing efficiency/productivity of paratransit service by linking multiple trips together instead of only single rider trips
- 3) providing positive community perception

Currently, this service is marketed very little. There is a very small mention of it on the SPOT schedule, with no detailed information about the service, and the website doesn't have any section about this service. SPOT should increase the information about paratransit on the SPOT printed schedule and website as a first step to better marketing this service. The next step would be to create a dedicated informational card on this service, much like the one suggested for the Bonner's Ferry demand response service, that would describe hours of service, prequalification process, area of service, and other helpful information. This should be distributed to all social service organizations in the Sandpoint area, as well as at assisted living facilities, the hospital, disability organizations, and the senior center.

## Vanpool

Based on the current lack of affordable housing and challenges that employers have in finding skilled workers, SHIFT anticipates that SPOT will see significant growth in this program. Employers will find that vanpool can provide them with skilled workers from outside the area, and employees will find that vanpool links affordable housing locations with high paying jobs in a cost-effective way.



Vanpool marketing is straightforward:

Put together an informational piece on how vanpool works

- Include example pricing and commuter tax benefit information (vanpool qualifies for pre-tax consideration under the Commuter Benefits program)
- Describe benefits of vanpool for employee and employer
- Adapt for flyer/brochure and electronic dissemination

Set-up meetings with owners and managers of local businesses and present vanpool basics

- Find how vanpool can solve the employee challenges
- Vanpool delivers happier, safer, better rested employees to the job

Follow-up with interested employers to build interest among employees

- Employee staff meetings, email communications, and drop-in coffee talks are all ways to build employee interest

The Sandpoint area employers should be very receptive to vanpool, and SPOT could see this program grow quickly with some basic promotion and direct outreach.

## Marketing to Those Who Will Never Ride

Riders or non-rider aside, the public perception of SPOT is critical to ongoing partnerships and funding. SPOT is a public agency receiving local tax dollars that aren't guaranteed year-to-year; therefore, marketing to the community itself is a necessity. It's not enough to have regular riders taking more trips, new demographics getting on the bus, and routes connecting to new destinations. Elected officials, business leaders, non-profit organizations, and the community at large must know about SPOT and understand why SPOT is important to the community, regardless of whether someone rides or not. SPOT needs the community to feel that public transportation is an important community asset and something worthy of supporting.

SPOT can tailor the message for a particular group, but some of the resonating talking points that board and staff can use include:

### SPOT is good for quality of life

- Communities with good public transportation are nicer, easier, more connected places to live and work
- Public transportation makes the community more attractive – those living here are more likely to stay and those thinking of living here are more likely to relocate
- Communities that rely less on single occupancy vehicles are more resilient

### SPOT is good for business

- With a tight job market, employers are looking for ways to attract and retain employees – public transportation options make this easier
- Consistent transportation means employees get to work safely and are often more rested and ready to work
- Those people riding SPOT save money and can spend it on other things
- Bus trips end and begin with walking or biking, which means bus riders are more likely to frequent businesses while enroute

### SPOT is good for housing

- With limited affordable housing within walking distance to most amenities, SPOT can better link jobs and services with housing in outlying areas
- Vanpool can be used as a tool to link areas of regional activity

### SPOT is good for biking and walking and community health

- Public transportation can reduce depression and isolation among those who use it
- Every bus trip on SPOT starts and end with a walk or a bike trip, which helps improve health
- SPOT takes an average of 400 cars off the road per day, which improves the downtown experience for biking and walking











SPOT is good for the environment and congestion









- With an average of 6 people an hour getting on the bus, that means the effective miles per gallon of the bus is 72MPG!
- More people on the bus = less people in cars
- SPOT must continually talk about the community benefits of public transportation and build specific outreach efforts towards building general awareness. By growing ridership and this community awareness, the political support and overall goodwill will happen naturally.







SPOT must continually talk about the community benefits of public transportation and build specific outreach efforts towards building general awareness. By growing ridership and this community awareness, the political support and overall goodwill will happen naturally.

















## THE TOOLKIT









TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Better bus stop amenities</b>	One of the top requests from the surveys was better bus stops with amenities like benches, shelters, and lighting. All of these improve the overall riding experience and make new riders more likely to ride again. Bus stops are also the most visible aspect of the service and impact the community perception.	All current and potential riders; the community at-large		
<b>Better bus stop signage</b>	Through its work on this plan, SHIFT heard that bus stop signage needs to improve to show the system map and the bus times at a particular stop. The signage should also identify the stop itself. In addition, larger and more visible signs can have an advertising benefit.	Current riders and general community impression		
<b>Invest in better buses that all have route identification</b>	Many of SPOT buses are in need of replacement and hurt the rider experience, especially for those buses that don't have adequate air conditioning for cooling in the summer. Also, many riders requested desire to know what route a bus is running through bus identification. Although this is a capital improvement issue, it impacts marketing and ridership growth. Buses with better passenger amenities that are easier to board and are more comfortable will help market the service.	Current riders, new riders, and general community impression		
<b>Improve the service</b>	Although this is part of the transit service plan, improving the service is certainly a marketing tool. Especially for tourists who might use the service to get around and for skiers going to Schweitzer. And later night service might encourage 25-45 demographic ridership.	New riders (millennials, young families), tourists, skiers, seniors, employees/commuters		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Invest in the drivers as marketers</b>	Drivers are SPOT's ambassadors. By keeping drivers happy and informed, they can be effective marketing tools for growing the service. Training drivers in how to provide the highest quality customer service will pay dividends every time someone rides the bus.	Current riders, first time riders		
<b>New website</b>	Redesigning and updating the SPOT website is recommended and is a key customer information tool. This effort would include completely overhauling the existing site to create a much easier user experience; update website content with more complete SPOT information; include real-time bus information tools; and have better maps and timetables. Once the new site is built, SPOT should plan to use the site for timely news and rider alerts, as service changes.	Youth, tourists, businesses, existing riders		
<b>Press releases</b>	SPOT should celebrate its successes and regularly update the community on SPOT through periodic press releases. SPOT should have a standard press release template and list of press contacts for distribution of press releases. The Bonner County Bee, Sandpoint Reader, Sandpoint Online Town Crier, and KXLY should all receive SPOT press releases.	Community at large; those who may never ride		
<b>Business partner campaign "I'm on the SPOT"</b>	This idea is to create a campaign where supporting businesses would display a "I'm on the SPOT – ask me about the free bus" window sticker to show support of SPOT. The business would also have SPOT schedules available, preferably in a holder on the counter, and know the basics about SPOT. Also promoting it to specific businesses with built-in ridership needs like auto repair shops.	Visitors, new riders, businesses		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>School partnerships and outreach</b>	Since youth are such a big part of SPOT's current ridership, SPOT should work to encourage more students to ride the bus by promoting SPOT at school events, in youth publications (like the high school newspaper), and by having SPOT bus information at all of the schools. SPOT should also look for opportunities to partner with schools on transportation needs – taking a SPOT route for a field trip is a great way to introduce SPOT.	Youth, school staff		
<b>Re-do printed schedule and distribute more widely</b>	Through surveys conducted for this project, we know that the SPOT bus schedule needs to be updated for easier comprehension and made more readily available throughout the community. The SPOT printed schedule needs a better map and easier to understand timetable for each route, and it needs to include information on paratransit and vanpool. A separate information rack card should be developed for Bonner's Ferry service for distribution in that area. SPOT should consider paying to have the schedule distributed in local brochure racks.	Community at large; those who may never ride		
<b>Quick reference guides and training of staff near bus stops</b>	Businesses closest to the bus stops can be one of the best ambassadors for the service. This idea involves creating a simple quick reference card or handout that shows the nearest bus stop location in relation to the system map ("you are here") and gives the schedule for just that bus stop location (northbound bus at :45 from 6:45 until 5:45). This allows local businesses to know and share information with their customers.	All		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Flyers and posters around town</b>	From market and community research, flyers and posters around town seem to be an effective communication tool. SPOT should develop flyers and posters that build awareness of the bus service, its benefits, and any new and interesting services. This tool could be particularly effective when SPOT grows or changes its service. Flyers could be placed at many locations around town – senior centers, social service offices, the library, non-profits, and community centers would all make good poster locations.	Locals, seniors, youth, visitors, employees/commuters		
<b>SPOT as a vehicle for better health</b>	According to a study presented at the American Heart Association's Scientific Sessions 2015, riding the bus or train to work is associated with significant health improvements. Promoting this fact and partnering with public health organizations can be a great way to build ridership. The ParkRx program, a health initiative to get people healthier by exercising in parks, of the Kanisku Land Trust is a developing partnership for SPOT. By linking the SPOT bus into a trip to a park, SPOT can attract new riders. This tool is simply partnering with ParkRx and other healthcare organizations to cross-promote SPOT services.	Those with physical or mental health problems		
<b>Presentations to partners, especially city councils, business groups</b>	Making presentations is one of the most effective ways to educate the community about SPOT services and their importance. Although this is a time consuming effort, it is low cost and very effective. SPOT should work to develop a standard set of talking points, service highlights, and organizational statistics. Depending on the presentation, this might be a PowerPoint, a 1-2 page handout, or use the flyers. This tool will help build general community support for SPOT.	Decision makers, community leadership		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Rider of the month spotlight and/or bus schedule in newspaper</b>	Advertising in the newspaper isn't something recommended for SPOT due to high costs; however, SPOT may be able to work with the Bee or Reader to get free or discounted placement of monthly rider profiles or perhaps having the bus schedule in the newspaper. The rider profile could be a recurring feature that would have a picture and quote from a SPOT rider in order to highlight why SPOT is awesome and showcase a daily rider who's story helps illustrate the paradigm, that SPOT is "just the way we get around."	All		
<b>"Get on the SPOT" campaign for coffee sleeves and coasters</b>	Having a simple message printed on coffee sleeves and coasters at local coffee shops and restaurants could be a low-cost way to create exposure to SPOT. This tool would hopefully be something that the local business partner (restaurant or coffee shop) would want to help underwrite.	New riders, millennials, choice riders (those who drive but might choose to ride occasionally)		
<b>Employer outreach</b>	Local businesses need to know about SPOT and how SPOT can help solve employee commuting challenges. SPOT should meet with and present to major employers and their employees details about SPOT services. This tool will be particularly helpful in building vanpools. Attending employee staff meetings, dropping by with donuts for a meet and greet, and working with HR staff on flyers and emails to employees are all ways to implement.	Commuters		
<b>Facebook page, social media</b>	Facebook and select regional Facebook groups could be effective ways to send periodic updates about SPOT with interesting and timely content. In order to be effective, the SPOT social media account must be regularly monitored and actively managed.	Youth, millennials, community at large		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Troubleshoot phone app and promote as part of all other campaigns, along with other technology</b>	SPOT has an app that shows customers where the bus is in real-time, but it isn't working consistently and isn't promoted. The DoubleMap app could be an excellent tool, especially for tech savvy riders, but it must be managed and promoted (i.e. included on all SPOT materials). This technology does take a lot of time to manage and keep up to date; SPOT doesn't have this expertise or time today. If SPOT does have the capacity, integrating SPOT schedule information into Google Maps through the GTFS file spec could be another way to reach technology-savvy riders.	Youth, millennials, visitors		
<b>Targeted radio and magazine advertising</b>	Radio seems to be an effective advertising tool for ongoing messages to build awareness. SPOT should pursue trade or public service announcements (PSAs) on radio. Additionally, SPOT could look at ads in local magazines, although this is higher cost and harder to trade or get free submissions. SPOT has been in Sandpoint Magazine in the past and needs to evaluate the effectiveness of this ad and its cost relative to other marketing potentials. Cost dependent on trade or PSA.	New riders, general community		
<b>Special events</b>	SPOT could consider providing additional bus service for many special events throughout the year. This would introduce the bus to new riders and increase SPOT's visibility in the community; however, special events can be challenging. SPOT will need a partner who will promote the extra event service and limit parking around the event venue, or the special event service can be underutilized and ineffective.	New riders		
<b>Links to local partners</b>	SPOT should work to integrate awareness into as many efforts of the cities and counties as possible. This could include SPOT on municipal websites or having SPOT at city or county sponsored events. SPOT should be integrated into the cities and the county, as the transportation arm.	The community at-large		



## The Plan Year by Year

For the coming three years, SPOT should begin to put into action some of the information, ideas, and tools presented. SPOT can take its limited budgeted and staff time and slowly and incrementally implement the Marketing and Outreach Plan.

Year	Goal and Theme	Tools	Resources*
Year 1	To improve the basic marketing and outreach building blocks, in order to setup SPOT for future success. SPOT must invest in basic customer information tools, rider amenities, PR strategies, and partnerships.	<ul style="list-style-type: none"> <li>Bus stop signage and amenities</li> <li>Website rebuild</li> <li>Bus branding and ID</li> <li>Driver training</li> <li>Press releases</li> <li>Update bus schedule format</li> <li>Links to local partners</li> </ul>	<p>\$5,000-\$10,000 in direct marketing spend plus in-kind partner support</p> <p>Staff, board, and in-kind partners time total of 10-20 hours per month</p>
Year 2	<p>Continue work from Year 1 and begin to leverage those efforts to:</p> <ol style="list-style-type: none"> <li>1. Get regular riders riding more</li> <li>2. Start attracting new markets.</li> </ol> <p>With basics in place, SPOT can now go to work on getting more people on board and building community awareness.</p>	<ul style="list-style-type: none"> <li>Employer outreach</li> <li>School partnerships</li> <li>Rider of the month spots</li> <li>SPOT for better health</li> <li>Flyers and posters</li> <li>Facebook and social media</li> <li>Quick reference guides</li> </ul>	<p>\$10,000-\$15,000 in marketing plus in-kind partner support</p> <p>Staff, board, contracted, and in-kind time total of 20-25 hours per month</p>
Year 3	Years 1 and 2 create opportunity for Year 3 to be year of significant external marketing and ridership growth among new marketing. This is the year to make SPOT omnipresent in the community.	<ul style="list-style-type: none"> <li>Business partner "I'm on the SPOT"</li> <li>Presentations to the community</li> <li>Phone app and other technology</li> <li>Coffee sleeves and coasters</li> <li>Targeted ads</li> <li>Special events</li> </ul>	<p>\$20,000-\$25,000 in marketing plus in-kind</p> <p>Time of 25-30 hours per month</p>

*\*This is direct marketing and out expense. Capital and operating expenses that have marketing benefits, such as service improvements, bus stop amenities and new buses, are not included in Resources.*



Each year builds on the next and efforts started in Year 1 must be continually developed through Years 2 and 3. Once an effort is started, it is recommended that it be continued going forward, unless it is thoroughly reviewed and there is an identified reason it is deemed ineffective (effectiveness often increases with time). Budgeting and staffing must grow to support increasing SPOT marketing and outreach efforts over the next three years.

### Getting This Work Done (Limitations and Need for Partnerships)

The challenge to implementing this plan is figuring how to fund these efforts and how to improve marketing without impacting existing service. Every public transportation system faces the same challenge of finding enough funding for marketing and outreach when the direct costs of running bus service are a higher priority. But funding this marketing plan is critical to SPOT's success; running SPOT buses without good marketing means the service will not reach its full potential. Acknowledging that SPOT has budget and staff limitations in implementing the ideas of this plan, SPOT must seek creative partnerships, cost share, schedule the work slowly, and use low-cost approaches.

The budget constraint is one of the biggest challenges to plan implementation. SPOT should look to allocate more funding to marketing, but this approach will take time – SPOT has a fixed budget and service commitments that use almost all the current budget. It is recommended that SPOT also pursue a more immediate solution for accomplishing marketing goals – set-up an interior and exterior bus advertising program with the goal of trading ads on buses for SPOT ads in a variety of media. SPOT should trade bus ad space for radio spots, online advertising, putting the bus schedule in the newspaper, getting SPOT into businesses (like on coffee cups or coasters), or any other creative trades SPOT can establish. The goal of ads on SPOT buses wouldn't be to generate direct revenue – the goal would be to generate trade dollars for SPOT marketing and outreach. Bus ads could also be used as trade for staff time from partners who can help market and promote.

The other biggest constraint is available staff time. Currently, SPOT is not staffed to carry out much of this plan. SPOT has one full-time employee whose time is consumed with day to day operations. Given this time constraint, SPOT must look to other ways to get this work completed and rely on its partners to help.

#### Workhorse board of directors

- The SPOT board has shown that it is willing to work and will need to give time to these marketing efforts

#### Schweitzer Mountain Resort

- With in-house marketing resources, Schweitzer could provide marketing staff time to help SPOT implement this plan, which could be done as part of a trade for bus ad space or as in-kind donation as part of a partnership for bus service to the mountain

#### Municipal partners

- SPOT could reach out to its partner cities to ask for help with specific marketing and outreach initiatives from city staff or officials who may have expertise or access to helpful resources like existing city newsletters

## CONCLUSION

SPOT has a strong, recognizable community brand with loyal and happy customers. Building upon this base of support, SPOT is ready to grow its awareness, usage, and community impact. By implementing this Marketing and Outreach Plan, SPOT will become a community institution that is positively viewed throughout the region. Many more opportunities and new ideas will result from starting down the path of better marketing and outreach – SPOT should plan to incorporate this evolution of marketing and outreach through periodic updates to this plan.

See

SPOT



A Comprehensive Success Guide





# See SPOT Run

## A Comprehensive Success Guide

developed by



September 2016

See

SPOT

*ENGAGE*

A decorative graphic consisting of a series of overlapping circles in various colors (blue, grey, orange, green, and light blue) arranged in a curved path that follows the word 'ENGAGE'.

Marketing and Public Outreach





# See SPOT Engage

## OVERVIEW

The goal of this SPOT Marketing and Public Outreach Plan is to provide a clear path towards continuing to grow ridership and build community support. SPOT has a solid foundation on which to build increased marketing and public outreach efforts. It has a strong brand, solid ridership, enthusiastic community support, and positive political momentum. This plan will leverage all of these assets in a thoughtful and strategic way.

The Marketing and Public Outreach Plan addresses the following:

- Current marketing efforts
- Who is riding today, why they ride, and how to get them to ride more
- Who isn't riding much today and how to get them onboard
- A toolkit of strategies, rated by cost and complexity, and mapped to target audiences
- A three-year approach to implementation
- Partnerships required to successfully implement this plan

Informing this plan are stakeholder interviews, two community surveys – from riders and stakeholders, and market research performed by SHIFT. This plan uses industry best practices, opportunities unique to SPOT and the communities it serves, and successful efforts from other communities.

Implementation of this plan will result in a stronger SPOT that continues to weave itself more tightly into the fabric of the community. In several of our community interviews, the idea of making SPOT “just the way you get around” and “what our community does” and “a community institution” were expressed and embody exactly what a good marketing and public outreach plan can do for SPOT, along with strategic implementation.

## SPOT MARKETING EFFORTS TO DATE

The SPOT brand is very strong for a small transit system. SPOT's brand reflects the community and is easily identifiable. The logo, bus graphics and generally positive community perception of SPOT are tremendous assets that can be leveraged towards a new infusion of energy, excitement, and growth.

As SPOT moves forward with the marketing and outreach efforts of this plan, the brand and what it represents should be infused into all the various outputs. The brand should remain the same and be adapted and leveraged to connect more people to the bus and get more people on board. The main goal of this plan is for the community to view the SPOT brand synonymously with economic vitality and development.



*The SPOT Brand = fun, interesting, community-oriented*

SPOT has gone through a common cycle for new services in rural areas with a limited budget. Initially, SPOT had a lot of buzz, the awareness of SPOT grew quickly, there was initial money to market the service, and ridership grew quickly. Now, SPOT has hit a 5-year plateau where ridership is steady but not growing, awareness among non-riders has dropped, money for marketing is very limited, and customer information needs improvement. SPOT must invest more in marketing in order to reverse this trend. The baseline budget for marketing is very small:

*The current SPOT marketing and advertising budget  
is only \$1500-\$2000 per year.*

This current spend consists of limited print advertising, printed brochures, and website costs. Bus graphics and bus stop signage are not included in this total, but are included as part of the Capital Improvement Plan (bus graphics are included in the cost of a new bus and bus stop signage project already funded and slated for 2017). The advertising budget is so limited that SPOT is not able to build awareness or grow ridership through marketing or outreach.

SPOT should start planning for how to grow funding for these marketing investments. This is a challenge that will be addressed later in this plan with ideas on how to partner and trade for market exposure. The good news is that SPOT has strong brand fundamentals and is ready to build on this foundation to renew itself and look for more support and use in the coming three years.



## COMMUNITY SURVEYS

SHIFT conducted two similar surveys, from two distinct community groups – existing riders and community stakeholders. The goal of the surveys was to understand a variety of aspects including the markets and identify marketing opportunities, service improvement needs and perceptions of SPOT. Only a portion of the questions from each survey were asked of both groups, the rest were tailored specifically to either existing riders or community stakeholders.

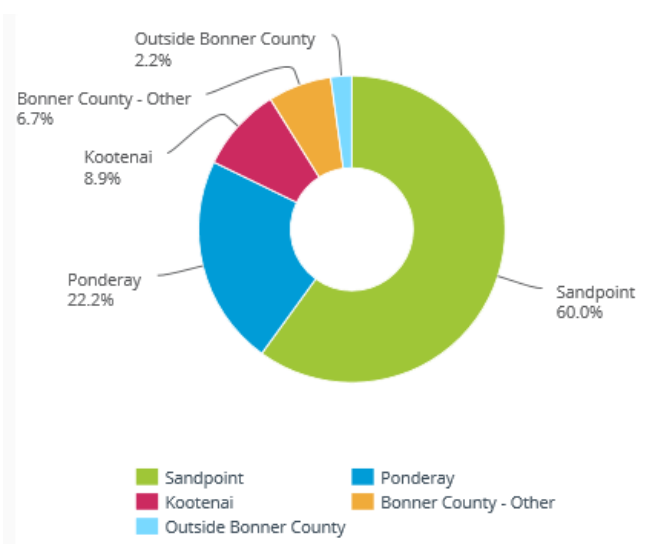
This plan focuses only on the survey responses that inform the markets and marketing opportunities. The existing riders group responded to marketing questions about how they use SPOT and why, how they plan their trip, and where they get their SPOT and other community information. The stakeholder group represented key decision makers and responded to some rider questions, such as why they ride or don't ride and what could get them to ride or ride more frequently, as well as marketing ideas for increasing ridership.

### Existing Riders Survey - Results

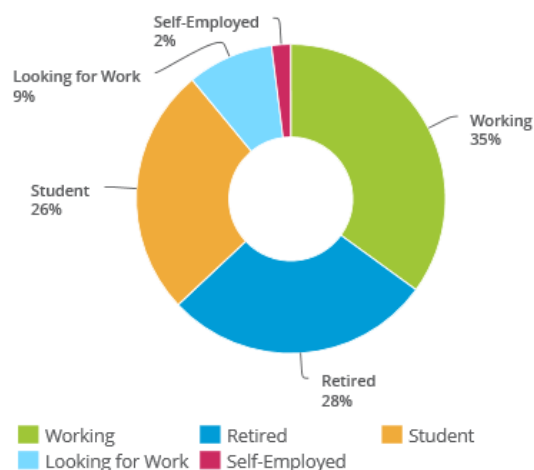
SHIFT conducted a survey of existing riders to understand who is using SPOT, why they are riding, and how they use the bus. 45 riders responded to the survey, which represents approximately 3% of the average weekly ridership, and 21% of the average daily ridership.

The survey shows 25% of respondents use SPOT 10 or more times a week, while 50% of respondents use it between 1-5 times a week. All respondents ride on weekdays and almost all ride on weekends too. The large majority live in Sandpoint, and most are employed, followed closely by retirees (retirees includes those no longer working, not necessarily retirement age).

Rider Residency

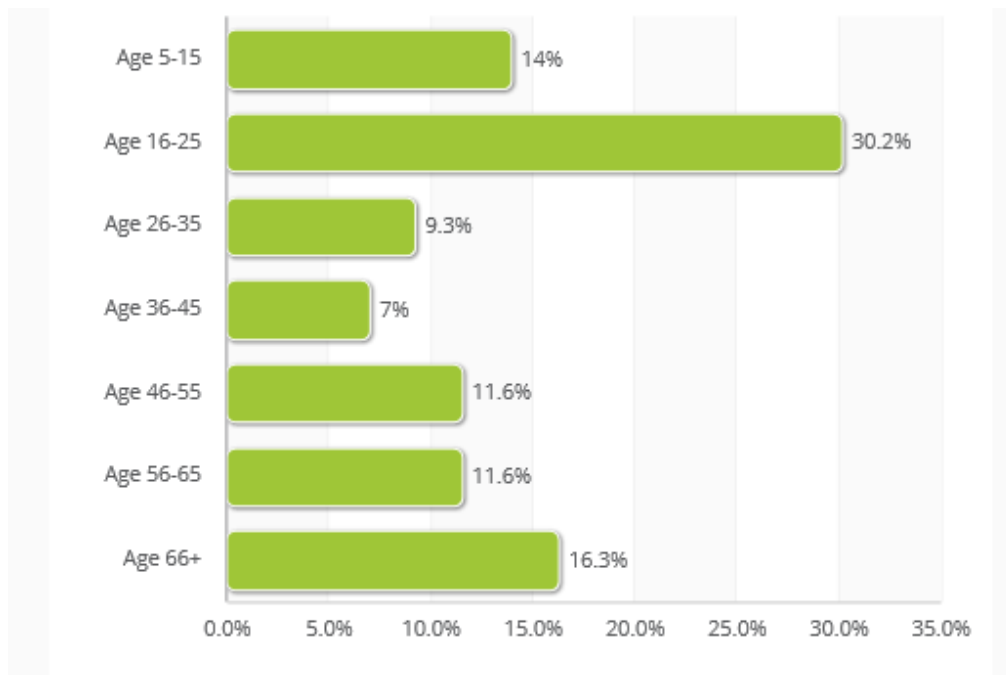


Employment Status



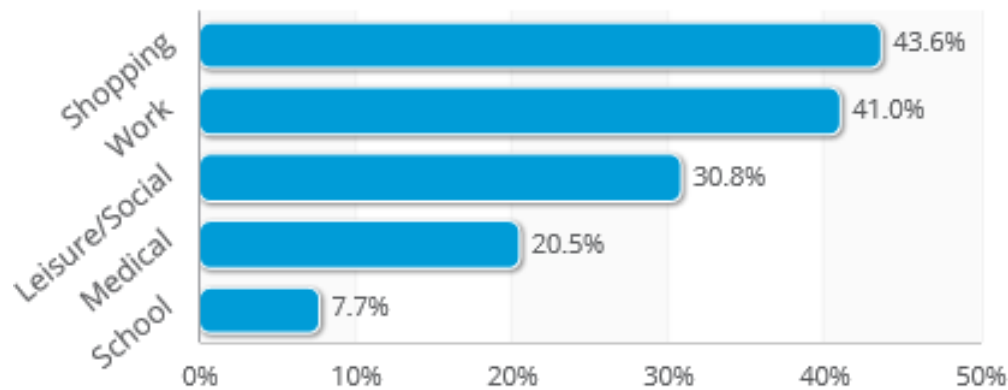
In terms of age, SPOT riders tend to be either younger riders, with 44% of riders aged 25 or younger, or older riders, with 28% of riders aged 56 or older. Middle-aged riders make up the smallest percentage of riders.

Rider Age



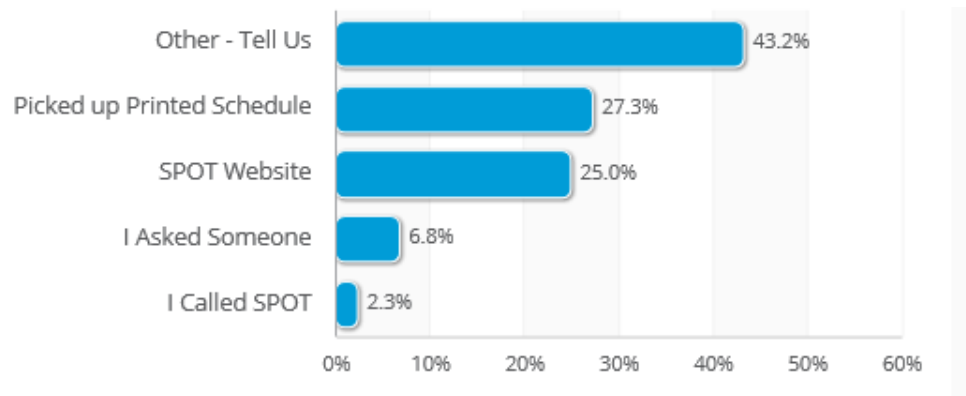
When asked about trip purpose, SHIFT found that most SPOT riders were using the bus for shopping, followed closely by work, but the results show that SPOT is being used for a wide variety of trip purposes. The data show that SPOT has a diverse ridership that counts on the service for all types of trips:

Reason for Trip



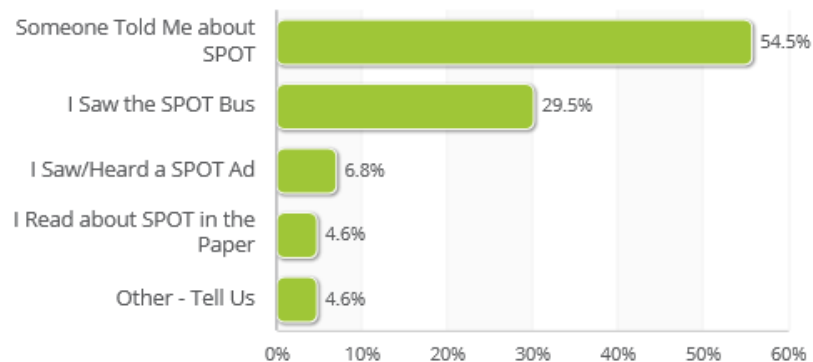
Another goal of the survey was to find out how riders are doing their trip planning, how they originally found out about the bus, and why they ride:

### How Did You Plan Your Trip Today?

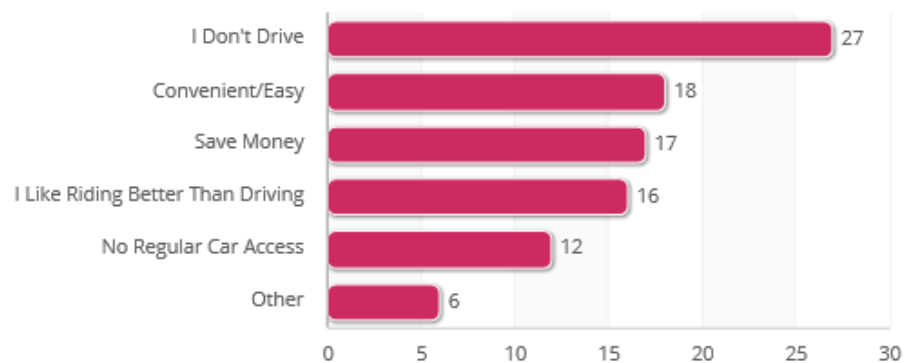


The “other” responses were predominately that the rider knows the schedule and doesn’t need to pre-plan their trip. The two additional responses received as “other” are: 1) schedule on phone; 2) called paratransit.

### How Did You Hear about SPOT?



### Why Do You Ride SPOT?



## Existing Riders Survey - Discussion

SPOT is used by a diverse group of people, representing many age groups with varying reasons for using SPOT. There were a few patterns identified in the responses received that lead to assumptions regarding who the majority of riders are today and what groups of riders are not as prevalent. The survey results highlight three target market opportunities:



- 1) Youth/young adults
- 2) Seniors
- 3) Employees (middle ages)

The youth/young adult segment of SPOT respondents can be summarized as follows:

- They form the majority of riders responding to the survey
- They don't drive or have access to a vehicle
- They are almost solely use SPOT for shopping and work trips
- 70% live in Sandpoint
- They use both routes equally
- They predominately get their information from the SPOT website

The survey was conducted in August; therefore, youth respondents were not in school and no responses were collected reflecting that this age demographic is using SPOT for school transportation. Additional information or survey data would need to be collected to identify whether they are using SPOT for transportation to and from school. Without knowing the results, assumptions can be made that this is likely occurring during the school year. Gaining more youth ridership during the school year is certainly a marketing opportunity through outreach and promotion at the schools.

Riders greater than 65 in age made up 16% of respondents. This group's responses can be summarized as follows:

- They use SPOT primarily for shopping and leisure trips
- 50% live in Ponderay
- They get their SPOT information from a variety of places – website, brochures around town, newspaper, and at community centers

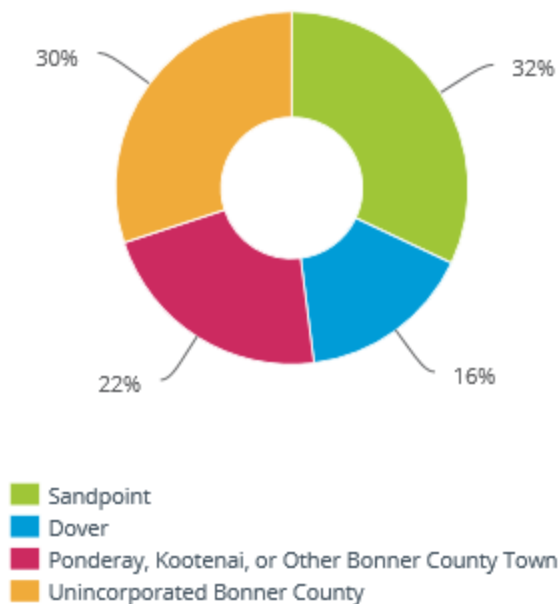
- Their trips tend to be longer in miles, which might be because 50% of the respondents from this demographic reported to live in Ponderay and are likely traveling to Sandpoint or another location outside of Ponderay for their shopping and leisure trips
- They ride SPOT predominately because they would rather not drive and because it's easy and convenient

Almost 56% of all respondents heard about SPOT from someone (word of mouth), with about 30% finding out about SPOT by seeing the bus. This leaves about 14% of respondents learning about SPOT from other forms of marketing. This is an indicator that either SPOT has invested little in advertising or riders are not receptive to the types of advertising that SPOT has pursued. The former is likely the primary reason, but strategically selecting the type of advertising is also an important consideration.

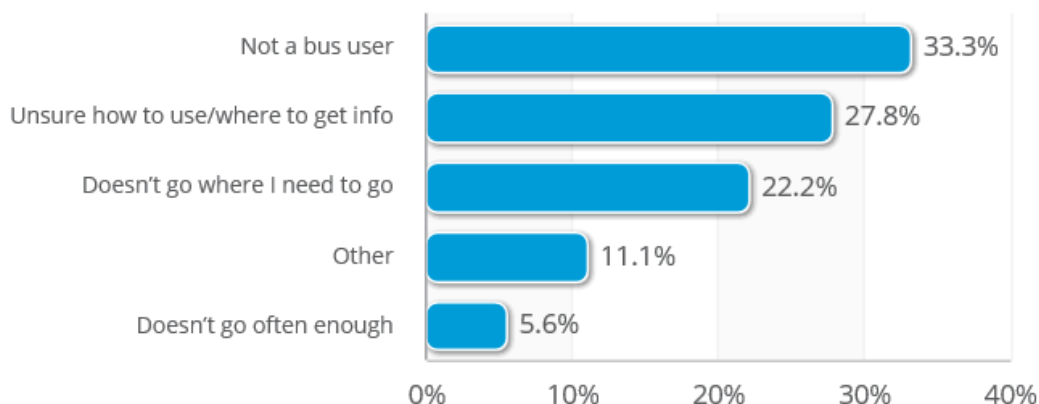
### Stakeholder Survey (Riders and Non-Riders) - Results and Discussion

SHIFT polled community stakeholders by designing an online survey and distributing it electronically through a variety of means including the Sandpoint Chamber, city and county electronic mailing lists, a link on the SPOT website, a feature in the Bonner County Bee, and a feature on Sandpoint Online. Here are the results of 49 respondents who took the survey.

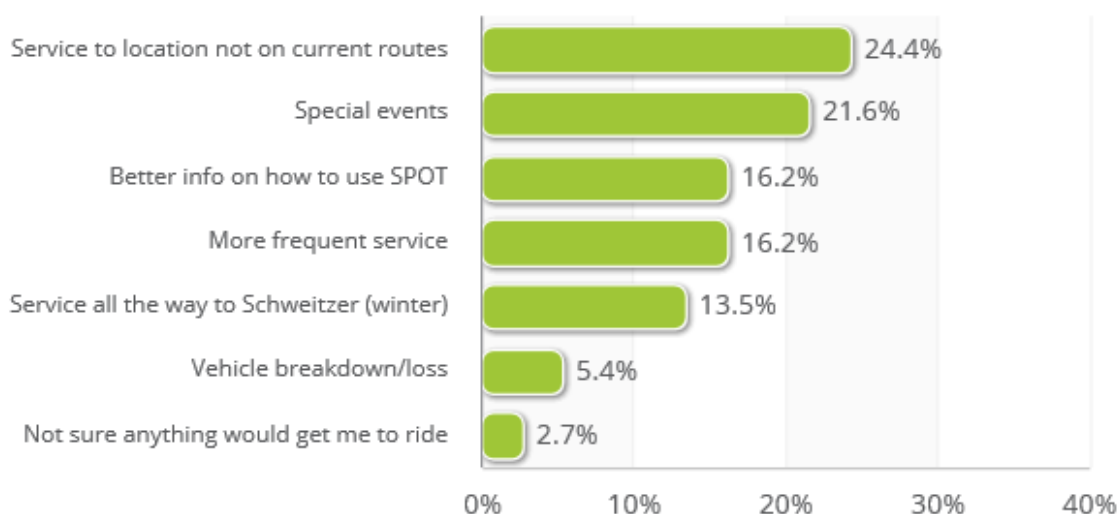
#### Rider Residency



43.5% have never taken SPOT before. Of these respondents, the following reasons for not riding were received:



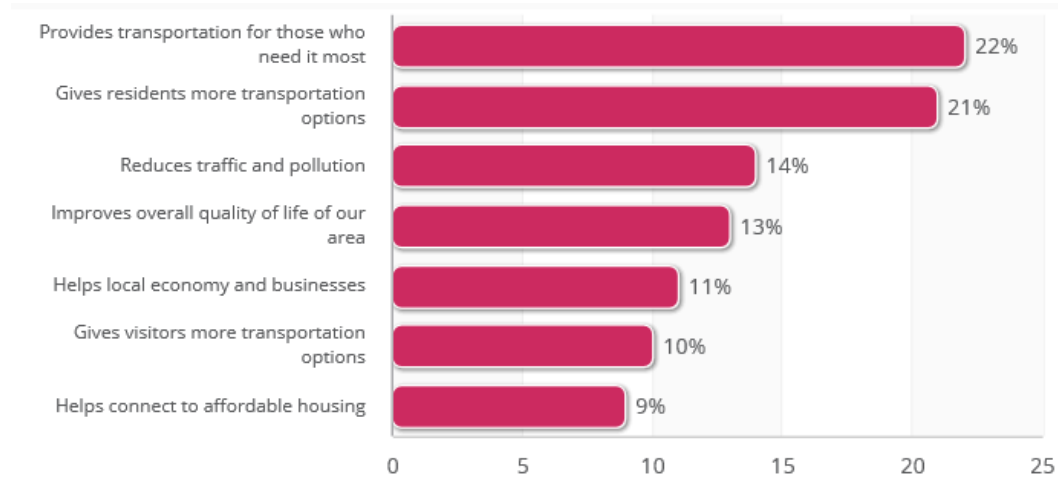
When this group was asked what could get them to ride spot, they responded as follows:



In addition to the choices provided above, the group was also given the option to write in their own ideas that might get them to ride SPOT. Their feedback was predominately split between two responses: 1) clearer information and route maps; 2) expanded service to Sagle, Baldy Road, and shuttle service between parking areas and City Beach/downtown during the weekends.

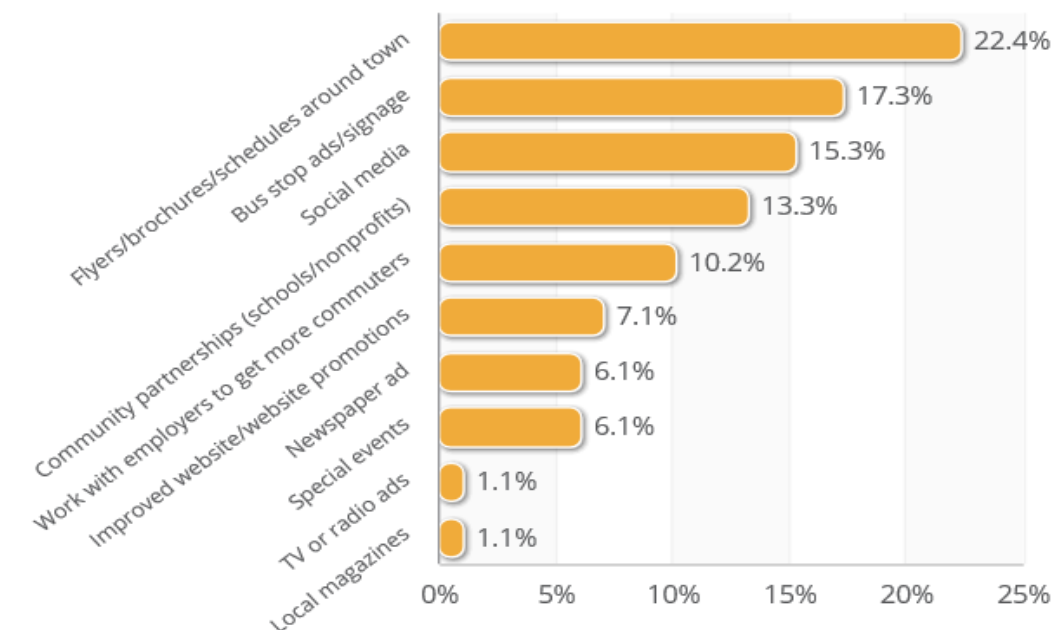
56.5% of the stakeholder group has taken SPOT. When asked their reasons for riding, the top three responses among respondents were: 1) transportation while their car was repaired; 2) leisure or social activity; 3) shopping. These results are consistent with the results of the rider survey; few middle-age respondents are using SPOT for transportation to and from work. The stakeholder group likely uses SPOT for infrequent trips, on occasion, not for daily commuting.

The stakeholder group was asked to respond to what the perception of SPOT is and its role in the community. Here were the responses:



These results indicate that stakeholders perceive SPOT as a necessary service for those that need it and as a benefit to residents to allow them more transportation options. They see SPOT less as helping the local economy and businesses and even less as giving visitors more transportation options. These are two areas where more targeted marketing can change the community's perception of SPOT from offering limited, but necessary, transportation benefits to SPOT being "a community institution" and "just the way we get around," as heard during several stakeholder interviews.

The stakeholder group was asked what the most cost effective marketing strategies/tools are to attract more riders and improve awareness of SPOT and the following responses were received:





Getting more information out about SPOT around town is a common theme in the results of both community surveys that could help increase ridership with the general community as well as visitors and establish SPOT as beneficial to the economy and businesses.

There can be a relationship between increased ridership and economic and community vitality. SPOT riders walk or bike to and from each bus stop when they begin and end their trip. Walking by businesses creates opportunities for more economic activity around these bus stops. When parking is limited people may decide not to visit downtown areas at all, whereas SPOT could provide a hassle free and easy way to get people to a location without the stress and inconvenience of parking.

## Marketing for Boundary County, Paratransit, and Vanpool

Much of the research, discussion, and tools in this plan are focused on riders of the fixed route system – Blue and Green Route riders. This market represents one of the largest opportunities for growth through marketing and outreach. Many of the marketing ideas in the toolkit section of the plan can be used for these services, but it is important to discuss specific marketing tactics for Boundary County, paratransit and vanpool and the communities they serve. These groups weren't specifically surveyed, but SHIFT conducted many interviews and drew on best practices when marketing to these groups.

### Boundary County-Bonner's Ferry Demand Response Service

This service is still relatively new, running less than eighteen months, and has done a good job of attracting a base of riders that need the service. It routinely runs at better than two riders per hour, which is good for a demand response service.

In a small community such as Bonner's Ferry, word of mouth and grassroots marketing are the best approach. As a new service, SPOT needs to educate the community about what SPOT is, how it operates, and why it's good for everyone.

The first step is creating a simple marketing piece that can be printed and distributed in several forms including as a rack card, a flyer, and electronically. The purpose of this would be two-fold: to promote the service itself and how to use it (hours of service, destinations, etc.), and to educate on what public transportation is.



The educational message should be:

- Public transportation is a public service and is open to everyone
- The city and county support and sponsor SPOT services
- With more demand and use, SPOT could add more service to the Bonner's Ferry area
- Public transportation is good for the community – it provides vital mobility, saves riders money, and provides more independence to those who use SPOT



*SPOT strengthens the community by providing mobility and independence*

*Credit: Bonner's Ferry Herald*

Recommended distribution of this marketing piece is:

- posting around town
- city mailings
- local businesses
- hospital
- assisted living facilities (e.g. Restorium)
- visitor center
- city hall

SPOT should also consider being interviewed on the local radio show and presenting to as many community groups as possible. It should also be distributed electronically through Bonner's Ferry online, Facebook groups, and city and county online resources.

## Bonner County Paratransit Service

Paratransit service is a federal requirement of a fixed route service, when federally funded. SPOT should consider marketing this service in conjunction with marketing the fixed route service. There are numerous benefits to increased awareness of paratransit service:

- 1) providing mobility to those that need it most
- 2) increasing efficiency/productivity of paratransit service by linking multiple trips together instead of only single rider trips
- 3) providing positive community perception

Currently, this service is marketed very little. There is a very small mention of it on the SPOT schedule, with no detailed information about the service, and the website doesn't have any section about this service. SPOT should increase the information about paratransit on the SPOT printed schedule and website as a first step to better marketing this service. The next step would be to create a dedicated informational card on this service, much like the one suggested for the Bonner's Ferry demand response service, that would describe hours of service, prequalification process, area of service, and other helpful information. This should be distributed to all social service organizations in the Sandpoint area, as well as at assisted living facilities, the hospital, disability organizations, and the senior center.

## Vanpool

Based on the current lack of affordable housing and challenges that employers have in finding skilled workers, SHIFT anticipates that SPOT will see significant growth in this program. Employers will find that vanpool can provide them with skilled workers from outside the area, and employees will find that vanpool links affordable housing locations with high paying jobs in a cost-effective way.



Vanpool marketing is straightforward:

Put together an informational piece on how vanpool works

- Include example pricing and commuter tax benefit information (vanpool qualifies for pre-tax consideration under the Commuter Benefits program)
- Describe benefits of vanpool for employee and employer
- Adapt for flyer/brochure and electronic dissemination

Set-up meetings with owners and managers of local businesses and present vanpool basics

- Find how vanpool can solve the employee challenges
- Vanpool delivers happier, safer, better rested employees to the job

Follow-up with interested employers to build interest among employees

- Employee staff meetings, email communications, and drop-in coffee talks are all ways to build employee interest

The Sandpoint area employers should be very receptive to vanpool, and SPOT could see this program grow quickly with some basic promotion and direct outreach.

## Marketing to Those Who Will Never Ride

Riders or non-rider aside, the public perception of SPOT is critical to ongoing partnerships and funding. SPOT is a public agency receiving local tax dollars that aren't guaranteed year-to-year; therefore, marketing to the community itself is a necessity. It's not enough to have regular riders taking more trips, new demographics getting on the bus, and routes connecting to new destinations. Elected officials, business leaders, non-profit organizations, and the community at large must know about SPOT and understand why SPOT is important to the community, regardless of whether someone rides or not. SPOT needs the community to feel that public transportation is an important community asset and something worthy of supporting.

SPOT can tailor the message for a particular group, but some of the resonating talking points that board and staff can use include:

### SPOT is good for quality of life

- Communities with good public transportation are nicer, easier, more connected places to live and work
- Public transportation makes the community more attractive – those living here are more likely to stay and those thinking of living here are more likely to relocate
- Communities that rely less on single occupancy vehicles are more resilient

### SPOT is good for business

- With a tight job market, employers are looking for ways to attract and retain employees – public transportation options make this easier
- Consistent transportation means employees get to work safely and are often more rested and ready to work
- Those people riding SPOT save money and can spend it on other things
- Bus trips end and begin with walking or biking, which means bus riders are more likely to frequent businesses while enroute

### SPOT is good for housing

- With limited affordable housing within walking distance to most amenities, SPOT can better link jobs and services with housing in outlying areas
- Vanpool can be used as a tool to link areas of regional activity

### SPOT is good for biking and walking and community health









- Public transportation can reduce depression and isolation among those who use it
- Every bus trip on SPOT starts and end with a walk or a bike trip, which helps improve health
- SPOT takes an average of 400 cars off the road per day, which improves the downtown experience for biking and walking

SPOT is good for the environment and congestion









- With an average of 6 people an hour getting on the bus, that means the effective miles per gallon of the bus is 72MPG!
- More people on the bus = less people in cars
- SPOT must continually talk about the community benefits of public transportation and build specific outreach efforts towards building general awareness. By growing ridership and this community awareness, the political support and overall goodwill will happen naturally.

SPOT must continually talk about the community benefits of public transportation and build specific outreach efforts towards building general awareness. By growing ridership and this community awareness, the political support and overall goodwill will happen naturally.







## THE TOOLKIT







TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Better bus stop amenities</b>	One of the top requests from the surveys was better bus stops with amenities like benches, shelters, and lighting. All of these improve the overall riding experience and make new riders more likely to ride again. Bus stops are also the most visible aspect of the service and impact the community perception.	All current and potential riders; the community at-large		
<b>Better bus stop signage</b>	Through its work on this plan, SHIFT heard that bus stop signage needs to improve to show the system map and the bus times at a particular stop. The signage should also identify the stop itself. In addition, larger and more visible signs can have an advertising benefit.	Current riders and general community impression		
<b>Invest in better buses that all have route identification</b>	Many of SPOT buses are in need of replacement and hurt the rider experience, especially for those buses that don't have adequate air conditioning for cooling in the summer. Also, many riders requested desire to know what route a bus is running through bus identification. Although this is a capital improvement issue, it impacts marketing and ridership growth. Buses with better passenger amenities that are easier to board and are more comfortable will help market the service.	Current riders, new riders, and general community impression		
<b>Improve the service</b>	Although this is part of the transit service plan, improving the service is certainly a marketing tool. Especially for tourists who might use the service to get around and for skiers going to Schweitzer. And later night service might encourage 25-45 demographic ridership.	New riders (millennials, young families), tourists, skiers, seniors, employees/commuters		



















TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Invest in the drivers as marketers</b>	Drivers are SPOT's ambassadors. By keeping drivers happy and informed, they can be effective marketing tools for growing the service. Training drivers in how to provide the highest quality customer service will pay dividends every time someone rides the bus.	Current riders, first time riders		
<b>New website</b>	Redesigning and updating the SPOT website is recommended and is a key customer information tool. This effort would include completely overhauling the existing site to create a much easier user experience; update website content with more complete SPOT information; include real-time bus information tools; and have better maps and timetables. Once the new site is built, SPOT should plan to use the site for timely news and rider alerts, as service changes.	Youth, tourists, businesses, existing riders		
<b>Press releases</b>	SPOT should celebrate its successes and regularly update the community on SPOT through periodic press releases. SPOT should have a standard press release template and list of press contacts for distribution of press releases. The Bonner County Bee, Sandpoint Reader, Sandpoint Online Town Crier, and KXLY should all receive SPOT press releases.	Community at large; those who may never ride		
<b>Business partner campaign "I'm on the SPOT"</b>	This idea is to create a campaign where supporting businesses would display a "I'm on the SPOT – ask me about the free bus" window sticker to show support of SPOT. The business would also have SPOT schedules available, preferably in a holder on the counter, and know the basics about SPOT. Also promoting it to specific businesses with built-in ridership needs like auto repair shops.	Visitors, new riders, businesses		



TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>School partnerships and outreach</b>	Since youth are such a big part of SPOT's current ridership, SPOT should work to encourage more students to ride the bus by promoting SPOT at school events, in youth publications (like the high school newspaper), and by having SPOT bus information at all of the schools. SPOT should also look for opportunities to partner with schools on transportation needs – taking a SPOT route for a field trip is a great way to introduce SPOT.	Youth, school staff		
<b>Re-do printed schedule and distribute more widely</b>	Through surveys conducted for this project, we know that the SPOT bus schedule needs to be updated for easier comprehension and made more readily available throughout the community. The SPOT printed schedule needs a better map and easier to understand timetable for each route, and it needs to include information on paratransit and vanpool. A separate information rack card should be developed for Bonner's Ferry service for distribution in that area. SPOT should consider paying to have the schedule distributed in local brochure racks.	Community at large; those who may never ride		
<b>Quick reference guides and training of staff near bus stops</b>	Businesses closest to the bus stops can be one of the best ambassadors for the service. This idea involves creating a simple quick reference card or handout that shows the nearest bus stop location in relation to the system map ("you are here") and gives the schedule for just that bus stop location (northbound bus at :45 from 6:45 until 5:45). This allows local businesses to know and share information with their customers.	All		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Flyers and posters around town</b>	From market and community research, flyers and posters around town seem to be an effective communication tool. SPOT should develop flyers and posters that build awareness of the bus service, its benefits, and any new and interesting services. This tool could be particularly effective when SPOT grows or changes its service. Flyers could be placed at many locations around town – senior centers, social service offices, the library, non-profits, and community centers would all make good poster locations.	Locals, seniors, youth, visitors, employees/commuters		
<b>SPOT as a vehicle for better health</b>	According to a study presented at the American Heart Association's Scientific Sessions 2015, riding the bus or train to work is associated with significant health improvements. Promoting this fact and partnering with public health organizations can be a great way to build ridership. The ParkRx program, a health initiative to get people healthier by exercising in parks, of the Kanisku Land Trust is a developing partnership for SPOT. By linking the SPOT bus into a trip to a park, SPOT can attract new riders. This tool is simply partnering with ParkRx and other healthcare organizations to cross-promote SPOT services.	Those with physical or mental health problems		
<b>Presentations to partners, especially city councils, business groups</b>	Making presentations is one of the most effective ways to educate the community about SPOT services and their importance. Although this is a time consuming effort, it is low cost and very effective. SPOT should work to develop a standard set of talking points, service highlights, and organizational statistics. Depending on the presentation, this might be a PowerPoint, a 1-2 page handout, or use the flyers. This tool will help build general community support for SPOT.	Decision makers, community leadership		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Rider of the month spotlight and/or bus schedule in newspaper</b>	Advertising in the newspaper isn't something recommended for SPOT due to high costs; however, SPOT may be able to work with the Bee or Reader to get free or discounted placement of monthly rider profiles or perhaps having the bus schedule in the newspaper. The rider profile could be a recurring feature that would have a picture and quote from a SPOT rider in order to highlight why SPOT is awesome and showcase a daily rider who's story helps illustrate the paradigm, that SPOT is "just the way we get around."	All		
<b>"Get on the SPOT" campaign for coffee sleeves and coasters</b>	Having a simple message printed on coffee sleeves and coasters at local coffee shops and restaurants could be a low-cost way to create exposure to SPOT. This tool would hopefully be something that the local business partner (restaurant or coffee shop) would want to help underwrite.	New riders, millennials, choice riders (those who drive but might choose to ride occasionally)		
<b>Employer outreach</b>	Local businesses need to know about SPOT and how SPOT can help solve employee commuting challenges. SPOT should meet with and present to major employers and their employees details about SPOT services. This tool will be particularly helpful in building vanpools. Attending employee staff meetings, dropping by with donuts for a meet and greet, and working with HR staff on flyers and emails to employees are all ways to implement.	Commuters		
<b>Facebook page, social media</b>	Facebook and select regional Facebook groups could be effective ways to send periodic updates about SPOT with interesting and timely content. In order to be effective, the SPOT social media account must be regularly monitored and actively managed.	Youth, millennials, community at large		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Troubleshoot phone app and promote as part of all other campaigns, along with other technology</b>	SPOT has an app that shows customers where the bus is in real-time, but it isn't working consistently and isn't promoted. The DoubleMap app could be an excellent tool, especially for tech savvy riders, but it must be managed and promoted (i.e. included on all SPOT materials). This technology does take a lot of time to manage and keep up to date; SPOT doesn't have this expertise or time today. If SPOT does have the capacity, integrating SPOT schedule information into Google Maps through the GTFS file spec could be another way to reach technology-savvy riders.	Youth, millennials, visitors		
<b>Targeted radio and magazine advertising</b>	Radio seems to be an effective advertising tool for ongoing messages to build awareness. SPOT should pursue trade or public service announcements (PSAs) on radio. Additionally, SPOT could look at ads in local magazines, although this is higher cost and harder to trade or get free submissions. SPOT has been in Sandpoint Magazine in the past and needs to evaluate the effectiveness of this ad and its cost relative to other marketing potentials. Cost dependent on trade or PSA.	New riders, general community		
<b>Special events</b>	SPOT could consider providing additional bus service for many special events throughout the year. This would introduce the bus to new riders and increase SPOT's visibility in the community; however, special events can be challenging. SPOT will need a partner who will promote the extra event service and limit parking around the event venue, or the special event service can be underutilized and ineffective.	New riders		
<b>Links to local partners</b>	SPOT should work to integrate awareness into as many efforts of the cities and counties as possible. This could include SPOT on municipal websites or having SPOT at city or county sponsored events. SPOT should be integrated into the cities and the county, as the transportation arm.	The community at-large		

## The Plan Year by Year

For the coming three years, SPOT should begin to put into action some of the information, ideas, and tools presented. SPOT can take its limited budgeted and staff time and slowly and incrementally implement the Marketing and Outreach Plan.

Year	Goal and Theme	Tools	Resources*
Year 1	To improve the basic marketing and outreach building blocks, in order to setup SPOT for future success. SPOT must invest in basic customer information tools, rider amenities, PR strategies, and partnerships.	<ul style="list-style-type: none"> <li>● Bus stop signage and amenities</li> <li>● Website rebuild</li> <li>● Bus branding and ID</li> <li>● Driver training</li> <li>● Press releases</li> <li>● Update bus schedule format</li> <li>● Links to local partners</li> </ul>	<p>\$5,000-\$10,000 in direct marketing spend plus in-kind partner support</p> <p>Staff, board, and in-kind partners time total of 10-20 hours per month</p>
Year 2	<p>Continue work from Year 1 and begin to leverage those efforts to:</p> <ol style="list-style-type: none"> <li>1. Get regular riders riding more</li> <li>2. Start attracting new markets.</li> </ol> <p>With basics in place, SPOT can now go to work on getting more people on board and building community awareness.</p>	<ul style="list-style-type: none"> <li>● Employer outreach</li> <li>● School partnerships</li> <li>● Rider of the month spots</li> <li>● SPOT for better health</li> <li>● Flyers and posters</li> <li>● Facebook and social media</li> <li>● Quick reference guides</li> </ul>	<p>\$10,000-\$15,000 in marketing plus in-kind partner support</p> <p>Staff, board, contracted, and in-kind time total of 20-25 hours per month</p>
Year 3	Years 1 and 2 create opportunity for Year 3 to be year of significant external marketing and ridership growth among new marketing. This is the year to make SPOT omnipresent in the community.	<ul style="list-style-type: none"> <li>● Business partner "I'm on the SPOT"</li> <li>● Presentations to the community</li> <li>● Phone app and other technology</li> <li>● Coffee sleeves and coasters</li> <li>● Targeted ads</li> <li>● Special events</li> </ul>	<p>\$20,000-\$25,000 in marketing plus in-kind</p> <p>Time of 25-30 hours per month</p>

*\*This is direct marketing and out expense. Capital and operating expenses that have marketing benefits, such as service improvements, bus stop amenities and new buses, are not included in Resources.*

Each year builds on the next and efforts started in Year 1 must be continually developed through Years 2 and 3. Once an effort is started, it is recommended that it be continued going forward, unless it is thoroughly reviewed and there is an identified reason it is deemed ineffective (effectiveness often increases with time). Budgeting and staffing must grow to support increasing SPOT marketing and outreach efforts over the next three years.

### Getting This Work Done (Limitations and Need for Partnerships)

The challenge to implementing this plan is figuring how to fund these efforts and how to improve marketing without impacting existing service. Every public transportation system faces the same challenge of finding enough funding for marketing and outreach when the direct costs of running bus service are a higher priority. But funding this marketing plan is critical to SPOT's success; running SPOT buses without good marketing means the service will not reach its full potential. Acknowledging that SPOT has budget and staff limitations in implementing the ideas of this plan, SPOT must seek creative partnerships, cost share, schedule the work slowly, and use low-cost approaches.

The budget constraint is one of the biggest challenges to plan implementation. SPOT should look to allocate more funding to marketing, but this approach will take time – SPOT has a fixed budget and service commitments that use almost all the current budget. It is recommended that SPOT also pursue a more immediate solution for accomplishing marketing goals – set-up an interior and exterior bus advertising program with the goal of trading ads on buses for SPOT ads in a variety of media. SPOT should trade bus ad space for radio spots, online advertising, putting the bus schedule in the newspaper, getting SPOT into businesses (like on coffee cups or coasters), or any other creative trades SPOT can establish. The goal of ads on SPOT buses wouldn't be to generate direct revenue – the goal would be to generate trade dollars for SPOT marketing and outreach. Bus ads could also be used as trade for staff time from partners who can help market and promote.

The other biggest constraint is available staff time. Currently, SPOT is not staffed to carry out much of this plan. SPOT has one full-time employee whose time is consumed with day to day operations. Given this time constraint, SPOT must look to other ways to get this work completed and rely on its partners to help.

#### Workhorse board of directors

- The SPOT board has shown that it is willing to work and will need to give time to these marketing efforts

#### Schweitzer Mountain Resort

- With in-house marketing resources, Schweitzer could provide marketing staff time to help SPOT implement this plan, which could be done as part of a trade for bus ad space or as in-kind donation as part of a partnership for bus service to the mountain

#### Municipal partners

- SPOT could reach out to its partner cities to ask for help with specific marketing and outreach initiatives from city staff or officials who may have expertise or access to helpful resources like existing city newsletters

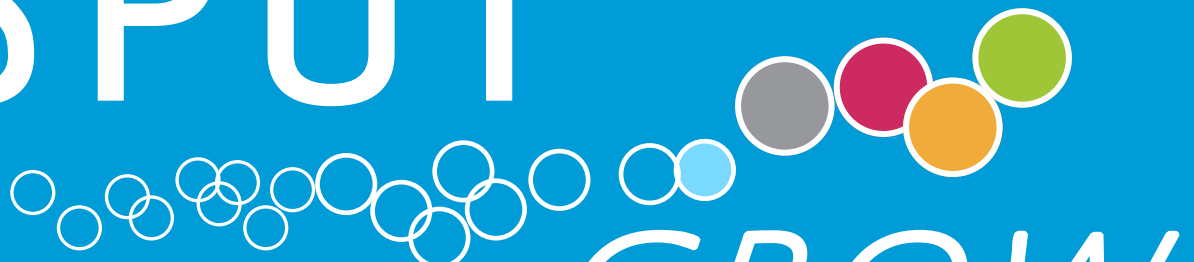
## CONCLUSION

SPOT has a strong, recognizable community brand with loyal and happy customers. Building upon this base of support, SPOT is ready to grow its awareness, usage, and community impact. By implementing this Marketing and Outreach Plan, SPOT will become a community institution that is positively viewed throughout the region. Many more opportunities and new ideas will result from starting down the path of better marketing and outreach – SPOT should plan to incorporate this evolution of marketing and outreach through periodic updates to this plan.



See

SPOT

  
*GROW*

Transit Service Development Plan





# See SPOT Grow

## OVERVIEW

A Transit Service Development Plan is an organizational planning tool that describes how existing transit routes and transportation services will be analyzed, developed, and operated, all of which is internally valuable to SPOT staff and board. This tool is also used to communicate externally with SPOT stakeholders and the community about transit service needs.

This plan will define the planning process by which the Transit Service Development Plan is updated annually. Included in this process is a mechanism for soliciting public comment on planned transit service and vet new service requests. This will allow for a transparent process to create more buy-in from the community. Not all the needs can be met, but SPOT must give an opportunity to hear from riders, the communities SPOT serves, and the general public about how SPOT service should grow.

The core of the Transit Service Development Plan is an evaluation of how to improve and grow services. Ideas in the plan are based upon several factors:

- The existing service operated
- Interviews with key stakeholders
- Survey results from riders and non-riders
- Analysis of the services operated and associated statistics
- Funding available now and in the future
- Industry best practices

The plan attempts to reconcile needs with available resources, while protecting existing services that are succeeding. The goal is to give SPOT a context for considering how to improve existing services and how to evaluate new services.

Finally, the plan will address existing services, ideas for improvement, new services, and make recommendations for the coming three years. Included will be route statistics, operating costs, trade-off analysis, and growth projections.

## FIXED ROUTE SERVICE: THE FUNDAMENTALS

When planning a fixed route bus system, there are two ends of the service spectrum to consider. On the one side of the spectrum are systems designed to cover the largest amount of geographic area with routes that offer a relatively low level of service. These routes run circuitously over longer distances to many different destinations that are geographically dispersed with frequencies often 60 minutes or longer. These routes are designed to provide equity and access. On the other side of the spectrum are bus routes that run more like rail service, with direct connections along an efficient, linear route, that are commonly referred to as high frequency service. Frequency routes run with buses departing every 30 minutes or less and often connect major destinations. Frequency routes require people to walk more, but people will often walk further to get more frequent service than wait for an hour to catch a bus closer.

SPOT's current system has aspects of both a coverage and a frequency system. Service between the shopping areas of Ponderay and downtown Sandpoint are direct and more frequent with the combined effect of coupled service on both Blue and Green Routes, but other areas are served with lower frequency routes of 60 minutes or more, which often wind around to get passengers directly in front of where they want to go.

SPOT should consider what model it prefers as it adapts and changes services. Many of the ideas in this plan are based around trying to grow ridership and develop more frequent service. The reason for this is that ridership growth is an expectation for most funding partners, and more frequent service is more productive, in terms of ridership per hour. In fact, ridership grows disproportionately higher with increased frequency. In other words, doubling frequency from 60 minutes to 30 minutes will often grow ridership by more than double.

In addition to considering the directness and frequency of a route, SPOT needs to ensure that the service provided is high quality, convenient, and consistent. Ridership doesn't happen overnight. You have to invest in a new service with the mindset that you will operate for at least a year, preferably two. Ridership is very hard to build and very easy to lose. You build ridership by developing services thoughtfully and run those new service with the long-term in mind. Unfortunately, ridership can easily be lost a lot, if service is inconsistent or unreliable.

The other key aspects to making a service go are:

### Demand

- Do you have enough confidence that a new service will be successful over the long-term? Have there been a lot of consistent requests for the service?

### Community-driven (political will)

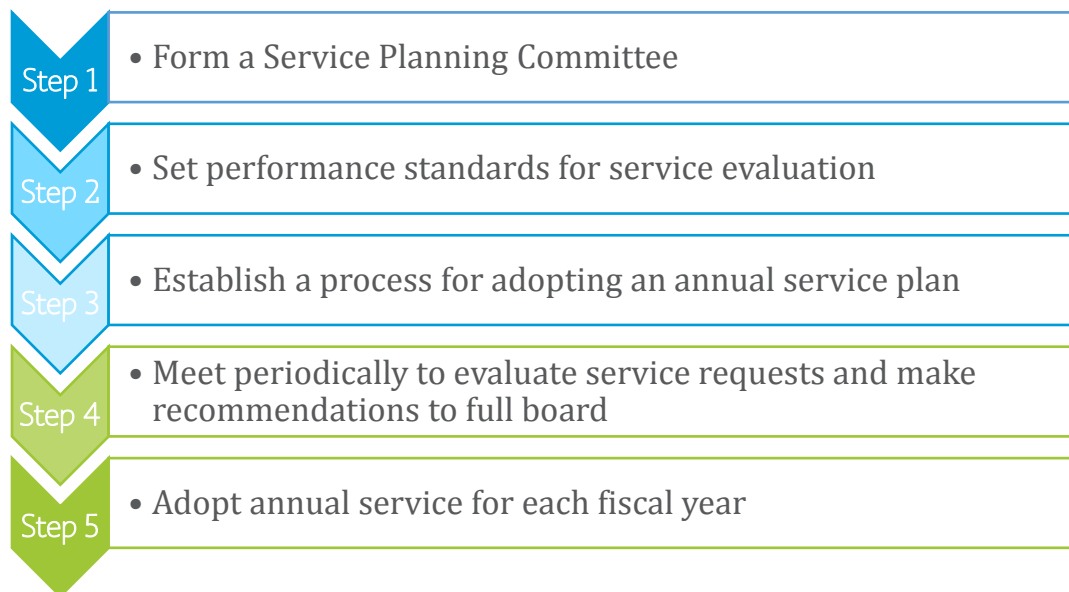
- This is often overlooked, but for a new route to be successful, there must be community interest and political will. Not necessarily from elected officials, political will can come from a new employer who is behind the start of a new vanpool, or a business like Schweitzer, helping to support the expansion of Blue Route to connect to the mountain base.

### Funding

- This one is obvious, but a service must have funding to support it. The funding should be predictable and sustainable, as much as possible with public transportation funding. SPOT should also be looking at both the operating and capital needs of the service. A new bus may be required to start a new route and SPOT needs to include the capital equipment budget impacts, both upfront and ongoing, and plan accordingly.

## THE PLANNING PROCESS: HOW TO BUILD

In order to have a well-functioning service, SPOT needs to establish a well-functioning process for service development. This process should be:



The committee should be made up of 3-4 board members and other stakeholders that have an interest in SPOT services. The existing technical advisory committees could transition onto this SPOT Planning Committee alongside willing SPOT board members. The committee should be no more than 10 people in order to keep meetings efficient. Meetings would be noticed and open to the public, as the Planning Committee would be making recommendations to the full SPOT board.

The first task for the SPOT Planning Committee would be to develop a set of standards for evaluating current services and new services. The committee would use these standards as a reference point for making changes to existing routes, increasing frequency of service, and adding new routes or services. Suggested questions to ask are:

### For Existing Services:

- 1) Is a given service meeting performance goals in terms of ridership and cost?
  - Even if a given service isn't meeting goals, is there a reason to keep operating it, regardless of performance? (e.g., "life-line" services that serve at-risk populations without other transportation options)
- 2) Are there improvements to the service that, on-balance, could provide more upside vs. downside?
- 3) Are bus stops getting too few or too many riders? Do stops need to be added or taken away?
- 4) How can SPOT continuously improve these existing services while still responding to unmet needs?
  - Don't harm existing, base-level of service
- 5) If a service needs to be cut or changed significantly, is there a way to still have another option for those impacted by any change?
  - Perhaps fixed route is replaced by demand response to retain basic mobility?

### For New Services:

- 1) What are the biggest unmet needs in the community?
  - Basis could be a missing connection, an unserved constituency, a change in land use or new land development, economic needs of businesses, or an affordable housing link
- 2) Does it complement existing SPOT services?
  - Is there a way to develop a new service such that it adds value to an existing service?
- 3) Does SPOT have the capacity to operate the service?
  - Administrative staff requirements, vehicle needs, marketing/promotional materials, and partnerships needed for success should all be considered

- 4) What is the funding model?
  - Is it sustainable? Does it have both local matching funds and federal funds?
  - Does it qualify for new sources of funding?
- 5) Does it meet the definition of public transportation?
  - Will it be open and accessible to the general public?

### Federally Mandated Guidelines:

In addition to establishing service change questions/standards, SPOT is required to set service policies and standards for five specific items (requirement of all Federal Transit Administration funding recipients):

- 1) Vehicle load – the maximum number of people per bus type (usually set by bus manufacturer but SPOT can choose to be more restrictive)
- 2) Vehicle assignment – bus sizes for each type of route
- 3) Vehicle headway – minimum service frequency for particular routes or route types
- 4) Distribution of transit amenities – goals for establishing bus shelters, benches, etc.
- 5) Transit access – the proximity of a route to existing population centers or other measure of service distribution like bus stop spacing

Once service standards are in place, the Planning Committee should establish a process for updating and adopting the annual service plan. In terms of timing with a fiscal year start of October 1<sup>st</sup>, the timeline and process for adopting an annual service plan could be:

**January – March:** collect service requests (use a standardized form); notify funding partners of the process

**May:** hold a meeting of the Planning Committee to review current services and evaluate requests for service changes, improvements, or new services.

**June:** put basic service concepts into a service outline that matches a draft budget

**July:** hold another Planning Committee meeting to develop the draft service plan that defines services for coming fiscal year

**August:** solicit public input on draft plan through surveys and community distribution of the plan

**September:** SPOT board adopts service plan, based on available budget and recommendation from Planning Committee

The process needs to allow for input from the leaders of the communities SPOT serves, the riders themselves, general public, and stakeholder organizations. As SPOT is a regional provider of public transportation services, there will always be more service requests than available resources. This process and timeline will provide context and guidance for how to deal with these competing requests.

## CURRENT SPOT FIXED ROUTE SERVICES: WHAT WE HEARD

SPOT today is characterized by strong public support, satisfied riders, and solid ridership. As SPOT considers how to develop transit services, the current services are the best place to start for transit service development.

The easiest and simplest way to grow ridership is to get existing riders to ride more often. By understanding what the existing riders like about the current services, why they ride, what they would like to see in improvements, SPOT will be able to make better decisions with regards to improving the existing routes. The rider survey, which sampled approximately 21% of the daily ridership, provided the following insights.

### Current riders would most like to see:

- 1) More frequent service
- 2) Later evening service
- 3) More stops along the routes
- 4) Connections to unserved places like Sagle and Ponder Point
- 5) Easier to read schedule

### What current riders love about the service today:

- 1) Free!
- 2) Easy and convenient
- 3) Friendly drivers
- 4) Reliable service, that it is available

### Trip purposes:

- 1) Shopping
- 2) Work
- 3) Leisure or social activity
- 4) Medical
- 5) School

### Who's riding:

- 1) Those who can't drive
- 2) Young people
- 3) Those who want to save money
- 4) Retirees

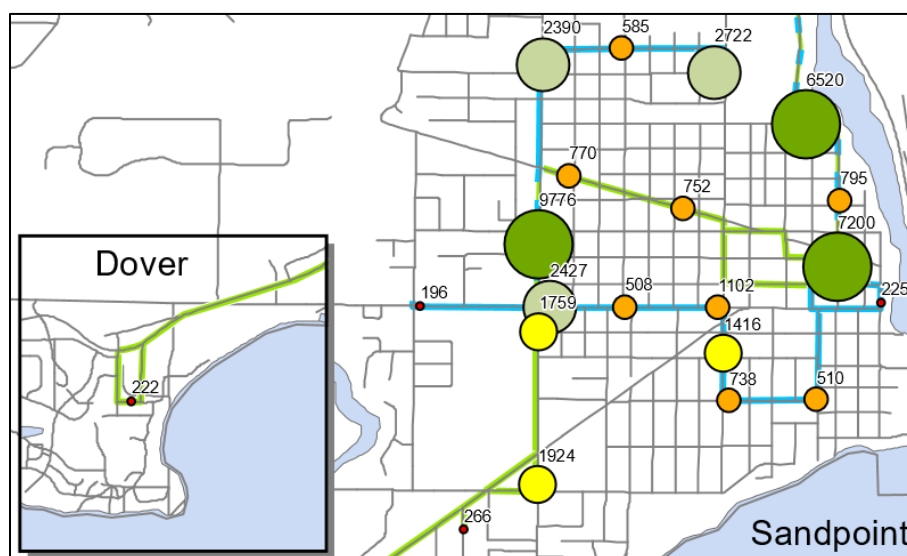
All of this rider feedback is crucial to remember when considering service changes – **SPOT has been successful thanks to its current riders and changes to service must protect the majority of these existing customers to the extent possible.**



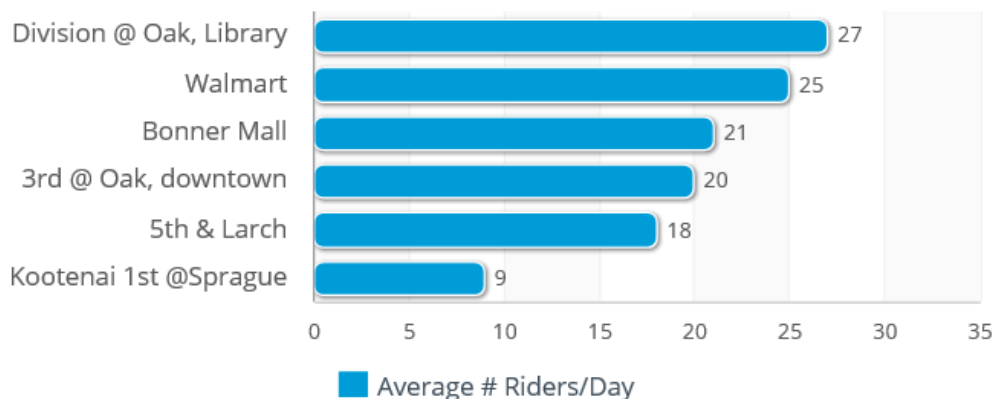
*Happy riders and friendly drivers define SPOT today*



Bus stops along the Blue and Green fixed routes are a good starting point to understanding the current service and where the riders are boarding the buses. By looking at bus stop usage, SPOT can start to see where opportunities for route improvement exist. For 2015, SPOT looked at rider concentrations per stop, based on recorded rider boardings. The bigger and more green the bubble, the higher the ride boardings; yellow, orange and red show lower rider concentrations.

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From this data, the top stops in the system, along with average riders per day, are:



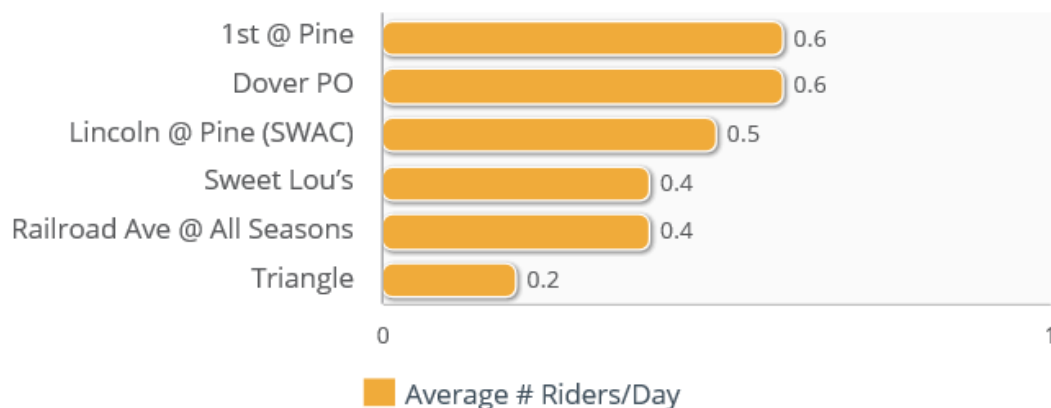
The data show how riders are using the system today – downtown Sandpoint, the library, Walmart, and Bonner Mall are the trip generators of the SPOT system. These stops show solid use and most are planned for bus stop improvements, which will help grow ridership even more.



*The Bonner Mall, one of the high-use stops*

Conversely, there are many stops with such limited use that SPOT must consider eliminating or moving some of these stops as part of the service plan.

The lowest performing stops in the SPOT system are:



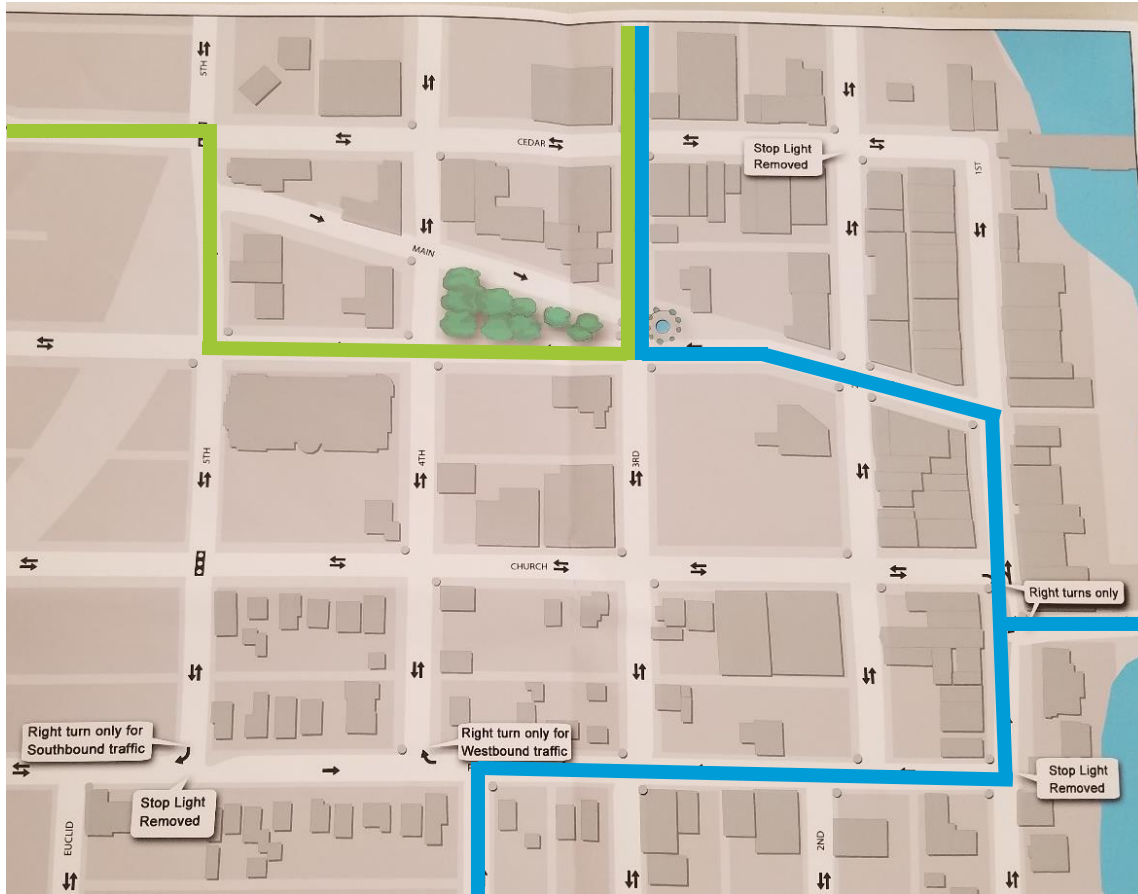
Considering that these stops are served many times each day, these average rider numbers are extremely low. A suggested benchmark would be at least 2 riders per day for any stop, especially if the stop requires a route to travel out of its way to serve that stop. If an underperforming stop is an intermediate point between two higher use stops, it is less of a concern and could remain as a stop. SPOT also needs to consider how planned service changes or improvements might affect whether or not a stop is eliminated. For example, the potential for Schweitzer service may be a reason to keep the Sweet Lou's stop due to potential growth in hotel guest ridership.

SHIFT also analyzed the distance between SPOT bus stops for Blue and Green Routes. In several cases, SPOT bus stop spacing is farther apart than what is typical for fixed route service. Within the transit industry, standards for bus stop spacing vary but are generally 500 to 1000 feet apart for downtown areas, higher density housing, or retail areas. In the SPOT service area, this would be downtown Sandpoint, the Bonner Mall, and Walmart areas. For more suburban housing areas or areas with dispersed retail or services, stops should generally be 1000 to 1500 feet apart (closer to ¼ mile spacing, or 1320 feet, which is the industry accepted maximum distance for how far someone will walk to a bus stop). In the SPOT service areas, this would be the areas along North Division, Chestnut, Michigan, City of Kootenai, Ponderay City Hall. More rural areas could see stop distances of ½ mile to 2 miles, depending on trip demand and safe stop placement. For SPOT, this would be Highway 2 to Dover, and points along Blue Route towards Schweitzer, west of Highway 95/2.

The recommended areas for adding stops are:

- 1) Along Main St., between downtown (3rd and Oak) and Division, 1 to 2 new stops
- 2) Along Division St, between Larch and Ontario, 2 to 3 new stops, especially at the High School and Middle School area
- 3) South downtown area, near Pine and 4th St., 1 new stop

There may be other areas that warrant new bus stops or adjustments to current stops, as services grow or land use changes. One big opportunity for adding new stops, as well as thinking about how to reconfigure Blue and Green routing, is the City of Sandpoint's planned change to downtown street configuration. This new layout will allow both Green and Blue Routes to provide more direct service in the downtown core, as shown.



*City of Sandpoint downtown street reconfiguration (Courtesy: City of Sandpoint)*

This is just one example of how Blue and Green Routes might operate after the streets of Sandpoint are changed. Other options may exist to more efficiently connect downtown destinations, including City Beach and the Library, while still serving the majority of the current stops. SPOT needs to be ready to adjust bus routing once the street project is complete.

## CURRENT SPOT SERVICES: HOW TO IMPROVE

Given the complexities of transit service planning, there is no holy grail or silver bullet that can meet all goals. As mentioned previously, there are inherent trade-offs between serving many communities and destinations versus providing high frequency service. Each route and service is a reflection of the community itself and usually develops from a community-based service planning process. SPOT service has grown up around this concept, and the system is generally working well. The current SPOT system:

- 1) Connects four different communities with consistent fixed route service, operating seven days a week
- 2) Serves major community destinations including the shopping areas of Ponderay, the downtown core of Sandpoint, the hospital, schools, grocery stores, the library, and town centers of Dover and Kootenai
- 3) Provides a base level of service within the Bonner's Ferry area with a growing demand response service
- 4) Gives those how qualify under the Americans with Disabilities Act lifeline service that may not exist otherwise
- 5) Is well-used by a variety of user demographics for a variety of trip purposes





In suggesting improvements to current services, this plan strives to respect the current system and the riders that depend on it. There are always a variety of ways to improve and change a service, **but major changes to the existing routes could be detrimental and counterproductive**. The following are two examples, illustrating the trade-offs between coverage versus frequency (SHIFT does not recommend these changes, they are only provided as an example):

- 1) Just one route running between the library, downtown Sandpoint, and the shopping areas of Ponderay. This route could achieve 20-minute frequency with two buses but would leave many areas unserved. This approach would prioritize frequency above coverage area.
- 2) Add a third route, running every 60 minutes, to connect to more destinations. This would prioritize coverage over frequency of service.

Both of these examples run contrary to what has made SPOT successful to date.

What SHIFT is recommending, after analyzing all of the current routes and services, is a strategic approach that takes the existing routes and services and improves them incrementally over time, making small changes to frequency and/or coverage, where it's appropriate. By implementing small tweaks and adjustments, as opposed to fully rebuilding routes and services, SPOT can best leverage its current system to produce higher ridership and more efficient, effective service with the ideas herein. The added benefit to this approach is it will retain the existing ridership and get existing riders using SPOT more often.

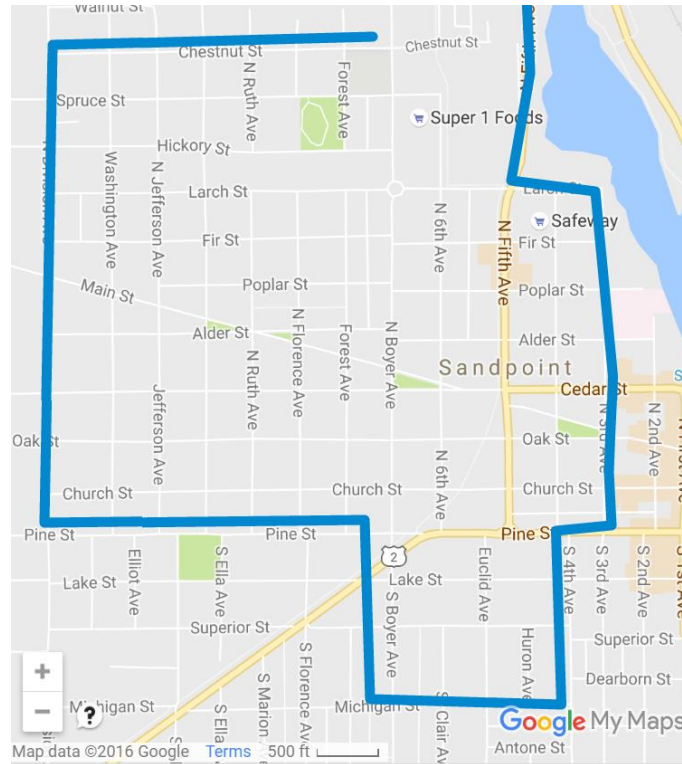
It is worth noting that SPOT operates in a very unique area that is constrained by many factors including: bodies of water that require indirect road routing, railroad tracks with intense train activity, one-way roads, and destinations that are not along direct routes. SPOT has done a commendable job designing a system that account for these many unique factors. The goal of this plan for improvements and service additions is to build on this solid foundation.

## Blue Route

SHIFT believes that Blue Route has the most opportunity for long-term growth due to potential for new Schweitzer and City Beach connections, and the fact that all of the highest use stops are served by Blue Route. When analyzing the route configuration (where it goes and how it gets there), SHIFT determined that the routing of Blue Route for points north of the City of Sandpoint is working well. For Blue Route within Sandpoint, SHIFT has identified options for SPOT to consider:

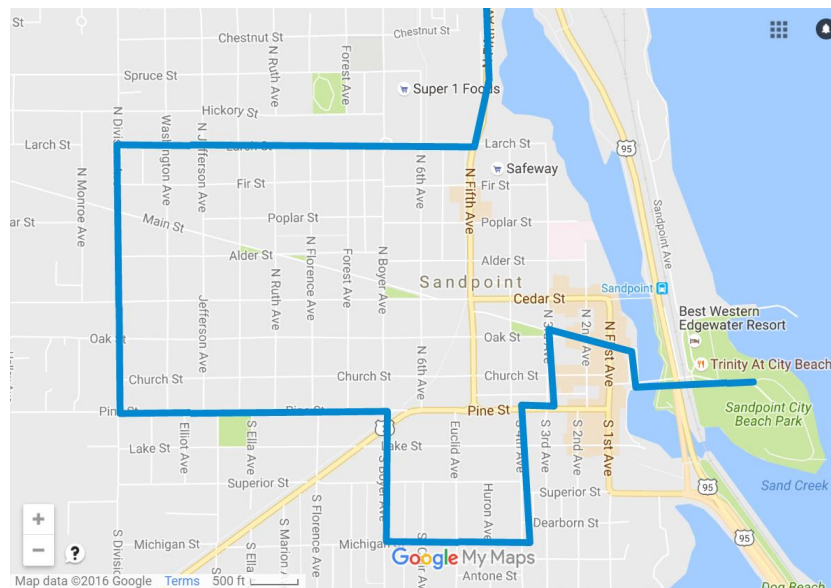
### Option 1 - Keep route as is in Sandpoint

- Blue Route doesn't necessarily need any adjustments, and SPOT could determine that the existing routing is preferred (apart from potential connection to City Beach that is easily added to current routing)



### Option 2 - Use Larch to Division as route into and out of Sandpoint

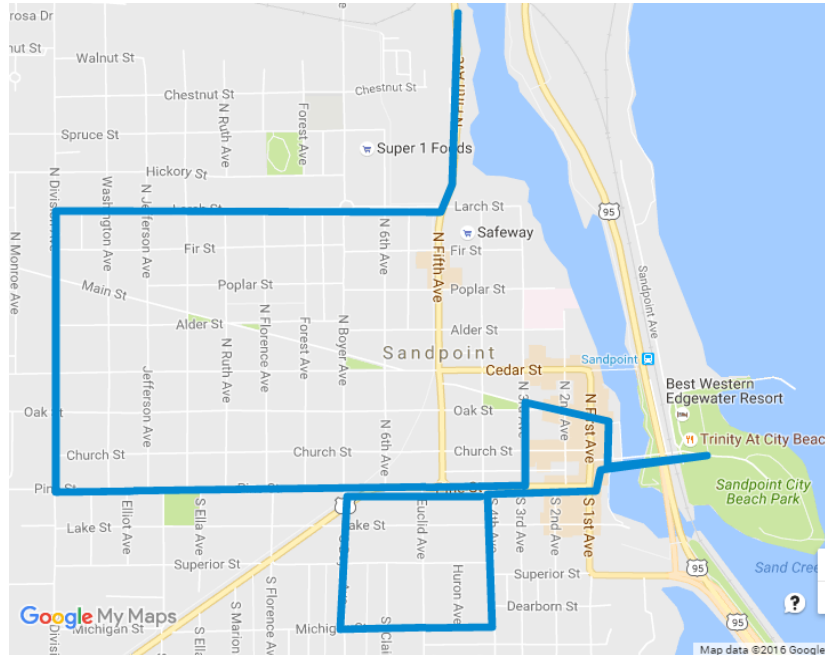
- Keeps current routing for neighborhood area off of Michigan





Option 3 - Same as Option 2 with exception of how Michigan neighborhood is served

- This option gets passengers straight to downtown first and then does a one-way loop to serve Michigan via 4<sup>th</sup> and Boyer



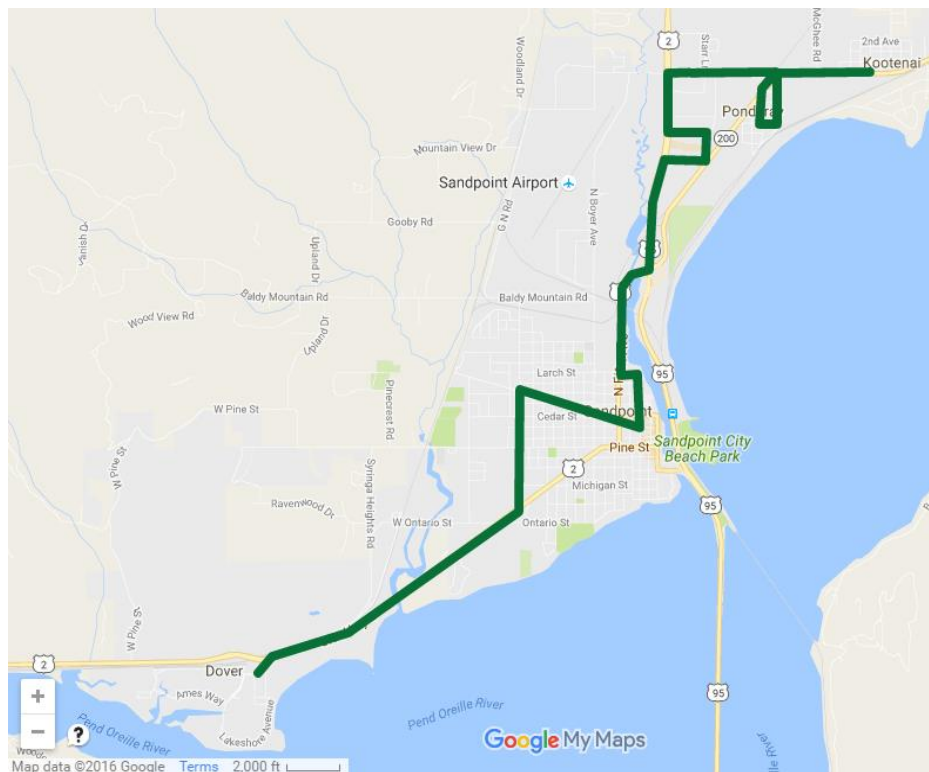
Routing options 2 and 3 make sense if SPOT felt more ridership could be gained from those in north Sandpoint who want a more direct connection to Ponderay, versus current routing that requires them to loop down to Michigan St. and into downtown before going to Ponderay and Kootenai. SPOT would also have to believe that those getting on in Kootenai and Ponderay are more interested in getting to destinations on the north side of Sandpoint, as well as the library, before going to downtown. The downside of both Option 2 and 3 is that the hospital isn't served and that getting to and from downtown isn't as direct.

Apart from potential routing adjustments that could be considered, there are service improvements that SPOT should evaluate to incrementally improve the Blue Route:

- 1) Make connection to City Beach in the summer
- 2) Add a second bus to improve frequency to every 30-minutes during winter and potentially summer; could start as part of Schweitzer for winter service and should be evaluated for eventual year-round service
- 3) Expand late night service to Wednesday through Saturday nights until 9:30p for both winter and summer to start and eventually provide late night Wed-Sat for entire year

## Green Route

The southern “tail” of Green Route currently alternates between two different destinations, resulting in a very low frequency (120 minutes) for the Sandpoint West Athletic Club and Dover. SHIFT recommends that the routing of Green Route be changed such that the connection to the SWAC is eliminated and Dover is served every trip. This will improve frequency for Dover to 60-minutes and will give the Dover ridership a chance to increase. It also provides for a more consistent and easier to understand schedule for the public. Here is the suggested routing change:



SHIFT looked at alternatives for changing how Green Route serves the Ponderay area, but the railroad tracks, lack of pedestrian infrastructure along Route 200, and needed connections to both the retail area and downtown Ponderay caused SHIFT to conclude that the routing in Ponderay should remain the same. Kootenai routing is recommended to remain largely the same as well.

Other opportunities for Green Route improvements include:

- 1) Reestablishing a bus stop at Kootenai City Hall
- 2) Make small adjustments to route timing to give drivers a longer break either in downtown or at the SPOT office

Due to timing constraints, Ponder Point isn't a recommendation for Green Route service, but SHIFT is recommending that this be included in a new demand response service for certain areas of Sandpoint (see separate section on "New Services").

### Paratransit in Sandpoint Area

SHIFT found that the paratransit service that operates within a  $\frac{3}{4}$  mile of the fixed route service area for those who qualify under the Americans with Disabilities Act is well used, is compliant with regulations, and is providing important service. Apart from more marketing to increase awareness of this service, there are no improvement recommendations for the paratransit service; however, there is a suggestion for a new demand response service that would utilize the existing paratransit service as its basis.

### Demand Response in Bonner's Ferry Area

Started in April of 2015, this service is one of the newest for SPOT. Ridership has grown from 92 in the first full month to over 200 per month recently. The service is open to the public and requires passengers to request trips in advance. Current service operates three days a week from 9am until 3pm and includes two days in and around Bonner's Ferry, and one day from Bonner's Ferry to Bonner County.

Given the population size of the area, SHIFT recommends that SPOT continue to improve demand response service for the next few years and not implement fixed route service. Demand response is much more flexible and appropriate for this service area. Demand response should be expanded from three days a week to four days a week with slightly longer hours and potential for larger service area to points:

#### Bonner's Ferry demand response goals (implemented over three years):

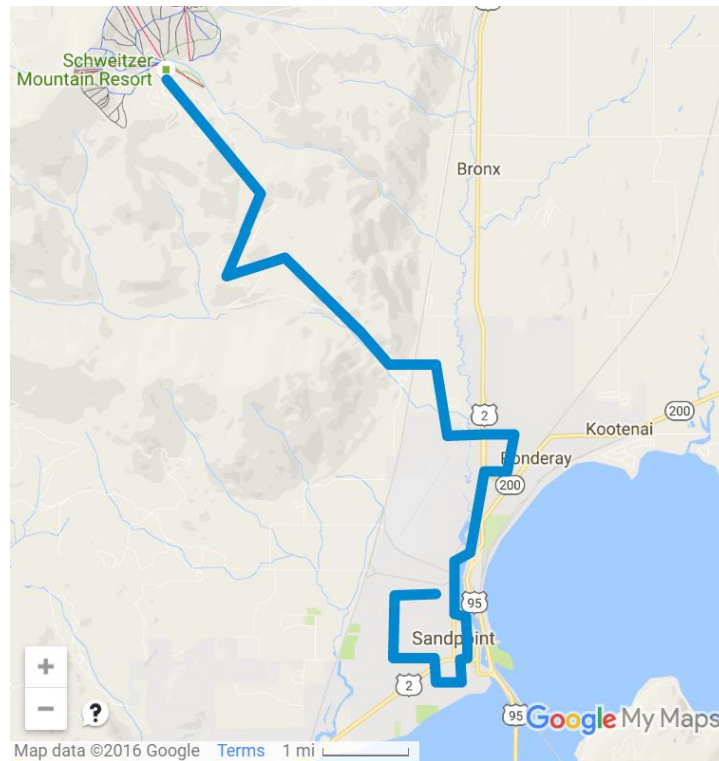
- Demand response service 4 days a week
- Monday through Thursday from 9a until 4p
- Expanded service area

Increasing service will take increased funding from partners in Boundary County and Bonner's Ferry. SPOT needs to continue to communicate about the resources required to grow this service, so that funding partners can plan ahead. It should be noted that the growth of this service is a separate goal from the new regional connection between Bonner's Ferry and Ponderay and Sandpoint, as detailed in the New Service section.

## NEW SPOT SERVICES: HOW TO GROW

### Schweitzer Connection

The extension of Blue Route to Schweitzer Mountain Resort in the winter is a new service that has been discussed by SPOT and Schweitzer in detail for more than a year. This new service idea seems to be viable – the community appears to support this new service, Schweitzer is willing to subsidize the operating and capital of this service, SPOT is willing to operate the service, and ridership should increase significantly. The proposed route, previously discussed by SPOT and Schweitzer, is an extension of Blue Route:



Schweitzer service dovetails into the existing Blue Route timing, but requires additional buses to operate. This timetable shows how buses would be timed for both 60-minute frequency, which requires 2 buses to operate, and 30-minute frequency, which requires 4 buses. (Frequency is calculated by using the time it takes 1 bus to make a full lap and dividing by the number of buses.) Bus times shown are suggested to create times that are easy for passengers to remember going to and from Schweitzer and match relatively close to existing Blue Route timing. Only show major time points, as shown in the table below (route would serve all existing intermediate stops).

<b>BLUE ROUTE TIMING WITH SCHWEITZER</b>	<b>60-minute frequency 2 buses</b>	<b>30-minute frequency 4 buses</b>
<b>TOWARDS SANDPOINT</b> (bus times after the hour)		
Schweitzer	:30	:30, :00
Red Barn	:00	:00, :30
Walmart	:10	:10, :40
Sandpoint downtown	:20	:20, :50
Spruce @ Boyer	:30	:30, :00
<b>TOWARDS SCHWEITZER</b> (bus times after the hour)		
Spruce @ Boyer	:30	:30, :00
Sandpoint downtown	:40	:40, :10
Walmart	:50	:50, :20
Red Barn	:00	:00, :30
Schweitzer	:30	:30, :00

In both scenarios, northbound and southbound buses are crossing paths at the Red Barn. This is a big advantage – if the road were closed and a bus was unable to make it down the hill in time, the other bus would simply turn around at the Red Barn and start running the schedule of the stuck bus.

### Demand Response Addition for Sandpoint Area

With a dedicated bus already operating complimentary paratransit service for ADA passengers in the Dover, Kootenai, Ponderay, and Sandpoint area, SHIFT believes that SPOT should consider using this service to also offer demand response service to specific areas and destinations not currently served. SPOT could offer a demand response service open to the public to connect to the following areas:

#### West Sandpoint, including service to SWAC

- Given recommendation for rerouting the Green Route and eliminating the SWAC stop, this would still give connectivity to this area

#### North Sandpoint

- Foodbank and airport area – demand response could work well to connect to these areas, especially since railroad tracks and deviation time make this area difficult to serve for existing fixed routes

### Ponder Point

- As mentioned, Green Route is very time constrained and cannot afford the time to go to Ponder Point. Demand service could fill this gap and provide service for this area

### Sagle

- The bridge is a challenge for this connection, but demand response with 1-2 standing trips (prescheduled trips that only operate if someone requests in advance) per day could be a place to start for serving Sagle

### Vanpool

With the first route just getting started for Quest Aircraft employees, SPOT vanpool is a brand new expansion of service, and SPOT's first foray into regional commuter transportation. SHIFT believes that vanpool will grow very quickly for SPOT over the coming years. As employers understand the benefits that vanpool offers in terms of employee retention and attraction, vanpool ridership will follow.

SHIFT believes that SPOT should grow vanpool carefully, as resources allow. With the current cost structure of vanpool, some administration costs are built in and SPOT must put that funding first into increasing the hours of an office assistant, and ultimately funding a vanpool coordinator position that could also be responsible for demand response coordination.

**Vanpool should be a core part of SPOT's growth over the coming three years with the goal of adding 1-2 vanpool routes per year**

### Regional Connections

As SPOT is about to expand its joint powers agreement regionally, SHIFT recommends that SPOT start planning for regional scheduled service. Two areas are recommended:

#### Connection between Bonner's Ferry and Ponderay/Sandpoint

**Plan:** transition current demand response run to scheduled fixed route one day a week and add Saturday service for casino goers and general public – both of these could start in 2017 and be expanded as funding and ridership grow.

**Funding:** existing demand response connection already funded; casino could fund weekend service

### Connection between Sandpoint area and Coeur D'Alene (CDA)

**Plan:** start conversation with regional partners in the CDA area and start planning route and funding. Apply for 5311(f) funding in 2017 and start service in 2018.





















**Funding:** 5311(f) intercity funding from the Federal Transit Administration with local match required. Kootenai County and Bonner County partners will have to participate.

SHIFT believes SPOT's role in regional transportation is going to grow in terms of importance and influence. By planning now, SPOT will be more successful in connecting a broader region and delivering economic benefits to all partners.

## SUMMARY OF IMPROVEMENTS

In considering potential improvements to existing services or additional new services, SPOT should be aware of the pros, cons, relative costs, and relative ridership gains.



Improvement or service addition	Analysis-Recommendation	Expense	Estimated Ridership Gain
Later night service for Blue	One of the top requests from riders, but this ridership potential may be limited. Recommended only if resources allow.		
30-minute frequency for Blue	Getting Blue Route to every half-hour will significantly improve ridership, but it is expensive. If resources allow, this is recommended (implement slowly)		
City Beach summer connection for Blue	This is an easy, low-cost change to Blue Route that should yield strong ridership gains and is recommended.		
Reconfigure Blue to operate along Larch	These options could produce more ridership. Not enough data to make a recommendation.		
Reconfigure Green to serve Dover every trip	Having a consistent route is important. This is low cost and is recommended, but ridership may take time to build.		
Demand response for specific areas around Sandpoint	General public demand response could work well for areas that aren't practical for fixed route service but are in need of service. Recommended if resources allow.		
Schweitzer service as Blue extension	This service seems to have the most energy and interest. It is expensive but Schweitzer is willing funding partner. Ridership numbers will be high, based on Schweitzer data. Recommended.		
Regional fixed route w/ limited service from Sandpoint to Bonner's Ferry	Currently the demand response service comes into Ponderay/Sandpoint once a week from Bonner's Ferry. This service is recommended to be transitioned to a fixed route. Saturday service is only recommended if the casino funds it.		
Regional intercity route to CDA	This is longer term project that is recommended for planning only at this point. If funding develops and partners are in place, service could be started in three years.		
Vanpool	Implementing vanpool is fairly low-cost with riders paying costs of the van. Given employer needs and housing, vanpool growth of 1-2 vans per year is recommended for SPOT.		

## THREE-YEAR SERVICE PLAN

There are many opportunities for SPOT – this chart charts illustrates a course for implementation. SPOT will need to determine if all of these opportunities make sense and whether they should happen sooner or later than recommended. As SPOT implements some of these opportunities, this three-year plan will need to be updated to reflect new information resulting from service, land use, and other changes.

EXISTING SERVICE	2017	2018	2019
Blue Route	Connect to city beach, consider route configuration	Increase night service.	Increase to 30-minute for winter and potentially summer service.
Green Route	Realign route to serve Dover every run, add new stops along existing route	Make time adjustment to Green to account for more Blue service	Evaluate long-term potential in 2020 and beyond of increasing to 30-min. freq.
Paratransit in Bonner County	Maintain as is	Maintain as is	Maintain as is
Demand response Boundary County	Maintain as is	Expand hours of service and look at larger service area	Add 4th day of service and keep Boundary bus in Bonner's Ferry for all 4 days
NEW SERVICE	2017	2018	2019
Schweitzer service	Plan ahead for winter 2017-2018 start. Finalize service details.	Start Schweitzer service with 60- minute service	Expand Schweitzer service to 30-min., evaluate peak load needs in partnership w/Schweitzer
Demand response in Bonner County	Add limited service areas and days to existing paratransit bus	Expand to other service areas	Add another bus for 2 hours per weekday
New regional service to Bonner's Ferry	Start with 1 day per week scheduled service with 1 round-trip	Expand to 2 days per week	Expand to 3 days per week with multiple roundtrips
New intercity service	Begin regional discussions and apply for funding	Start service with 1 day per week with 1 roundtrip	Expand service to 2 days per week
Vanpool	3 vanpool routes by end of 2017	5 vanpool routes by end of 2018	7 vanpool routes by end of 2019
RESOURCES REQUIRED	2017	2018	2019
Estimated incremental operating costs	\$50,000 - \$75,000	\$140,000 - \$180,000	\$220,000-\$270,000
Increased administrative staff	Add full-time office assistant	Add part-time vanpool and demand response; add driver trainer position	Make vanpool and demand response coord. full-time; transition management from Ops Manager to Exec Director
RESOURCES AVAILABLE	2017	2018	2019
	Schweitzer operating funding, vanpool fares, funding from casino	Schweitzer, vanpool, casino, 5311(f) for intercity, additional local JPA contributions	Schweitzer, vanpool, casino, 5311(f), additional local JPA contributions, additional 5311 operating funding

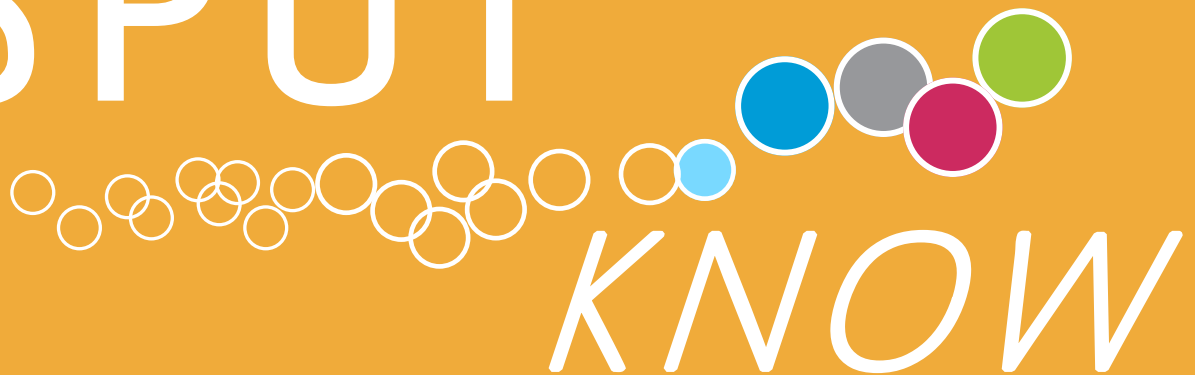
## CONCLUSION

SPOT has tremendous opportunity over the next three years to strengthen and improve existing services. Improving existing services should be SPOT's top priority. New services should be developed as resources allow and must be implemented carefully with a long-term, incremental approach.

See

SPOT

*KNOW*

A decorative graphic consisting of a series of circles of varying sizes and colors (blue, grey, pink, green, and light blue) arranged in a curved path that follows the word 'KNOW'.

Performance Dashboard





# See SPOT Know

## OVERVIEW

A performance dashboard is a monitoring and feedback tool for SPOT to use to evaluate its impact and performance over time. A performance dashboard tracks specific performance indicators and represents them in an easy to read and understand format, typically with graphical data, comparisons against benchmark goals, and historical trends.

Three main performance areas of focus for this dashboard are **ridership, financial, and safety**. In these three areas, the dashboard gives 1-2 specific metrics for each that quantify SPOT's performance (e.g., riders per hour). For each area an appropriate goal is suggested as the benchmark.

The goal of this tool is to give SPOT insight into its performance on an ongoing basis. A performance dashboard is primarily used by staff and the board to understand the organization better, but it can be used to present information to specific stakeholders or the community at large. By creating a feedback loop of information, SPOT can determine if specific projects or initiatives are working and how they impact performance.

It should be noted that a performance dashboard does have limitations; it cannot present the entire organizational performance. A dashboard can't tell you, for example, that there was a big economic slowdown that impacted ridership, or that costs spiked one month due to a large unscheduled maintenance issue. There are so many variables in running a public transportation system that must be recognized. It may make sense for staff to provide descriptive context to the dashboard when it is presented. And there may be good reason to accept lower than desired benchmark performance – a new route may take longer to get established, SPOT's cost structure, especially overhead, may have to increase to support more service growth, and a few back-to-back incidents or accidents may skew safety data temporarily. The key is to look at trends and patterns and use the dashboard data as potential indicators to help inform decisions or make adjustments appropriately.

## AGENCY SNAPSHOT

In order to determine where SPOT should go, it's important to understand where SPOT is today. **The organization is in a great place with solid ridership, low cost structure, satisfied customers, and safe operations.**

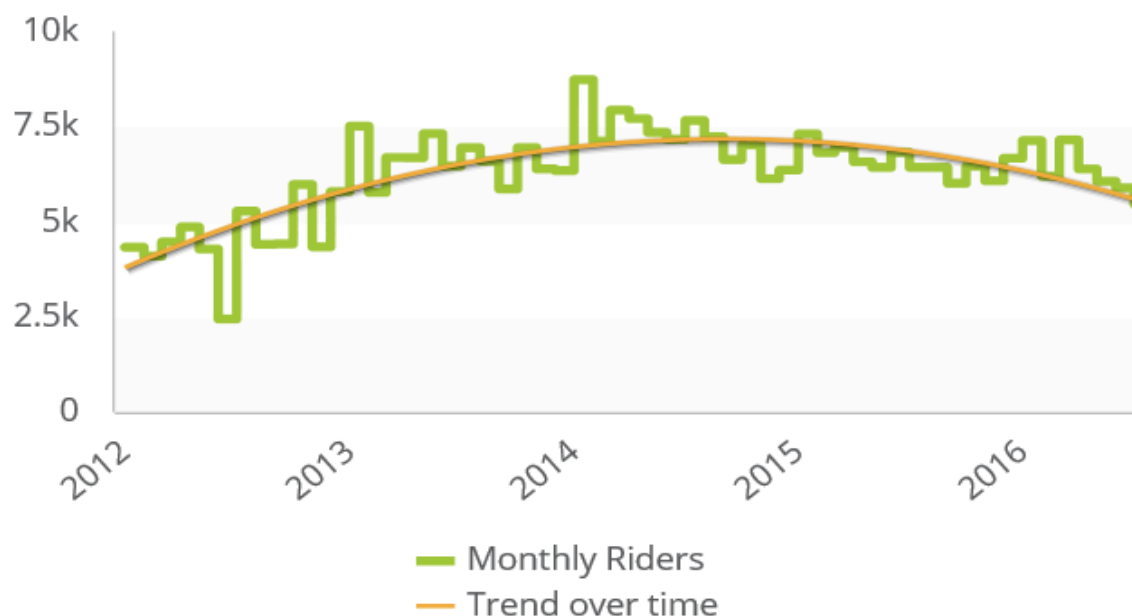
## A Typical Month for SPOT

Riders boarding	6,408
Hours of service provided	1,074
Miles driven	14,526
Monthly expenses to run SPOT	\$38,790
Accidents and incidents	Less than 1 per year

*12-month average for July 2015-July 2016*

Formed in 2011, SPOT is a relatively new organization that grew its ridership quickly from 2012-2014. However, growth has stalled in recent years. **Ridership numbers are relatively stable, but – in the past two years – the trend has been downward.** Based on interviews that SHIFT conducted with SPOT board members, the goal is to reverse this trend and see SPOT ridership grow.

## Trends in Ridership for SPOT



## PERFORMANCE METRICS

Developing performance metrics involves taking available data streams and combining them in ways that make sense for the organization. For SPOT, the data streams that are readily available and currently tracked by staff include:

### Use of service

- Riders per route, riders per month
- Riders per stop

### Quantity of service

- Hours per route, hours per month
- Mileage per route, mileage per month

### Costs of service

- Expenses per month

### Safety of service

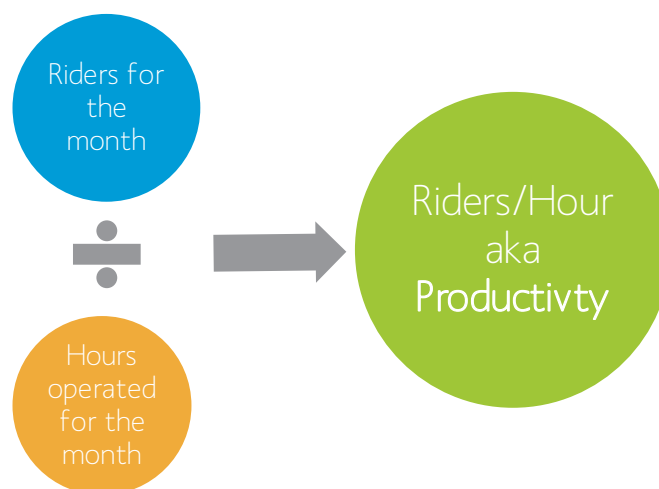
- Number of incidents or accidents

### Historical trends

- The data over a particular time frame

CURRENT  
DATA  
STREAMS

Developing a performance metric takes combines these data streams to develop a ratio that can quantify performance. For example, to understand how productive a particular service is, you would take ridership and divide by hours of service to get ridership per hour:





With so much data and so many different ways to calculate and present the data in an understandable format, it is recommended that the SPOT dashboard track these metrics for each area of performance:

### SPOT Recommended Performance Metrics

METRIC		6 month average for SPOT actual performance	Suggested SPOT benchmark goal for each metric
Ridership	Riders per hour for fixed route service	7.9	9
	Riders per hour for paratransit and demand response	2.1	2.5
Financial	Cost per hour of revenue service	\$38	< \$45
	Cost per passenger (total with both paratransit and fixed route)	\$6.35	< \$7
Safety	Accident and incidents per year	1	< 2

These specific metrics were chosen because they give a picture of data driven performance of the organization in three key areas that are easy to calculate, readily available from existing data, and typical in the public transportation industry.

The suggested benchmarks were chosen as achievable goals for SPOT, which are applicable for a small rural transit agency operating a similar amount of service. Every transit agency is different when it comes to performance, and there is no industry standard benchmark for these metrics. Agency performance varies widely based on the type of service, the amount of service, the density of the areas served, incentives to take public transportation, disincentives to driving, and many other unique factors.

Given that SPOT is serving small towns and rural areas, SPOT is performing well overall. In comparison to neighboring agencies, most of which are serving much larger areas with a much higher level of service, SPOT has a very low cost structure and has solid ridership per hour.

### Comparables: Ridership and Financial

Community	Ridership Total	Hours of service	Ridership per Hour Average	Ridership per Hour By Service	Operating budget	Cost per Hour	Cost per Pass
Spokane, WA (STA)	11,811,344	580,892	20.3	28.9 = Bus 2.96 = Demand	\$58,695,223	\$101	\$4.97
Boise, ID (ValleyRide)	1,466,139	121,563	12.1	15.3 = Bus 2.0 = Demand	\$9,624,981	\$79	\$6.52
Missoula, MT (Mtn Line)	922,768	54,624	16.9	20.1 = Bus 2.2 = Demand	\$5,031,414	\$85	\$5.02
Billings, MT (MET)	671,907	51,461	13.1	16.1 = Bus 4.0 = Demand	\$5,150,741	\$100	\$7.67
SPOT (2015 data)	79,170	12,931	6.2	7.5 = Bus 2.1 = Demand	\$438,601	\$34.04	\$5.54
Idaho Falls, ID (TRPTA)	38,660	32,114	1.2	1.7 = Bus 1.0 = Demand	\$1,118,204	\$34.82	\$28.92

*\*2014 Data from the Federal Transit Administration National Transit Database.*

## THE DASHBOARD

A good dashboard should include these metrics in an attractive presentation and be easy to understand at a glance. The dashboard developed for SPOT combines speedometers that show where SPOT is operating in the range for a particular month alongside graphs that show the trend over a longer period of time. The dashboard is shown in Appendix A for a recent month. This dashboard should be updated by staff on a monthly or quarterly basis and be shared with board members as part of the regular board meetings.

## OTHER METRICS TO CONSIDER

The SPOT dashboard is a quantitative tool to give organizational feedback to staff and the board on an ongoing basis. SPOT should consider tracking other metrics on a less frequent basis. Other potential performance indicators could include:

### Customer satisfaction survey

- The recent survey conducted by SHIFT sampling 45 riders showed that, on average, passengers were very happy with SPOT service, giving it an average of 4.7 out of 5 stars on overall experience

### Driver satisfaction survey

- Happy drivers = happy customers = good community feelings about SPOT

### Ridership per stop

- Looking at how many people are boarding at each stop will give SPOT an idea of which stops may not be effective

### Property values near popular bus stops

- Are they increasing faster than other properties?

These indicators could be looked at annually or as the resources allow. This could be part of a more in-depth annual performance report.



See **SPOT** Know

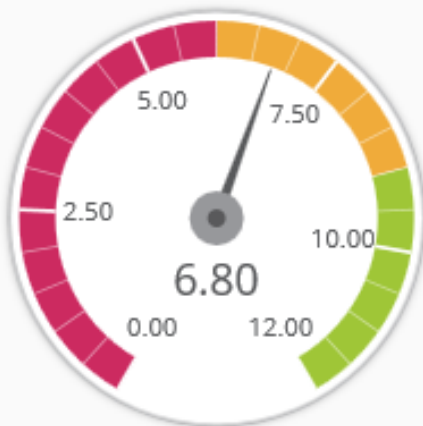
## APPENDIX A



## RIDERSHIP PERFORMANCE

### Riders per Hour (Fixed Route)

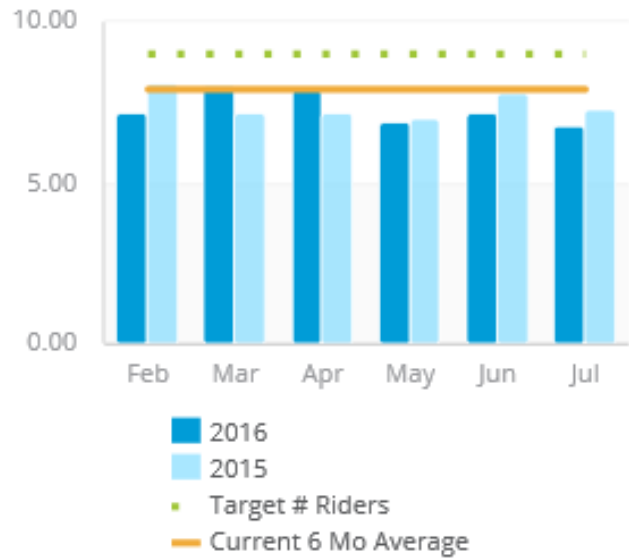
July 2016



Goal of 9 riders/hr

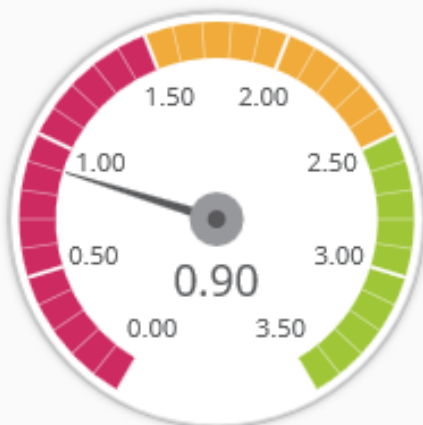
### Riders per Hour (Fixed Route)

Six Months vs. One Year Ago and Target



### Riders per Hour (Para and Demand)

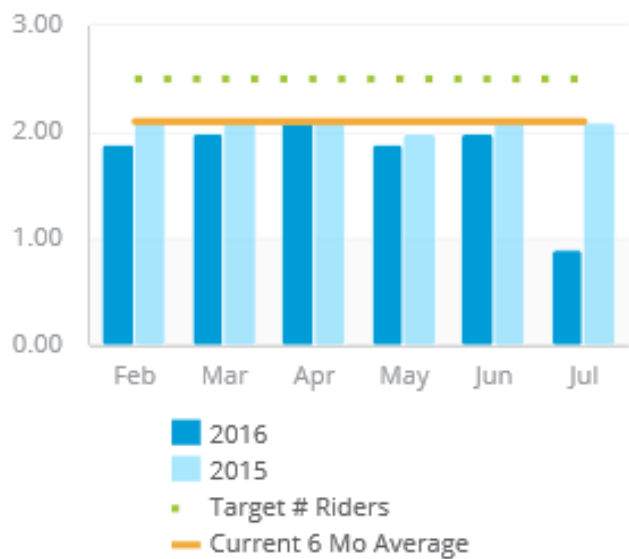
July 2016



Goal of 2.5 riders/hr

### Riders per Hour (Para/Demand)

Six Months vs. One Year Ago and Target

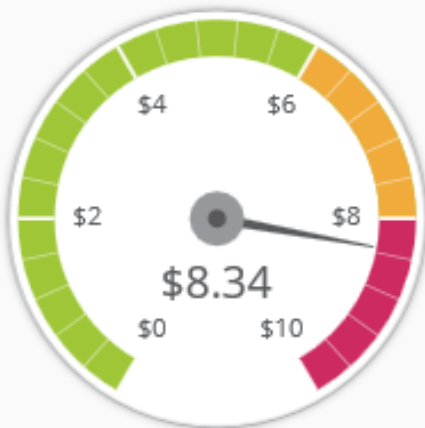




## FINANCIAL PERFORMANCE

### Cost per Passenger

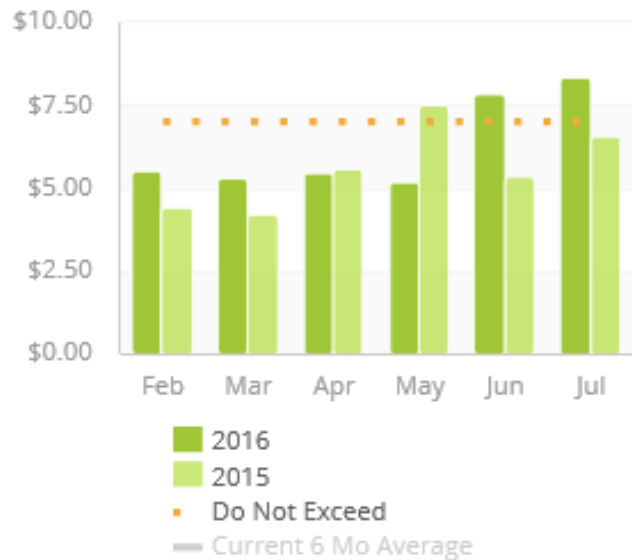
July 2016



Goal of less than \$8/passenger

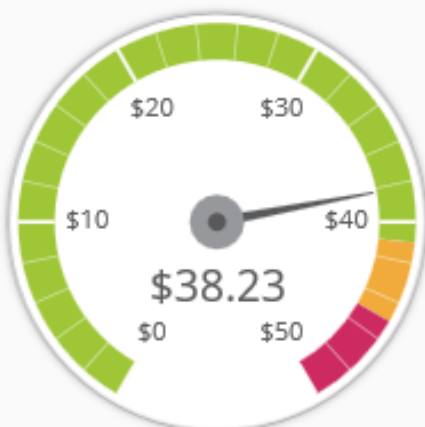
### Cost per Passenger

Six Months vs. One Year Ago and Target



### Cost per Hour of Revenue Service

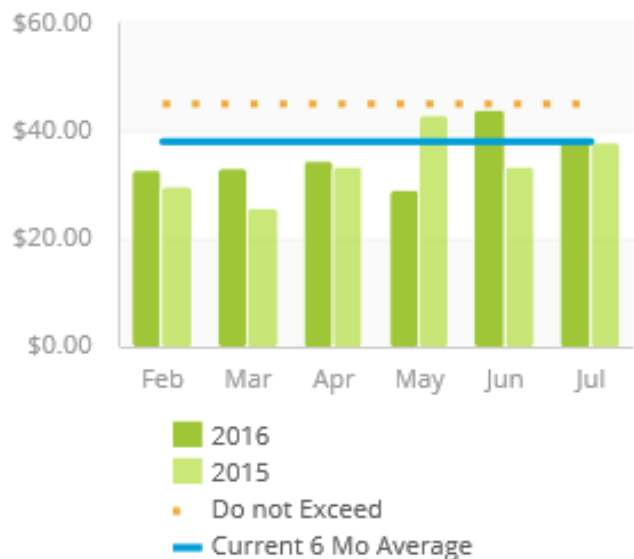
July 2016



Goal of less than \$45/Hour

### Cost per Hour of Revenue Service

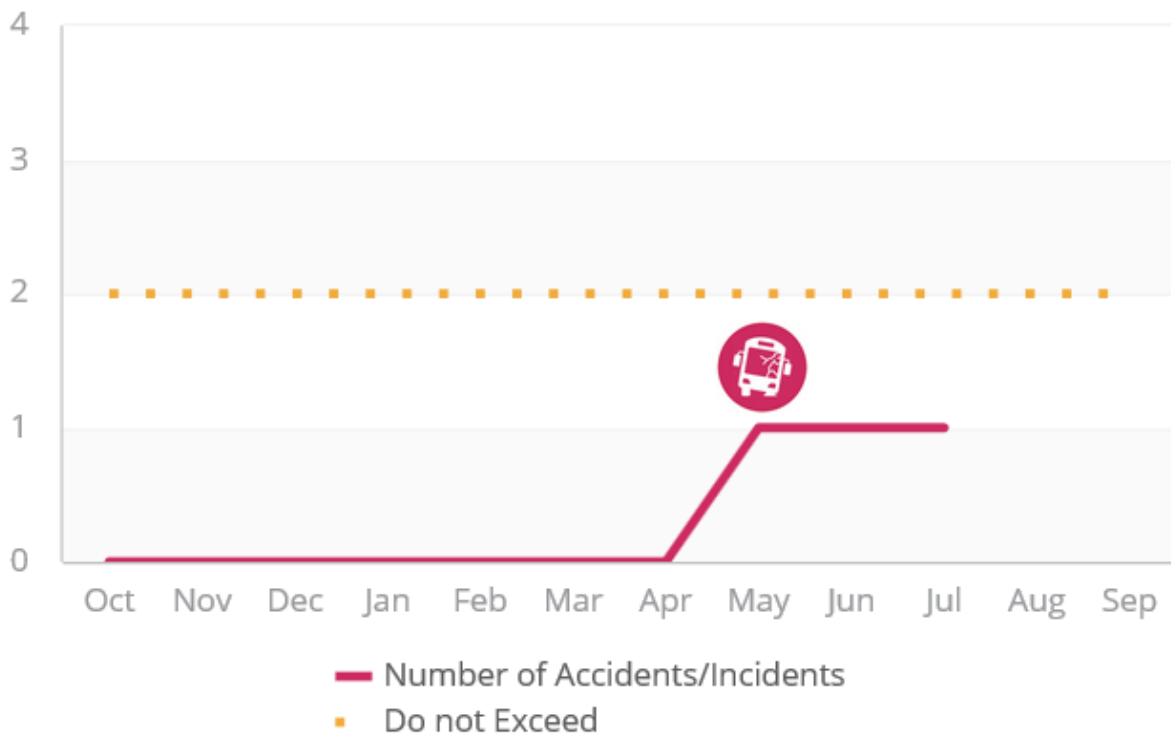
Six Months vs. One Year Ago and Target





## SAFETY PERFORMANCE

Accidents and Incidents per Fiscal Year




Goal of less than 2/Year



See

SPOT

  
*BUILD*

Capital Improvement Plan





# See SPOT Build

## OVERVIEW

Capital planning is critical to the success of any public transportation provider. The SPOT Capital Improvement Plan (CIP) will be a valuable planning tool used to assess, predict, and develop capital needs of the organization over a specific time frame. This CIP uses a five-year time horizon as its basis, planning out capital projects for fiscal years 2017-2021 (FY2017 starts 10/1/16 and ends 9/30/17).

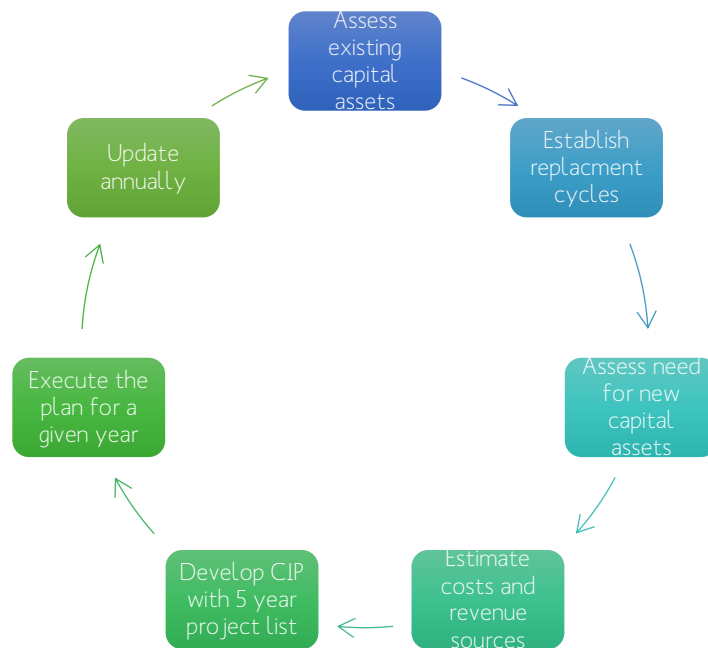
SPOT is at a point in its evolution where there are numerous capital needs to maintain and grow the vehicle fleet, improve bus stops, and look to a future SPOT-owned facility. Having a CIP in place ensures that the SPOT board and staff will be proactive in planning for capital needs and investing in SPOT's continued success.

A CIP ensures that assets are always in a state of good repair, providing safe and reliable service to the community.

## CAPITAL IMPROVEMENT PLANNING PROCESS

Each year SPOT staff, board, and community stakeholders should work together to update this CIP, moving the plan forward one year so that the plan always looks forward to the next five years of capital projects. Capital needs and funding opportunities are always in flux. This plan must be adjusted to match capital needs with capital resources, according to the process below.

## SPOT Capital Project Planning Process



In order to provide predictions about future capital needs, a CIP is formulaic. It assumes that capital assets - especially vehicles – depreciate incrementally and need to be replaced at a certain mileage or after a certain number of years, in accordance with industry standards and guidance. However, actual experience will be different and will have to be accounted for in the annual update.

It is common for a bus expected to go 250,000 miles to need replacement much sooner than expected (the “lemon” effect) and for some buses to go much longer than expected. Staff and board must assess which vehicles, and other assets, are running ahead of or behind the originally planned life cycle and plan accordingly.

By keeping the CIP current and adapting to opportunities and challenges, SPOT can be nimble and responsive in maintaining, replacing, and growing its assets.

## TYPES OF CAPITAL PROJECTS

SPOT’s CIP projects fall into five basic categories:

- bus replacements
- bus expansion (for new service)
- on-street assets like bus shelters
- facilities
- technology

Vanpool vehicles are not included in this CIP, because the leasing model SPOT is using for vanpool should work well going forward. By leasing vehicles and including this in the cost to riders, SPOT doesn't need to include vanpool vans as owned assets in the CIP.

## Bus Replacements

Currently SPOT operates light duty and medium duty buses that have a minimum useful life of 5 years/150,000 miles or 7 years/200,000 miles, as established by the Federal Transit Administration (FTA).

These minimum useful life estimates help a transit agency understand what to expect for minimum life cycle performance of the bus. Many larger transit agencies view these minimums as the point at which a bus should be replaced, but smaller transit agencies like SPOT have to plan to use buses longer than these minimum life estimates.



## Minimum Service-Life Categories for Buses and Vans

Category	Typical Characteristics				Minimum Life	
	Length	Approx. GVW	Seats	Average Cost	Whichever comes First	
					Years	Miles
Heavy-Duty Large Bus	35-48 ft; 60 ft artic.	33,000 to 40,000	27-40	\$325,000 to >\$600,000	12	500,000
Heavy-Duty Small Bus	30 ft	26,000 to 33,000	26-35	\$200,000 to \$325,000	10	350,000
Medium-Duty and Purpose-Built Bus	30 ft	16,000 to 26,000	22-30	\$75,000 to \$175,000	7	200,000
Light-Duty Mid-Sized Bus	25-35 ft	10,000 to 16,000	16-25	\$50,000 to \$65,000	5	150,000
Light-Duty Small Bus, Cutaways, and Modified Van	16-28 ft	6,000 to 14,000	10-22	\$30,000 to \$40,000	4	100,000

*Source: FTA Useful Life of Transit Buses and Vans Final Report, April 2007*

To date, the light and medium-duty buses have served SPOT well, and this vehicle type should continue to do so in the future. The light and medium-duty buses do have limitations – SPOT should be aware of the limitations and how to plan around them.

The current fixed route buses in the SPOT fleet are built on the Ford E450 chassis and can accommodate a maximum of 16-18 passengers without the wheelchair positions occupied. Base price for these buses is approximately \$75,000, for current model year.

The current demand response, paratransit buses are also built on the Ford E450 chassis and can accommodate a maximum of 8 passengers without the wheelchair positions occupied. Base price for these demand response vehicles is approximately \$60,000. All buses have a wheelchair lift and standard safety equipment.

PROS of current buses	CONS of current buses
Cost to purchase and maintain is lower than most other bus options	Expected serviceable life is 250,000 miles or less (engines and transmissions may need to be replaced at 150,000-200,000 miles)
Ford chassis means local dealer can provide maintenance and warranty support	Passenger capacity of 16-18 passengers means system growth could be limited by bus capacity
Gas engine has less issues than modern diesel engine in stop and go operations	Buses have wheelchairs lifts, which require more time and training to operate safely, as opposed to a wheelchair ramp
Sized right for the existing routes, services, and ridership	Buses don't have proper options to serve Schweitzer
Flexible and interchangeable among existing routes and services	Buses have steps which are challenging for some riders

As SPOT continues to evaluate bus needs for fixed route and demand response service, it should consider optional add-ons to the current vehicle chassis that improve carrying capacity and passenger accessibility:

Improvements to current fixed route bus configuration package with stop requests, destination signage, rear bike racks, and rear cameras

Adds \$10,000  
to cost

Increasing carrying capacity of fixed route bus by adding 5-8 passenger capacity

Adds \$30,000  
to cost

Eliminate entry steps and wheelchair lift and replace with a low-floor option (no entry steps and flip-out wheelchair ramp instead of wheelchair lift)

Adds \$40,000  
to cost



*Low floor bus with ramp  
(Credit: Champion Bus)*

If SPOT wanted to purchase heavier duty buses with longer serviceable life, the cost goes up dramatically – as a point of reference, a 28-32 passenger heavy-duty (12 year rated) diesel bus with a low floor (wheelchair ramp) is \$350,000-\$400,000. A 10 year-rated bus with a capacity of 25-30 passengers is \$200,000-\$300,000.

### Bus Expansion for New Service

In evaluating service expansion, SPOT should carefully consider how to grow the fleet. For a small transit system, it's very helpful to have one vehicle platform that is easily interchangeable among different routes and service. Having vehicles that only work on one route is too limiting for a small transit provider like SPOT. By planning around the current Ford vehicle chassis with small adjustments to seating capacity, add-on packages, and potential low-floor option, SPOT will be able to keep a cost-effective fleet that can be used year-round on all routes and services.

With fleet consistency in mind, the biggest challenge in the next 1-2 years will be what type of bus to get for a potential Schweitzer service. If SPOT moves forward with this service, it is recommended that SPOT consider purchasing a bus that has additional passenger capacity but built on a similar Ford chassis as the current SPOT buses. Using the same basic

bus chassis will allow for interchangeability with the current fleet, current routes, and current needs of the service. Especially if the existing Blue Route is lengthened to connect to Schweitzer, SPOT must have a bus that can maneuver easily in town and not be oversized to the year-round usage of the route. This approach will require that Schweitzer retain some of its current buses in order to deal with peak skier demands from the Red Barn parking lot up to the resort.

The buses for Schweitzer are recommended to be built on a Ford E-450 or F-550, or equivalent, chassis and have capacity for 22-26 passengers. They will need to be wheelchair accessible. Additional add-on packages for this bus must include:

- Heavier duty transmission and braking package with retarder system (used to help slow the bus)
- Auto-chains for winter conditions
- Exterior ski racks
- Higher gross vehicle weight to accommodate the additional passenger load

**Estimated per bus cost with these options: \$130,000-\$140,000**



*Auto chain system and driveline retarder system (Credit: left: ONSPOT; right: Telma)*

In addition to the fleet expansion for the Schweitzer service, SPOT will also need to plan for expansion of the bus fleet for potential new services like a scheduled route between the Sandpoint area and Bonner's Ferry to serve commuters or casino goers and a regional intercity connection from the Sandpoint area to Coeur D'Alene. Both of these connections require an additional bus in the fleet and are included in the 5 year CIP. These buses are recommended to be built around a similar specification as the SPOT fixed route buses for Blue and Green Routes.



## On-Street Infrastructure (Stops, Shelters, Park-and-Ride)



*SPOT bus shelter concept  
(Credit: Steve Holt, Eureka Institute)*

SPOT has developed a well-functioning fixed route bus system with over 40 established bus stops served by the Green and Blue Routes within the communities of Dover, Sandpoint, Ponderay, and Kootenai. Most of these stops have limited passenger amenities for safe and comfortable accessibility. SPOT is aware of this need and has already started the capital funding process by applying for and receiving a grant of \$125,000 from the Federal Transit Authority (FTA) for improving bus stops that will become active in the fall of 2016. With matching funds included, this project will result in over \$150,000 in bus stop improvements.

This project will likely not start until 2017 and includes:

- New bus shelters at 10 different higher volume bus stops
  - 4 in Sandpoint
  - 4 in Ponderay
  - 1 in Dover
  - 1 in Kootenai
- Bus stop benches at an additional 9 stops throughout the system.
- Better bus stop signage that shows departure times.

SPOT has built community partnerships for this project including a creative partnership with the Eureka Institute. The Eureka Institute has developed a modern, attractive bus shelter design that fits the community aesthetic. This design will be built by youth, as part of Eureka's Construction Basics Initiative. The partnership leverages the FTA funding that SPOT has secured with the community support for this youth construction program. SPOT has correctly recognized that this effort is only the beginning and needs to be continued in future years, beyond this federal grant. As a result, SPOT and Eureka have started the conversation on ways to keep this project self-funded by looking at bus shelter sponsorship opportunities. This could result in sustained funding for building more shelters and adding more benches.

## Potential Park and Ride Lot in Dover

Another project included in this CIP is the development of a park-and-ride lot in Dover. This lot would become the terminal point for the Green Route in Dover. The City of Dover is a willing partner for acquiring and entitling the land for the park-and-ride, and SPOT would seek grant funding for improvements including paving the lot and building a bus shelter. The project in the [CIP Appendix A](#) includes the cost of these improvements, but excludes the cost of acquiring the land.

SPOT must also work in partnership with the cities in which it operates to help support development of continuously improving bicycle and pedestrian infrastructure. SPOT most likely won't manage the development of better bike lanes, pathways, crosswalks and sidewalks, but SPOT should support and encourage these efforts within the communities that it operates. Every bus trip begins and ends with a walk or bike trip; safe and complete pedestrian and bicycle infrastructure compliments and promotes transit services. Across the nation, ridership numbers are higher in communities that have provided this type of infrastructure.



## Facilities

SPOT currently rents a facility located in Sandpoint. This is its only facility. It is used for office space and bus storage with outdoor parking. This space is meeting the current needs of the organization, but SPOT should be planning for long-term growth. As SPOT expands operations and levels of service, it will need more office space, better bus storage (preferably indoors), and space to perform bus maintenance in-house. Investing in a facility will eliminate rent payments, improve longevity of vehicle fleet, and provide more capacity to grow services.

The CIP includes a facility project that begins with one year of design and planning, followed by a 1-2 year construction process. SPOT may be able to acquire land through one of its partner cities or by working with Schweitzer. The value of this land could be used as match toward the project. Alternatively, SPOT may find that it is able to acquire an existing building that meets the needs of a maintenance and administration facility. Acquiring an existing building would be a quicker process and less costly, avoiding the challenges of having to construct a new facility.

It may seem premature to start planning for a facility, but these projects take years to plan and fund. It is likely that this project will extend beyond the term of this CIP, but SPOT will have a head start if planning and funding development starts now.

## Technology

SPOT currently operates a real-time customer information phone app called DoubleMap. This system utilizes tablets onboard the buses to track bus location and send that information to an app that customers can use to see the bus location. It is unclear how much this system is being used and how much it will cost to maintain the system going forward. The CIP includes funding to keep this program going into 2017, but SPOT should evaluate whether this tool is sustainable. It could be very useful for SPOT customers, but it requires staff time to keep it operating properly.

Other technology projects include:

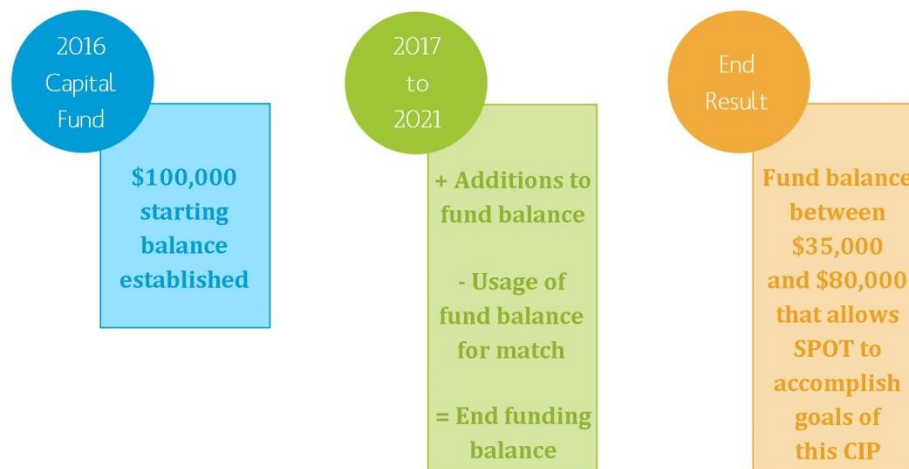
- Ridership tracking system – this would allow drivers to put ridership directly into a tablet instead of doing this by hand. The data would be readily available to management staff and would eliminate time spent entering this data by hand into a spreadsheet
- Scheduling software – as demand response and paratransit ridership increases, SPOT could benefit from software for entering and scheduling these rides.
- Asset management/maintenance software – as the fleet grows, SPOT will need more sophistication in how it manages and tracks maintenance of its buses.



## BASE FUNDING FOR THIS PLAN

Capital planning requires steady capital funding. Currently, SPOT doesn't have a separate budget and account for capital funding. It is recommended that SPOT use its existing "excess funding" that is unallocated in order to establish a capital fund balance. Based on discussions with SPOT staff regarding available fund balances, SHIFT recommends that this starting fund balance be established at \$100,000 for FY2017, beginning October 1<sup>st</sup>, 2016.

## Capital Fund Establishment



For each year going forward, it is recommended that SPOT allocate 10% of local contributions to the newly created capital fund for the purpose of creating a balance of matching funds. Currently SPOT receives approximately \$166,000 of local funding each year. Starting in 2017, SPOT should allocate \$16,000 of this local funding to the capital fund. This allocation creates stability to the capital fund with a growing fund balance that can be leveraged to get new federal funding. Almost all capital projects that SPOT would consider qualify for 80% federal funding from the FTA. Having 20% local funding available and “in the bank” means that SPOT can move forward with capital projects quickly and when needed.

This could be established by creating a separate bank account and establishing a separate capital budget each year, based up the priorities in this plan. This capital budget should be adopted in conjunction with the adoption of the annual operating budget. SPOT’s total adopted budget should include operating and capital funds with estimated revenue and estimated expenses. This new process may require SPOT to ask for more funding from local funding partners to build these capital matching funds in excess of \$166,000 a year.

By establishing this standard of always allocating 10% of every local dollar received, SPOT will be able to show funding partners that there won’t be any surprises when it comes to capital needs. Having to make one-time funding request, outside of the annual budget request, of cities and counties for capital projects creates challenges for the city and county budgeting processes. If funding partners know that SPOT is proactively planning for both operations and capital, then there will be a higher degree of trust in SPOT’s ability to manage its finances.

## FUNDING SOURCES

CIP projects are expensive and require a variety of funding sources to complete. Fortunately, SPOT has been very adept, finding creative ways to make projects happen. SPOT has been successful in competing for federal capital project grants and is using many of the sources listed below to build more capacity for funding future projects.

### Funding from Municipalities and Counties

As previously described, SPOT needs to establish a capital fund and start allocating a percentage of every local dollar received to building and maintaining a fund balance for the capital account. This fund balance can be used as match to federal funding or to complete a capital project in its entirety. SPOT should build this fund in anticipation of large capital projects. The more funding available from local funding sources, the better SPOT can compete for grants that often require or recommend local participation in project funding.

### 5339 Program of the Federal Transit Administration (FTA)

The FTA states that the Grants for Buses and Bus Facilities program (49 U.S.C. 5339) makes federal resources available to states and direct recipients to replace, rehabilitate and purchase buses and related equipment and to construct bus-related facilities including technological changes or innovations to modify low or no emission vehicles or facilities. Funding is provided through formula allocations and competitive grants. For most 5339 projects, the funding from the FTA provides 80% of the cost with a 20% local match requirement.

This 5339 program will fund most major SPOT capital projects, with the assumption that 80% of the cost of a given project for bus replacement/acquisition or new bus facilities, including bus stop improvements, will be paid out of this program. The 5339 program is managed by the Idaho Transportation Department (ITD). ITD has an application cycle of every two years, but periodically ITD has released one-time funding.

### Other Federal Funding

Opportunities for bus and bus facility projects outside of the 5339 program are limited for rural providers like SPOT, but there are still programs that SPOT should look at when considering larger capital projects, especially a new facility. SPOT may be able to access one-time programs like TIGER, 5311(f), and 5310. The SPOT Strategic Plan from 2015 has a list of potential federal sources in Appendix A. SPOT should continue to look for federal funding opportunities for capital projects.

### Creative Community Funding

As a service uniquely positioned in the community, SPOT has the opportunity to continue to grow funding support from a variety of non-profit and business partnerships in order to fund capital projects:



- Eureka Institute and other community minded organizations interested in construction
- Other non-profits like the food bank, the senior center, North Idaho College
- Sponsorship of assets like benches and bus shelters that can be used to continue programs
- Business partnerships

These funding sources can bolster the capital fund balances, be used as matching funds for federal grants, or they could be used entirely to fund a smaller capital project, like bus stop amenities, benches or customer accessibility projects.

### Schweitzer Mountain Resort

SPOT has already received commitment from Schweitzer Mountain Resort to provide the matching funds up to \$170,000 for 4 additional buses to be used to connect Sandpoint and Ponderay with Schweitzer. These matching funds are critical to expanding SPOT's service to Schweitzer. The CIP summary of projects includes two buses for winter 2017-2018 and two buses for winter 2018-2019, based on Schweitzer matching funds.

### Other Grant Opportunities

In the SPOT strategic plan from 2015, many ideas for funding are provided and should be evaluated as opportunities present themselves. Smaller capital projects for bus stop improvements and passenger amenities can often be funded through smaller grant opportunities, as shown in the SPOT strategic plan.

## ANALYSIS OF CURRENT FLEET

SHIFT analyzed the current bus fleet in order to determine necessary vehicle replacement needs to maintain the service. SPOT currently runs a fleet of gas powered light to mid-duty buses in fixed route and demand response service.

Some stats to note:

- Fixed route buses operate a total of 145,000 miles per year.
- Demand response and paratransit buses operate a total of 30,000 miles per year.
- Fleet mileage total of 175,000 miles per year.

This results in the need to replace one bus every other year or sooner, based on current usage.

## Bus Fleet Today

SPOT ID #	Model	Model Year	# of Passengers	Service Mode	Current Mileage 6/30/16	Typical Useful Life for Bus Type (Miles)	Estimated Replacement Cost
<b>106</b>	FORD E450 cutaway	2005	16	Fixed Route Spare	298,301	200,000	\$75,000
<b>107</b>	FORD E450 cutaway	2007	9	Demand Response	195,270	250,000	\$80,000
<b>110</b>	FORD E450 cutaway	2010	16	Demand Response	158,535	250,000	\$78,000
<b>111</b>	FORD E450 cutaway	2011	16	Fixed Route Spare	270,844	250,000	\$75,000
<b>114</b>	FORD E450 cutaway	2014	16	Fixed Route Blue	119,520	250,000	\$82,000
<b>115</b>	FORD E450 cutaway	2015	16	Fixed Route Green	79,919	250,000	\$84,000
<b>BFB#1</b>	FORD E450 cutaway	2011	8	Demand Response Boundary Co.	36,031	200,000	\$80,000

The next step in understanding the fleet is to use mileage data to calculate when a particular bus will be at the end of its useable life, based on how many miles each bus is predicted to accumulate.



Mileage Analysis with Predicted Replacement Year  
Highlight indicates point of replacement

SPOT ID#	Avg miles per year	Estimated Mileage End 2016	Estimated Mileage End 2017	Estimated Mileage End 2018	Estimated Mileage End 2019	Estimated Mileage End 2020	Estimated Mileage End 2021	Notes
106	10,000	303,301	313,301	10,000	20,000	30,000	40,000	replace now no AC, original engine & transmission
107	12,000	201,270	213,270	225,270	237,270	12,000	24,000	replace sooner due to age in 2019
110	12,000	164,535	176,535	12,000	24,000	36,000	48,000	replace sooner due to age and rough condition
111	10,000	275,844	285,844	295,844	10,000	20,000	30,000	run longer due to new engine in 2016
114	60,000	149,520	209,520	239,520	269,520	60,000	90,000	replace when >250k
115	60,000	109,919	169,919	229,919	259,919	289,919	60,000	replace when >250k
BFB#1	12,000	42,031	54,031	66,031	78,031	90,031	102,031	replace due to age

This analysis is the best guess as to how buses will age and how services will grow. Most likely, the SPOT fleet replacement schedule will need to be adjusted to account for numerous unknown factors. The annual CIP update should include adjustments to fleet replacements opportunities.

## CONCLUSION

A CIP is a valuable tool that will allow SPOT to project local and federal funding requirements for achieving capital goals. Capital planning ensures that SPOT can maintain its capital assets in an ongoing state of good repair. Federal funding requires it, local funding partners will appreciate it, and customers will benefit from it.

The CIP addresses acquisition and construction costs of capital projects, but maintaining assets over their lifetime is just as important to the capital asset process. Maintenance costs are not included in the CIP, as they should be included in SPOT's annual operating budget as an ongoing expense.

Given the 5-year timeframe and the many assumptions that have built into this plan, it is necessary that SPOT view the CIP as a living document that should always be as current as possible.

## APPENDIX A - CIP SUMMARY AND SCHEDULE OF PROJECTS 2017-2021

TYPE of PROJECTS	COST OF REPLACEMENT or ACQUISITION by YEAR				
	2017	2018	2019	2020	2021
<b>Existing fleet-replacement</b>					
Fixed route buses (incl. spares)	\$ 75,000	\$ 78,000	\$ 81,000	\$ 84,000	
Demand/paratransit buses (incl. spares)	\$ 60,000		\$ 64,000		\$ 68,000
<b>Fleet expansion</b>					
Schweitzer buses	\$ 270,000	\$ 270,000			
Regional buses			\$ 78,000	\$ 78,000	
<b>On-street assets</b>					
Park and ride lots			\$ 35,000		
Bus stop signage + bike racks	\$ 20,000				
Bus shelters	\$ 130,000	\$ 18,000	\$ 18,000		
<b>Facilities</b>					
Planning/design			\$ 20,000		
Building/construction of facility				\$ 100,000	\$ 150,000
<b>Technology</b>					
DoubleMap App (or other customer tech)	\$ 5,000				
Scheduling software			\$ 15,000		
System for tracking ridership		\$ 10,000			
Asset management/maintenance				\$ 5,000	
<b>TOTAL CAPITAL SPEND BY YEAR</b>	<b>\$ 560,000</b>	<b>\$ 376,000</b>	<b>\$ 311,000</b>	<b>\$ 267,000</b>	<b>\$ 218,000</b>
LESS Federal Funding (80%)	\$ 448,000	\$ 300,800	\$ 248,800	\$ 213,600	\$ 174,400
<b>BALANCE to fund locally (20%)</b>	<b>\$ 112,000</b>	<b>\$ 75,200</b>	<b>\$ 62,200</b>	<b>\$ 53,400</b>	<b>\$ 43,600</b>
<b>ANALYSIS of CAPITAL FUND</b>					
<b>INCOME Sources</b>					
Capital fund balance (Start with \$100k)	\$ 100,000	\$ 75,000	\$ 77,800	\$ 56,600	\$ 40,200
Capital fund additions-10% of local funds	\$ 16,000	\$ 17,000	\$ 18,000	\$ 19,000	\$ 20,000
Misc local funding (private, grants, etc)	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000
Schweitzer	\$ 54,000	\$ 54,000	\$ -	\$ -	\$ -
Tribe or other local business partners	\$ -	\$ -	\$ 16,000	\$ 16,000	\$ -
Community partners for stop improvements	\$ 15,000	\$ 5,000	\$ 5,000	\$ -	\$ -
<b>TOTAL LOCAL FUNDING AVAILABLE</b>	<b>\$ 187,000</b>	<b>\$ 153,000</b>	<b>\$ 118,800</b>	<b>\$ 93,600</b>	<b>\$ 62,200</b>
LESS BALANCE to fund locally for GIVEN YEAR (annual local expense)	\$ 112,000	\$ 75,200	\$ 62,200	\$ 53,400	\$ 43,600
<b>CARRYOVER CAPITAL FUND BALANCE</b>	<b>\$ 75,000</b>	<b>\$ 77,800</b>	<b>\$ 56,600</b>	<b>\$ 40,200</b>	<b>\$ 18,600</b>

### NOTES

1. As of 10/1/16 start of this plan, only funding secure through federal award is \$125,000 of federal funding for bus stop improvements
2. All other projects are contingent upon future federal awards
3. Capital fund balance starts with \$100k, as described in the CIP, and has 10% of local municipal/county funding added to it each year



**Selkirks - Pend Oreille Transit Authority**  
31656 HWY 200, Box 8 Ponderay, ID 83852 (mailing address)  
31656 HWY 200, Suite 102 Ponderay, ID 83852 (physical address)  
**208-263-3774**

January 10, 2024

Attn: Sam Carroll, Grants & Contracts Officer  
Public Transportation Office  
Idaho Transportation Department  
PO 7129  
Boise, ID 83707

[PTCares@itd.idaho.gov](mailto:PTCares@itd.idaho.gov)

**Re: One-Time CARES Application for Communication Equipment - Radios**

Dear Mr. Carroll,

Attached is an application for One-Time CARES funds and the required attachments.

Please contact us if you need any additional information.

Respectfully Submitted,

*Donna Griffin*

Donna Griffin  
Executive Director  
Selkirks- Pend Oreille Transit Authority



**YOUR Safety ••• ► YOUR Mobility ••• ► YOUR Economic Opportunity**

## CARES Act One-Time Application

Thank you for your interest in this grant application and advancing transportation for the State of Idaho. Questions regarding content within the application will be accepted up to 10 business days before the close of the application. If you have any questions on the application or the submittal process, please feel free to contact the application contact listed below.

### Application Contact:

Sam Carroll, Grants & Contracts Officer  
[PTCares@itd.idaho.gov](mailto:PTCares@itd.idaho.gov)  
208 334-8139

### Timeline/Review Process

1. October 13, 2023: Application Release
2. January 12, 2024: Application Close
3. February 05 – March 08, 2024: Technical Assistance
4. March 11 – April 10, 2024: Public Comment
5. April 2024: PTAC reviews ITD-PT recommendations and public comments and may concur or recommend changes to projects and/or funding levels.
6. May 2024: Idaho Transportation Board reviews ITD-PT recommendations, PTAC response, and public comment in their determination of final project award and funding levels.
7. Summer 2024: ITD-PT Office programs with FTA
8. October 1, 2024: Funding begins. Please note, capital projects have the possibility of start sooner if funding is programmed with FTA before this date.

### Application Submittal Checklist

- ☒ Cover Sheet
- ☒ Sections 1-5
- ☒ Section 6-7 (ITD-PT Internal Review of Application)
- ☒ Attachments
  - ☒ Attachment A: Budget Sheet
  - ☒ Attachment B: Milestone Reporting
  - ☒ Attachment C: NEPA/SSA/Rolling Stock Worksheet
  - ☒ Attachment D: Demonstration of Need
- ☒ Back-Up Documentation
- ☒ Letters of Support (specific to the project)

### Application Specifications

- Font: Black, Times New Roman, size 12-14
- Paper: 8 1/2 x 11, drawings may be larger
- Format: pdf or word (Attachment A and budget sheets may be in excel)
- Pages must be numbered

### Application Submission

Please submit all items in the submittal checklist formatted as outlined in the application specifications to:

- ITD – Public Transportation Office, Attn: Sam Carroll, PO 7129, Boise, ID 83707
- Or email to: [PTCares@itd.idaho.gov](mailto:PTCares@itd.idaho.gov)



**YOUR Safety • • • ► YOUR Mobility • • • ► YOUR Economic Opportunity**

**Application Information Form**

Applicant: Selkirks - Pend Oreille Transit Authority (SPOT Bus)

Authorized Representative: Donna Griffin

Address: 31856 Hwy 200, Suite 102, Box 8, Ponderay ID 83852

Phone: 208-263-3774

Email Address: dgriffin@spotbus.org

DUNS #: 082358452

Architect/Engineer/Planner if applicable: (Contact Name): Adam Crippen - RACOM

Phone: 509-789-0703

Address: Not available

**Project Description:**

To greatly enhance safety and our ability to communicate between buses, base station, and if needed, emergency personnel and road crews, for this project we request funding for communication equipment for each bus and for our base station (SPOT office). Money will fund the purchase of 40W, UHF mobile radios, equipment and installation for each bus, a portable radio with needed equipment, as well as a base station.

**TOTAL PROJECT COST: \$29,404.00**

**FEDERAL SHARE: \$29,404.00 LOCAL MATCH: \$0.00**



## Section 1: Project Description

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### Concise Project Description

For this project we request funding for radios for each bus and for our base station (SPOT office). SPOT requests grant funding in the amount of \$29,404.00. Money will fund the purchase and installation of UHF mobile radios and equipment for each bus, our base station (SPOT office), and one portable radio. Equipment includes the following:

- (9) TM9300 Mobiles, 40W, UHF, Dash Mount, DMR Tier II License, Antenna, Coaxial Cable, 5 Year Warranty
- (1) TM9300 Base Radio, 40W, UHF, Desktop Mount w/ Power Supply, DMR Tier II License, 5 Year Warranty
- (1) TP9300 Portable, Black, PKP, UHF, DMR Tier II License, High-Cap Battery, Antenna, Belt Clip, Single Bay Charger, 5 Year Warranty

We currently use cell phones to communicate. This equipment will greatly enhance safety and our ability to communicate between buses, base station, and if needed, emergency personnel and road crews. Radios will allow SPOT Bus to provide safe, reliable, public transit services in the two most northern counties in Idaho – Bonner County and Boundary County. This CARES One-Time funding will directly support the operation of three fixed routes and Paratransit service in Bonner County, demand response service in Boundary County, demand response service between Boundary County and Bonner County, as well as public special event service.

This project was previously funded. The vendor we planned to use no longer offers this service. Based on research, pricing, and recommendations we went with RACOM as a service provider. The cost of the project increased. We will use the previously awarded funding to purchase the antenna, duplexer, repeater as well as the related equipment and installation. Schweitzer Mountain Resort allocated space to us for placement of the equipment as well as access to the site as needed for service and updates.

#### a. FTA Program Eligibility:

This project meets the FTA funding source program as the purchase of radios is a capital activity normally eligible under Sections 5311. The Coronavirus Aid, Relief, and Economic Security (CARES) Act provides emergency assistance and health care response for individuals, families and businesses affected by the COVID-19 pandemic. Selkirks Pend Oreille Transit is an existing 5311 grant sub recipient, providing fixed route, paratransit service, and demand service in a rural area, and is an eligible recipient for this grant. And, according to the 2024-2026 5311 Rural Congressional Application, Federal program details and related Federal Circulars <https://www.transit.dot.gov/rural-formula-grants-5311purpose>. Selkirks- Pend Oreille Transit Authority (SPOT) is eligible to apply for funding because our service fulfills the purpose of the Section 5311 Program. The project components meet the FTA guidelines for CARES Act funds by providing capital assistance to support public transportation in rural areas with populations with less than 50,000 people where many residents rely on public transit to reach their destination.



This project provides equipment that will improve driver and guest safety as we continue operations that support the FTA Goals listed below with additional information about SPOT's efforts to meet each goal.

Our operating expenses have skyrocketed. We currently depend on CARES funding to bridge the gap between our current funding level and our actual operating expenses. We expect to exhaust that (greatly appreciated) awarded source of funding next year as we provide transit service. Our ridership continues to increase. We have exceeded our pre-COVID numbers, and we expect to exceed 140,000 rides in 2023. Please see our ridership numbers, through November 2023 attached.

The Section 5311 Program supports both the maintenance of existing public transportation services and the expansion of those services through the following program goals:

*a. Enhancing access in rural areas to health care, shopping, education, employment, public services, and recreation:* SPOT has fixed and demand routes servicing all the above categories.

*b. Assisting in the maintenance, development, improvement, and use of public transportation systems in rural areas:* SPOT uses the FTA funding for these exact purposes. In addition to the work of the Board and Executive Director, SPOT utilizes service development committees to help assess transportation needs in the area and recommend service changes and improvements to the SPOT Board.

*c. Encouraging and facilitating the most efficient use of all transportation funds used to provide passenger transportation in rural areas through the coordination of programs and services:* SPOT diligently looks for ways to increase ridership and increase our operational efficiencies. SPOT is a member of the Bonner County Area Transportation Team (BCATT) and the Boundary Area Transportation Team (BATT). We partner as often as practical on projects and purchases ensuring that we are good stewards of the funding we are entrusted with. We participated in the Urban Area Transportation Plan and in the development of a Multi-Modal Transportation Plan for the city of Sandpoint, which included public transit elements. Please see attached letters of support.

*d. Providing financial assistance to help carry out national goals related to mobility for all, including seniors, individuals with disabilities, and low-income individuals:* SPOT has taken steps to serve the above categories of riders. The Idaho Area Agency on Aging approves and financially supports SPOT's services in both Bonner and Boundary Counties. In **the third quarter 2023**, SPOT buses **provided 5,752 rides for seniors and 1,419 rides for riders with disabilities, and 2,829 youth rides.**

*e. Increasing availability of transportation options through investments in intercity bus services:* SPOT does not provide service in this area. However, Intercity Service is in our Master Plan. SPOT has met with Citylink and Spokane Transit to discuss future connectivity. All three agencies support the concept. SPOT does provide transportation between Boundary County/Bonnors Ferry and Sandpoint with its demand service.

*f. Assisting in the development and support of intercity bus transportation:* Same response as given to item e above. SPOT continues working with Kootenai County Public Transportation gaining information with our involvement in the regional mobility platform.

*g. Encourage mobility management, employment-related transportation alternatives, joint development practices, and transit-oriented development:* We are currently partners with Schweitzer Mountain Resort in providing public transportation from the local communities to the base of the mountain and service from the

base to the village, serving both customers of the ski resort and their employees. SPOT is a member of the Bonner County Area Transportation Team (BCATT) and the Boundary Area Transportation Team (BATT). Agencies involved in transportation at all levels meet monthly to provide updates about area transportation projects. SPOT participated in the development of a Multi-Modal Transportation Plan for the city of Sandpoint, which included public transit elements. SPOT works with the City of Ponderay to include transit facilities in new developments in Ponderay. SPOT has worked with the cities of Dover, Sandpoint, and Kootenai to install bus pads, shelters and benches in their cities. Property developers now use the availability of our services in the traffic impact analyses as required when new developments are planned and permitted, demonstrating the positive impact of our services to the overall transportation system.

*h. Providing for the participation of private transportation providers in rural public transportation:* We are currently partners with Schweitzer Mountain Resort in providing public transportation. SPOT contracts with Schweitzer Mountain Resort to provide mountain route services. SPOT buses provide service from the communities to the base of the mountain and the bulk of service from the base of the mountain up to the village.

#### **b. ITD Call for Project Priorities**

This project meets the ITD-PT call for project priorities. Program Priorities:

1. Existing 5311 Services (Capital, Preventative Maintenance).

With this application, SPOT is applying for funds in ITD's number 1 priority to support Existing 5311 Services. The funds will fund the purchase and installation of UHF mobile radios and equipment for each bus, our base station (SPOT office), and one portable radio. This equipment will greatly enhance safety and our ability to communicate between buses, base station, and if needed, emergency personnel and road crews. Radios will allow SPOT Bus to provide safe, reliable, public transit services.

Our service requires funding assistance to support public transportation in our rural area with populations less than 50,000. Many residents rely on public transit to reach their destinations. SPOT expects to provide more than 140,000 rides in 2023 filling a crucial role in safe, reliable transportation services. Ridership continues to increase.

SPOT is an eligible recipient. SPOT was created and operates under a Joint Powers Agreement of six local government authorities. SPOT serves both Bonner and Boundary County with transit service.

SPOT has strong support in raising the required match from the seven partner municipalities including Boundary County as well as the cities of Bonners Ferry, Dover, Kootenai, Moyie Springs, Ponderay, and Sandpoint. Additional contributors include Schweitzer Mountain Resort, Schweitzer Mountain Homeowners Association, Idaho Area Agency on Aging, Festival at Sandpoint, and a handful of private contributors.

SPOT endeavors to comply with all required regulations: SPOT gathers community input with appointed Board Members from each joint powers partner; SPOT has a Service Development Committee in each county with members from social service agencies, economic development corporations, municipalities, businesses, and the general public; SPOT adheres to all administration requirements; SPOT applies for NEPA determination when required; SPOT follows ADA regulations. We agree with the terms outlined in the Grant Project Funding Agreement with ITD and Uniform Administrative Requirements (2 CFR 200). The NEPA requirements do not apply to this project.

### **c. Application Scope of Work**

The scope of work entails SPOT purchasing 40W, UHF radios and equipment for five fixed route buses, and four demand buses as well as a portable radio and a base station (SPOT office) radio. Each bus we order hereafter will include the cost to purchase and install compatible equipment. SPOT requests grant funding in the amount of \$29,404.00. We actually expect completion and operation no later than September 2025. Equipping our buses with radios will enhance communication and increase safety as we continue operations that support the ITD priorities.

Equipment includes the following:

- (9) TM9300 Mobiles, 40W, UHF, Dash Mount, DMR Tier II License, Antenna, Coaxial Cable, 5 Year Warranty
- (1) TM9300 Base Radio, 40W, UHF, Desktop Mount w/ Power Supply, DMR Tier II License, 5 Year Warranty
- (1) TP9300 Portable, Black, PKP, UHF, DMR Tier II License, High-Cap Battery, Antenna, Belt Clip, Single Bay Charger, 5 Year Warranty

RACOM Engineering and Project Management Services (Technical Services) include the following:

- Programming and Installation of 9 Mobile Radios, 1 Base Radio, and 1 Portable Radio
- Base Antenna/coax for Office Desktop Radio requires physical attachment of antenna, routing of coax & grounding to building. Building penetration will be required to complete installation as proposed.

This purchase will perpetuate SPOT's ability to provide safe, reliable, public transit services in the two most northern counties in Idaho – Bonner County and Boundary County. We operate three fixed routes and Paratransit service in Bonner County, demand response service in Boundary County, demand response service between Boundary County and Bonner County, as well as public special event service. For this project we request CARES funding in the amount of \$29,404.00 which accounts for a 15% increase in price between the time of submission of this application and when we place the order. This purchase will support the operation of our existing service. Schweitzer Mountain has granted us permission to place our equipment on Schweitzer Mountain since it is the highest peak and already used by many parties. We continue working with EMS, local highway districts and ITD to finalize and pool efforts to enhance communication.

## Section 2: Project Planning

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This project was developed out of necessity. We currently use cell phones to communicate. First and foremost, drivers and passengers are subject to safety hazards if they use a cell phone when driving. Police officers can fine drivers and employers who violate the cell phone use and texting ban. We instruct our drivers to pull over in a safe spot if they need to contact anyone or answer the phone. We have received reports from other motorists about our drivers using their phones while driving. This communication equipment will greatly enhance safety and our ability to communicate between buses, base station, and if needed, emergency personnel and road crews.

### **a. Project ties to specific goals in the ITD Statewide Transportation Plan**

#### ***Goal: Ensure the Safety and Security of Public Transportation***

1. SPOT strives to ensure the safety and security of the public.
2. SPOT holds regular training meetings with the staff to review procedures and policies. Guest speakers are sometimes brought in. The police have spoken to review the gun policies and give the drivers directions on how to handle situations involving guns.
3. SPOT now orders all buses with multiple cameras on both the inside and outside.
4. SPOT is up to date in training drivers on how to operate the lifts safely.
5. SPOT buses provide safe transportation services.

#### ***Goal: Encourage Public Transportation as an Important Element of an Effective Multi-Modal Transportation System in Idaho***

1. SPOT equips all our buses with bike racks and posts training videos on the website instructing riders on their use.
2. SPOT participated in the development of Sandpoint's Multi Modal Transportation Plan and the Urban Area Transportation Plan.
3. Property developers use the availability of our services in the traffic impact analyses as required when new developments are planned and permitted, demonstrating the positive impact of our services to the overall transportation system.

#### ***Goal: Preserve the Existing Public Transportation Network***

1. SPOT continues to look to the future. Growth is our goal. SPOT has no intention of maintaining the status quo.
2. SPOT continues to cultivate resourceful partnerships to efficiently provide excellent service in accordance with, and respectful of various organizations missions, goals, objectives, plans, policies, and procedures.
3. SPOT is dedicated to continuing operations for the benefit of the public indefinitely.

#### ***Goal: Provide a Transportation System that Drives Economic Opportunity***

1. The economy of the service area of SPOT is largely based on tourism. SPOT has a financial partnership with Schweitzer Mountain Resort driven by the desire to move both locals and tourists between the resort and the communities below. The hotels, restaurants, and shops are major benefactors of this partnership.
2. SPOT is the sole source of transportation for many riders, providing daily access to employment, doctors, services and recreation. City planning departments report that developers chose to invest in the Sandpoint area

because it has public transportation. The Chamber of Commerce reports people visit our area because there is public transportation.

3. Project planning and coordination is a continuous ongoing effort. SPOT provides public transportation services in two counties and is a sub-jurisdiction of six Idaho government entities. In addition to the work of the Board and Executive Director, SPOT utilizes service development committees to help assess transportation needs in the area and recommend service changes and improvements to the SPOT Board.

SPOT requires funding to achieve our operational benefits stated below:

### **Improve Efficiency and Increase Ridership**

We expect this grant to accomplish both improved efficiency and increases in ridership. The continuation of reliable fixed route and demand service will continue to increase SPOT's ridership and lower our overall cost per ride. Using radios as our key source of communication will cut down on the number of times drivers will need to pull over to acquire up to minute information on their routes.

### **Improve Safety**

As with any public transportation system, the roads are always safer with less vehicles on them. Safety also increases when vehicles are operated by professional drivers. Installing radios will let drivers focus on their driving task instead of having the distraction of a ringing phone. Sometimes having the ability to report situations immediately makes a big difference in safety and security.

### **Improve Mobility**

SPOT continues to explore new avenues of service to the communities in which we operate. We always have the attitude of "come join us". Whenever someone suggests new service options, the response of SPOT to engage them to help us work out how that idea can become a reality. Growth does not happen by just responding "We can't do that". There are a lot of creative people that can help SPOT provide new and better service to Bonner and Boundary Counties.

## **b. Project Development Process**

### **1. Describe coordination with local stakeholders**

A primary source of our project development process is relying on our Strategic Plan. The Strategic Plan was developed with a broad range of community input. The Strategic Plan outlines the goals of SPOT. Our Strategic Plan is included as an attachment.

### **SPOT Mission Statement**

A COOPERATIVE EFFORT OF AREA MUNICIPALITIES TO PROVIDE CONVENIENT, SAFE  
AND RELIABLE PUBLIC TRANSPORTATION FOR RESIDENTS AND VISITORS TO EMPLOYMENT,  
RECREATION AND SERVICE DESTINATIONS.

This mission statement is the result of a community visioning process which resulted in the following vision statement:

**SPOT Vision Statement**

SPOT is the people's choice for travel throughout North Idaho.  
We will continue to help preserve North Idaho's human and natural environments for generations to come.  
We are innovative, taking advantage of new technology to stay cost effective and affordable.  
SPOT is recognized and leveraged as a valuable asset for economic development and community vitality.  
Our partnerships and strategies for self-reliance are a national model.

Our Marketing and Public Outreach Plan outlines a clear path towards growing ridership and building community support. SPOT continues to grow its awareness, usage, and impact Bonner and Boundary Counties in a positive manner. We included our Marketing and Public Outreach Plan as an attachment.

SPOT also commissioned Shift Community Solutions to produce "See SPOT Run, A Comprehensive Success Guide". This guide included a survey of riders to help guide route development, service improvements, and marketing efforts. "See SPOT Run, A Comprehensive Success Guide" is included as an attachment.

The SPOT Board of Directors is comprised of representatives from the cities of Dover, Sandpoint, Kootenai, Ponderay, Bonners Ferry, and Boundary County. This ensures that the needs of each community are represented in the decision-making process. SPOT also utilizes local service development advisory committees that include a range of community stakeholders. Based on input from our Boundary County service development committee and the Boundary County Commissioners, SPOT has expanded its service area in Boundary County over the last four years to include the City of Moyie Springs, the Three Mile area and the Paradise Valley area.

SPOT enjoys enormous and continued support in the communities that we serve. Due to the support, we secured the match required to support our 5311-grant request. Match funds are provided by the Cities of Bonners Ferry, Dover, Kootenai, Moyie Springs, Ponderay, and Sandpoint, the Area Agency on Aging, Boundary County, Festival at Sandpoint, Schweitzer Mountain Resort, as well as the Schweitzer Mountain Homeowners Association and private donations. We also receive and continue to explore in-kind donations including radio ads, construction materials, planning resources, and site accesses.

**2. Describe efforts undertaken to coordinate and include Minority and Low-Income populations (Title VI)**

North Idaho is an area of the state with very few minorities. There is minority representation on the Service Development Committees.

There is representation from social service agencies that work with low-income populations on the community development committees. Input on service needs have been given by the Bonner Community Food Bank, the Sandpoint Senior Center, the Bonners Ferry Senior Center, the Bonners Ferry Food Bank, riders from low-income housing, and local elected officials regarding their constituents. This input represents the low-income population.

**3. What is your plan to include Disadvantaged Business Enterprises (DBE's) in this project?**

SPOT utilizes ITD's DBE program and submits reports to ITD as requested.

**4. Identify any local Labor Unions (if applicable) as identified by the Department of Labor**

There are no local labor unions covering workers employed under this grant application.

SPOT Authority does not discriminate in any way and provides transportation services to all of those who need it. We provide transportation to various stops that allow riders to access many businesses for personal care, shopping, recreation and work.

**c. Provide Attachment B: Milestone Reporting**

Attachment B is attached.



## Section 3: Project Benefits/Evaluation

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**Project Benefits:** The key benefit of this project is to continue providing safe, reliable, transit service in North Idaho that takes people where they want and need to go. The strategic planning team established goals (and objectives). Please see our goals and several objectives below that relate directly to our service:

Goal 1: To increase ridership

- Implement our marketing and public information plan to expanding SPOT's customer base, improving information on how to ride, and protecting/enhancing SPOT's brand.
- Perform community and rider surveys to identify barriers for current and potential customers, and to gauge the popularity of potential expansion options.
- Increase public awareness through various options including press release about SPOT activities.

Goal 2: Improve rider access, convenience, and amenities

- Evaluate routes and requests for service according to location and access to destinations
- Add shelters and benches to stop locations
- Expand on-board bicycle accommodation on all coaches
- Work to increase frequency of fixed route services (ongoing).

Goal 3: Leverage partnerships to expand service and improve the system

- Integrate SPOT with Schweitzer Mountain Resort's transportation needs and funding.
- Coordinate with Bonner County and/or other partners to become active participants in SPOT.
- As roadway projects are proposed, coordinate with BCATT, BATT, ITD, local cities and counties, to include stop furnishings, pedestrian access and safety features, and other transit infrastructure needs.
- Develop a sponsorship program for stop furnishings ("adopt a stop")
- Coordinate with land use agencies to incorporate SPOT needs in development reviews.
- Coordinate with social services agencies to implement Demand-Response service within in the Sandpoint area
- Provide regular (annual) updates to local government agencies and civic groups.

Goal 4: Increase organizational financial stability

- We evaluated alternate governance structures and revised current governance structure to reduce political risks and allow for easier service area expansion.
- On an ongoing basis, develop and expand SPOT's internal capacity and resources through training and grant opportunities.
- Create an endowment or other long-term donation opportunity for SPOT.

Goal 5: Promote environmental stewardship

- Explore other public transportation services including park and ride, vanpool and rideshare, as program champions are found.
- Add a seat on the TAC for a designated environmental advocate.

#### **a. Improve safety**

During daily operations we use cell phones to communicate between SPOT base and drivers, driver to driver, and passenger to driver. Drivers are told that they shall not answer or talk on the phone while driving SPOT buses. They sign a sheet that attests to their knowledge of the cell phone /texting ban. We ask them to pull over and recommend they get out of their seat while on the phone. Installing radios on buses will improve safety by eliminating the distraction to look, answer, and the need to pull over. This will also help them stay on time because they can hear quick updates immediately and will not need to stop.

The general population benefits by having a public transit service in the region. As with any public transportation system, the roads are always safer with fewer vehicles on them and more so, when the vehicles on the roadways are reliable. When people use our transit service, the riders as well as the general public are safer on the roadways. Another factor in North Idaho is the lack of daylight in the Wintertime. For those who find it difficult to see in the dark, we provide a safe option for people to get to where they need to go before 7:00 a.m. and after 4:00 p.m. Our Bonner County Paratransit and Demand route ridership continues to grow the fastest. Between our mechanic and the local repair shops our buses continue driving miles to get people where they want to go. We require safe reliable vehicles to accommodate the increased ridership.

We continue working with local jurisdictions to improve the safety of our riders as they wait for the bus. SPOT consciously included safety considerations in all our decisions. SPOT utilizes RTAP funding for first aid and CPR training for the drivers. We also remove snow at bus stops to increase safety. SPOT also includes instructional videos on our website to increase rider safety.

#### **b. Improve mobility**

SPOT continues to explore new avenues service to the community. We always have the attitude of “come join us”. Whenever someone suggests new service options, SPOT responds by working with them to help us work out how that idea can become a reality. Growth does not happen with a response of “We can’t do that”. There are a lot of creative people that help SPOT provide new and better service to Bonner and Boundary County. SPOT participated in Sandpoint’s multi-modal transportation plan. As a member of the Bonner County Area Transit Team (BCATT) and Boundary Area Transportation Team (BATT), we receive the first word on all area transportation projects. We have the opportunity to share our perspective and request inclusion - that they accommodate public transit in the projects.

We also expect this grant to accomplish both improved efficiency and increases in ridership to increase mobility. The continuation of reliable fixed route and demand route service will continue to increase SPOT’s ridership and lower our overall cost per ride. Immediate communication among SPOT staff will keep us on time and dependable. In some places we serve, there is limited or no parking and traffic congestion as a result. Drivers working together to navigate the situations will keep everyone safe and rolling. The general population benefits because of access to various venues, expedited ingress and egress from events, as well as improved efficiency, increased ridership, improved mobility and improved service times/areas.

#### **c. Support local economic development and expand economic opportunity**

SPOT strives to increase economic opportunity in its service area. First, we shop locally and employ local citizens. We buy our supplies and parts from local vendors as practical. We utilize local services such as local repair shops, our attorney, and our CPA. Routes such as the Festival at Sandpoint service and the Schweitzer

service support tourism and recreation in our area. These services have had high ridership counts and a very positive effect on our local economy while increasing convenience for riders and reducing vehicle and parking congestion.

In Bonner County, both our fixed route service and our paratransit service are used by employees to get to work. Riders use public transportation services to get to shopping and medical appointments. Property developers use the availability of our services in the traffic impact analyses as required when new developments are planned and permitted, demonstrating the positive impact of our services to the overall transportation system.

Our community and businesses benefit because workers and those with appointments show up on time. Our hours cater to many who need prompt access to their appointments. Our businesses strive to in turn, accommodate our riders with their schedules.

### **Project Evaluation:**

#### **a. SPOT bus will continually evaluate success of the project**

SPOT will maintain and sustain the radios and equipment through our high standard of upkeep and maintenance. Our buses and equipment continuously have a long productive life. Maintenance costs are evaluated monthly. Changes to the maintenance program will occur based on evaluations to ensure the safety of staff and the vehicles, and to extend the life of the equipment. We also receive daily reports if something malfunctions on each vehicle. This allows us to address concerns and fix problems immediately. Please see our Vehicle Inspection Form. Please note we will add a radio check to this inspection sheet.

The following data will be collected and evaluated:

- ✓ Ridership is collected and tabulated weekly and evaluated monthly by our Board and Committees. Ridership data includes general boardings, youth, senior and disabled. Stop utilization is also recorded and regularly evaluated. In calendar year 2022, SPOT's total ridership was 136,253. The pandemic reduced ridership in 2020 to 90,609.
- ✓ Ridership by Youth and Young Adults. SPOT has identified these two groups of riders as having large growth potential. We have targeted a 20% growth in this ridership. Many of our riders on the Mountain Route, up and down Schweitzer Mountain Road fall in these categories.
- ✓ Vehicle mileage and tire wear/replacement.
- ✓ Website and Social Media Usage. SPOT monitors its website traffic and social media reach.

#### **The following data will also be collected and evaluated regularly as follows:**

- ✓ Cost "Dashboard". SPOT has developed a cost "dashboard" to monitor the cost per ride and cost per mile for our fixed route and paratransit routes. This enables us to monitor and increase our operating efficiencies monthly.
- ✓ Website and Social Media Use. SPOT monitors its website traffic and social media reach.
- ✓ We collect and tabulate mileage sheets weekly.
- ✓ Budgets are evaluated weekly or more by staff and monthly by the Finance Committee and the SPOT Board.

**SPOT will sustain the project after the end of the grant period**

The maintenance of the asset purchased under this grant will be covered by the operating budget, and the equipment will have a useful life beyond the end of the grant period. Future 5311 grants will fund continued maintenance and operation costs.

SPOT plans to continue to apply for operating funds after this grant period in order to continue the project. Our partners have agreed to continue with the Joint Powers agreement.

**SPOT has the capacity to carry out the project as proposed**

**a.** The reorganization of the SPOT administration team has brought a higher level of management capability to the organization. The creation of a Finance Committee provides excellent financial oversight. The SPOT bookkeeper provides detailed monthly financial statements. Copies of the latest income statement and balance statement are attached.

SPOT has demonstrated its ability to manage the grant funding by having a technical rating of “Low” by ITD’s Public Transportation Division.

**b.** While the governmental agencies that provide match cannot commit to match amounts beyond the current fiscal year, all are strongly supportive of the system and are expected to continue to financially support SPOT.

## Section 4: Project Budget

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### a. Budget Narrative:

The amount of \$29,404.00 will fund cost of all radio components and installation. We are providing equipment on existing buses to improve our service. With this new radio equipment drivers can communicate among each other and with base that will allow us to confidently continue to provide Service for Bonner County and Boundary County residents. We provide service for Boundary County residents transporting them to Sandpoint one day each week and service to Bonners Ferry three days each week. SPOT also provides Bonner County service on three fixed routes and two to three paratransit routes. This varies daily due to demand.

1. We cannot scale down this project, If we eliminate radios on any buses, we will compromise our ability to communicate efficiently.

2. SPOT has the financial capability to make the purchases on a reimbursement basis with careful planning on the delivery and reimbursement schedule. See the Balance Sheet in the attached current financial statement.

The cost estimates for the project budget are based on the attached quote from our area/local communications company (RACOM).

Please note that SPOT currently depends on CARES Funding to cover current operating shortfalls. We expect to exhaust our CARES operating grant this fiscal year.

SPOT receives strong financial support from the joint powers agreement partners and other supporters. The list includes the Cities of Bonners Ferry, Moyie Springs, Dover, Sandpoint, Ponderay and Kootenai; Boundary County, Area Agency on Aging; Schweitzer Mountain Resort; and the Schweitzer Mountain Homeowners Association. While the governmental agencies that provide match cannot commit to match amounts beyond the current fiscal year, all are strongly supportive of the system and are expected to continue to financially support SPOT.

**b. Itemized Estimated Project Budget Communication Equipment (Radios)**

**This purchase has an overall cost of \$29,404.00. This includes a margin of 15% to account for possible price increases. Please see the invoice attached.**

Description	Quantity	Price each	Total Price
<b>Technical Services</b>	1 each	\$11,450.00	\$11,450.00
FCC Frequency coordination and licensing	1 each	\$ 1,850.00	\$ 1,850.00
RACOM Engineering and Project Management Services to include the following:			
• Programming and Installation of 9 Mobile Radios, 1 Base Radio, and 1 Portable Radio			
• Base Antenna/coax for Office Desktop Radio requires physical attachment of antenna, routing of coax & grounding to building. Building penetration will be required to complete installation as proposed.			
<b>Equipment</b>			
- Equipment includes the following:			
• TM9300 Mobiles, 40W, UHF, Dash Mount, DMR Tier II License, Antenna, Coaxial Cable, 5 Year Warranty	9	\$1,106.34	\$9,957.06
• TM9300 Base Radio, 40W, UHF, Desktop Mount w/ Power Supply, DMR Tier II License, 5 Year Warranty	1	\$1,320.62	\$ 1,320.62
• TP9300 Portable, Black, PKP, UHF, DMR Tier II License, High-Cap Battery, Antenna, Belt Clip, Single Bay Charger, 5 Year Warranty	1	\$990.58	\$ 990.58
			\$25,568.26
15% possible increase			\$ 3835.74
<b>Total</b>			<b>\$29,404.00</b>

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Communication Equipment - Radios

**This portion will be funded through a previously approved 5339 request.**

Description	Quantity	Grant amount requested	SPOT Match	Total Price
<b>DMR Tier II Repeater System</b> <ul style="list-style-type: none"> <li>• (1) Tait UHF TB7300 Repeater w/ DMR Tier II Enabled (DMR Tier III Trunking Software Upgradeable)</li> <li>• (1) Antenna System comprised of...</li> <li>• (1) Antenna (Tx/Rx) with mounting to existing mast structure</li> <li>• (1) 1 Ch Duplexer, UHF Pass/Reject</li> <li>• Up to 200ft of Coaxial Cable to antenna with in-line Grounding to existing building/structure grounding source.</li> </ul>	1 each	\$10,718.07	\$2,679.52	\$13,397.59
<b>Technical Services</b> RACOM Engineering and Project Management Services to include the following: <ul style="list-style-type: none"> <li>• Programming and Installation of 1 UHF Repeater, Duplexer, Antenna and Coaxial Cable</li> <li>• FCC Frequency Coordination and Licensing for (1) UHF Repeater Pair and (1) Simplex/Line-of-Sight Frequency, with Canadian A-Line Coordination</li> </ul>	1	\$12,400.00	\$3,100	\$15,500.00
<b>Total</b>		<b>\$23,080.16</b>	<b>\$5,770.04</b>	<b>\$28,897.59</b>



Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Communication Equipment - Radios

## Attachments

**Attachment A: Budget Sheet** This is a picture. Please see the excel version attached to this application.

Project Budget Request														
		<table border="1"> <tr> <td>Subrecipient</td> <td>Selkirks- Pend Oreille Transit Authority</td> </tr> <tr> <td>Agreement Term</td> <td>October 1, 2024 - September 30, 2025</td> </tr> <tr> <td>Contact Name</td> <td>Donna Griffin</td> </tr> <tr> <td>Address</td> <td>31656 Hwy 200, Suite 102, Box 8 Ponderay, ID 83852</td> </tr> <tr> <td>Phone Number</td> <td>208-263-3774</td> </tr> </table>			Subrecipient	Selkirks- Pend Oreille Transit Authority	Agreement Term	October 1, 2024 - September 30, 2025	Contact Name	Donna Griffin	Address	31656 Hwy 200, Suite 102, Box 8 Ponderay, ID 83852	Phone Number	208-263-3774
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Contact Name	Donna Griffin													
Address	31656 Hwy 200, Suite 102, Box 8 Ponderay, ID 83852													
Phone Number	208-263-3774													
FTA Grant	100/0		Scope of Work											
5311	Total	Federal	Match	SPOT will purchase 40W, UHF radios and equipment for five fixed route buses, and four demand buses as well as a portable radio and a base station (SPOT office) radio.										
CARES	\$29,404.00	\$ 29,404.00	\$ -											
Total Project Cost		Total Federal Request	Total Match Needed											
\$ 29,404.00		\$ 29,404.00	\$ -											
<table border="1"> <tr> <td>Donna Griffin</td> </tr> <tr> <td>Subrecipient Printed Name</td> </tr> <tr> <td><i>Donna M. Griffin</i></td> </tr> <tr> <td>Subrecipient Signature</td> </tr> <tr> <td>1/6/2024</td> </tr> <tr> <td>Date</td> </tr> </table>					Donna Griffin	Subrecipient Printed Name	<i>Donna M. Griffin</i>	Subrecipient Signature	1/6/2024	Date				
Donna Griffin														
Subrecipient Printed Name														
<i>Donna M. Griffin</i>														
Subrecipient Signature														
1/6/2024														
Date														
Local Match Source(s) for Project:														
Cities of Bonners Ferry, Dover, Kootenai, Moyie Springs, Ponderay and Sandpoint, the Area Agency on Aging, Boundary County, Festival at Sandpoint, Schweitzer Mountain Resort, as well as the Schweitzer Mountain Homeowners Association.														

## Attachment B: Milestone Reporting

### CARES One-Time Application

## Attachment B: Milestone Reporting

Agency Name	Selkirks-Pend Oreille Transit Authority (SPOT Bus)		
Agency Contact	Donna Griffin		
Phone #	208-263-3774	Email	dgriffin@SPOTBus.org
Grant Program	5311 CARES	Rural	One Time
Federal Award Amount	\$29,404.00		
<p>Scope of Work: SPOT will purchase 40W, UHF radios and equipment for five fixed route buses, and four demand buses as well as a portable radio and a base station (SPOT office) radio.</p>			
<p><b>Milestone Progress Report:</b> Target of major tasks to be achieved by specific dates. The report should include information such as: data for each activity line item within the approved project; a discussion of all</p> <ul style="list-style-type: none"> <li>• budget or schedule changes; original, estimated and actual estimated completion date</li> <li>• description of projects, status, specification preparation, bid solicitation, resolution of protests, and contract awards;</li> <li>• breakout of the costs incurred and those costs required to complete the project; reasons why any scheduled milestone or completion dates were not met, identifying problem areas and discussing how the problems will be solved; and discuss the expected impacts of delays and the steps planned to minimize these impacts.</li> </ul> <p>Add additional milestones to the table below as needed.</p>			
Name	Estimated Completion Date	Description	
ITD-PT Application Award timeline.	May 2024 ITD Board will determine project awards and funding level.	Hopefully, we will be awarded our request for this project. We will purchase radios and equipment through RACOM.	
Prepare for placement of equipment on the space allocated by Schweitzer Mountain	June 2024	Evaluate and finalize Specifications based on needs and availability including FCC frequency coordination and licensing.	
RFP/RFQ Issue Date	NA	We obtained quotes from other vendors and information from fellow radio and communications users. We will use RACOM to streamline the process and capitalize on complimenting what our partners have in place.	
ITD PT Funding Begins	October 1, 2024		
Start Date or Order Date for Rolling Stock, Equipment, and Technology Purchases	October 15, 2024 – May 30, 2025	Place the order for radios and equipment. Obtain the FCC frequency license.	
Construction Completion Date or Delivery Date for Rolling Stock, Equipment, or Technology Purchases	May 15, 2025, through May 15, 2026	Install and program communication equipment. We actually expect completion and operation no later than September 2025.	
Contract Completion Date	September 15, 2026	Complete paperwork and close the contract.	

Attachment C: NEPA/SSA/Rolling Stock Worksheet

NEPA/SSA/Rolling Stock Worksheet	NEPA/SSA/Rolling Stock Worksheet	NEPA/SSA/Rolling Stock Worksheet	NEPA/SSA/Rolling Stock Worksheet
<p>NEPA does not apply to this project</p>	<p>NEPA does not apply to this project</p>	<p>NEPA does not apply to this project</p>	<p>NEPA does not apply to this project</p>
<p>NEPA does not apply to this project</p>	<p>NEPA does not apply to this project</p>	<p>NEPA does not apply to this project</p>	<p>NEPA does not apply to this project</p>
<p>NEPA does not apply to this project</p>	<p>NEPA does not apply to this project</p>	<p>NEPA does not apply to this project</p>	<p>NEPA does not apply to this project</p>

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Communication Equipment - Radios

NEPA does not apply to this project

1. Project Description

2. Project Location

3. Project Justification

4. Project Impact

5. Project Funding

6. Project Timeline

7. Project Contact

8. Project Status

9. Project Notes

10. Project Signature

11. Project Date

12. Project Page



Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Communication Equipment - Radios

NEPA does not apply to this project

Item	Description	Quantity	Unit Price	Total Price
1	Handheld VHF Radios	10	\$150.00	\$1,500.00
2	Handheld UHF Radios	10	\$150.00	\$1,500.00
3	Base Station Radios	2	\$250.00	\$500.00
4	Antennas	10	\$20.00	\$200.00
5	Chargers	10	\$20.00	\$200.00
6	Accessories	10	\$10.00	\$100.00
7	Shipping & Handling	1	\$100.00	\$100.00
8	Tax	1	\$50.00	\$50.00
9	Total			\$3,050.00

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Page 2 of 2

Page 2 of 2

## **Attachment C: NEPA/SSA/Rolling Stock Worksheet, Cont.**

### **Sole Source Aquifer Checklist**

**PROJECT NAME:** Purchase Communication Equipment (Radios). This does not apply to the request.

#### **NAME OF SOLE SOURCE AQUIFER OR SOURCE AREA:**

- 1. Location of project:**
- 2. Project description.**
- 3. Is there any increase of impervious surface? If so, what is the area?**
- 4. Describe how storm water is currently treated on the site?**
- 5. How will storm water be treated on this site during construction and after the project is complete?**
- 6. Are there any underground storage tanks present or to be installed? Include details of such tanks.**
- 7. Will there be any liquid or solid waste generated? If so how will it be disposed of?**
- 8. What is the depth of excavation?**
- 9. Are there any wells in the area that may provide direct routes for contaminants to access the aquifer and how close are they to the project?**
- 10. Are there any hazardous waste sites in the project area....especially if the waste site has an underground plume with monitoring wells that may be disturbed? Include details.**
- 11. Are there any deep pilings that may provide access to the aquifer?**
- 12. Are Best Management Practices planned to address any possible risks or concerns?**

**13. Is there any other information that could be helpful in determining if this project may have an affect on the aquifer?**

**14. Does this Project include any improvements that may be beneficial to the aquifer, such as improvements to the wastewater treatment plan?**

The EPA Sole Source Aquifer Program may request additional information if impacts to the aquifer are questionable after this information is submitted for review.

## Attachment C: NEPA/SSA/Rolling Stock Worksheet, Cont.

### Rolling Stock Worksheet

Subrecipient	Vehicle #	Year	Make/Model/Description	In Service	Out of Service	Current Mileage	Award ID	Fed Share			
Example	1FTNS2EL0DB02363	2022	E250 Van	11/04/22	05/01/23	5,600	C2376XX	\$ 42,238.00			
<b>Out of service or ready for replacement</b>											
106	1FDXE45SX5HB50140	2005	Ford STARCRAFT	12/01/11	12/01/16	311,797		NA	NFPA – Non-Federal Public Funds		
107	1FDWE3SL67DB26555	2007	Ford Starcraft	06/01/11	09/01/23	236,339		\$ 35,232.00			
110	1FDXE4FS6ADA55814	2010	Ford STARCRAFT	3/1/2011	NA	247,417		\$ 55,443.00			
111	1FDXE4FS2BDA29759	2011	Ford Goshen	07/01/11	05/01/19	343,366		\$ 53,485.00			
114	1FDXE4FS3EDA48325	2014	Ford Champion	05/01/14	NA	286,811		NA	VIP		
115	1FDXE4FS3FDA14905	2015	Ford Elkhart	05/01/15	NA	308,071		\$ 46,732.00			
BFB	1FDEE3FL9BDA63289	2011	Ford STARCRAFT	06/01/11	NA	134,716		\$ 44,068.00			
<b>In service buses</b>											
117	1FDEE3FL0GDC33207	2017	Ford Eldorado Advantage	07/01/23	NA	52,014		NA			
217	1FDEE3FLXGDC18939	2017	Ford Eldorado Advantage	07/01/23	NA	68,926		NA			
118	1FDXE4FS3JDC01506	2018	Ford Elkhart	05/01/18	NA	86,013		\$ 56,562.00			
119	1FDXE4FS9KDC18439	2019	Ford STARTRANS	05/16/19	NA	205,329		\$ 56,909.00			
219	1FDXE4FSXKDC18434	2019	Ford STARTRANS	06/06/19	NA	215,500		\$ 56,909.00			
319	1FDXE4FS6KDC14428	2019	Ford STARTRANS	06/06/19	NA	175,162		\$ 56,909.00			
MT31	4DRBXTAR8KB549533	2019	IC RE	02/14/19	NA	68,068		\$ 128,000.00			
MT32	4DRBXTARXKB549534	2019	IC RE	02/14/19	NA	68,305		\$ 128,000.00			
MT33	1BAKJCSA3MF372250	2021	Bluebird Vision	12/27/19	NA	71,053		\$ 93,310.00			
MT34	1BABNB6A0PF388774	2023	Bluebird All American	12/01/23	NA	15,512					
MT35	1BABNB6A2PF388775	2023	Bluebird All American	12/01/23	NA	18,200					



## Attachment D: Demonstration of Need

### Congressional Application Attachment D: Demonstration of Need

1. Type of Service (Check all that apply):

- ☒ Fixed Route  
☐ Deviated Fixed Route  
☒ Demand/ Response

2. Service Area (Check one)

- ☐ City  
☐ County  
☒ Multi-County  
☐ Other (Please Specify):

3. Connectivity:

Do you connect with other modes of transportation? Check all that apply.

- ☐ Urban Public Systems  
☐ Intercity Carriers  
☐ Airports/ Trains  
☐ Other transit operators in your region (please list below):

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4. Ridership:

Estimate the average number of rides: Per Day \_\_\_\_\_ Per Year 138,000

Briefly describe your ridership over the last two years: -

Our ridership in Bonner County continues to increase. We will exceed 138,000 rides this year based on a very conservative estimate. We actually expect to reach this year's goal of 150,000 rides. We surpassed one million rides in February 2023.

5. Days/ Hours of Service:

List days of the week and hours transit provider is in service

Seven days a week, 12 hours day in Bonner County. Four days per week, 7 hours each day in Boundary County.

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## Back up Documentation

### **SPOT Ridership**

<b>2023</b>	<b>Fixed</b>	<b>Para</b>	<b>Bonnerr's Ferry</b>	<b>Mountain Route</b>	<b>Total</b>
23-Jan	4672	563	230	22489	27854
23-Feb	4200	509	204	19502	24415
23-March	4835	600	261	19601	25297
23-April	4197	477	152	4612	9438
23-May	4489	548	139	0	5176
23-June	4199	565	190	0	4,954
23-July	5986	489	129	628	7232
23-August	6820	536	216	0	7572
23-September	4231	547	149	2810	7737
23-October	4185	511	152	0	4848
23-November	4079	565	145	1214	6003
<b>2023 TOTAL</b>	<b>51,893</b>	<b>5,910</b>	<b>1,967</b>	<b>70,856</b>	<b>130,626</b>
<b>2022</b>	<b>Fixed</b>	<b>Para</b>	<b>Bonnerr's Ferry</b>	<b>Mountain Route</b>	<b>Total</b>
22-Jan	3986	365	136	20650	25137
22-Feb	3795	447	187	16777	21206
22-Mar	4399	538	277	12794	18008
22-Apr	3639	482	189	3470	7780
22-May	3752	467	191		4410
22-Jun	3827	588	185		4600
22-Jul	4417	480	202	494	5593
22-Aug	5132	596	217		5945
22-Sep	3888	545	223	2419	7075
22-Oct	4027	509	179		4715
22-Nov	3577	498	195	1815	6085
22-Dec	3776	478	237	21208	25699
<b>2022 TOTAL</b>	<b>48,215</b>	<b>5,993</b>	<b>2,418</b>	<b>79,627</b>	<b>136, 253</b>
<b>2021</b>	<b>Fixed</b>	<b>Para</b>	<b>Bonnerr's Ferry</b>	<b>Mountain Route</b>	<b>Total</b>
January	3334	270	111	9300	13015
February	3278	311	96	7894	11579
March	4345	414	111	6715	11585
April	3513	331	97	1531	5472
May	3949	299	69		4317
June	3782	375	119		4276
July	4420	388	169	524	5501
August	3965	460	139		4564
September	3392	459	123	3382	7356
October	3471	425	190		4086
November	3478	429	200	562	4669
December	3873	401	256	14,413	18943
<b>2021 TOTAL</b>	<b>44,800</b>	<b>4,562</b>	<b>1,680</b>	<b>44,321</b>	<b>95,363</b>
<b>2019</b>	<b>Fixed</b>	<b>Para</b>	<b>Bonnerr's Ferry</b>	<b>Mountain Route</b>	<b>Total</b>
September	4042	401	230	1269	5,942
October	4310	457	239		5,006
November	4473	395	226	393	5,487
December	4806	383	258	13013	18,460
<b>2019 TOTAL</b>	<b>56,599</b>	<b>5,019</b>	<b>2,924</b>	<b>35,514</b>	<b>100,056</b>

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Communication Equipment - Radios

5:27 PM  
10/13/23  
Accrual Basis

**Selkirks-Pend Oreille Transit Authority**  
**Summarized Balance Sheet**  
**As of September 30, 2023**

ASSETS	Bonner County	Boundary County	Total
<b>Current Assets</b>			
Checking/Savings	227,569.74	15,406.48	242,976.22
Accounts Receivable	1,038.00	342.00	1,380.00
Grant Funds Receivable	182,246.01	10,767.00	193,013.01
Total Other Current Assets	40,997.33	3,078.67	44,076.00
<b>Total Current Assets</b>	<b>451,851.08</b>	<b>29,594.15</b>	<b>481,445.23</b>
<b>Total Fixed Assets</b>	<b>1,427,011.11</b>	<b>72,360.37</b>	<b>1,499,371.48</b>
<b>TOTAL ASSETS</b>	<b>1,878,862.19</b>	<b>101,954.52</b>	<b>1,980,816.71</b>
<b>LIABILITIES &amp; EQUITY</b>			
<b>Liabilities</b>			
Current Liabilities	19,503.10	620.93	20,124.03
<b>Equity</b>	<b>1,859,359.09</b>	<b>101,333.59</b>	<b>1,960,692.68</b>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>1,878,862.19</b>	<b>101,954.52</b>	<b>1,980,816.71</b>

5:27 PM  
10/13/23  
Accrual Basis

**Selkirks-Pend Oreille Transit Authority**  
**Summary Profit & Loss Budget vs. Actual**  
**September 2023**

	Bonner County		Boundary County		Mountain Route		Total	
	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget
Total Income	92,150.00	126,206.82	7,168.00	6,297.00	13,029.00	7,464.88	112,347.00	139,968.70
Expenses:								
Administration	9,616.07	11,760.26	732.11	609.78	244.09	1,189.70	10,592.27	13,559.74
Operations	57,127.34	75,087.49	4,854.64	7,005.29	10,833.19	10,314.95	72,815.17	92,407.73
Preventative Maintenance	6,465.79	6,518.00	0.00	515.45	688.39	0.00	7,154.18	7,033.45
<b>Total Expenses</b>	<b>73,209.20</b>	<b>93,365.75</b>	<b>5,586.75</b>	<b>8,130.52</b>	<b>11,765.67</b>	<b>11,504.65</b>	<b>90,561.62</b>	<b>113,000.92</b>
<b>Net Ordinary Income</b>	<b>18,940.80</b>	<b>32,841.07</b>	<b>1,581.25</b>	<b>-1,833.52</b>	<b>1,263.33</b>	<b>-4,039.77</b>	<b>21,785.38</b>	<b>26,967.78</b>
Other Income/Expense	85.47	-74,060.08	0.00	0.00	0.00	0.00	85.47	-74,060.08
<b>Net Income</b>	<b>19,026.27</b>	<b>-41,219.01</b>	<b>1,581.25</b>	<b>-1,833.52</b>	<b>1,263.33</b>	<b>-4,039.77</b>	<b>21,870.85</b>	<b>-47,092.30</b>

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Communication Equipment - Radios

5:27 PM  
10/13/23  
Accrual Basis

**Selkirks-Pend Oreille Transit Authority**  
**Summary Profit & Loss Budget vs. Actual**  
**September 2023**

	Bonner County		Boundary County		Mountain Route		Total	
	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget
Total Income	92,150.00	126,206.82	7,168.00	6,297.00	13,029.00	7,464.88	112,347.00	139,968.70
Expenses:								
Administration	9,616.07	11,760.26	732.11	609.78	244.09	1,189.70	10,592.27	13,559.74
Operations	57,127.34	75,087.49	4,854.64	7,005.29	10,833.19	10,314.95	72,815.17	92,407.73
Preventative Maintenance	6,465.79	6,518.00	0.00	515.45	688.39	0.00	7,154.18	7,033.45
Total Expenses	73,209.20	93,365.75	5,586.75	8,130.52	11,765.67	11,504.65	90,561.62	113,000.92
Net Ordinary Income	18,940.80	32,841.07	1,581.25	-1,833.52	1,263.33	-4,039.77	21,785.38	26,967.78
Other Income/Expense	85.47	-74,060.08	0.00	0.00	0.00	0.00	85.47	-74,060.08
Net Income	19,026.27	-41,219.01	1,581.25	-1,833.52	1,263.33	-4,039.77	21,870.85	-47,092.30

5:27 PM  
10/13/23  
Accrual Basis

**Selkirks-Pend Oreille Transit Authority**  
**Summary Profit & Loss Budget vs. Actual**  
**October 2022-September 2023**

	Bonner County		Boundary County		Mountain Route		Total	
	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget
Total Income	811,519.10	1,120,732.30	74,685.18	82,303.82	555,672.40	329,254.86	1,441,876.68	1,532,290.98
Expenses:								
Administration	146,053.04	151,923.06	16,320.98	8,377.40	10,377.50	24,088.00	172,751.52	184,388.46
Operations	482,525.48	621,816.34	47,468.68	69,012.64	166,107.10	184,550.70	696,101.26	875,379.68
Preventative Maintenance	106,943.79	80,935.72	4,598.25	6,785.42	39,613.95	105,740.71	151,155.99	193,461.85
Total Expenses	735,522.31	854,675.12	68,387.91	84,175.46	216,098.55	314,379.41	1,020,008.77	1,253,229.99
Net Ordinary Income	75,996.79	266,057.18	6,297.27	-1,871.64	339,573.85	14,875.45	421,867.91	279,060.99
Other Income/Expense	-20,400.69	-392,481.00	-171.33	0.00	-329,382.60	0.00	-349,954.62	-392,481.00
Net Income	55,596.10	-126,423.82	6,125.94	-1,871.64	10,191.25	14,875.45	71,913.29	-113,420.01



**MEETING MINUTES  
SPOT**



**SELKIRK PEND OREILLE TRANSIT  
November 16, 2023**

**Nancy Lewis CALLED THE MEETING TO ORDER AT 11:00 A.M.**

**PRESENT:** Clif Warren, Colleen Culwell, Donna Griffin, Gary Kunzeman, Nancy Lewis, Ron Smith, Shannon Pittman, Zale Palmer

**Absent:** Wally Cossairt

**Public Comment Period:** No comments.

**MINUTES:** Approve minutes of the October 19, 2023 regular meeting as presented.

**Motion to approve the minutes of the October 19, 2023 regular meeting as presented. Zale Palmer/ Gary Kunzeman. All in favor. Approved**

**FINANCIAL REPORTS:**

Accept Financial Reports for October.

**Motion to accept the financial reports for October. Clif Warren/ Zale Palmer. All in favor. Approved**

Approve payment of prepaid bills and outstanding bills.

**Motion to approve payment of prepaid bills and outstanding bills. Zale Palmer/ Ron Smith. All in favor. Approved**

**STAFF REPORTS:**

**Ridership:** Donna Griffin reported that ridership for the fixed route overall is on track to exceed last year's ridership. Same for the para transit. Boundary County ridership is still lower. Ridership might come out to match last year. Donna is still working on more marketing – meeting in person with groups that may utilize the service. Schweitzer is planning to open for the season November 24<sup>th</sup>.

**Operations:** Donna Griffin reported AAA sent a contract extension that includes \$10,500 more in funding than the original contract. Disposing of three old buses that have previously been declared surplus property. They are not worth stripping for parts. Attorney has provided a checklist to follow. Buses to be disposed of are 107, 111, 106. Received approval to install a bench at the fairgrounds. The fairgrounds is removing their porta potty that our drivers use. Drivers will be told to utilize the facilities at the Red Barn once ski season opens. Feds are requiring that we use the GTSF system to upload our fixed route stop locations into their system.

**COMMITTEE REPORTS:**

- A. Boundary County Service Development Committee:** Ron Smith reported they are watching the ridership numbers. Discussing discontinuing the Tuesday trips to Sandpoint. May possibly change it to an in-town day.

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Communication Equipment - Radios

- B. Finance Committee Update:** The financial reports were reviewed and approved. Zale reported the committee discussed mechanic pay increase not covered last month's discussions of driver & admin pay increases. Committee recommends an increase. It has been one year since the krugerrand was placed in lost and found, however the prosecutors office has not released it to us yet. Committee reviewed the shelter grant balance. ITD approved to remove the installation of bike racks from the scope of work. Eureka is requesting additional funds for shelter construction due to increased cost of materials.

**ACTION & DISCUSSION ITEMS:**

- A. Action Item: Executive Session. Tabled.**
- B. Action Item: Authorize advertisement for Safety and Operations Manager position.** Donna distributed the job description for review. Board discussed various points. A special meeting has been scheduled for 10am November 28, 2023 to discuss further.  
**No action taken.**
- C. Action Item: SPOT staff pay increase**
- a. Mechanic.** Donna presented school district rate for entry level mechanic is \$23.39 up to \$29.63 for skilled mechanic. Looking for pay increase to \$24.50. An 8% pay increase for SPOT's mechanic would bring him to \$22.60/hr plus \$1 hazard pay.  
**Motion to increase mechanic base pay rate to \$22.60 effective October 1, 2023 plus \$1 hazard pay already in place. Zale Palmer/ Gary Kunzeman. All in favor. Passed.**
  - b. Assistant Director.** Donna presented Shannon was awarded a 5% pay increase as approved for admin staff, but drivers were awarded an 8% pay increase. She does occasionally drive vehicles and assist with moving them for repair purposes. The Finance Committee recommends not awarding the additional 3%. This would raise her pay rate to \$24.50/hr including hazard pay.  
**No action taken.**
- D. Action Item: Consider a Christmas Bonus for employees.**  
Donna mentioned drivers would prefer gift cards instead of cash bonuses.  
**Motion to award \$50 Christmas bonus for all employees via gift cards. Zale Palmer/ Gary Kunzeman. All in favor. Approved.**

**E. Action Item: Grant Applications 2024 - 2026.**

- a. Two Year Congressional Application suggestions**
  - i. Existing Services –** Donna plans to apply for funding for existing services, including Mountain Route which Schweitzer expects to continue past this current ski season.
  - ii. Capital/Asset Replacement – Buses (replacement for existing services) –** Would include two Mountain buses, two Fixed Route buses, two Para Transit buses.
  - iii. Add Demand Service in Bonner County –** Need county participation before this can move forward.
  - iv. Transit facility –** Need a place where buses can be worked on, parked, etc. Donna is discussing various options with Bonner County and with City of Ponderay.**Motion to authorize Donna to proceed with 5311 grant request for 2024-2026 and 5339 grant for capital/asset replacement. Gary Kunzeman/ Zale Palmer. All in favor. Passed.**  
**Grant requests for Bonner County demand service and transit facility tabled.**
- b. One-time CARES Application suggestions –** Available in October 2024 and no match requirements.
  - i. Communication Equipment**
  - ii. Office Equipment**
    - 1. Computers, phones, printer/scanner, and operating system.**



Motion to apply for one-time CARES grant for communication and office equipment. Zale Palmer/  
Ron Smith. All in favor. Passed.

- c. VIP or CARES funding Bus replacement or rehab (fixed) – Available in October 2024 and no match requirements for CARES grant. Bus 219 requires a new engine and other substantial work. Or it may need to be replaced.

Motion to apply for funding via either VIP or CARES grants for replacement or rehab. Zale Palmer/  
Ron Smith. All in favor. Passed.

- F. Action Item: Schweitzer Mountain Route. Contract received back from Schweitzer with federally required wording removed. ITD stated the wording is required. Wording was added back and ITD has approved the contract. Clif and Donna will deliver the contract to Schweitzer for signature.

Motion to authorize Nancy Lewis to sign the contract if it meets all requirements. Zale Palmer/ Gary  
Kunzeman. All in favor. Passed.



- G. Action Item: Boundary County Service. Discussed changing Tuesday service to Sandpoint.  
Motion to discontinue Tuesday service to Sandpoint and change it to local service day effective January 1,  
2024. Ron Smith/ Zale Palmer. All in favor. Approved.

- H. Action Item: Financial Considerations.  
None.

COMMENTS FROM THE CHAIR AND BOARD MEMBERS: No comments.

Meeting adjourned 12:26 p.m.



**SPECIAL MEETING MINUTES  
SPOT**



**SELKIRK PEND OREILLE TRANSIT  
December 12, 2023**

Gary Kunzeman CALLED THE MEETING TO ORDER AT 8:20 A.M.

**PRESENT:** Clif Warren, Colleen Culwell, Donna Griffin, Gary Kunzeman, Nancy Lewis, Ron Smith, Shannon Pittman, Zale Palmer

**Absent:** Wally Cossairt

**Public Comment Period:** No comments.

**MINUTES:** Approve minutes of the November 16, 2023 regular meeting as corrected.

Motion to approve the minutes of the November 16, 2023 regular meeting as corrected. Clif Warren/ Ron Smith. All in favor. Approved

Approve minutes of the November 28, 2023 special meeting as presented.

Motion to approve the minutes of the November 28, 2023 special meeting as presented. Zale Palmer/ Gary Kunzeman. All in favor. Approved

**FINANCIAL REPORTS:**

Approve payment of prepaid bills and outstanding bills.

Motion to approve payment of prepaid bills and outstanding bills. Zale Palmer/ Clif Warren. All in favor. Approved

**STAFF REPORTS:**

**Ridership:** Donna Griffin reported that ridership for the Fixed and Para Transit routes for this year should exceed pre-Covid levels and also last year. Boundary County ridership is still lower. Mountain Route ridership for November was good even with little snow.

**Operations:** Donna Griffin reported 15 applications have been received so far for the Safety and Operations Manager position. There are 4-5 that look good. The hiring committee should plan to meet towards the end of December. The Mountain bus repair costs are still running high. Two of the rear engine buses are being worked on at RWC. The 2019 route buses are also encountering high repairs - mainly ball joints, brakes, etc. The drivers appreciated the holiday gathering and gift cards.

**COMMITTEE REPORTS:**

A. Boundary County Service Development Committee: Nothing to report.

B. Finance Committee: Nothing to report.

**ACTION & DISCUSSION ITEMS:**

- A. **Action and Discussion Item: Approve an option for funding for the cost of buses.** Revisited numerous cost increases from Northwest Bus Sales on three buses on order. ITD has approved an additional \$50,000 of funding to cover latest cost increase. This is sufficient to cover the \$24,000 additional cost of the bodies. Donna and Clif met with the attorney to review the options. Because the contract is with the WA purchasing group, we have no standing. The WA contract allows for cost increases up to 50%. The latest proposed cost of these buses is comparable to other recent purchases of similar items. Another option is to order under the GA contract. This contract allows for August/September 2023 delivery date with no price increases after the PO's are issued. GA quoted Turtle Top buses, which also have a heavy-duty AC. Donna needs to confirm change of scope with ITD changing from three buses to two buses. Noted quotes do not include interior cameras, which need to be added.

Motion to cancel the PO with the WA group, purchase two Turtle Top buses per GA contract with changes discussed, and also contingent on ITD approval of change of scope. Clif Warren/ Zale Palmer. All in favor. Approved.

**B. Action Item: Grant Applications 2024 - 2026.**

- i. **One-time CARES Application** – Donna plans to apply for funding for updating office computers and phone system, purchase AC compressor diagnostic machine, and scanning tool for codes. Total still to be determined.
- ii. **VIP or CARES or Two-Year Congressional Application** – VIP grant does not have enough available funds to cover the purchase of an additional demand bus. CARES has \$795k for the District and no match funds required. The 2-year congressional has \$1.1M available with match as a 5339. According to Donna, we don't have to decide on which funding path – can leave that up to ITD to decide which one would be a best fit. Will have a total of six buses under grant applications.

Motion to authorize Donna to proceed with applying for grants for six buses (2 Mountain buses + 4 Regular buses), marking the grant applications as scalable. Clif Warren/ Zale Palmer. All in favor. Passed.

- C. **Action Item: Financial Considerations.**  
None.

**COMMENTS FROM THE CHAIR AND BOARD MEMBERS:** No comments.

Meeting adjourned 9:21 a.m.

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Communication Equipment - Radios



## Quote

To: SPOT - Selkirks-Pend Oreille Transit  
Donna Griffin  
Director  
31656 Hwy 200 P.O. Box 8  
Ponderay, ID 83852  
208.263.3774

Quote Date: 1/9/2024  
Quote #: 24-AC01050914  
Revision: 2  
Quote Validity: 60 Days  
Estimated Lead-Time: TBD  
Payment Terms: Net 30  
Freight: TBD

Project		Quoted By	
SPOT Bus Mobiles, Base and Portable Radio Equipment		Adam Cilppen	Ofc/Mobile: 509.789.0703
		E-Mail:	adam.cilppen@racom.net
Item	Description	Est Price	
<b>SPOT DMR System &amp; Subscribers</b>			
1	<b>SPOT Subscribers</b> <ul style="list-style-type: none"><li>• (9) TM9300 Mobiles, 40W, UHF, Dash Mount, DMR Tier II License, Antenna, Coaxial Cable, 5 Year Warranty</li><li>• (1) TM9300 Base Radio, 40W, UHF, Desktop Mount w/ Power Supply, DMR Tier II License, 5 Year Warranty</li><li>• (1) TP9300 Portable, Black, PXP, UHF, DMR Tier II License, High-Cap Battery, Antenna, Belt Clip, Single Bay Charger, 5 Year Warranty</li></ul>	\$	9,957.06
		\$	1,320.62
		\$	990.58
2	<b>Technical Services</b> RACOM Engineering and Project Management Services to include the following: <ul style="list-style-type: none"><li>• Programming and Installation of 9 Mobile Radios, 1 Base Radio, and 1 Portable Radio</li><li>• Base Antenna/coax for Office Desktop Radio requires physical attachment of antenna, routing of coax &amp; grounding to building. Building penetration will be required to complete installation as proposed.</li></ul>	\$	11,450.00
3	<b>FCC License &amp; Frequency Coordination</b> <ul style="list-style-type: none"><li>• FCC Frequency Coordination and Licensing for (1) UHF Repeater Pair and (1) Simplex/Line-of-Sight Frequency, with Canadian A-Line Coordination</li></ul>	\$	1,850.00
		<b>SPOT Sub-Total</b>	<b>\$ 25,568.26</b>
		Sales Tax 0.000%	\$ -
		<b>Freight</b>	<b>Included</b>
		<b>Project Total</b>	<b>\$ 25,568.26</b>
There will be a 3% convenience fee added to the total for using a credit/debit card as payment method.			
<b>Notes / Assumptions</b> 1) NASPO Contract Pricing Applied, per NASPO Contract #00318 State of Idaho Participating Addendum 2) This quotation is for a Tail DMR Tier II Subscribers & DMR Tier II Repeater System for SPOT. Equipment is software upgradable to support DMR Tier III operations. 3) This quotation includes installation of the Tail Radios, no additional services provided 4) Requires Schweitzer Ski Resort to allow access to desired installation site. 5) Repeater does not include battery backup in the event of AC power loss. 6) Proposal does not include radio system coverage drive testing or coverage guarantee. 7) Proof of Idaho Sales Tax Exemption Required at time of signed contract 8) Requires FCC Frequency Coordination and Licensing. Repeater Equipment Construction required to License Repeater Frequencies. 9) Requires approval and acceptance of accompanying Radio Quote.			
Proposal Accepted By: _____		Date: _____	



## Letters of Support

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### BONNER COUNTY EMERGENCY MANAGEMENT AGENCY

1500 Highway 2, Suite 101  
Sandpoint, ID 83864

Phone: 208-255-5681  
E-mail: [em@bonnercountyid.gov](mailto:em@bonnercountyid.gov)

January 4, 2024

Idaho Transportation Department  
Public Transit Office  
3311 W. State St.  
Boise, ID 83706

RE: Letter of Support -  
Communications

To whom it may concern:

I am writing to express our agency's support for Selkirks-Pend Oreille Transit Authority (SPOT Bus). SPOT Bus is and has been an excellent resource for the citizens and the communities within Bonner County.

I recommend you consider SPOT Bus for the CARES Act One-Time Application. The funding will allow the purchase of Nine TM9300 40 W UHF dash mount mobile radios, one Base radio, and related equipment for each bus. This will include installation and programming of each radio. This equipment will greatly enhance safety, reliability, and our ability to communicate between buses, base station, and provide interoperability as needed, with First Responders and road crews.

Bonner County Emergency Management has updated our Memorandum of Understanding with SPOT Bus as an emergency transportation resource for the citizens of Bonner County and as in any emergency, communications are of critical importance and this funding will provide the resiliency it's intended for.

Sincerely

A handwritten signature in cursive script that reads "Bob Howard".

Bob Howard  
Director  
Bonner County Emergency Management

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Communication Equipment - Radios



Boundary Area Transportation Team  
P.O. Box 1418  
Bonners Ferry, ID 83805  
208-267-3838

01/05/2024

Idaho Transportation Department Public Transportation Office  
311 W State St  
Boise, ID 83706

Attention: Cares Act- One-Time Application

To Whom It May Concern:

This Letter will serve to endorse the Cares Act- One Time Application for Communication Equipment being submitted by SPOT (Selkirks- Pend Oreille Transit). Boundary Area Transportation Team members have discussed supporting all applications submitted by jurisdictions for support and are in full support of this project. This Project meets BATT's mission statement of "promoting the coordination, planning, development and maintenance of the transportation infrastructure inf Boundary County."

Funding would allow SPOT to purchase much-needed communication equipment for their buses. The radios would allow SPOT drivers to communicate with one another. It will also allow for SPOT to communicate with emergency personnel in case of an emergency where residents need to be evacuated out of an area. Having communication equipment will greatly enhance the safety and reliability of SPOT.

The Boundary Area Transportation Team would appreciate your consideration of this project.

Thank You,

  
Commissioner Wally Cossairt  
Chairman Boundary Area Transportation Team



## CITY OF BONNERS FERRY

7232 Main Street  
P.O. Box 149  
Bonners Ferry, Idaho 83805  
Phone: 208-267-3105 Fax: 208-267-4375

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January 11, 2024

Idaho Transportation Department  
Public Transportation Office

**RE: Grant Application for Communication Equipment – SPOT Bus Radios**

To Whom It May Concern:

The City of Bonners Ferry wholeheartedly supports the Selkirks-Pend Oreille Transit Authority (SPOT) application for grant funding for communication equipment for the SPOT bus service. The City understands that communication equipment is very important for the safe and efficient operation of the SPOT bus program.

Our City residents, and the entire community, benefit greatly from the services offered by SPOT. Currently, a demand service is offered in Bonners Ferry and Moyie Springs where people call in and are picked up at their homes and taken to requested destinations. They are then transported back to their homes a few hours later. It is a much-needed service for people in our community. SPOT also offers a route from Bonners Ferry to Sandpoint that is very popular, since many Bonners Ferry residents have doctor appointments or need to shop in Sandpoint.

A significant portion of our population does not have the ability to drive. And we have heard specifically from Bonners Ferry City residents that the SPOT bus service has been a tremendous help to them in getting to doctor appointments, shopping, and performing other errands. Please approve the request for grant funding for SPOT from now through September 2026, so these services can continue in our area.

Sincerely,

A handwritten signature in blue ink that reads "Rick Alonzo".

Rick Alonzo  
Mayor

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Communication Equipment - Radios



KOOTENAI MAYOR  
Nancy Lewis

CITY Clerk-Treasurer  
Manda R. Corbett

COUNCIL  
MEMBERS  
David Sundquist  
Stephen Ferris  
Joseph Hafferty  
Daniel Schrock

January 04, 2024

Federal Transit Administration  
Boise, ID

Re: Rural Transit System Award

To Whom It May Concern,

Mayor Lewis of the City of Kootenai would like to support the Selkirk Pend Oreille Transit Service (SPOT) as a consideration for the 2024-2026 5311 Rural Congressional Application supporting the following:

- Continuation of existing services
- Office and Support Equipment
- Communication Equipment
- CARES Act one-time application (3 new fixed route buses)
- 2024-2026 Rural Congressional Application (Purchase of two new mountain buses)

I, Nancy Lewis Mayor of the city of Kootenai have always held SPOT in the highest of standards.

The city of Kootenai has a long and proud history of collaboration between the City and SPOT. I recognize the importance of SPOT's commitment to provide efficient and responsive public transportation services that are coordinated in a manner to encourage ease of ridership and quality services.

The SPOT system is a very valued resource. SPOT services supply public transportation for resident: visitors, and workers not only commuting to employment and medical centers but ensure connectivity to other surrounding city resources.

I, Nancy Lewis Mayor of the City of Kootenai am excited for the opportunity to help support this award. Please consider SPOT for the Rural Transit System of the Year Award.

Sincerely,

  
Nancy Lewis, Mayor



Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Communication Equipment - Radios



**BOUNDARY COUNTY**  
**P. O. Box 419**  
**Bonnors Ferry, ID 83805**

01/09/2024

Idaho Transportation Department Public Transportation Office  
311 W State St  
Boise, ID 83706

Attention: Cares Act- One-Time Application

To Whom It May Concern:

This Letter will serve to endorse the Cares Act- One Time Application for Communication Equipment being submitted by SPOT (Selkirks- Pend Oreille Transit). The Boundary County Board of Commissioners has discussed supporting all applications submitted by jurisdictions for support and are in full support of this project. This Project promotes the coordination, planning, development and maintenance of the transportation infrastructure in Boundary County."

Funding would allow SPOT to purchase much-needed communication equipment for their buses. The radios would allow SPOT drivers to communicate with one another. It will also allow for SPOT to communicate with emergency personnel in case of an emergency where residents need to be evacuated out of an area. Having communication equipment will greatly enhance the safety and reliability of SPOT.

The Boundary County Board of Commissioners would appreciate your consideration of this project.

Thank You,

**BOUNDARY COUNTY**  
**BOARD OF COMMISSIONERS**

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Communication Equipment - Radios

  
\_\_\_\_\_  
Tim Bertling, Chairman

  
\_\_\_\_\_  
Wally Cossart, Commissioner

  
\_\_\_\_\_  
Ben Robertson, Commissioner



Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Communication Equipment - Radios



January 4, 2024

Idaho Transportation Department  
PO Box 7129  
Boise, Idaho 83707-1129

RE: *Letter of Support for Public Transportation Funding- SPOT (Selkirk Pend Oreille Transit)*

Dear ITD Reviewers:

The Bonner County Area Transportation Team (BCATT), which is one of the longest-standing coordination groups in Idaho, is made up of member jurisdictions and local coordination groups which are dedicated to the planning, development, and maintenance of multi-modal transportation in northern Idaho. Membership includes ITD-D1, LHTAC, Bonner County, Sandpoint Independent Highway District, ten local communities, two school-districts, the non-vehicular trails/pathways group, and Selkirk Pend Oreille Public Transit (SPOT). This group's membership regularly seeks sources for transportation funding from all available entities- public and private, at the state and federal levels due to the ever-present statewide growth rate in ridership.

As longtime advocates for the development and advancement of public transit services to serve the ever-growing population in northern Idaho, BCATT is proud to comment on the status of this regional provider who has successfully woven public transit into all types of transportation planning throughout the geographic area. Our support covers five distinct areas of need which are briefly described below in terms of utilization and funding source(s):

- 1) Operations, Admin., Preventive Maintenance for Existing Services- (5311 Rural Congressional)  
This category of funding covers the continuation of existing services, including three fixed routes and paratransit services in Bonner County; demand response service in Boundary County; and the same service category between Boundary and Bonner counties.
- 2) Office and Support Equipment for Operations- (CARES Act One-Time Application)  
This category covers replacement of outdated systems, including telephone, updated operating systems and software; purchase of diagnostic tools for needed bus repairs.
- 3) Communication Equipment (CARES Act One-Time Application)- These funds will be used to purchase Nine-TM9300 40 W UHF Dash-mount mobile radios, one base-radio, as well as the programming and installation of the same.
- 4) Purchase of three new buses (fixed route) and one new demand-response bus; replace the outdated/high-maintenance vehicles for use in the two-county service area. (Cares Act One-Time Application)
- 5) Replace high mileage/ high maintenance **Mountain Route buses** with two new heavy-duty vehicles which will transport larger groups of passengers on mountainous route to and from Schweitzer Mountain ski destination (2024-2026 / 5339 Rural Congressional Application)

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Communication Equipment - Radios

(2)

BCATT is very proud of the dedication and sincere perseverance that the Selkirk-Pend Oreille Transit Authority (SPOT), exudes in every action it has taken in serving the people who live, shop and recreate in the two Northern-most counties of Idaho.

Over the decade of growth, and cooperation with the other local jurisdictions/organizations that value their innovative approach to public service, SPOT has manifest a model community- partnership with the entire geographic area that North Idaho occupies. Its involvement with the local jurisdictions, service groups, and individual riders has rendered it a Community Star.

BCATT will continue to support this outstanding model of community service and outreach and urge your positive consideration of this request for funding.

Respectfully submitted,



Commissioner Luke Omodt, Chair

## City of Moyie Springs



TELEPHONE (208) 267-5161  
POST OFFICE BOX 573  
MOYIE SPRINGS, IDAHO 83845  
FAX (208) 267-5161

January 10<sup>th</sup>, 2024

### **Idaho Transportation Public Transit Office**

**RE: Selkirks – Pend Oreille Transit Authority (SPOT Bus)**

**Project : CARES ACT One-Time Application**

To Whom It May Concern,

The City of Moyie Springs would like to give our total support for the Selkirks -Pend Orielle Transit Authority (SPOT Bus) in their 2024-2026 5311 Rural Congressional Applications. The service they are providing to our City and community in assisting residents in their transportation needs and is very welcomed. This service in our rural area providing transportation for groceries, and doctor or other appointments is a necessity for some residents and the City appreciates the SPOT Bus including our area in their routes. The City benefits as well as the riders.

Please consider the Selkirk -Pend Orielle Transit Authority (SPOT Bus) for grant funding to continue to provide their services. The City of Moyie Springs acknowledges the costs associated with these systems for maintenance and operations and we support the SPOT Bus in their efforts of find funding solutions to make our community a better place to live.

Thank you for your consideration,

A handwritten signature in blue ink that reads "Donna Wilson-Funkhouser". The signature is written in a cursive, flowing style.

Donna Wilson-Funkhouser, City Clerk/Treasurer





January 3, 2024

RE: Selkirk – Pend Oreille Transit

To Whom It May Concern:

The Area Agency on Aging of North Idaho (AAANI) has a vested interest in transportation for the senior population in the northern five counties of Idaho. In accordance with Section 306 of the Older American's Act, we are required to assure that continuing efforts are made to make transportation services available to older individuals residing within the geographical boundaries of our Area. We are also mandated to provide transportation services by the Idaho Senior Services Act, which states: "Transportation Services (IDAPA 15.01.01.013.03.l) designed to transport eligible clients to and from community facilities/resources for the purposes of applying for and receiving services, reducing isolation, or otherwise promoting independence."

AAANI clients are provided transportation to healthcare services, pharmacies, shopping (including grocery stores), senior centers, and miscellaneous excursions to help maintain their independence. The populations that we primarily serve include seniors aged 60 and over. Our goal is to enable older adults to live in their own homes as long as they can, safely and with independence.

The Selkirk-Pend Oreille Transit (SPOT) is critical to our goal of helping seniors maintain their independence and enjoy an increased quality of life. SPOT services have significantly helped address the need for public transportation with fixed route buses for many seniors in the Sandpoint area in Bonner County, and curb to curb service in Bonners Ferry area in Boundary County. SPOT's paratransit service for individuals with disabilities is essential for homebound seniors to access needed services, such as for medical services or social assistance agencies. The SPOT transportation service is an intricate and necessary process for the senior population to achieve their goals of remaining safely in their own homes.

Please let me know if you have any questions or need further clarification regarding transportation for seniors. It is a vital service that we need to provide in our state.

Sincerely,

Sage Stoddard  
Director  
Area Agency on Aging of North Idaho

## **Selkirk Pend Oreille Transit VEHICLE MAINTENANCE PROGRAM**

A schedule for vehicle maintenance on all every transportation vehicle is kept to maintain all vehicles in good operating condition.

### **Schedule -**

**Daily** – Pre trip and Post trip inspections will be performed on all vehicles that will be in service that day

**Monthly** – Maintenance inspection and lubrication for wheelchair lifts, wheelchair ramps and all vehicles door tracts, hinges and latches.

**Quarterly** – A vehicle inventory report is conducted. This report is done to check to see if equipment is missing or needs replace in each transit vehicle.

**Six Months** – This includes but is not limited to: Change seasonal tires and replace as needed; Inspect Brake Pads; Inspect Shocks / Struts; Inspect Front and Back suspension; and inspect lug bolts.

**Annually** – The following will be performed at least annually or every 35,000 – 45,000 miles, whichever comes first. This includes but is not limited to: Inspect and/or replace Air filter; Flush radiator and replace anti-freeze; Inspect and/or replace battery and cables; replace Spark Plugs, spark plug wires, distributor cap / ignition rotor; inspect and/or replace power steering fluid, belts, fuel pressure regulator, hoses, and cabin air filter.

**As Needed** – This will includes but is not limited to: oil changes (see requirements for services to be performed during an oil change) to be performed every 3,000 –5000 miles or sooner if needed; windshield repair; upholstery repair and chaise repairs.

A Service record (Appendix6) is kept on an ongoing basis to record all services performed and vehicles. This report is kept by vehicle with the receipts following in the vehicle binder.

### **DAILY MAINTENANCE SCHEDULE**

Prior to putting a vehicle into service each day a pre-inspection will be performed by the driver on the vehicle. At the end of that vehicle's service day the driver will perform a post-inspection on the vehicle. This inspection includes under the hood fuel levels and hoses and/or belts.



## **MONTHLY MAINTENANCE AND LUBRICATION INSPECTION**

This inspection is to check and lubricate wheelchair lifts, ramps, door tracts, hinges and latches.

## **TWICE A YEAR MAINTENANCE SCHEDULE – Typically spring and fall**

- Change and/or Replace Tires
- Inspect Brakes-Pads
- Inspect Shocks / Struts
- Inspect Front and Back suspension
- Inspect Lug bolts

## **ANNUAL MAINTENANCE SCHEDULE**

The following services will be performed on each vehicle annually or every 35,000 to 45,000 miles, whichever comes first.

- Inspect and/or Replace Air filter
- Flush radiator and Replace Anti-freeze
- Inspect and/or Replace Battery and Cables
- Replace Spark plugs
- Replace Spark plug wires
- Replace Distributor cap / Ignition rotor
- Inspect and/or replace Power steering fluid
- Inspect CV boots/joints or Drive shaft/U-joints
- Inspect/Replace Belts
- Inspect/ Replace Fuel pressure regulator
- Inspect and/or Replace Hoses
- Inspect and/or Replace Cabin air filter

**AS NEEDED** - OIL CHANGE will be performed on each vehicle every 3,000-5,000 miles or sooner if needed. The following will be included during each oil change.

- Check Coolant fluid & level
- Inspect Lug bolt
- Top off Washer fluid
- Check/Top off Power steering fluid & level
- Check/ Top off Brake fluid & level
- Check differential fluids & level
- Check Transmission fluids & level
- Check transfer case fluids & levels
- Replace Oil filter
- Change engine oil
- Perform a 14 Point inspection
- Test Drive

Lube Chassis fittings  
Wash Windows inside & out  
Dust interior  
Vacuum interior  
Check/ Replace Wiper blades  
Check? Replace Air filter  
Check/ Replace Battery  
Check Exhaust system  
Check Tires  
Check Air Pressure in tires  
Lube Fittings on Steering linkages  
Lube Ball joints  
Lube Drive shaft  
Check all Gas filters  
Install next Oil change sticker  
Lube Drive shaft  
Check all Gas filters  
Install next Oil change sticker

## **EVERY SPRING AND FALL**

Change and/or Replace Tires  
Inspect Brakes-Pads  
Inspect Shocks / Struts  
Inspect Front and Back suspension  
Inspect Lug bolts



# SELKIRKS-PEND OREILLE TRANSIT STRATEGIC PLAN

*NOVEMBER, 2015*



## Table of Contents

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## ACKNOWLEDGMENTS

The following people contributed to the development of this strategic plan:

Erik Brubaker, City of Ponderay

George Eskridge, Idaho Public Transportation Advisory Council

Marion Johnson, SPOT Manager

Susan Kiebert

Carol Kunzeman, City of Ponderay

Nancy Lewis, City of Kootenai

Carrie Logan, City of Sandpoint

Devin Marks, Schweitzer Mountain Resort

Saegen Neiman, Bonner County

Carole Richardson, Plangineering

Annie Shaha, City of Dover

Clif Warren

Bill Williamson, Schweitzer Mountain Resort

Bill Wright, SPOT Driver

Jared Yost, City of Sandpoint



## 1. INTRODUCTION

In 2011, the cities of Dover, Sandpoint, Ponderay and Kootenai launched a public transportation system offering fixed route service connecting each of the four cities. The City of Dover assumed the role of operator for the community transit system, using Federal Transit Administration funding with matching funds provided by Sandpoint and Ponderay.

The Selkirk-Pend Oreille Transit (SPOT) system was an immediate success, and ridership has grown steadily over the past four years. SPOT's early achievements are a testament to the effectiveness of our collaborative approach. SPOT successes and lessons learned offer a valuable statewide model for other transit systems in Idaho, demonstrating the power of partnerships in addressing critical community needs.

Our transit system's success has caught the attention of the Idaho Transportation Department and other organizations who are interested in seeing the system expand to serve new geographic areas. Recently, SPOT was encouraged to initiate demand-response service to serve a critical transportation need in Boundary County. SPOT has stepped to the plate and is currently providing limited demand response service within Boundary County, with a weekly inter-city connection between Bonners Ferry and Sandpoint.

Looking ahead, SPOT's leadership team desires a deliberate, informed approach to future expansion opportunities, so that the system's growth does not outpace available resources.

## PLANNING PROCESS

In the summer of 2015, SPOT's leadership team developed this strategic plan to set priorities, focus energy and resources, validate investment decisions, and enhance the organization's legitimacy in the eyes of funders, customers and stakeholders.

In discussing a vision for the organization, our team recognized that forward momentum would require sustained motivation and commitment by SPOT's leaders and partners.

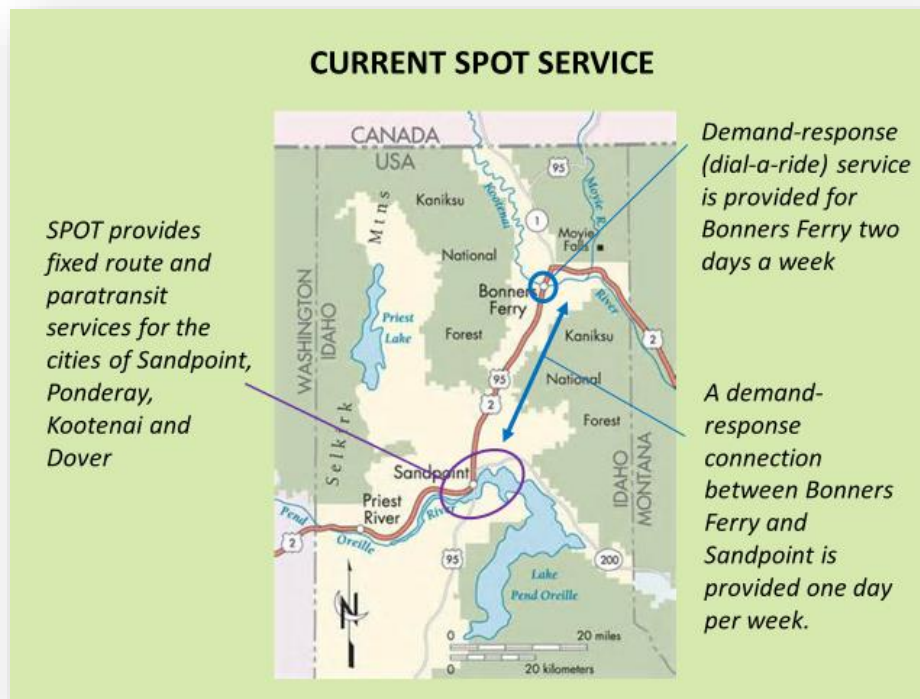
Understanding that each person is motivated by his or her own values, identifying common values for our leadership team and the communities we serve was a critical first step.

Values that could be positively influenced by SPOT led to the development of SPOT's vision statement. We then established a set of goals and objectives to be accomplished within the next five years to support the vision, and confirmed that SPOT's current mission provides a solid footing on which to start.



## 2. CURRENT ORGANIZATION, MISSION AND SERVICE

SPOT is a cooperative effort, formed through a memorandum of understanding between the cities of Dover, Sandpoint, Ponderay and Kootenai. Our oversight board, which includes the mayors of each city and an ex-officio member at large, is supported by a technical committee of staff members from each city plus a representative from Schweitzer Mountain Resort.



### MISSION

A COOPERATIVE EFFORT OF AREA MUNICIPALITIES TO PROVIDE CONVENIENT, SAFE AND RELIABLE PUBLIC TRANSPORTATION FOR RESIDENTS AND VISITORS TO EMPLOYMENT, RECREATION AND SERVICE DESTINATIONS.

Our mission is to provide convenient, safe and reliable public transportation for residents and visitors to employment, recreation and service destinations in the area.

Currently, fixed route service in the Sandpoint Area includes two routes connecting the four cities, with hourly service seven days per week. SPOT also provides paratransit service within the four city area.

For residents of Boundary County, SPOT recently initiated essential demand-response service within Bonners Ferry two days per week. We also offer a connection from Bonners Ferry to Sandpoint one day per week, which allows access to critical health care services, shopping and other basic needs.



### 3. WHAT WE VALUE

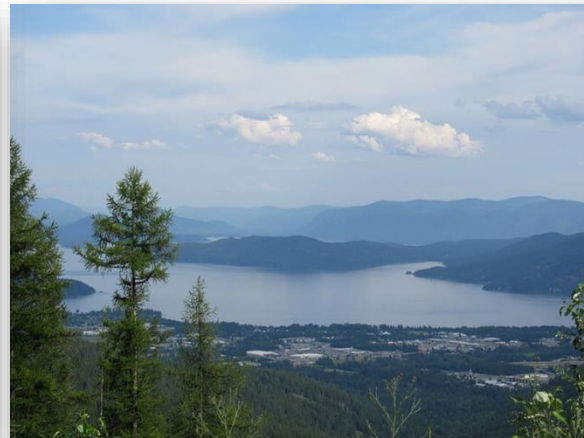
#### PEOPLE

SPOT riders inspire us! Coming from all walks of life, their appreciation for SPOT is a source of pride for us. We work hard to earn their trust and to keep it through friendly, excellent service. Hearing customers refer to SPOT as “my” bus, not just “the” bus, is music to our ears.



#### PLACES

From the Pend Oreille River to the scenic Selkirk Mountains, a ride with SPOT showcases magnificent natural beauty, clean air and water, and artistic, livable communities with a small-town feel. SPOT is privileged to help preserve these advantages for future generations, by reducing traffic congestion and fossil fuel emissions.



## PROSPERITY

Prosperity has many faces. SPOT fosters economic prosperity by providing businesses with access to the regional workforce, and helping to reduce employee commuting costs.

Elderly, disabled, low income and other socio-economically disadvantaged people depend on affordable, accessible transportation. Without it, many could not access medical services, shop for necessities, or get to work, and may become isolated in their homes. SPOT provides essential travel options to reduce these serious health and safety risks.



## PASSION

There is no better feeling than helping others. We get a big charge out of solving problems for people, and sharing lessons learned so that other transit systems can also succeed.

## 4. OUR VISION



### Vision Statement

- SPOT is the people's choice for travel throughout North Idaho.
- We will continue to help preserve North Idaho's human and natural environments for generations to come.
- We are innovative, taking advantage of new technology to stay cost-effective and affordable.
- SPOT is recognized and leveraged as a valuable asset for economic development and community vitality.
- Our strong partnerships and strategies for self-reliance are a national model.

## 5. STRATEGIC PLAN

SPOT's strategic plan covers goals and objectives for these five areas, to support SPOT's ultimate vision:

- Ridership
- Rider Access and Convenience
- Partnerships
- Stability and Sustainability
- Environmental Stewardship.

The strategic planning team established long-range goals for each of these areas, and developed objectives to be accomplished over the next five years. The "SMART" principle was used to make goals and objectives *specific, measurable, achievable, realistic and time-bound*. Table 1 lists goals and objectives along with the anticipated year for action. SPOT's technical advisory committee will maintain an action plan (Appendix C) to monitor progress and accomplishments.



Table 1. SPOT Strategic Plan

SPOT STRATEGIC PLAN		2015	2016	2017	2018	2019
<b>GOAL 1: INCREASE RIDERSHIP</b>						
1A	Prepare and implement a marketing and public information plan by December, 2016, aimed at expanding SPOT's customer base, improving information on how to ride, and protecting/enhancing SPOT's brand.		◆			
1B	Get SPOT's routes and stops on Google Transit by December, 2015.	◆				
1C	Fully implement the Double Map app by December, 2015.	◆				
1D	Perform community and rider surveys in 2016 to identify barriers for current and potential customers, and to gauge the popularity of potential expansion options.		◆			
1E	Work to increase public awareness by issuing regular press releases about SPOT activities.		◆	◆	◆	◆
<b>GOAL 2: IMPROVE RIDER ACCESS, CONVENIENCE AND AMENITIES</b>						
2A	Add third route to serve airport, food bank, residential and medical area.		◆			
2B	Perform an annual review of routes, stop frequencies, and operating hours; make adjustments if appropriate to improve convenience for riders.	◆	◆	◆	◆	◆
2C	Add shelters and bicycle racks to 10% of stop locations by 2016 and an additional 10% by 2018.		◆		◆	





SPOT STRATEGIC PLAN		2015	2016	2017	2018	2019
2D	Expand on-board bicycle accommodation on all coaches by 2018.				◆	
2E	Work to increase frequency of fixed route services (ongoing).	◆	◆	◆	◆	◆
<b>GOAL 3: LEVERAGE PARTNERSHIPS TO EXPAND SERVICE AND IMPROVE THE SYSTEM</b>						
3A	Integrate SPOT with Schweitzer Mountain Resort's transportation needs and funding. Implement a new route serving the mountain beginning November 2016.		◆			
3B	Coordinate with Bonner County and/or other partners to become active participants in SPOT by 2017.			◆		
3D	As roadway projects are proposed, coordinate with BCATT, BATT, ITD, local cities and counties, to include stop furnishings, pedestrian access and safety features, and other transit infrastructure needs.	◆				
3E	Develop a sponsorship program for stop furnishings ("adopt a stop") by 2016.		◆			
3F	Coordinate with land use agencies to incorporate SPOT needs in development reviews by December 2015.	◆				
3G	Coordinate with social services agencies to implement Demand-Response service within in the Sandpoint area by 2016.		◆			
3H	Provide regular (annual) updates to local government agencies and civic groups.	◆	◆	◆	◆	◆

SPOT STRATEGIC PLAN		2015	2016	2017	2018	2019
<b>GOAL 4: INCREASE ORGANIZATIONAL AND FINANCIAL STABILITY</b>						
4A	Evaluate alternate governance structures and select desired approach by 2017.	◆				
4B	By 2017, revise current governance structure to reduce political risks and allow for easier service area expansion.			◆		
4C	On an ongoing basis, develop and expand SPOT's internal capacity and resources through training and grant opportunities.	◆	◆	◆	◆	◆
4D	Update this list of objectives and action items quarterly.	◆	◆	◆	◆	◆
4E	Identify and select performance measures for SPOT and report on them annually		◆			
4F	Create an endowment or other long-term donation opportunity for SPOT, after Objective 4B is complete.				◆	
<b>GOAL 5: PROMOTE ENVIRONMENTAL STEWARDSHIP</b>						
5A	Explore other public transportation services including park and ride, vanpool and rideshare, as program champions are found.					◆
5B	Report annual emission reductions due to rides on SPOT on the SPOT website, beginning in 2017.			◆	◆	◆
5C	Add a seat on the TAC for a designated environmental advocate.	◆				





SPOT STRATEGIC PLAN		2015	2016	2017	2018	2019
5D	Consider energy efficiency options with next bus purchase.					◆
5E	Consider solar technology and other energy efficient options for shelters with next significant installation project.					◆

## APPENDICES

## APPENDIX A – FUNDING INVENTORY

## STATE AND FEDERAL FUNDING SOURCES

In 2012, Congress enacted new federal transportation funding legislation known as “MAP-21” (Moving Ahead for Progress in the 21<sup>st</sup> Century). The majority of funding for transit systems and services in the country comes from this federal transportation act.

MAP-21 contains provisions for funding programs administered by the Federal Transit Administration (FTA), and the Federal Highway Administration (FHWA), which are found in Chapter 53 and 23 of the Code of Federal Regulations respectively. While the lion’s share

of transit funding is contained in Chapter 53, there are some transit funding opportunities within the Highway program in Chapter 23.

Much of the federal transportation funding that is available to rural areas in Idaho State will flow through the Idaho Transportation Department (ITD), however there are several direct-federal programs that SPOT could explore; specifically direct-federal funding that is available to tribes and for projects that improve access to federal lands. A summary of MAP-21 programs for which transit activities may be eligible follows.

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### *FEDERAL TRANSIT PROGRAMS ADMINISTERED BY ITD*

#### **5310 Enhanced Mobility of Seniors and Individuals with Disabilities**

- Former New Freedom program has been rolled into the 5310 program
- At least 55% of Idaho’s program funds must be spent on capital project planning, design and implementation specifically for seniors and individuals with disabilities when public transportation is insufficient, inappropriate or unavailable.
- Remaining 45% can be used for projects that improve access to fixed route service and decrease reliance by individuals with disabilities on paratransit.
- Capital 80% federal funding; 20% match
- Operating 50% federal funding; 50% match
- Projects must be identified within a Coordinated Public Transportation Human Services Transportation Plan

#### **5311 Rural Formula Funding**

- Eligible recipients are states and Indian tribes. Subrecipients may be state or local governments, nonprofits, public transportation operators or intercity bus services.
- Eligible activities are planning, capital, operating, JARC projects, and acquisition of public transportation services.
- Amount that comes to Idaho is dependent on vehicle revenue miles. SPOT can help increase Idaho’s share by increasing ridership.

- Low-income populations in rural areas is also a formula factor.
- Data collection required
  - Annual revenue
  - Sources of revenue
  - Total annual operating costs
  - Total annual capital costs
  - Fleet size and type, related facilities
  - Vehicle revenue miles
  - Ridership
- Capital 80% federal funding; 20% match
- Operating 50% federal funding; 50% match

**5311(f) Intercity**

- 15% of the state's 5311 funds have to go to intercity service
- Planning and marketing for intercity transportation
- Capital
- Operating through purchase of service agreements, etc
- Coordinating rural connections between small public transportation operations and intercity bus carriers

**5319 Bicycle Facilities**

- Providing shelters and parking facilities for bikes near transit facilities
- Installing equipment for bikes on buses
- 90% federal funding; 10% local match

**5324 Emergency Relief**

- Capital projects to protect, repair, reconstruct or replace equipment and facilities after a governor-declared disaster
- Transit agency operating costs related to evacuation, rescue, temporary service or changing routes before, during or after an emergency in an a directly-affected area.

**5326 Transit Asset Management**

- Will be a future requirement for recipients to manage capital assets and prioritize investments.
- There will likely be a technical assistance program.

**5339 Bus and Bus Facilities Formula grants**

- Capital 80% federal funding; 20% local match

**RTAP**

- Supports a variety of technical services and training opportunities for transit operators in rural areas.
- Includes scholarships to cover tuition and expenses for individuals to attend training courses, workshops and conferences.

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**OTHER FEDERAL FUNDING****5311(c) Tribal Transit Program** (\$25M for tribes by formula and \$5M discretionary nationally)

- This program is administered directly by the Federal Transit Administration (FTA), not ITD.
- \$25 million annually is available nationally, and is allocated to tribes by formula. There is no match required for the formula funds.
- A recipient that is an Indian tribe may use funds apportioned under this subsection to finance public transportation services provided by a non-tribal provider of public transportation that connects residents of tribal lands with surrounding communities, improves access to employment or health care, or otherwise addresses the mobility needs of tribal members.
- Award amounts are based on revenue miles and number of low-income individuals residing on tribal lands
- There has been no formula allocation for the Kootenai Tribe in Idaho under this program, however other neighboring tribes do receive apportionments. 2015 apportionments included:
  - Confederated Salish and Kootenai Tribes (Montana) \$473,565
  - Coeur d'Alene Tribe/Citylink (Idaho) \$302,689
  - Kalispel Tribe (Washington) \$40,998
- An additional \$5 million annually is available nationally for competitive application. (The Idaho Kootenais should be eligible applicants for this portion of the program.) There is a 10% match required for the competitively awarded funds.

**Tribal Transportation Program**

- Separate from the Tribal Transit Program
- This program is jointly administered by the Federal Highway Administration and Bureau of Indian Affairs.
- Historically used for roadways, but eligible activities include planning, design and construction of transit and non-motorized transportation projects.

**Transportation Investment Generating Economic Recovery (TIGER)**

- TIGER is a nationally competitive funding program for transportation projects that have a significant national or regional impact. A broad array of projects are eligible for TIGER funding.
- Competition is typically fierce, however, and projects must demonstrate significant benefits for safety, economic competitiveness, state of good repair, livability and/or environmental sustainability.
- Most of SPOT's smaller capital improvements and bus purchases would not have the broader regional or national significance to compete well in this program. However, as the SPOT team continues to collaborate, the team may identify larger initiatives requiring the participation of multiple partners, for which the TIGER program could be considered.
- This is a direct federal program that is not administered by ITD.

**Surface Transportation Program (STP)**

- \$10 billion nationally in STP flexible funding. Non-motorized transportation facilities, transit capital projects and public bus terminals and facilities are eligible.
- In Idaho, STP funding for local agencies is administered by the Local Highway Technical Assistance Council (LHTAC). Projects within Bonner County are prioritized by the Bonner County Area Transportation Team (BCATT) and within Boundary County by the Boundary Area Transportation Team (BATT).

**Transportation Alternatives Program (TAP)**

- Construction, planning, and design of on-road and off-road trail facilities for pedestrians, bicyclists, and other non-motorized forms of transportation, including sidewalks, bicycle infrastructure, pedestrian and bicycle signals, traffic calming techniques, lighting and other safety-related infrastructure, and transportation projects to achieve compliance with the Americans with Disabilities Act of 1990.
- Construction, planning, and design of infrastructure-related projects and systems that will provide safe routes for non-drivers, including children, older adults, and individuals with disabilities to access daily needs.
- This program is administered by ITD.



**Federal Lands Access Program**

- This program is administered by the Federal Highway Administration, although ITD participates in project selection.
- Eligible recipients: State, county, town, township, tribal, municipal, or local government
- Eligible projects must address access to or within federal lands:
  - Preventive maintenance, rehabilitation, restoration, construction and reconstruction
  - Adjacent vehicular parking areas
  - Acquisition of necessary scenic easements and scenic or historic sites
  - Provisions for pedestrian and bicycles
  - Environmental mitigation in or adjacent to Federal land to improve public safety and reduce vehicle-wildlife mortality while maintaining habitat connectivity
  - Construction and reconstruction of roadside rest areas, including sanitary and water facilities.
  - Operation and maintenance of transit facilities

**Federal Lands Transportation Program**

- Only federal land management agencies are eligible for this program. Includes National Parks, US Forest Service, US Fish and Wildlife Service, Bureau of Land Management and Corps of Engineers.
- Operation and maintenance of transit programs are eligible.

**USDA Rural Development - Community Facilities Programs**

- Administered by the Idaho office of the US Department of Agriculture Rural Development Division
- Provide low-interest loans, grants and loan guarantees for projects to develop essential community facilities for public use in rural areas. An essential community facility is defined as a facility that provides an essential service to the local community for the orderly development of the community in a primarily rural area, and does not include private, commercial or business undertakings.
- Eligible borrowers include public bodies, community-based non-profit corporations, federally-recognized Tribes.
- Rural areas including cities, villages, townships and towns including Federally Recognized Tribal Lands with no more than 20,000 residents according to the latest [U.S. Census Data](#) are eligible for this program.
- Funds can be used to purchase, construct, and / or improve essential community facilities, purchase equipment and pay related project expenses.

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*COMMUNITY DEVELOPMENT BLOCK GRANTS***CDBG Public Facilities and Downtown Revitalization Grants**

- Eligible agencies are incorporated cities with a population under 50,000, or counties. Special service providers must be sponsored by a city or county.
- Funds public utility systems, fire stations, removal of architectural barriers and other public infrastructure.

**CDBG Job Creation Grant**

- Eligible agencies are incorporated cities with a population under 50,000, or counties. Special service providers must be sponsored by a city or county.
- Funds public facility construction and improvements that support companies who are expanding, or new companies that will be creating jobs.

## PRIVATE FUNDING SOURCES

Most private sources of funds grant small amounts. As many federal funding sources require a local match amount, private funding can be important as a source for required match amounts. Many private foundation grants require a nonprofit (non-government) recipient.

### *UNION PACIFIC FOUNDATION*

The UP Foundation provides grants to public charities or municipalities located in communities that are served by Union Pacific Railroad. Grants are typically modest – in 2015 grants made in Idaho totaled \$180,000, with an average individual award of roughly \$5,000.

### *STATE FARM COMMUNITY GRANTS*

Nationally, State Farm supports communities through social investments and countrywide relationships. At a local level, the company grants focus on two areas: safety and education.

#### Safety Grants

- Auto and roadway safety
- Teen Driver Education
- Home safety and fire prevention
- Disaster preparedness
- Disaster recovery

#### Education Grants

- Basic Economics
- Budget Counseling
- Employable Skills Training
- First Time Homebuyers Workshop
- Foreclosure Prevention Counseling

### *FORD FOUNDATION*

<http://www.fordfoundation.org/grants/organizations-seeking-grants>

Each year the Ford Foundation receives about 40,000 proposals and makes about 1,400 grants. Requests range from a few thousand to millions of dollars and are accepted in categories such as project planning and support; general support; and endowments. Grant applications are reviewed at our New York headquarters and in our regional offices.

Grant types include:

- General/core support
- Project
- Planning

- Competition
- Matching
- Recoverable
- Individual
- Endowment
- Foundation-administered project

The foundation has numerous grant interest areas. Those most applicable to SPOT will likely be found under the categories of Economic Fairness, Democratic and Accountable Government, and Sustainable Development. Inquiries can be submitted on-line throughout the year.

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*MJ MURDOCK CHARITABLE TRUST*

<http://www.murdock-trust.org/grants/index.php>

Description and Eligible Activities

The trust provides grants for a broad range of activities. These generally include education, culture and the arts, health and human services, scientific research, and youth leadership. The trust does not fund normal ongoing operations, including existing staff, or for the continuation of existing projects, or the continuation of programs previously financed from other external sources.

Amount and Match Requirement

Grant award size varies depending upon organization and project; however, past practices inform future decisions. Because the Trust's application and evaluation process is rigorous, thorough, and time intensive, requests for less than \$50,000 are generally discouraged.

Eligibility

To be eligible to apply for a grant, organizations must:

- Be a 501(c)(3) organization
- Operate in the Alaska, Idaho, Montana, Oregon, or Washington

Organizations must submit a letter of inquiry.

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*THE ROBERT WOOD JOHNSON FOUNDATION: MULTIPLE PROGRAMS*

[http://www.rwjf.org/applications/solicited/cfp.jsp?ID=21390&cid=XEM\\_A5734](http://www.rwjf.org/applications/solicited/cfp.jsp?ID=21390&cid=XEM_A5734)

Description and Eligible Activities

The Robert Wood Johnson foundation has multiple funding programs focusing on improving health and health care for Americans. Specific programs and funding initiatives vary year to year. Access to health care may be funded under various initiatives by this foundation.

Amount and Match Requirement

To be eligible for funding, applicants must typically secure 100 percent matching support. Matching funds may come from private organizations, or from city, county, state and federal funds. Usually, at least 50 percent of the match must be a cash match from one or more local, state, regional or national funding partners. The balance may be in-kind support provided by organizations other than the applicant organization.

Timing

Proposals are solicited at various time throughout the year. Watch the website for applicable opportunities.

Eligibility

To be eligible, an applicant organization must be located in the United States or its territories and be a:

- Nonprofit organization that is tax-exempt under Section 501(c)(3) of the Internal Revenue Code;
- Tribal group recognized by the U.S. federal government; or
- State or local agency.

In addition, grantees must be organizations that participate in established coalitions or networks that span multiple sectors and perspectives and may include representatives from business; education; public health; health care; community organizations; community members; policy advocates; foundations; and policy-makers.

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STATE FARM COMPANY GRANTS

<http://www.statefarm.com/aboutus/community/grants/company/company.asp>

Description and Eligible Activities

The grants focus on three areas: safety, community development and education.

- Safety Grants—Auto and Roadway Safety, Home Safety and Fire Prevention, Disaster Preparedness, Disaster Recovery, Personal Financial Safety/Security
- Community Development Grants—Affordable Housing, 1st Time Homeowners, Community Revitalization, Economic Development

- Education—Grants for K-12 public schools

Amount and Match Requirement

N/A.

Timing

Applications for 2016 funding were available from Tuesday, September 1 through Friday, October 30, 2015. Expect a similar timeframe for 2017.

Eligibility

The applicant must be an educational Institution, government entity, 501(c)(3) charitable nonprofit organizations, a 501(c)(4) volunteer fire companies, or a 501(c)(6) chambers of commerce.

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*TOM'S OF MAINE 50 STATES FOR GOOD*

<http://www.tomsofmaine.com/community-involvement/living-well/project-sponsorships>

Description and Eligible Activities

Tom's of Maine 50 States for Good initiative supports grassroots organizations throughout the country working to do good in their communities. Eligible projects must have a positive impact on the community in one of the following areas:

- Environmental Goodness
- Healthy Goodness
- Human Goodness

An internal panel narrows applications down to the top 100. An external panel narrows the 100 nominees down to 51 finalists (one from each state and the District of Columbia). 15 Final awards are made based on a consumer vote on Tom's of Maine's Facebook page.

Amount and Match Requirement

\$150,000 is available nationally; individual grants are \$10,000.

Eligibility

To be eligible to apply for a grant, organizations must:

- Nonprofit 501(c)(3) organizations, in good standing, for funding requests related to community events, projects or program support

- Nonprofit must have an operating budget of less than \$2 million

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#### *WALMART FOUNDATION*

<http://foundation.walmart.com/apply-for-grants/>

#### Description and Eligible Activities

Walmart has national, state and community grant programs. Funding requests should align with the Foundation's areas of focus. Current focus areas are:

- Hunger Relief and Healthy Eating
- Sustainability
- Women's Economic Empowerment
- Career Opportunity

The Community Grant Program considers additional focus areas.

#### Amount and Match Requirement

The Community Grants Program awards grants of \$250 to \$2,500.

Larger grants - \$25,000 minimum -- are possible through Walmart's National and State Giving Programs.

#### Eligibility

Organizations must be described as one of the following:

- An organization holding a current tax-exempt status under Section 501(c)(3), (4), (6) or (19) of the Internal Revenue Code;
- A recognized government entity: state, county, or city agency, including law enforcement or fire departments, that are requesting funds exclusively for public purposes;
- A K-12 public or private school, charter school, community/junior college, state/private college or university; or
- A church or other faith-based organization with a proposed project that benefits the community at large.



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*US BANCORP FOUNDATION*

<http://www.usbank.com/community/index.html>

Description and Eligible Activities

The U.S. Bancorp Foundation offers grants for unrestricted general operating support, program support, capital support, and contributions of equipment and property.

The Foundation has the following funding priorities:

- Affordable Housing
- Self-Sufficiency for low and moderate income populations
- Economic Development
- Education
- Cultural and Artistic Enrichment
- United Way

Eligibility

Only nonprofit organizations are funded. Organizations receiving primary funding support from a United Way organization are not eligible for a direct grant from the Foundation.

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*BULLITT FOUNDATION*

<http://www.bullitt.org/>

Description and Eligible Activities

The mission of the Bullitt Foundation is to safeguard the natural environment by promoting responsible human activities and sustainable communities in the Pacific Northwest. The Foundation supports nonprofit organizations that serve Idaho, Oregon, Washington, western Montana (including the Rocky Mountain range), coastal Alaska from Cook Inlet to the Canadian border, and British Columbia, Canada.

The Foundation's current focus is on the following areas:

- Urban Ecology
- Ecosystem Services

- Energy, Industry, and Technology
- Leadership and Civic Engagement

The Foundation will consider special requests in response to unforeseen emergencies or time- sensitive needs. However, funds for such grants are limited, and approval standards are high. Interested applicants should contact a program officer to determine eligibility. The Foundation does not fund capital projects or university overhead costs, nor does it fund candidates for political office or lobbying activities.

Applicants must begin the application process by completing an online proposal inquiry form available on the Foundation's website.

#### Amount and Match Requirement

Total Annual Giving: \$5,394,000; Grant Range: \$5,000 - \$200,000; Average Grant: \$25,000 - \$50,000

#### Timing

Proposal inquiry forms are available annually on March 15 and September 15, annually. Invited proposals are solicited May 1 and November 1, annually

#### Eligibility

Applicants must have a 501(c)(3) determination letter, or identify themselves as a validly organized and operating municipal corporation, public agency, or Native American tribe.

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#### *PEOPLE FOR BIKES GRANT PROGRAM*

<http://www.peopleforbikes.org/pages/grant-guidelines>

#### Description and Eligible Activities

Formerly the Bikes Belong Grant Program, People for Bikes is aimed at providing funding to those who strive to improve bicycling in America through efforts such as the building of trails and paths, or through promoting general bicycling advocacy and awareness. Fundable projects include paved bike paths, lanes, and rail-trails as well as mountain bike trails, bike parks, BMX facilities, and large-scale bicycle advocacy initiatives. A key goal of the Bikes Belong grants program is to support bicycling in as many places as possible.

Amount and Match Requirement

People for Bikes will accept requests for funding of up to \$10,000 for facility and advocacy projects. It does not require a specific percentage match, but prefers leverage and funding partnerships. The fund does not consider grant requests in which its funding would amount to 50 percent or more of the project budget.

Timing

People for Bikes generally holds 1-2 open grant cycles every year, historically in the spring and fall.

Eligibility

While SPOT is not specifically eligible for this funding program, it is included here for informational purposes as the planning team looks to partner with bicycling groups in the future. The program funds end-of-trip facilities for bicycles, such as bike racks, bike parking, and bike storage. Applications are accepted from nonprofit organizations whose missions are bicycle and/or trail specific. They also accept applications from public agencies and departments at the national, state, regional, and local levels; however, they encourage these municipalities to align with a local bicycle advocacy group that will help develop and advance the project or program. Because of its limited funds, People for Bikes rarely awards grants to organizations and communities that have received People for Bikes funding within the past three years.

## TECHNICAL ASSISTANCE, TRAINING AND OTHER RESOURCES

Technical assistance grants can help SPOT to build their internal knowledge and capacity. Grants are typically small, and usually in the form of time donated by technical experts rather than cash. The following programs may be of interest.

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### *AMERICAN PLANNING ASSOCIATION'S COMMUNITY PLANNING ASSISTANCE TEAM PROGRAM—PLANNING ASSISTANCE*

<http://www.planning.org/communityassistance/teams/>

#### Description

APA's Community Planning Assistance Team program considers applications from communities seeking pro bono planning assistance. If you live in or know of a community that lacks planning resources and could benefit from a team of planning experts, you're encouraged to apply. There is a \$50 application fee.

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### *GOOGLE GRANTS—FREE ADVERTISING*

<http://www.google.com/grants/>

#### Description

Google Grants provides \$10,000 per month in in-kind AdWords™ advertising (Google's online advertising tool), to nonprofit organizations to promote their missions and initiatives on Google.com. Grantees build and manage their own AdWords accounts just like paying advertisers, but participate with the following restrictions:

- A daily budget set to \$330, which is equivalent to about \$10,000 per month
- A maximum cost-per-click (CPC) limit of \$1.00 USD
- Only run keyword-targeted campaigns
- Only appear on Google.com
- Only run text ads

#### Timing

Google will run the ads run for as long as the organization remains actively engaged with their Grants AdWords account.

Eligibility

Only registered 501(c)(3) nonprofit organizations are eligible. Applicants must register on “Google for Nonprofits.”

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*MJ MURDOCK CHARITABLE TRUST FUNDRAISING & CAPACITY BUILDING ESSENTIALS OF DEVELOPMENT SEMINAR—FUNDRAISING SEMINARS*

<http://www.murdock-trust.org/enrichment-programs/essentials-development-seminar.php>

Description

The Essentials of Development Seminar helps organizations create a diversified funding development structure. Designed for smaller or start-up organizations, the program’s goal is to help these groups sustain the long-term accomplishment of their mission. The seminar is a pair of two-day workshops in Vancouver, Washington.

Among the topics covered in the seminar are:

- Principles of Fundraising
- Development of a case for support
- Donor list segmentation and management
- Donor contact and care
- Multiple approaches to fundraising

Participants

Each year, a group of about ten organizations is invited to participate in this program. Each organization brings its executive director, development personnel, and at least two board members

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*BENEVON—FUNDRAISING FROM INDIVIDUALS*

<http://www.benevon.com/welcome>

Description

Benevon trains and coaches nonprofit organizations in its system for developing individual donor programs. Benevon programs and services provide step-by-step process and the tools—training, templates, scripts, and rigorous coaching—to put non-profit organizations on the pathway

to financial sustainability. Benevon offers free 17-minute and 55-minute video training sessions on its website. It also offers free seminars and conference calls.

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*COMMUNITY TRANSPORTATION ASSOCIATION OF AMERICA*

The Community Transportation Association of America (CTAA) provides technical assistance for a wide variety of alternative transportation issues and activities. [www.ctaa.org](http://www.ctaa.org)

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*THE CHRONICLE OF PHILANTHROPY*

<http://philanthropy.com/section/Home/172/>

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*ASSOCIATION OF FUNDRAISING PROFESSIONALS*

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

## APPENDIX B – STAKEHOLDER ASSESSMENT



The SPOT strategic planning team brainstormed potential stakeholders in order to identify potential partners, and also discuss key outreach tactics that may be useful to consider as a marketing plan is prepared.

SPOT STRATEGIC PLAN: STAKEHOLDER ASSESSMENT NOTES							
Stakeholder or Stakeholder Group	Interests or “Stake”	Outreach Tactics/Key Messages	Possible Source of:				Best Team Contacts(s)
			Money	Time	Materials or Equipment	Political/ Moral Support	
Tourists	Ease of use Hassle factor Want to spend their time doing, not figuring out how to get around.	Sightsee with SPOT PR Campaign Educational Materials Provide info at hotels, chamber of commerce/visitor center, Schweitzer, and on line travel sites	X			X	Devon
Seniors	Access to essential shopping and services Safety Independence Combat Social isolation	Education Promote SPOT’s understanding of senior needs and issues Convenience Outreach through assisted living facilities, medical offices, and area aging agency	X			X	Susan
ITD (Upper Levels)	Funding levels Impacts on roads	Economic benefits of transit Private/public partnerships Safety					
Anti-Government	Cost/taxes	Economic return to community and benefits of getting people to employment and medical care in a cost-effective way					

SPOT STRATEGIC PLAN: STAKEHOLDER ASSESSMENT NOTES							
Stakeholder or Stakeholder Group	Interests or “Stake”	Outreach Tactics/Key Messages	Possible Source of:				Best Team Contacts(s)
			Money	Time	Materials or Equipment	Political/ Moral Support	
Rural Residents	Cost of travel Commuting	Drive in, park once and take SPOT Use mailers and advertising to reach this group					
Un-served Residents	Funding (taxpayer dollars going to services that they do not benefit from) General lack of awareness about the service						
Private Transportation Providers (Taxi’s)	Effects on their income	Partner with taxis for off-hour service needs Consider SPOT as a complementary service		X	X		Clif
Taxpayers	They pay the bill – can that be reduced by reduced costs for roads	Need clear statement of benefits.	X			X	All Team Members
Environmentalists/EPA	Clean air and water	Highlight SPOT’s environmental goals	X		X	X	
Government Agencies (All)	Financial impacts	Bring local elected officials into the “inner circle” – give them first-to-know status on SPOT’s activities	X			X	Mayors on SPOT Board
City Governments	Service to citizens / public welfare Cost-effectiveness Increased visitors to cities for business, shopping, entertainment; school	Keep them updated – presentations Encourage participation in SPOT advisory board	X	X	X	X	

SPOT STRATEGIC PLAN: STAKEHOLDER ASSESSMENT NOTES							
Stakeholder or Stakeholder Group	Interests or “Stake”	Outreach Tactics/Key Messages	Possible Source of:				Best Team Contacts(s)
			Money	Time	Materials or Equipment	Political/ Moral Support	
Road Departments	Road construction and maintenance	Benefits of transit for helping to reduce traffic Teaming with SPOT on road projects helps make the multi-modal case – may help to increase competitive position for funding	X			X	
SPOT Staff, Board and Committees	Ability to operate the system well Sustainability of the system Providing quality service		X	X	X	X	
Bus Riders	Expanded travel options Get to work Get to recreation	Use social media Provide info about SPOT at places of employment and recreational destinations	X			X	
Retailers	Impacts on business revenues; access to workforce; parking for customers	Reach them through DBA. Communicate benefits of transit for recruiting/retaining employees. Be seen as an environmentally friendly/ socially responsible/ community caring business.	X			X	
Cyclists	Safe commuting Access to recreation/nature/outdoors	Take the bus on days when you can’t have helmet hair. Reach them through cycle clubs	X	X		X	

SPOT STRATEGIC PLAN: STAKEHOLDER ASSESSMENT NOTES							
Stakeholder or Stakeholder Group	Interests or “Stake”	Outreach Tactics/Key Messages	Possible Source of:				Best Team Contacts(s)
			Money	Time	Materials or Equipment	Political/ Moral Support	
Pedestrians	Aesthetics/pleasant walking environment Avoiding car trips	SPOT is a great option for long distances or inclement weather Make buses, stops, signs easily identifiable Make schedule info available at stops	X			X	
Children (and Parents)	Independence Safety	Provide info on SPOT to teachers, PTA’s, libraries, child care businesses, recreational/sports/after school programs					
Low Income	Transportation affordability Access to jobs, medical and essential shopping	Outreach through health and welfare/social services agencies		X		X	
Disabled	Independence Transportation affordability	Outreach through medical offices		X		X	
Public At-Large	Traffic congestion Travel options/automobile dependence May not know much about SPOT	Advertising/radio/TV Word of mouth	X	X	X	X	

## APPENDIX C – ACTION PLAN

## SPOT ACTION PLAN 2015-2017

To be updated quarterly by the SPOT Technical Advisory Committee

Date of Last Update: \_\_\_\_\_

GOALS AND OBJECTIVES		2015	2016	2017	2018	2019	ACTION ITEMS
<b>GOAL 1: INCREASE RIDERSHIP</b>							
1A	Prepare and implement a marketing and public information plan by December, 2016, aimed at expanding SPOT's customer base, improving information on how to ride, and protecting/enhancing SPOT's brand.		X				<b>Marion</b> - secure funding <b>SPOT Board</b> - work on increasing budget for marketing <b>Jared and TAC</b> – Develop and analyze market info using Census and other available demographic data <b>Annie</b> – look for a marketing coordinator
1B	Get SPOT's routes and stops on Google Transit by December, 2015.	X					<b>Jared</b>
1C	Fully implement the Double Map app by December, 2015.	X					<b>Jared</b>
1D	Perform community and rider surveys in 2016 to identify barriers for current and potential customers, and to gauge the popularity of potential expansion options.		X				<b>Clif, Marion and Bill Wright</b> - design survey questions <b>Jared</b> - provide online survey <b>Marion and Bill</b> - Administer on-board survey <b>TAC</b> - Synthesize results for Board
1E	Work to increase public awareness by issuing regular press releases about SPOT activities.	X	X	X	X	X	<b>Annie</b> – add standing item to Board agenda to decide whether to issue a press release each month and agree on key messages.

GOALS AND OBJECTIVES		2015	2016	2017	2018	2019	ACTION ITEMS
<b>GOAL 2: IMPROVE RIDER ACCESS, CONVENIENCE AND AMENITIES</b>							
2A	Add third route to serve airport, food bank, residential and medical area.		X				<b>Marion</b> - submit grant applications for operations funding and capital funding in 2015
2B	Perform an annual review of routes, stop frequencies, and operating hours; make adjustments if appropriate to improve convenience for riders.	X	X	X	X	X	<b>Marion, Bill Wright and TAC</b>
2C	Add shelters and bicycle racks to 10% of stop locations by 2016, and an additional 10% by 2018.		X		X		<b>Marion</b> - submit grant application in 2015 and 2017
2D	Expand on-board bicycle accommodation on all coaches by 2018.				X		<b>Marion</b> - look for grant opportunity in 2016
2E	Work to increase frequency of fixed route services. (On-going objective.)	X	X	X	X	X	<b>TAC</b> – begin with peak hour frequencies in 2016.
<b>GOAL 3: LEVERAGE PARTNERSHIPS TO EXPAND SERVICE AND IMPROVE THE SYSTEM</b>							
3A	Integrate SPOT with Schweitzer Mountain Resort's transportation needs and funding. Implement a new route serving the mountain beginning November 2016.		X				<b>Clif and Devon</b> - negotiate service and payment schedule <b>Clif</b> - draft agreement for Board and Schweitzer approval.
3B	Coordinate with Bonner County and/or other partners to become active participants in SPOT by 2017.			X			<b>Saegen, Annie and George</b> - begin dialogue with county commissioners after community survey (Objective 1D) is complete.
3D	As roadway projects are proposed, coordinate with BCATT, BATT, ITD, local cities and counties, to include stop furnishings, pedestrian access and safety features, and other transit infrastructure needs.	X					<b>Susan</b> - discuss with BCATT and BATT members; implement a transit checkoff process for LHTAC projects starting this fall.



GOALS AND OBJECTIVES		2015	2016	2017	2018	2019	ACTION ITEMS
3E	Develop a sponsorship program for stop furnishings ("adopt a stop") by 2016.		X				<b>Erik</b> – Develop the program and secure initial sponsors. Consider a “top SPOT stop adopter” award.
3F	Coordinate with land use agencies to incorporate SPOT needs in development reviews by December 2015.	X					Implement a process for SPOT feedback prior to subdivision and commercial building permit approvals: <b>Carrie</b> (Sandpoint), <b>Carol K/Erik</b> (Ponderay), <b>Nancy</b> (Kootenai), <b>Annie</b> (Dover), <b>Saegen</b> (County).
3G	Coordinate with social services agencies to implement Demand-Response service within in the Sandpoint area by 2016.		X				<b>TAC</b> to make assignments for this task.
3H	Provide regular (annual) updates to local government agencies and civic groups.	X	X	X	X	X	<b>Plangineering</b> - prepare initial powerpoint for SPOT team's use <b>Marion and Clif</b> - update the powerpoint annually <b>Carrie, Annie, Carol K, and Nancy</b> – present the strategic plan to the Idaho Transportation Board <b>TAC</b> – schedule presentations to SURA, SDBA and PCDC
<b>GOAL 4: INCREASE ORGANIZATIONAL AND FINANCIAL STABILITY</b>							
4A	Evaluate alternate governance structures and select desired approach by 2017.	X	X	X			<b>Clif and Annie</b> - Compare pros and cons of: Joint Powers Agreement, 501(c)(3) or(4); Regional Public Transportation Authority; for-profit structure; or refinements to current structure. Provide information for Board discussion.

GOALS AND OBJECTIVES		2015	2016	2017	2018	2019	ACTION ITEMS
4B	By 2017, revise current governance structure to reduce political risks and allow for easier service area expansion.			X			Lead person for this action item to be decided after Objective 3A is complete.
4C	On an ongoing basis, develop and expand SPOT's internal capacity and resources through training and grant opportunities.	X	X	X	X	X	<b>Marion</b> - watch for RTAP training
4D	Update this list of objectives and action items quarterly.	X	X	X	X	X	<b>Marion</b> or designated TAC member
4E	Identify and select performance measures for SPOT and report on them annually		X				<b>Clif and Erik</b>
4F	Create an endowment or other long-term donation opportunity for SPOT after governance structure has been revised (see Objective 4B).				X		Action items to be assigned after 4B is complete.
<b>GOAL 5: PROMOTE ENVIRONMENTAL STEWARDSHIP</b>							
5A	Explore other public transportation services including park and ride, vanpool and rideshare, as program champions are found.					X	<b>TAC</b> – look for potential program champions/volunteer coordinators. Action items to be assigned after coordinators are found.
5B	Report annual emission reductions due to rides on SPOT on the SPOT website, beginning in 2017.			X	X	X	<b>Plangineering</b> - Provide simple spreadsheet tool for SPOT to estimate fossil fuel savings due to transit use.
5C	Add a seat on the TAC for a designated environmental advocate	X					<b>Erik</b> – Recruit a person for this position in consultation with other TAC members and the Board.
5D	Consider energy efficiency options with next bus purchase					X	<b>Marion, Clif and TAC</b>
5E	Consider solar technology and other energy efficient options for shelters with next significant installation project.				X		<b>Marion, Clif and TAC</b>



# See SPOT Engage

## OVERVIEW

The goal of this SPOT Marketing and Public Outreach Plan is to provide a clear path towards continuing to grow ridership and build community support. SPOT has a solid foundation on which to build increased marketing and public outreach efforts. It has a strong brand, solid ridership, enthusiastic community support, and positive political momentum. This plan will leverage all of these assets in a thoughtful and strategic way.

The Marketing and Public Outreach Plan addresses the following:

- Current marketing efforts
- Who is riding today, why they ride, and how to get them to ride more
- Who isn't riding much today and how to get them onboard
- A toolkit of strategies, rated by cost and complexity, and mapped to target audiences
- A three-year approach to implementation
- Partnerships required to successfully implement this plan

Informing this plan are stakeholder interviews, two community surveys – from riders and stakeholders, and market research performed by SHIFT. This plan uses industry best practices, opportunities unique to SPOT and the communities it serves, and successful efforts from other communities.

Implementation of this plan will result in a stronger SPOT that continues to weave itself more tightly into the fabric of the community. In several of our community interviews, the idea of making SPOT “just the way you get around” and “what our community does” and “a community institution” were expressed and embody exactly what a good marketing and public outreach plan can do for SPOT, along with strategic implementation.

## SPOT MARKETING EFFORTS TO DATE

The SPOT brand is very strong for a small transit system. SPOT's brand reflects the community and is easily identifiable. The logo, bus graphics and generally positive community perception of SPOT are tremendous assets that can be leveraged towards a new infusion of energy, excitement, and growth.

As SPOT moves forward with the marketing and outreach efforts of this plan, the brand and what it represents should be infused into all the various outputs. The brand should remain the same and be adapted and leveraged to connect more people to the bus and get more people on board. The main goal of this plan is for the community to view the SPOT brand synonymously with economic vitality and development.



*The SPOT Brand = fun, interesting, community-oriented*

SPOT has gone through a common cycle for new services in rural areas with a limited budget. Initially, SPOT had a lot of buzz, the awareness of SPOT grew quickly, there was initial money to market the service, and ridership grew quickly. Now, SPOT has hit a 5-year plateau where ridership is steady but not growing, awareness among non-riders has dropped, money for marketing is very limited, and customer information needs improvement. SPOT must invest more in marketing in order to reverse this trend. The baseline budget for marketing is very small:

*The current SPOT marketing and advertising budget is only \$1500-\$2000 per year.*

This current spend consists of limited print advertising, printed brochures, and website costs. Bus graphics and bus stop signage are not included in this total, but are included as part of the Capital Improvement Plan (bus graphics are included in the cost of a new bus and bus stop signage project already funded and slated for 2017). The advertising budget is so limited that SPOT is not able to build awareness or grow ridership through marketing or outreach.

SPOT should start planning for how to grow funding for these marketing investments. This is a challenge that will be addressed later in this plan with ideas on how to partner and trade for market exposure. The good news is that SPOT has strong brand fundamentals and is ready to build on this foundation to renew itself and look for more support and use in the coming three years.

## COMMUNITY SURVEYS

SHIFT conducted two similar surveys, from two distinct community groups – existing riders and community stakeholders. The goal of the surveys was to understand a variety of aspects including the markets and identify marketing opportunities, service improvement needs and perceptions of SPOT. Only a portion of the questions from each survey were asked of both groups, the rest were tailored specifically to either existing riders or community stakeholders.

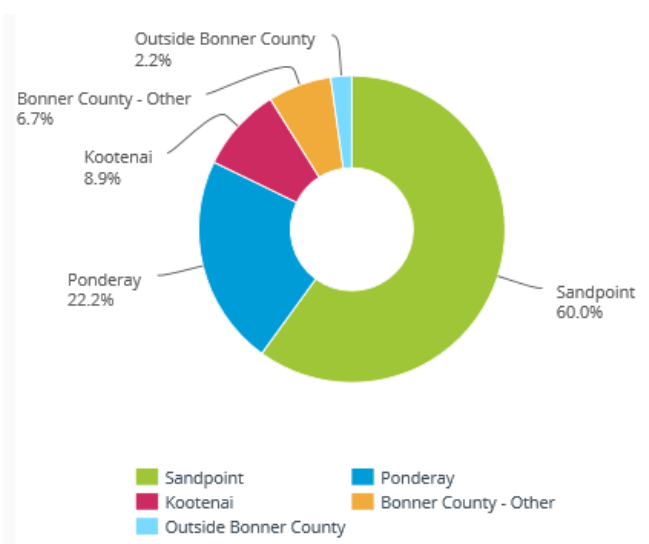
This plan focuses only on the survey responses that inform the markets and marketing opportunities. The existing riders group responded to marketing questions about how they use SPOT and why, how they plan their trip, and where they get their SPOT and other community information. The stakeholder group represented key decision makers and responded to some rider questions, such as why they ride or don't ride and what could get them to ride or ride more frequently, as well as marketing ideas for increasing ridership.

### Existing Riders Survey - Results

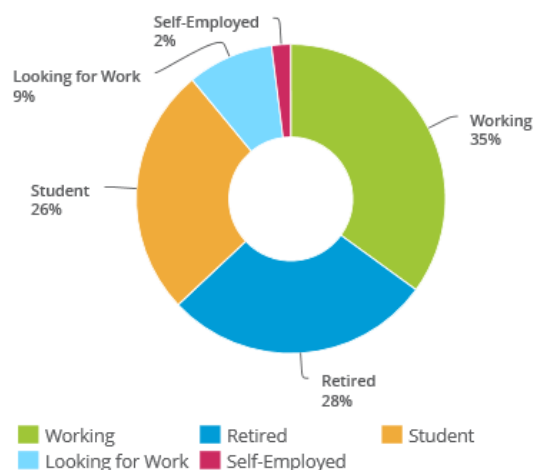
SHIFT conducted a survey of existing riders to understand who is using SPOT, why they are riding, and how they use the bus. 45 riders responded to the survey, which represents approximately 3% of the average weekly ridership, and 21% of the average daily ridership.

The survey shows 25% of respondents use SPOT 10 or more times a week, while 50% of respondents use it between 1-5 times a week. All respondents ride on weekdays and almost all ride on weekends too. The large majority live in Sandpoint, and most are employed, followed closely by retirees (retirees includes those no longer working, not necessarily retirement age).

Rider Residency

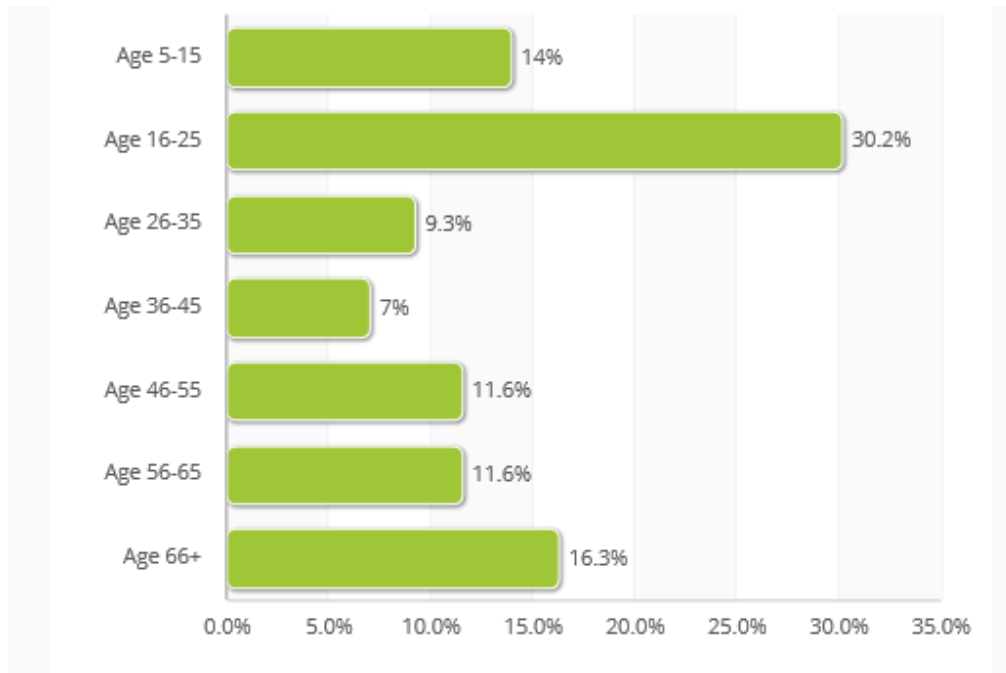


Employment Status



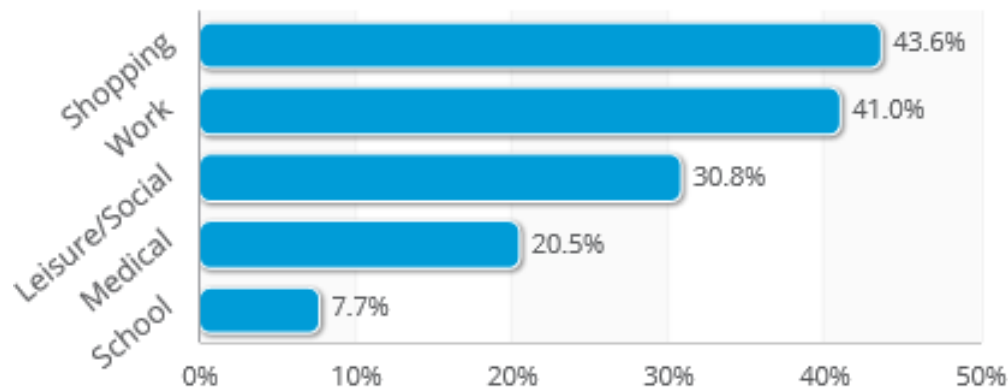
In terms of age, SPOT riders tend to be either younger riders, with 44% of riders aged 25 or younger, or older riders, with 28% of riders aged 56 or older. Middle-aged riders make up the smallest percentage of riders.

Rider Age



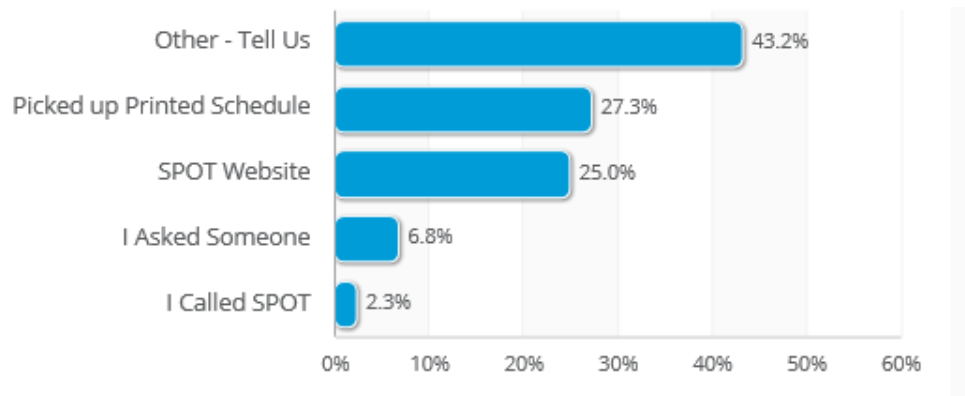
When asked about trip purpose, SHIFT found that most SPOT riders were using the bus for shopping, followed closely by work, but the results show that SPOT is being used for a wide variety of trip purposes. The data show that SPOT has a diverse ridership that counts on the service for all types of trips:

Reason for Trip



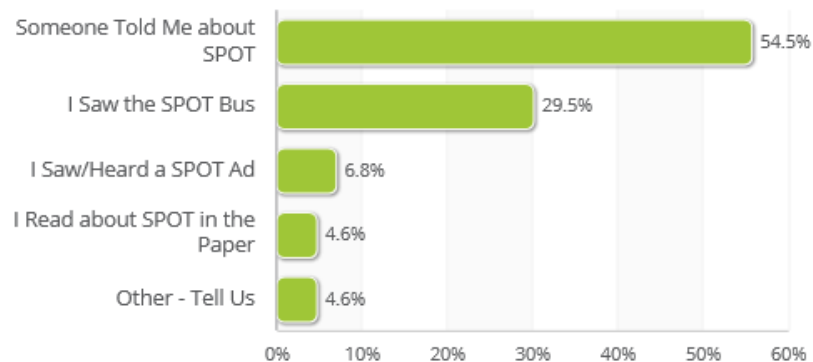
Another goal of the survey was to find out how riders are doing their trip planning, how they originally found out about the bus, and why they ride:

### How Did You Plan Your Trip Today?

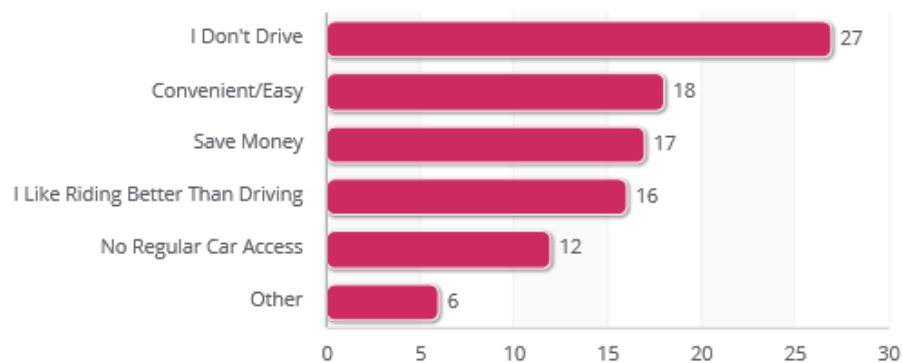


The “other” responses were predominately that the rider knows the schedule and doesn’t need to pre-plan their trip. The two additional responses received as “other” are: 1) schedule on phone; 2) called paratransit.

### How Did You Hear about SPOT?



### Why Do You Ride SPOT?





## Existing Riders Survey - Discussion

SPOT is used by a diverse group of people, representing many age groups with varying reasons for using SPOT. There were a few patterns identified in the responses received that lead to assumptions regarding who the majority of riders are today and what groups of riders are not as prevalent. The survey results highlight three target market opportunities:



- 1) Youth/young adults
- 2) Seniors
- 3) Employees (middle ages)

The youth/young adult segment of SPOT respondents can be summarized as follows:

- They form the majority of riders responding to the survey
- They don't drive or have access to a vehicle
- They are almost solely use SPOT for shopping and work trips
- 70% live in Sandpoint
- They use both routes equally
- They predominately get their information from the SPOT website

The survey was conducted in August; therefore, youth respondents were not in school and no responses were collected reflecting that this age demographic is using SPOT for school transportation. Additional information or survey data would need to be collected to identify whether they are using SPOT for transportation to and from school. Without knowing the results, assumptions can be made that this is likely occurring during the school year. Gaining more youth ridership during the school year is certainly a marketing opportunity through outreach and promotion at the schools.

Riders greater than 65 in age made up 16% of respondents. This group's responses can be summarized as follows:

- They use SPOT primarily for shopping and leisure trips
- 50% live in Ponderay
- They get their SPOT information from a variety of places – website, brochures around town, newspaper, and at community centers

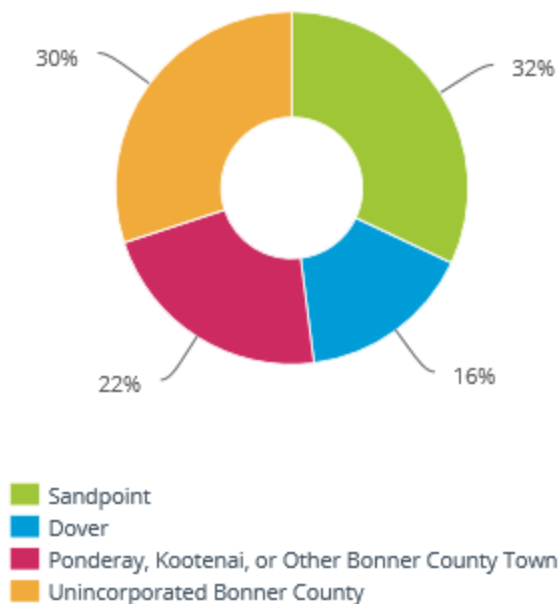
- Their trips tend to be longer in miles, which might be because 50% of the respondents from this demographic reported to live in Ponderay and are likely traveling to Sandpoint or another location outside of Ponderay for their shopping and leisure trips
- They ride SPOT predominately because they would rather not drive and because it's easy and convenient

Almost 56% of all respondents heard about SPOT from someone (word of mouth), with about 30% finding out about SPOT by seeing the bus. This leaves about 14% of respondents learning about SPOT from other forms of marketing. This is an indicator that either SPOT has invested little in advertising or riders are not receptive to the types of advertising that SPOT has pursued. The former is likely the primary reason, but strategically selecting the type of advertising is also an important consideration.

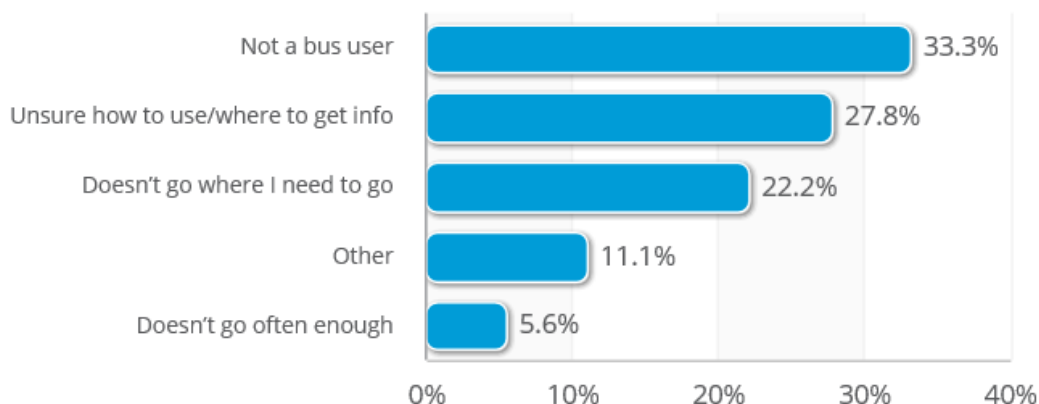
### Stakeholder Survey (Riders and Non-Riders) - Results and Discussion

SHIFT polled community stakeholders by designing an online survey and distributing it electronically through a variety of means including the Sandpoint Chamber, city and county electronic mailing lists, a link on the SPOT website, a feature in the Bonner County Bee, and a feature on Sandpoint Online. Here are the results of 49 respondents who took the survey.

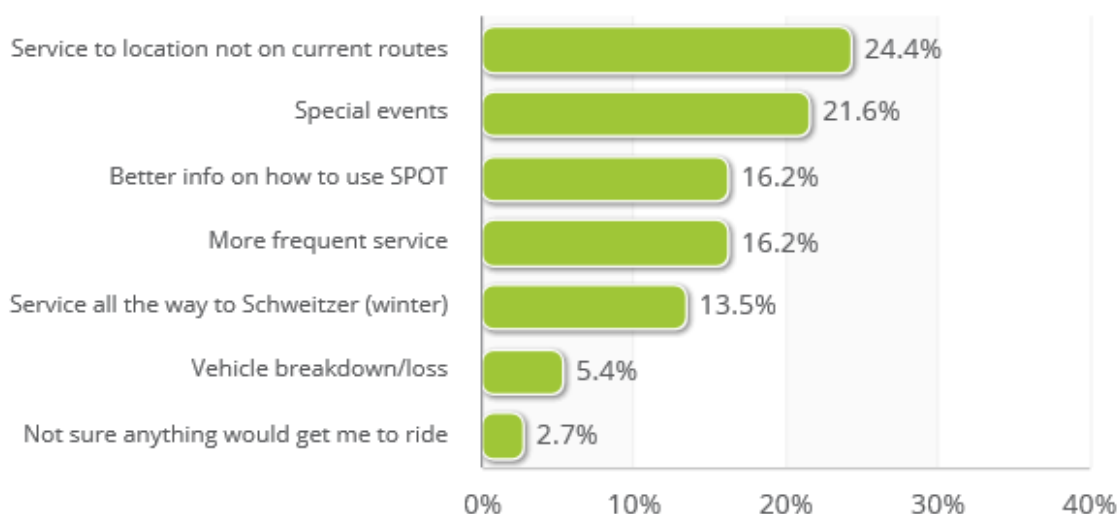
#### Rider Residency



43.5% have never taken SPOT before. Of these respondents, the following reasons for not riding were received:



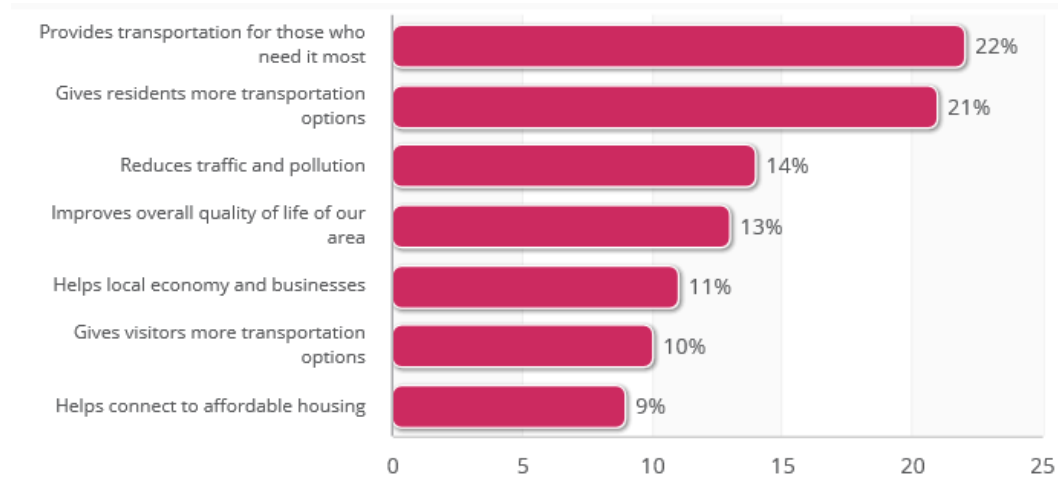
When this group was asked what could get them to ride spot, they responded as follows:



In addition to the choices provided above, the group was also given the option to write in their own ideas that might get them to ride SPOT. Their feedback was predominately split between two responses: 1) clearer information and route maps; 2) expanded service to Sagle, Baldy Road, and shuttle service between parking areas and City Beach/downtown during the weekends.

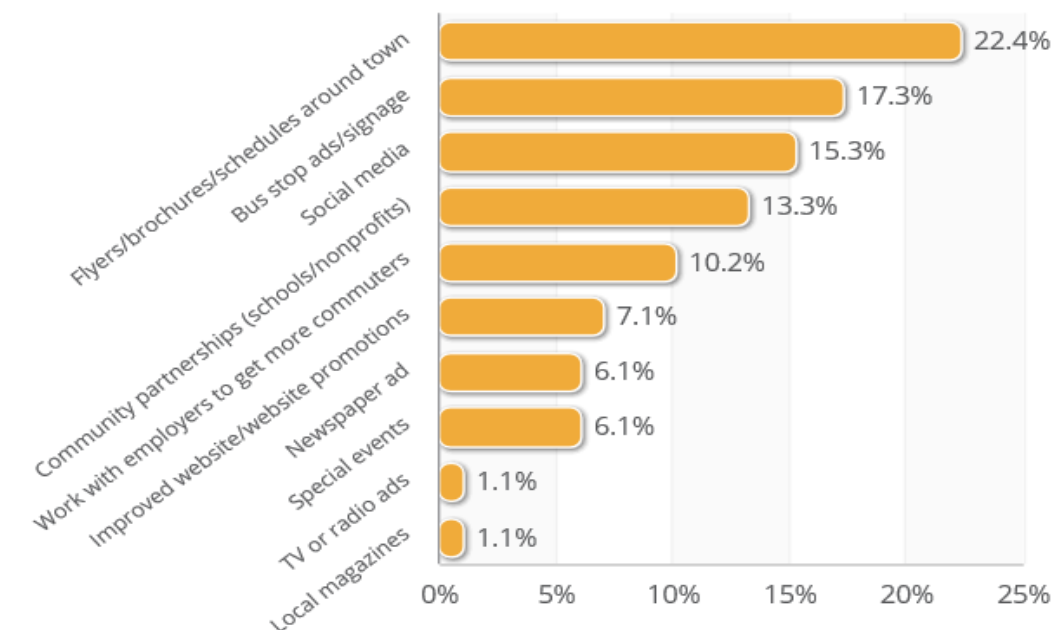
56.5% of the stakeholder group has taken SPOT. When asked their reasons for riding, the top three responses among respondents were: 1) transportation while their car was repaired; 2) leisure or social activity; 3) shopping. These results are consistent with the results of the rider survey; few middle-age respondents are using SPOT for transportation to and from work. The stakeholder group likely uses SPOT for infrequent trips, on occasion, not for daily commuting.

The stakeholder group was asked to respond to what the perception of SPOT is and its role in the community. Here were the responses:



These results indicate that stakeholders perceive SPOT as a necessary service for those that need it and as a benefit to residents to allow them more transportation options. They see SPOT less as helping the local economy and businesses and even less as giving visitors more transportation options. These are two areas where more targeted marketing can change the community's perception of SPOT from offering limited, but necessary, transportation benefits to SPOT being "a community institution" and "just the way we get around," as heard during several stakeholder interviews.

The stakeholder group was asked what the most cost effective marketing strategies/tools are to attract more riders and improve awareness of SPOT and the following responses were received:



Getting more information out about SPOT around town is a common theme in the results of both community surveys that could help increase ridership with the general community as well as visitors and establish SPOT as beneficial to the economy and businesses.

There can be a relationship between increased ridership and economic and community vitality. SPOT riders walk or bike to and from each bus stop when they begin and end their trip. Walking by businesses creates opportunities for more economic activity around these bus stops. When parking is limited people may decide not to visit downtown areas at all, whereas SPOT could provide a hassle free and easy way to get people to a location without the stress and inconvenience of parking.

## Marketing for Boundary County, Paratransit, and Vanpool

Much of the research, discussion, and tools in this plan are focused on riders of the fixed route system – Blue and Green Route riders. This market represents one of the largest opportunities for growth through marketing and outreach. Many of the marketing ideas in the toolkit section of the plan can be used for these services, but it is important to discuss specific marketing tactics for Boundary County, paratransit and vanpool and the communities they serve. These groups weren't specifically surveyed, but SHIFT conducted many interviews and drew on best practices when marketing to these groups.

### Boundary County-Bonner's Ferry Demand Response Service

This service is still relatively new, running less than eighteen months, and has done a good job of attracting a base of riders that need the service. It routinely runs at better than two riders per hour, which is good for a demand response service.

In a small community such as Bonner's Ferry, word of mouth and grassroots marketing are the best approach. As a new service, SPOT needs to educate the community about what SPOT is, how it operates, and why it's good for everyone.

The first step is creating a simple marketing piece that can be printed and distributed in several forms including as a rack card, a flyer, and electronically. The purpose of this would be two-fold: to promote the service itself and how to use it (hours of service, destinations, etc.), and to educate on what public transportation is.



The educational message should be:

- Public transportation is a public service and is open to everyone
- The city and county support and sponsor SPOT services
- With more demand and use, SPOT could add more service to the Bonner's Ferry area
- Public transportation is good for the community – it provides vital mobility, saves riders money, and provides more independence to those who use SPOT



*SPOT strengthens the community by providing mobility and independence*

*Credit: Bonner's Ferry Herald*

Recommended distribution of this marketing piece is:

- posting around town
- city mailings
- local businesses
- hospital
- assisted living facilities (e.g. Restorium)
- visitor center
- city hall

SPOT should also consider being interviewed on the local radio show and presenting to as many community groups as possible. It should also be distributed electronically through Bonner's Ferry online, Facebook groups, and city and county online resources.

## Bonner County Paratransit Service

Paratransit service is a federal requirement of a fixed route service, when federally funded. SPOT should consider marketing this service in conjunction with marketing the fixed route service. There are numerous benefits to increased awareness of paratransit service:

- 1) providing mobility to those that need it most
- 2) increasing efficiency/productivity of paratransit service by linking multiple trips together instead of only single rider trips
- 3) providing positive community perception



Currently, this service is marketed very little. There is a very small mention of it on the SPOT schedule, with no detailed information about the service, and the website doesn't have any section about this service. SPOT should increase the information about paratransit on the SPOT printed schedule and website as a first step to better marketing this service. The next step would be to create a dedicated informational card on this service, much like the one suggested for the Bonner's Ferry demand response service, that would describe hours of service, prequalification process, area of service, and other helpful information. This should be distributed to all social service organizations in the Sandpoint area, as well as at assisted living facilities, the hospital, disability organizations, and the senior center.

## Vanpool

Based on the current lack of affordable housing and challenges that employers have in finding skilled workers, SHIFT anticipates that SPOT will see significant growth in this program. Employers will find that vanpool can provide them with skilled workers from outside the area, and employees will find that vanpool links affordable housing locations with high paying jobs in a cost-effective way.



Vanpool marketing is straightforward:

### Put together an informational piece on how vanpool works

- Include example pricing and commuter tax benefit information (vanpool qualifies for pre-tax consideration under the Commuter Benefits program)
- Describe benefits of vanpool for employee and employer
- Adapt for flyer/brochure and electronic dissemination

### Set-up meetings with owners and managers of local businesses and present vanpool basics

- Find how vanpool can solve the employee challenges
- Vanpool delivers happier, safer, better rested employees to the job

### Follow-up with interested employers to build interest among employees

- Employee staff meetings, email communications, and drop-in coffee talks are all ways to build employee interest

The Sandpoint area employers should be very receptive to vanpool, and SPOT could see this program grow quickly with some basic promotion and direct outreach.



## Marketing to Those Who Will Never Ride

Riders or non-rider aside, the public perception of SPOT is critical to ongoing partnerships and funding. SPOT is a public agency receiving local tax dollars that aren't guaranteed year-to-year; therefore, marketing to the community itself is a necessity. It's not enough to have regular riders taking more trips, new demographics getting on the bus, and routes connecting to new destinations. Elected officials, business leaders, non-profit organizations, and the community at large must know about SPOT and understand why SPOT is important to the community, regardless of whether someone rides or not. SPOT needs the community to feel that public transportation is an important community asset and something worthy of supporting.

SPOT can tailor the message for a particular group, but some of the resonating talking points that board and staff can use include:

### SPOT is good for quality of life

- Communities with good public transportation are nicer, easier, more connected places to live and work
- Public transportation makes the community more attractive – those living here are more likely to stay and those thinking of living here are more likely to relocate
- Communities that rely less on single occupancy vehicles are more resilient

### SPOT is good for business

- With a tight job market, employers are looking for ways to attract and retain employees – public transportation options make this easier
- Consistent transportation means employees get to work safely and are often more rested and ready to work
- Those people riding SPOT save money and can spend it on other things
- Bus trips end and begin with walking or biking, which means bus riders are more likely to frequent businesses while enroute

### SPOT is good for housing

- With limited affordable housing within walking distance to most amenities, SPOT can better link jobs and services with housing in outlying areas
- Vanpool can be used as a tool to link areas of regional activity

### SPOT is good for biking and walking and community health









- Public transportation can reduce depression and isolation among those who use it
- Every bus trip on SPOT starts and end with a walk or a bike trip, which helps improve health
- SPOT takes an average of 400 cars off the road per day, which improves the downtown experience for biking and walking









SPOT is good for the environment and congestion







- With an average of 6 people an hour getting on the bus, that means the effective miles per gallon of the bus is 72MPG!
- More people on the bus = less people in cars
- SPOT must continually talk about the community benefits of public transportation and build specific outreach efforts towards building general awareness. By growing ridership and this community awareness, the political support and overall goodwill will happen naturally.







SPOT must continually talk about the community benefits of public transportation and build specific outreach efforts towards building general awareness. By growing ridership and this community awareness, the political support and overall goodwill will happen naturally.









## THE TOOLKIT

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Better bus stop amenities</b>	One of the top requests from the surveys was better bus stops with amenities like benches, shelters, and lighting. All of these improve the overall riding experience and make new riders more likely to ride again. Bus stops are also the most visible aspect of the service and impact the community perception.	All current and potential riders; the community at-large		
<b>Better bus stop signage</b>	Through its work on this plan, SHIFT heard that bus stop signage needs to improve to show the system map and the bus times at a particular stop. The signage should also identify the stop itself. In addition, larger and more visible signs can have an advertising benefit.	Current riders and general community impression		
<b>Invest in better buses that all have route identification</b>	Many of SPOT buses are in need of replacement and hurt the rider experience, especially for those buses that don't have adequate air conditioning for cooling in the summer. Also, many riders requested desire to know what route a bus is running through bus identification. Although this is a capital improvement issue, it impacts marketing and ridership growth. Buses with better passenger amenities that are easier to board and are more comfortable will help market the service.	Current riders, new riders, and general community impression		
<b>Improve the service</b>	Although this is part of the transit service plan, improving the service is certainly a marketing tool. Especially for tourists who might use the service to get around and for skiers going to Schweitzer. And later night service might encourage 25-45 demographic ridership.	New riders (millennials, young families), tourists, skiers, seniors, employees/commuters		









TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Invest in the drivers as marketers</b>	Drivers are SPOT's ambassadors. By keeping drivers happy and informed, they can be effective marketing tools for growing the service. Training drivers in how to provide the highest quality customer service will pay dividends every time someone rides the bus.	Current riders, first time riders		
<b>New website</b>	Redesigning and updating the SPOT website is recommended and is a key customer information tool. This effort would include completely overhauling the existing site to create a much easier user experience; update website content with more complete SPOT information; include real-time bus information tools; and have better maps and timetables. Once the new site is built, SPOT should plan to use the site for timely news and rider alerts, as service changes.	Youth, tourists, businesses, existing riders		
<b>Press releases</b>	SPOT should celebrate its successes and regularly update the community on SPOT through periodic press releases. SPOT should have a standard press release template and list of press contacts for distribution of press releases. The Bonner County Bee, Sandpoint Reader, Sandpoint Online Town Crier, and KXLY should all receive SPOT press releases.	Community at large; those who may never ride		
<b>Business partner campaign "I'm on the SPOT"</b>	This idea is to create a campaign where supporting businesses would display a "I'm on the SPOT – ask me about the free bus" window sticker to show support of SPOT. The business would also have SPOT schedules available, preferably in a holder on the counter, and know the basics about SPOT. Also promoting it to specific businesses with built-in ridership needs like auto repair shops.	Visitors, new riders, businesses		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>School partnerships and outreach</b>	Since youth are such a big part of SPOT's current ridership, SPOT should work to encourage more students to ride the bus by promoting SPOT at school events, in youth publications (like the high school newspaper), and by having SPOT bus information at all of the schools. SPOT should also look for opportunities to partner with schools on transportation needs – taking a SPOT route for a field trip is a great way to introduce SPOT.	Youth, school staff		
<b>Re-do printed schedule and distribute more widely</b>	Through surveys conducted for this project, we know that the SPOT bus schedule needs to be updated for easier comprehension and made more readily available throughout the community. The SPOT printed schedule needs a better map and easier to understand timetable for each route, and it needs to include information on paratransit and vanpool. A separate information rack card should be developed for Bonner's Ferry service for distribution in that area. SPOT should consider paying to have the schedule distributed in local brochure racks.	Community at large; those who may never ride		
<b>Quick reference guides and training of staff near bus stops</b>	Businesses closest to the bus stops can be one of the best ambassadors for the service. This idea involves creating a simple quick reference card or handout that shows the nearest bus stop location in relation to the system map ("you are here") and gives the schedule for just that bus stop location (northbound bus at :45 from 6:45 until 5:45). This allows local businesses to know and share information with their customers.	All		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Flyers and posters around town</b>	From market and community research, flyers and posters around town seem to be an effective communication tool. SPOT should develop flyers and posters that build awareness of the bus service, its benefits, and any new and interesting services. This tool could be particularly effective when SPOT grows or changes its service. Flyers could be placed at many locations around town – senior centers, social service offices, the library, non-profits, and community centers would all make good poster locations.	Locals, seniors, youth, visitors, employees/commuters		
<b>SPOT as a vehicle for better health</b>	According to a study presented at the American Heart Association's Scientific Sessions 2015, riding the bus or train to work is associated with significant health improvements. Promoting this fact and partnering with public health organizations can be a great way to build ridership. The ParkRx program, a health initiative to get people healthier by exercising in parks, of the Kanisku Land Trust is a developing partnership for SPOT. By linking the SPOT bus into a trip to a park, SPOT can attract new riders. This tool is simply partnering with ParkRx and other healthcare organizations to cross-promote SPOT services.	Those with physical or mental health problems		
<b>Presentations to partners, especially city councils, business groups</b>	Making presentations is one of the most effective ways to educate the community about SPOT services and their importance. Although this is a time consuming effort, it is low cost and very effective. SPOT should work to develop a standard set of talking points, service highlights, and organizational statistics. Depending on the presentation, this might be a PowerPoint, a 1-2 page handout, or use the flyers. This tool will help build general community support for SPOT.	Decision makers, community leadership		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Rider of the month spotlight and/or bus schedule in newspaper</b>	Advertising in the newspaper isn't something recommended for SPOT due to high costs; however, SPOT may be able to work with the Bee or Reader to get free or discounted placement of monthly rider profiles or perhaps having the bus schedule in the newspaper. The rider profile could be a recurring feature that would have a picture and quote from a SPOT rider in order to highlight why SPOT is awesome and showcase a daily rider who's story helps illustrate the paradigm, that SPOT is "just the way we get around."	All		
<b>"Get on the SPOT" campaign for coffee sleeves and coasters</b>	Having a simple message printed on coffee sleeves and coasters at local coffee shops and restaurants could be a low-cost way to create exposure to SPOT. This tool would hopefully be something that the local business partner (restaurant or coffee shop) would want to help underwrite.	New riders, millennials, choice riders (those who drive but might choose to ride occasionally)		
<b>Employer outreach</b>	Local businesses need to know about SPOT and how SPOT can help solve employee commuting challenges. SPOT should meet with and present to major employers and their employees details about SPOT services. This tool will be particularly helpful in building vanpools. Attending employee staff meetings, dropping by with donuts for a meet and greet, and working with HR staff on flyers and emails to employees are all ways to implement.	Commuters		
<b>Facebook page, social media</b>	Facebook and select regional Facebook groups could be effective ways to send periodic updates about SPOT with interesting and timely content. In order to be effective, the SPOT social media account must be regularly monitored and actively managed.	Youth, millennials, community at large		



TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Troubleshoot phone app and promote as part of all other campaigns, along with other technology</b>	SPOT has an app that shows customers where the bus is in real-time, but it isn't working consistently and isn't promoted. The DoubleMap app could be an excellent tool, especially for tech savvy riders, but it must be managed and promoted (i.e. included on all SPOT materials). This technology does take a lot of time to manage and keep up to date; SPOT doesn't have this expertise or time today. If SPOT does have the capacity, integrating SPOT schedule information into Google Maps through the GTFS file spec could be another way to reach technology-savvy riders.	Youth, millennials, visitors		
<b>Targeted radio and magazine advertising</b>	Radio seems to be an effective advertising tool for ongoing messages to build awareness. SPOT should pursue trade or public service announcements (PSAs) on radio. Additionally, SPOT could look at ads in local magazines, although this is higher cost and harder to trade or get free submissions. SPOT has been in Sandpoint Magazine in the past and needs to evaluate the effectiveness of this ad and its cost relative to other marketing potentials. Cost dependent on trade or PSA.	New riders, general community		
<b>Special events</b>	SPOT could consider providing additional bus service for many special events throughout the year. This would introduce the bus to new riders and increase SPOT's visibility in the community; however, special events can be challenging. SPOT will need a partner who will promote the extra event service and limit parking around the event venue, or the special event service can be underutilized and ineffective.	New riders		
<b>Links to local partners</b>	SPOT should work to integrate awareness into as many efforts of the cities and counties as possible. This could include SPOT on municipal websites or having SPOT at city or county sponsored events. SPOT should be integrated into the cities and the county, as the transportation arm.	The community at-large		

## The Plan Year by Year

For the coming three years, SPOT should begin to put into action some of the information, ideas, and tools presented. SPOT can take its limited budgeted and staff time and slowly and incrementally implement the Marketing and Outreach Plan.

Year	Goal and Theme	Tools	Resources*
Year 1	To improve the basic marketing and outreach building blocks, in order to setup SPOT for future success. SPOT must invest in basic customer information tools, rider amenities, PR strategies, and partnerships.	<ul style="list-style-type: none"> <li>Bus stop signage and amenities</li> <li>Website rebuild</li> <li>Bus branding and ID</li> <li>Driver training</li> <li>Press releases</li> <li>Update bus schedule format</li> <li>Links to local partners</li> </ul>	<p>\$5,000-\$10,000 in direct marketing spend plus in-kind partner support</p> <p>Staff, board, and in-kind partners time total of 10-20 hours per month</p>
Year 2	<p>Continue work from Year 1 and begin to leverage those efforts to:</p> <ol style="list-style-type: none"> <li>1. Get regular riders riding more</li> <li>2. Start attracting new markets.</li> </ol> <p>With basics in place, SPOT can now go to work on getting more people on board and building community awareness.</p>	<ul style="list-style-type: none"> <li>Employer outreach</li> <li>School partnerships</li> <li>Rider of the month spots</li> <li>SPOT for better health</li> <li>Flyers and posters</li> <li>Facebook and social media</li> <li>Quick reference guides</li> </ul>	<p>\$10,000-\$15,000 in marketing plus in-kind partner support</p> <p>Staff, board, contracted, and in-kind time total of 20-25 hours per month</p>
Year 3	Years 1 and 2 create opportunity for Year 3 to be year of significant external marketing and ridership growth among new marketing. This is the year to make SPOT omnipresent in the community.	<ul style="list-style-type: none"> <li>Business partner "I'm on the SPOT"</li> <li>Presentations to the community</li> <li>Phone app and other technology</li> <li>Coffee sleeves and coasters</li> <li>Targeted ads</li> <li>Special events</li> </ul>	<p>\$20,000-\$25,000 in marketing plus in-kind</p> <p>Time of 25-30 hours per month</p>

*\*This is direct marketing and out expense. Capital and operating expenses that have marketing benefits, such as service improvements, bus stop amenities and new buses, are not included in Resources.*

Each year builds on the next and efforts started in Year 1 must be continually developed through Years 2 and 3. Once an effort is started, it is recommended that it be continued going forward, unless it is thoroughly reviewed and there is an identified reason it is deemed ineffective (effectiveness often increases with time). Budgeting and staffing must grow to support increasing SPOT marketing and outreach efforts over the next three years.

### Getting This Work Done (Limitations and Need for Partnerships)

The challenge to implementing this plan is figuring how to fund these efforts and how to improve marketing without impacting existing service. Every public transportation system faces the same challenge of finding enough funding for marketing and outreach when the direct costs of running bus service are a higher priority. But funding this marketing plan is critical to SPOT's success; running SPOT buses without good marketing means the service will not reach its full potential. Acknowledging that SPOT has budget and staff limitations in implementing the ideas of this plan, SPOT must seek creative partnerships, cost share, schedule the work slowly, and use low-cost approaches.

The budget constraint is one of the biggest challenges to plan implementation. SPOT should look to allocate more funding to marketing, but this approach will take time – SPOT has a fixed budget and service commitments that use almost all the current budget. It is recommended that SPOT also pursue a more immediate solution for accomplishing marketing goals – set-up an interior and exterior bus advertising program with the goal of trading ads on buses for SPOT ads in a variety of media. SPOT should trade bus ad space for radio spots, online advertising, putting the bus schedule in the newspaper, getting SPOT into businesses (like on coffee cups or coasters), or any other creative trades SPOT can establish. The goal of ads on SPOT buses wouldn't be to generate direct revenue – the goal would be to generate trade dollars for SPOT marketing and outreach. Bus ads could also be used as trade for staff time from partners who can help market and promote.

The other biggest constraint is available staff time. Currently, SPOT is not staffed to carry out much of this plan. SPOT has one full-time employee whose time is consumed with day to day operations. Given this time constraint, SPOT must look to other ways to get this work completed and rely on its partners to help.

#### Workhorse board of directors

- The SPOT board has shown that it is willing to work and will need to give time to these marketing efforts

#### Schweitzer Mountain Resort

- With in-house marketing resources, Schweitzer could provide marketing staff time to help SPOT implement this plan, which could be done as part of a trade for bus ad space or as in-kind donation as part of a partnership for bus service to the mountain

#### Municipal partners

- SPOT could reach out to its partner cities to ask for help with specific marketing and outreach initiatives from city staff or officials who may have expertise or access to helpful resources like existing city newsletters

## CONCLUSION

SPOT has a strong, recognizable community brand with loyal and happy customers. Building upon this base of support, SPOT is ready to grow its awareness, usage, and community impact. By implementing this Marketing and Outreach Plan, SPOT will become a community institution that is positively viewed throughout the region. Many more opportunities and new ideas will result from starting down the path of better marketing and outreach – SPOT should plan to incorporate this evolution of marketing and outreach through periodic updates to this plan.

See

SPOT



A Comprehensive Success Guide





# See SPOT Run

## A Comprehensive Success Guide

developed by



September 2016

See

SPOT

*ENGAGE*

A decorative graphic consisting of a series of overlapping circles in various colors (blue, grey, orange, green, and light blue) arranged in a curved path that follows the word 'ENGAGE'.

Marketing and Public Outreach







# See SPOT Engage

## OVERVIEW

The goal of this SPOT Marketing and Public Outreach Plan is to provide a clear path towards continuing to grow ridership and build community support. SPOT has a solid foundation on which to build increased marketing and public outreach efforts. It has a strong brand, solid ridership, enthusiastic community support, and positive political momentum. This plan will leverage all of these assets in a thoughtful and strategic way.

The Marketing and Public Outreach Plan addresses the following:

- Current marketing efforts
- Who is riding today, why they ride, and how to get them to ride more
- Who isn't riding much today and how to get them onboard
- A toolkit of strategies, rated by cost and complexity, and mapped to target audiences
- A three-year approach to implementation
- Partnerships required to successfully implement this plan

Informing this plan are stakeholder interviews, two community surveys – from riders and stakeholders, and market research performed by SHIFT. This plan uses industry best practices, opportunities unique to SPOT and the communities it serves, and successful efforts from other communities.

Implementation of this plan will result in a stronger SPOT that continues to weave itself more tightly into the fabric of the community. In several of our community interviews, the idea of making SPOT “just the way you get around” and “what our community does” and “a community institution” were expressed and embody exactly what a good marketing and public outreach plan can do for SPOT, along with strategic implementation.

## SPOT MARKETING EFFORTS TO DATE

The SPOT brand is very strong for a small transit system. SPOT's brand reflects the community and is easily identifiable. The logo, bus graphics and generally positive community perception of SPOT are tremendous assets that can be leveraged towards a new infusion of energy, excitement, and growth.

As SPOT moves forward with the marketing and outreach efforts of this plan, the brand and what it represents should be infused into all the various outputs. The brand should remain the same and be adapted and leveraged to connect more people to the bus and get more people on board. The main goal of this plan is for the community to view the SPOT brand synonymously with economic vitality and development.



*The SPOT Brand = fun, interesting, community-oriented*

SPOT has gone through a common cycle for new services in rural areas with a limited budget. Initially, SPOT had a lot of buzz, the awareness of SPOT grew quickly, there was initial money to market the service, and ridership grew quickly. Now, SPOT has hit a 5-year plateau where ridership is steady but not growing, awareness among non-riders has dropped, money for marketing is very limited, and customer information needs improvement. SPOT must invest more in marketing in order to reverse this trend. The baseline budget for marketing is very small:

*The current SPOT marketing and advertising budget is only \$1500-\$2000 per year.*

This current spend consists of limited print advertising, printed brochures, and website costs. Bus graphics and bus stop signage are not included in this total, but are included as part of the Capital Improvement Plan (bus graphics are included in the cost of a new bus and bus stop signage project already funded and slated for 2017). The advertising budget is so limited that SPOT is not able to build awareness or grow ridership through marketing or outreach.

SPOT should start planning for how to grow funding for these marketing investments. This is a challenge that will be addressed later in this plan with ideas on how to partner and trade for market exposure. The good news is that SPOT has strong brand fundamentals and is ready to build on this foundation to renew itself and look for more support and use in the coming three years.

## COMMUNITY SURVEYS

SHIFT conducted two similar surveys, from two distinct community groups – existing riders and community stakeholders. The goal of the surveys was to understand a variety of aspects including the markets and identify marketing opportunities, service improvement needs and perceptions of SPOT. Only a portion of the questions from each survey were asked of both groups, the rest were tailored specifically to either existing riders or community stakeholders.

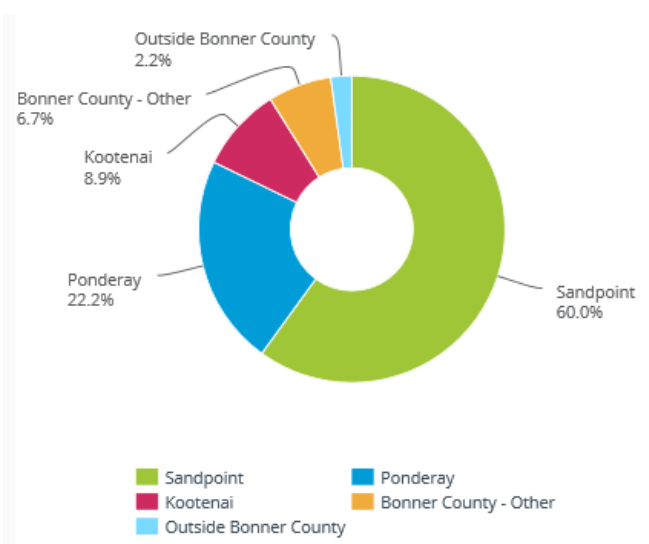
This plan focuses only on the survey responses that inform the markets and marketing opportunities. The existing riders group responded to marketing questions about how they use SPOT and why, how they plan their trip, and where they get their SPOT and other community information. The stakeholder group represented key decision makers and responded to some rider questions, such as why they ride or don't ride and what could get them to ride or ride more frequently, as well as marketing ideas for increasing ridership.

### Existing Riders Survey - Results

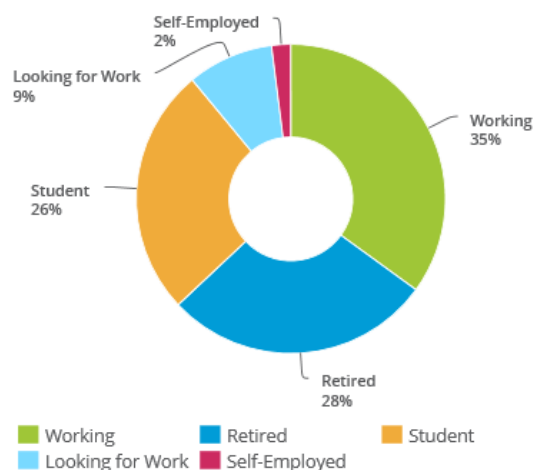
SHIFT conducted a survey of existing riders to understand who is using SPOT, why they are riding, and how they use the bus. 45 riders responded to the survey, which represents approximately 3% of the average weekly ridership, and 21% of the average daily ridership.

The survey shows 25% of respondents use SPOT 10 or more times a week, while 50% of respondents use it between 1-5 times a week. All respondents ride on weekdays and almost all ride on weekends too. The large majority live in Sandpoint, and most are employed, followed closely by retirees (retirees includes those no longer working, not necessarily retirement age).

Rider Residency

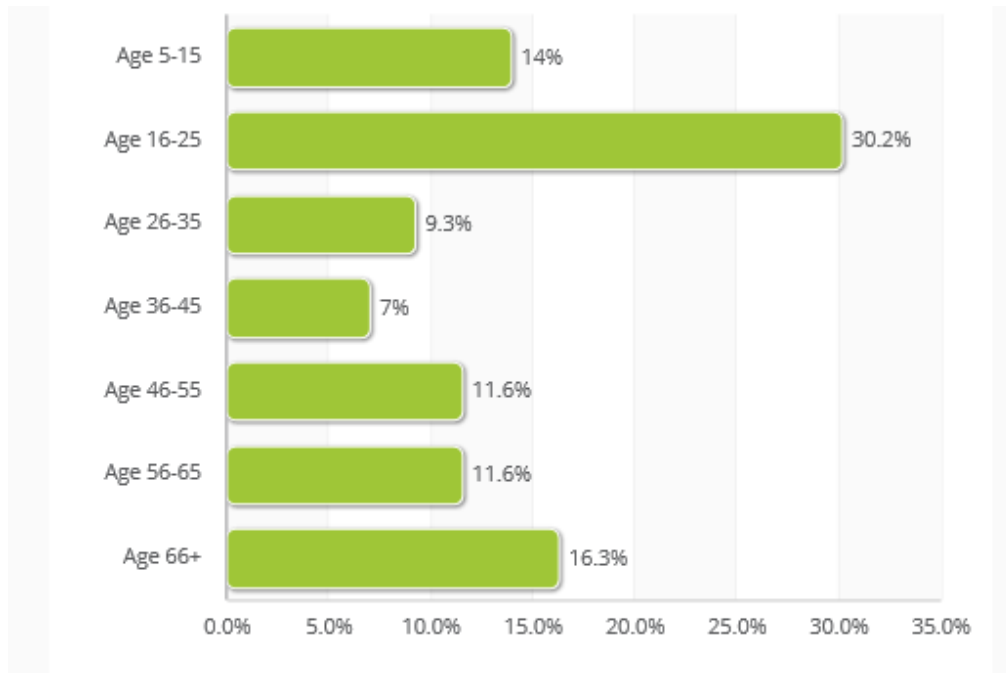


Employment Status



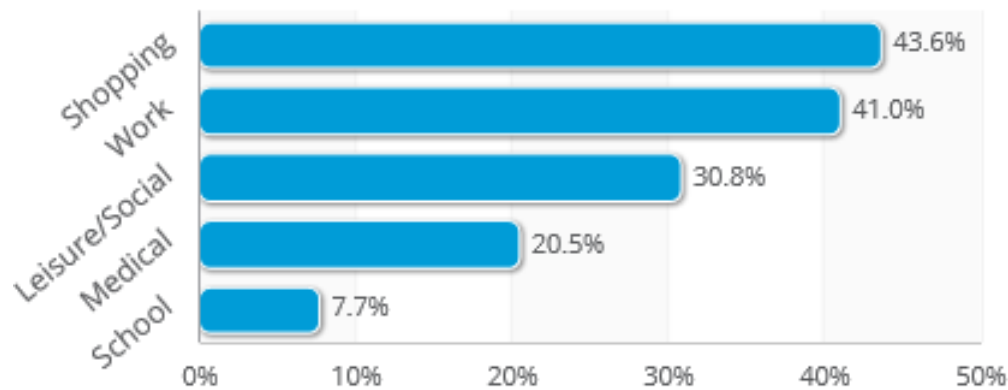
In terms of age, SPOT riders tend to be either younger riders, with 44% of riders aged 25 or younger, or older riders, with 28% of riders aged 56 or older. Middle-aged riders make up the smallest percentage of riders.

Rider Age



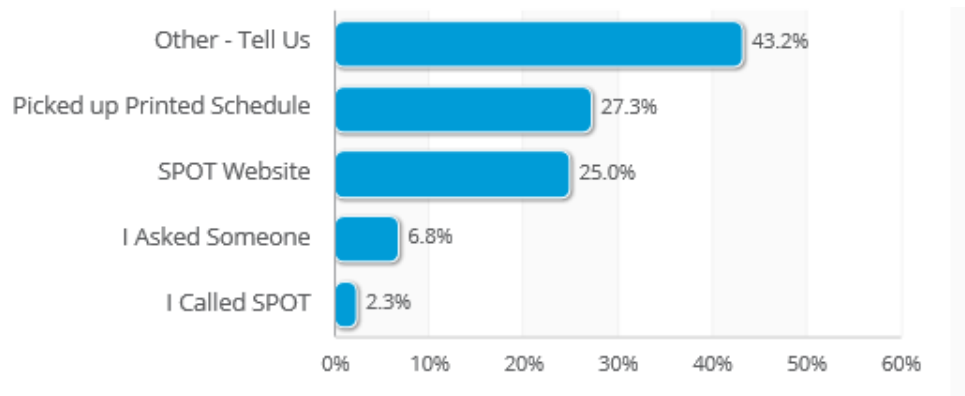
When asked about trip purpose, SHIFT found that most SPOT riders were using the bus for shopping, followed closely by work, but the results show that SPOT is being used for a wide variety of trip purposes. The data show that SPOT has a diverse ridership that counts on the service for all types of trips:

Reason for Trip



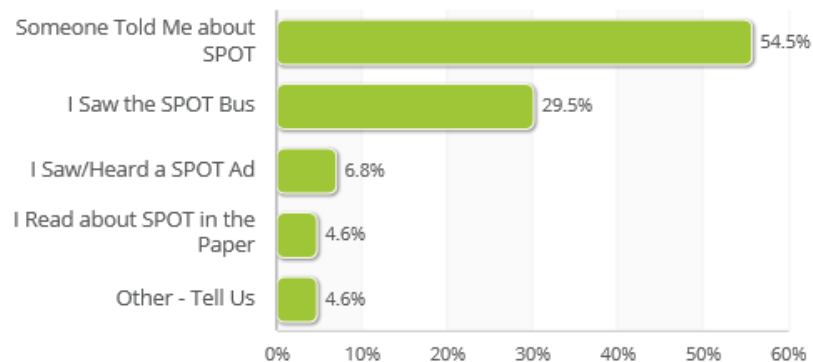
Another goal of the survey was to find out how riders are doing their trip planning, how they originally found out about the bus, and why they ride:

### How Did You Plan Your Trip Today?

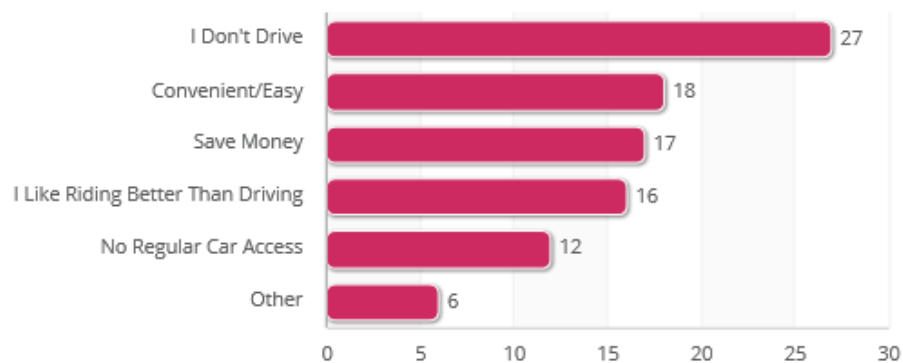


The “other” responses were predominately that the rider knows the schedule and doesn’t need to pre-plan their trip. The two additional responses received as “other” are: 1) schedule on phone; 2) called paratransit.

### How Did You Hear about SPOT?



### Why Do You Ride SPOT?



## Existing Riders Survey - Discussion

SPOT is used by a diverse group of people, representing many age groups with varying reasons for using SPOT. There were a few patterns identified in the responses received that lead to assumptions regarding who the majority of riders are today and what groups of riders are not as prevalent. The survey results highlight three target market opportunities:



- 1) Youth/young adults
- 2) Seniors
- 3) Employees (middle ages)

The youth/young adult segment of SPOT respondents can be summarized as follows:

- They form the majority of riders responding to the survey
- They don't drive or have access to a vehicle
- They are almost solely use SPOT for shopping and work trips
- 70% live in Sandpoint
- They use both routes equally
- They predominately get their information from the SPOT website

The survey was conducted in August; therefore, youth respondents were not in school and no responses were collected reflecting that this age demographic is using SPOT for school transportation. Additional information or survey data would need to be collected to identify whether they are using SPOT for transportation to and from school. Without knowing the results, assumptions can be made that this is likely occurring during the school year. Gaining more youth ridership during the school year is certainly a marketing opportunity through outreach and promotion at the schools.

Riders greater than 65 in age made up 16% of respondents. This group's responses can be summarized as follows:

- They use SPOT primarily for shopping and leisure trips
- 50% live in Ponderay
- They get their SPOT information from a variety of places – website, brochures around town, newspaper, and at community centers

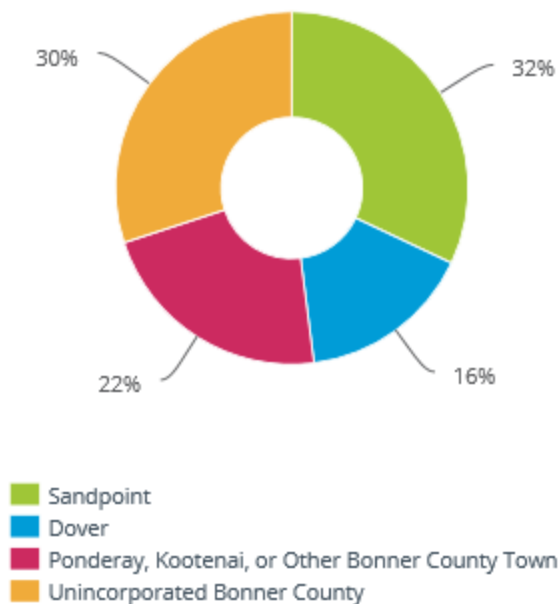
- Their trips tend to be longer in miles, which might be because 50% of the respondents from this demographic reported to live in Ponderay and are likely traveling to Sandpoint or another location outside of Ponderay for their shopping and leisure trips
- They ride SPOT predominately because they would rather not drive and because it's easy and convenient

Almost 56% of all respondents heard about SPOT from someone (word of mouth), with about 30% finding out about SPOT by seeing the bus. This leaves about 14% of respondents learning about SPOT from other forms of marketing. This is an indicator that either SPOT has invested little in advertising or riders are not receptive to the types of advertising that SPOT has pursued. The former is likely the primary reason, but strategically selecting the type of advertising is also an important consideration.

### Stakeholder Survey (Riders and Non-Riders) - Results and Discussion

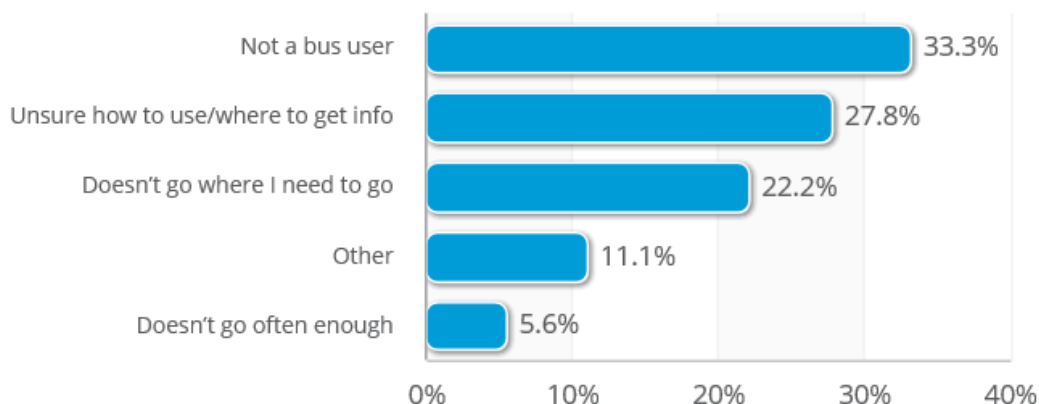
SHIFT polled community stakeholders by designing an online survey and distributing it electronically through a variety of means including the Sandpoint Chamber, city and county electronic mailing lists, a link on the SPOT website, a feature in the Bonner County Bee, and a feature on Sandpoint Online. Here are the results of 49 respondents who took the survey.

#### Rider Residency

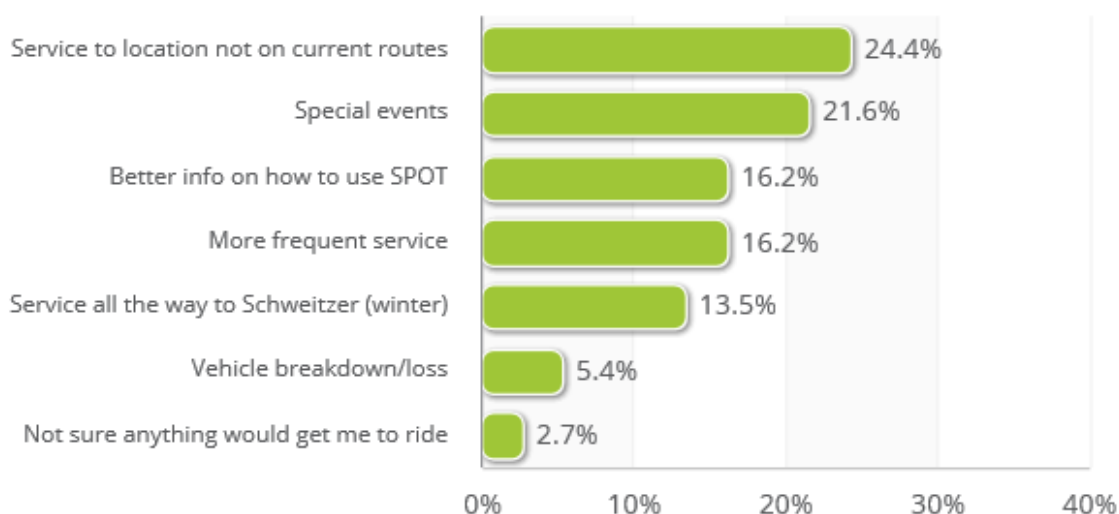




43.5% have never taken SPOT before. Of these respondents, the following reasons for not riding were received:



When this group was asked what could get them to ride spot, they responded as follows:



In addition to the choices provided above, the group was also given the option to write in their own ideas that might get them to ride SPOT. Their feedback was predominately split between two responses: 1) clearer information and route maps; 2) expanded service to Sagle, Baldy Road, and shuttle service between parking areas and City Beach/downtown during the weekends.

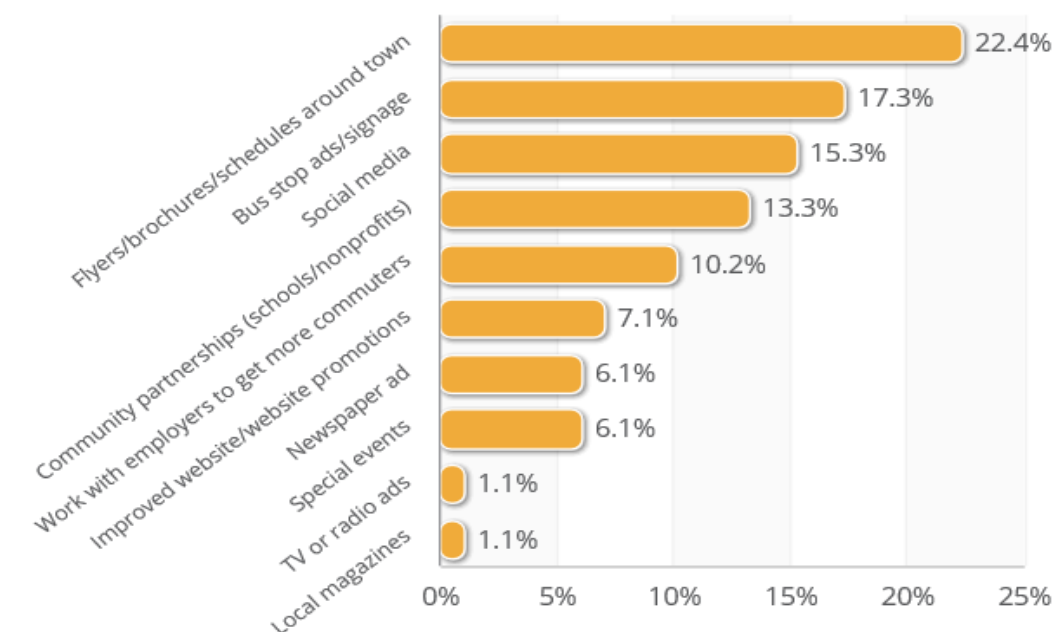
56.5% of the stakeholder group has taken SPOT. When asked their reasons for riding, the top three responses among respondents were: 1) transportation while their car was repaired; 2) leisure or social activity; 3) shopping. These results are consistent with the results of the rider survey; few middle-age respondents are using SPOT for transportation to and from work. The stakeholder group likely uses SPOT for infrequent trips, on occasion, not for daily commuting.

The stakeholder group was asked to respond to what the perception of SPOT is and its role in the community. Here were the responses:



These results indicate that stakeholders perceive SPOT as a necessary service for those that need it and as a benefit to residents to allow them more transportation options. They see SPOT less as helping the local economy and businesses and even less as giving visitors more transportation options. These are two areas where more targeted marketing can change the community's perception of SPOT from offering limited, but necessary, transportation benefits to SPOT being "a community institution" and "just the way we get around," as heard during several stakeholder interviews.

The stakeholder group was asked what the most cost effective marketing strategies/tools are to attract more riders and improve awareness of SPOT and the following responses were received:



Getting more information out about SPOT around town is a common theme in the results of both community surveys that could help increase ridership with the general community as well as visitors and establish SPOT as beneficial to the economy and businesses.

There can be a relationship between increased ridership and economic and community vitality. SPOT riders walk or bike to and from each bus stop when they begin and end their trip. Walking by businesses creates opportunities for more economic activity around these bus stops. When parking is limited people may decide not to visit downtown areas at all, whereas SPOT could provide a hassle free and easy way to get people to a location without the stress and inconvenience of parking.

## Marketing for Boundary County, Paratransit, and Vanpool

Much of the research, discussion, and tools in this plan are focused on riders of the fixed route system – Blue and Green Route riders. This market represents one of the largest opportunities for growth through marketing and outreach. Many of the marketing ideas in the toolkit section of the plan can be used for these services, but it is important to discuss specific marketing tactics for Boundary County, paratransit and vanpool and the communities they serve. These groups weren't specifically surveyed, but SHIFT conducted many interviews and drew on best practices when marketing to these groups.

### Boundary County-Bonner's Ferry Demand Response Service

This service is still relatively new, running less than eighteen months, and has done a good job of attracting a base of riders that need the service. It routinely runs at better than two riders per hour, which is good for a demand response service.

In a small community such as Bonner's Ferry, word of mouth and grassroots marketing are the best approach. As a new service, SPOT needs to educate the community about what SPOT is, how it operates, and why it's good for everyone.

The first step is creating a simple marketing piece that can be printed and distributed in several forms including as a rack card, a flyer, and electronically. The purpose of this would be two-fold: to promote the service itself and how to use it (hours of service, destinations, etc.), and to educate on what public transportation is.



The educational message should be:

- Public transportation is a public service and is open to everyone
- The city and county support and sponsor SPOT services
- With more demand and use, SPOT could add more service to the Bonner's Ferry area
- Public transportation is good for the community – it provides vital mobility, saves riders money, and provides more independence to those who use SPOT



*SPOT strengthens the community by providing mobility and independence*

*Credit: Bonner's Ferry Herald*

Recommended distribution of this marketing piece is:

- posting around town
- city mailings
- local businesses
- hospital
- assisted living facilities (e.g. Restorium)
- visitor center
- city hall

SPOT should also consider being interviewed on the local radio show and presenting to as many community groups as possible. It should also be distributed electronically through Bonner's Ferry online, Facebook groups, and city and county online resources.

## Bonner County Paratransit Service

Paratransit service is a federal requirement of a fixed route service, when federally funded. SPOT should consider marketing this service in conjunction with marketing the fixed route service. There are numerous benefits to increased awareness of paratransit service:

- 1) providing mobility to those that need it most
- 2) increasing efficiency/productivity of paratransit service by linking multiple trips together instead of only single rider trips
- 3) providing positive community perception

Currently, this service is marketed very little. There is a very small mention of it on the SPOT schedule, with no detailed information about the service, and the website doesn't have any section about this service. SPOT should increase the information about paratransit on the SPOT printed schedule and website as a first step to better marketing this service. The next step would be to create a dedicated informational card on this service, much like the one suggested for the Bonner's Ferry demand response service, that would describe hours of service, prequalification process, area of service, and other helpful information. This should be distributed to all social service organizations in the Sandpoint area, as well as at assisted living facilities, the hospital, disability organizations, and the senior center.

## Vanpool

Based on the current lack of affordable housing and challenges that employers have in finding skilled workers, SHIFT anticipates that SPOT will see significant growth in this program. Employers will find that vanpool can provide them with skilled workers from outside the area, and employees will find that vanpool links affordable housing locations with high paying jobs in a cost-effective way.



Vanpool marketing is straightforward:

### Put together an informational piece on how vanpool works

- Include example pricing and commuter tax benefit information (vanpool qualifies for pre-tax consideration under the Commuter Benefits program)
- Describe benefits of vanpool for employee and employer
- Adapt for flyer/brochure and electronic dissemination

### Set-up meetings with owners and managers of local businesses and present vanpool basics

- Find how vanpool can solve the employee challenges
- Vanpool delivers happier, safer, better rested employees to the job

### Follow-up with interested employers to build interest among employees

- Employee staff meetings, email communications, and drop-in coffee talks are all ways to build employee interest

The Sandpoint area employers should be very receptive to vanpool, and SPOT could see this program grow quickly with some basic promotion and direct outreach.

## Marketing to Those Who Will Never Ride

Riders or non-rider aside, the public perception of SPOT is critical to ongoing partnerships and funding. SPOT is a public agency receiving local tax dollars that aren't guaranteed year-to-year; therefore, marketing to the community itself is a necessity. It's not enough to have regular riders taking more trips, new demographics getting on the bus, and routes connecting to new destinations. Elected officials, business leaders, non-profit organizations, and the community at large must know about SPOT and understand why SPOT is important to the community, regardless of whether someone rides or not. SPOT needs the community to feel that public transportation is an important community asset and something worthy of supporting.

SPOT can tailor the message for a particular group, but some of the resonating talking points that board and staff can use include:

### SPOT is good for quality of life

- Communities with good public transportation are nicer, easier, more connected places to live and work
- Public transportation makes the community more attractive – those living here are more likely to stay and those thinking of living here are more likely to relocate
- Communities that rely less on single occupancy vehicles are more resilient

### SPOT is good for business

- With a tight job market, employers are looking for ways to attract and retain employees – public transportation options make this easier
- Consistent transportation means employees get to work safely and are often more rested and ready to work
- Those people riding SPOT save money and can spend it on other things
- Bus trips end and begin with walking or biking, which means bus riders are more likely to frequent businesses while enroute

### SPOT is good for housing

- With limited affordable housing within walking distance to most amenities, SPOT can better link jobs and services with housing in outlying areas
- Vanpool can be used as a tool to link areas of regional activity

### SPOT is good for biking and walking and community health

- Public transportation can reduce depression and isolation among those who use it
- Every bus trip on SPOT starts and end with a walk or a bike trip, which helps improve health
- SPOT takes an average of 400 cars off the road per day, which improves the downtown experience for biking and walking











SPOT is good for the environment and congestion









- With an average of 6 people an hour getting on the bus, that means the effective miles per gallon of the bus is 72MPG!
- More people on the bus = less people in cars
- SPOT must continually talk about the community benefits of public transportation and build specific outreach efforts towards building general awareness. By growing ridership and this community awareness, the political support and overall goodwill will happen naturally.







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## THE TOOLKIT









TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Better bus stop amenities</b>	One of the top requests from the surveys was better bus stops with amenities like benches, shelters, and lighting. All of these improve the overall riding experience and make new riders more likely to ride again. Bus stops are also the most visible aspect of the service and impact the community perception.	All current and potential riders; the community at-large		
<b>Better bus stop signage</b>	Through its work on this plan, SHIFT heard that bus stop signage needs to improve to show the system map and the bus times at a particular stop. The signage should also identify the stop itself. In addition, larger and more visible signs can have an advertising benefit.	Current riders and general community impression		
<b>Invest in better buses that all have route identification</b>	Many of SPOT buses are in need of replacement and hurt the rider experience, especially for those buses that don't have adequate air conditioning for cooling in the summer. Also, many riders requested desire to know what route a bus is running through bus identification. Although this is a capital improvement issue, it impacts marketing and ridership growth. Buses with better passenger amenities that are easier to board and are more comfortable will help market the service.	Current riders, new riders, and general community impression		
<b>Improve the service</b>	Although this is part of the transit service plan, improving the service is certainly a marketing tool. Especially for tourists who might use the service to get around and for skiers going to Schweitzer. And later night service might encourage 25-45 demographic ridership.	New riders (millennials, young families), tourists, skiers, seniors, employees/commuters		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Invest in the drivers as marketers</b>	Drivers are SPOT's ambassadors. By keeping drivers happy and informed, they can be effective marketing tools for growing the service. Training drivers in how to provide the highest quality customer service will pay dividends every time someone rides the bus.	Current riders, first time riders		
<b>New website</b>	Redesigning and updating the SPOT website is recommended and is a key customer information tool. This effort would include completely overhauling the existing site to create a much easier user experience; update website content with more complete SPOT information; include real-time bus information tools; and have better maps and timetables. Once the new site is built, SPOT should plan to use the site for timely news and rider alerts, as service changes.	Youth, tourists, businesses, existing riders		
<b>Press releases</b>	SPOT should celebrate its successes and regularly update the community on SPOT through periodic press releases. SPOT should have a standard press release template and list of press contacts for distribution of press releases. The Bonner County Bee, Sandpoint Reader, Sandpoint Online Town Crier, and KXLY should all receive SPOT press releases.	Community at large; those who may never ride		
<b>Business partner campaign "I'm on the SPOT"</b>	This idea is to create a campaign where supporting businesses would display a "I'm on the SPOT – ask me about the free bus" window sticker to show support of SPOT. The business would also have SPOT schedules available, preferably in a holder on the counter, and know the basics about SPOT. Also promoting it to specific businesses with built-in ridership needs like auto repair shops.	Visitors, new riders, businesses		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>School partnerships and outreach</b>	Since youth are such a big part of SPOT's current ridership, SPOT should work to encourage more students to ride the bus by promoting SPOT at school events, in youth publications (like the high school newspaper), and by having SPOT bus information at all of the schools. SPOT should also look for opportunities to partner with schools on transportation needs – taking a SPOT route for a field trip is a great way to introduce SPOT.	Youth, school staff		
<b>Re-do printed schedule and distribute more widely</b>	Through surveys conducted for this project, we know that the SPOT bus schedule needs to be updated for easier comprehension and made more readily available throughout the community. The SPOT printed schedule needs a better map and easier to understand timetable for each route, and it needs to include information on paratransit and vanpool. A separate information rack card should be developed for Bonner's Ferry service for distribution in that area. SPOT should consider paying to have the schedule distributed in local brochure racks.	Community at large; those who may never ride		
<b>Quick reference guides and training of staff near bus stops</b>	Businesses closest to the bus stops can be one of the best ambassadors for the service. This idea involves creating a simple quick reference card or handout that shows the nearest bus stop location in relation to the system map ("you are here") and gives the schedule for just that bus stop location (northbound bus at :45 from 6:45 until 5:45). This allows local businesses to know and share information with their customers.	All		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Flyers and posters around town</b>	From market and community research, flyers and posters around town seem to be an effective communication tool. SPOT should develop flyers and posters that build awareness of the bus service, its benefits, and any new and interesting services. This tool could be particularly effective when SPOT grows or changes its service. Flyers could be placed at many locations around town – senior centers, social service offices, the library, non-profits, and community centers would all make good poster locations.	Locals, seniors, youth, visitors, employees/commuters		
<b>SPOT as a vehicle for better health</b>	According to a study presented at the American Heart Association's Scientific Sessions 2015, riding the bus or train to work is associated with significant health improvements. Promoting this fact and partnering with public health organizations can be a great way to build ridership. The ParkRx program, a health initiative to get people healthier by exercising in parks, of the Kanisku Land Trust is a developing partnership for SPOT. By linking the SPOT bus into a trip to a park, SPOT can attract new riders. This tool is simply partnering with ParkRx and other healthcare organizations to cross-promote SPOT services.	Those with physical or mental health problems		
<b>Presentations to partners, especially city councils, business groups</b>	Making presentations is one of the most effective ways to educate the community about SPOT services and their importance. Although this is a time consuming effort, it is low cost and very effective. SPOT should work to develop a standard set of talking points, service highlights, and organizational statistics. Depending on the presentation, this might be a PowerPoint, a 1-2 page handout, or use the flyers. This tool will help build general community support for SPOT.	Decision makers, community leadership		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Rider of the month spotlight and/or bus schedule in newspaper</b>	Advertising in the newspaper isn't something recommended for SPOT due to high costs; however, SPOT may be able to work with the Bee or Reader to get free or discounted placement of monthly rider profiles or perhaps having the bus schedule in the newspaper. The rider profile could be a recurring feature that would have a picture and quote from a SPOT rider in order to highlight why SPOT is awesome and showcase a daily rider who's story helps illustrate the paradigm, that SPOT is "just the way we get around."	All		
<b>"Get on the SPOT" campaign for coffee sleeves and coasters</b>	Having a simple message printed on coffee sleeves and coasters at local coffee shops and restaurants could be a low-cost way to create exposure to SPOT. This tool would hopefully be something that the local business partner (restaurant or coffee shop) would want to help underwrite.	New riders, millennials, choice riders (those who drive but might choose to ride occasionally)		
<b>Employer outreach</b>	Local businesses need to know about SPOT and how SPOT can help solve employee commuting challenges. SPOT should meet with and present to major employers and their employees details about SPOT services. This tool will be particularly helpful in building vanpools. Attending employee staff meetings, dropping by with donuts for a meet and greet, and working with HR staff on flyers and emails to employees are all ways to implement.	Commuters		
<b>Facebook page, social media</b>	Facebook and select regional Facebook groups could be effective ways to send periodic updates about SPOT with interesting and timely content. In order to be effective, the SPOT social media account must be regularly monitored and actively managed.	Youth, millennials, community at large		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Troubleshoot phone app and promote as part of all other campaigns, along with other technology</b>	SPOT has an app that shows customers where the bus is in real-time, but it isn't working consistently and isn't promoted. The DoubleMap app could be an excellent tool, especially for tech savvy riders, but it must be managed and promoted (i.e. included on all SPOT materials). This technology does take a lot of time to manage and keep up to date; SPOT doesn't have this expertise or time today. If SPOT does have the capacity, integrating SPOT schedule information into Google Maps through the GTFS file spec could be another way to reach technology-savvy riders.	Youth, millennials, visitors		
<b>Targeted radio and magazine advertising</b>	Radio seems to be an effective advertising tool for ongoing messages to build awareness. SPOT should pursue trade or public service announcements (PSAs) on radio. Additionally, SPOT could look at ads in local magazines, although this is higher cost and harder to trade or get free submissions. SPOT has been in Sandpoint Magazine in the past and needs to evaluate the effectiveness of this ad and its cost relative to other marketing potentials. Cost dependent on trade or PSA.	New riders, general community		
<b>Special events</b>	SPOT could consider providing additional bus service for many special events throughout the year. This would introduce the bus to new riders and increase SPOT's visibility in the community; however, special events can be challenging. SPOT will need a partner who will promote the extra event service and limit parking around the event venue, or the special event service can be underutilized and ineffective.	New riders		
<b>Links to local partners</b>	SPOT should work to integrate awareness into as many efforts of the cities and counties as possible. This could include SPOT on municipal websites or having SPOT at city or county sponsored events. SPOT should be integrated into the cities and the county, as the transportation arm.	The community at-large		



## The Plan Year by Year

For the coming three years, SPOT should begin to put into action some of the information, ideas, and tools presented. SPOT can take its limited budgeted and staff time and slowly and incrementally implement the Marketing and Outreach Plan.

Year	Goal and Theme	Tools	Resources*
Year 1	To improve the basic marketing and outreach building blocks, in order to setup SPOT for future success. SPOT must invest in basic customer information tools, rider amenities, PR strategies, and partnerships.	<ul style="list-style-type: none"> <li>Bus stop signage and amenities</li> <li>Website rebuild</li> <li>Bus branding and ID</li> <li>Driver training</li> <li>Press releases</li> <li>Update bus schedule format</li> <li>Links to local partners</li> </ul>	<p>\$5,000-\$10,000 in direct marketing spend plus in-kind partner support</p> <p>Staff, board, and in-kind partners time total of 10-20 hours per month</p>
Year 2	<p>Continue work from Year 1 and begin to leverage those efforts to:</p> <ol style="list-style-type: none"> <li>1. Get regular riders riding more</li> <li>2. Start attracting new markets.</li> </ol> <p>With basics in place, SPOT can now go to work on getting more people on board and building community awareness.</p>	<ul style="list-style-type: none"> <li>Employer outreach</li> <li>School partnerships</li> <li>Rider of the month spots</li> <li>SPOT for better health</li> <li>Flyers and posters</li> <li>Facebook and social media</li> <li>Quick reference guides</li> </ul>	<p>\$10,000-\$15,000 in marketing plus in-kind partner support</p> <p>Staff, board, contracted, and in-kind time total of 20-25 hours per month</p>
Year 3	Years 1 and 2 create opportunity for Year 3 to be year of significant external marketing and ridership growth among new marketing. This is the year to make SPOT omnipresent in the community.	<ul style="list-style-type: none"> <li>Business partner "I'm on the SPOT"</li> <li>Presentations to the community</li> <li>Phone app and other technology</li> <li>Coffee sleeves and coasters</li> <li>Targeted ads</li> <li>Special events</li> </ul>	<p>\$20,000-\$25,000 in marketing plus in-kind</p> <p>Time of 25-30 hours per month</p>

*\*This is direct marketing and out expense. Capital and operating expenses that have marketing benefits, such as service improvements, bus stop amenities and new buses, are not included in Resources.*



Each year builds on the next and efforts started in Year 1 must be continually developed through Years 2 and 3. Once an effort is started, it is recommended that it be continued going forward, unless it is thoroughly reviewed and there is an identified reason it is deemed ineffective (effectiveness often increases with time). Budgeting and staffing must grow to support increasing SPOT marketing and outreach efforts over the next three years.

### Getting This Work Done (Limitations and Need for Partnerships)

The challenge to implementing this plan is figuring how to fund these efforts and how to improve marketing without impacting existing service. Every public transportation system faces the same challenge of finding enough funding for marketing and outreach when the direct costs of running bus service are a higher priority. But funding this marketing plan is critical to SPOT's success; running SPOT buses without good marketing means the service will not reach its full potential. Acknowledging that SPOT has budget and staff limitations in implementing the ideas of this plan, SPOT must seek creative partnerships, cost share, schedule the work slowly, and use low-cost approaches.

The budget constraint is one of the biggest challenges to plan implementation. SPOT should look to allocate more funding to marketing, but this approach will take time – SPOT has a fixed budget and service commitments that use almost all the current budget. It is recommended that SPOT also pursue a more immediate solution for accomplishing marketing goals – set-up an interior and exterior bus advertising program with the goal of trading ads on buses for SPOT ads in a variety of media. SPOT should trade bus ad space for radio spots, online advertising, putting the bus schedule in the newspaper, getting SPOT into businesses (like on coffee cups or coasters), or any other creative trades SPOT can establish. The goal of ads on SPOT buses wouldn't be to generate direct revenue – the goal would be to generate trade dollars for SPOT marketing and outreach. Bus ads could also be used as trade for staff time from partners who can help market and promote.

The other biggest constraint is available staff time. Currently, SPOT is not staffed to carry out much of this plan. SPOT has one full-time employee whose time is consumed with day to day operations. Given this time constraint, SPOT must look to other ways to get this work completed and rely on its partners to help.

#### Workhorse board of directors

- The SPOT board has shown that it is willing to work and will need to give time to these marketing efforts

#### Schweitzer Mountain Resort

- With in-house marketing resources, Schweitzer could provide marketing staff time to help SPOT implement this plan, which could be done as part of a trade for bus ad space or as in-kind donation as part of a partnership for bus service to the mountain

#### Municipal partners

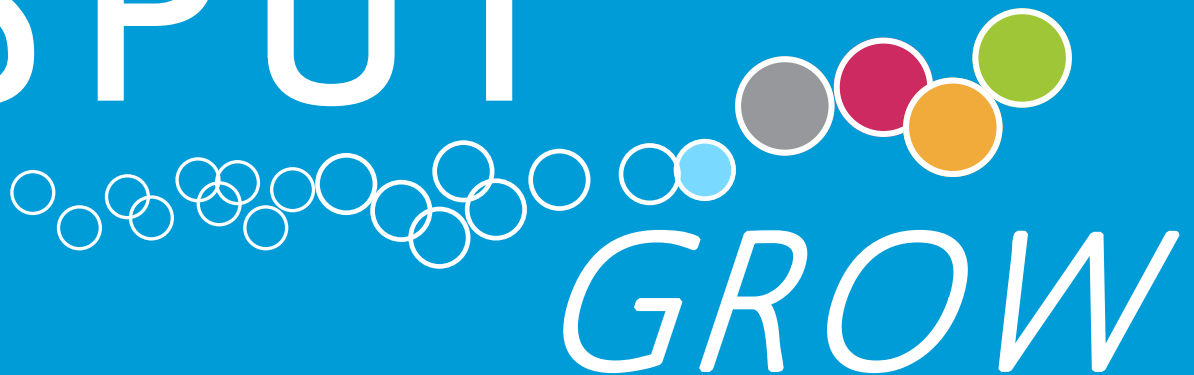
- SPOT could reach out to its partner cities to ask for help with specific marketing and outreach initiatives from city staff or officials who may have expertise or access to helpful resources like existing city newsletters

## CONCLUSION

SPOT has a strong, recognizable community brand with loyal and happy customers. Building upon this base of support, SPOT is ready to grow its awareness, usage, and community impact. By implementing this Marketing and Outreach Plan, SPOT will become a community institution that is positively viewed throughout the region. Many more opportunities and new ideas will result from starting down the path of better marketing and outreach – SPOT should plan to incorporate this evolution of marketing and outreach through periodic updates to this plan.

See

SPOT



Transit Service Development Plan





# See SPOT Grow

## OVERVIEW

A Transit Service Development Plan is an organizational planning tool that describes how existing transit routes and transportation services will be analyzed, developed, and operated, all of which is internally valuable to SPOT staff and board. This tool is also used to communicate externally with SPOT stakeholders and the community about transit service needs.

This plan will define the planning process by which the Transit Service Development Plan is updated annually. Included in this process is a mechanism for soliciting public comment on planned transit service and vet new service requests. This will allow for a transparent process to create more buy-in from the community. Not all the needs can be met, but SPOT must give an opportunity to hear from riders, the communities SPOT serves, and the general public about how SPOT service should grow.

The core of the Transit Service Development Plan is an evaluation of how to improve and grow services. Ideas in the plan are based upon several factors:

- The existing service operated
- Interviews with key stakeholders
- Survey results from riders and non-riders
- Analysis of the services operated and associated statistics
- Funding available now and in the future
- Industry best practices

The plan attempts to reconcile needs with available resources, while protecting existing services that are succeeding. The goal is to give SPOT a context for considering how to improve existing services and how to evaluate new services.

Finally, the plan will address existing services, ideas for improvement, new services, and make recommendations for the coming three years. Included will be route statistics, operating costs, trade-off analysis, and growth projections.

## FIXED ROUTE SERVICE: THE FUNDAMENTALS

When planning a fixed route bus system, there are two ends of the service spectrum to consider. On the one side of the spectrum are systems designed to cover the largest amount of geographic area with routes that offer a relatively low level of service. These routes run circuitously over longer distances to many different destinations that are geographically dispersed with frequencies often 60 minutes or longer. These routes are designed to provide equity and access. On the other side of the spectrum are bus routes that run more like rail service, with direct connections along an efficient, linear route, that are commonly referred to as high frequency service. Frequency routes run with buses departing every 30 minutes or less and often connect major destinations. Frequency routes require people to walk more, but people will often walk further to get more frequent service than wait for an hour to catch a bus closer.

SPOT's current system has aspects of both a coverage and a frequency system. Service between the shopping areas of Ponderay and downtown Sandpoint are direct and more frequent with the combined effect of coupled service on both Blue and Green Routes, but other areas are served with lower frequency routes of 60 minutes or more, which often wind around to get passengers directly in front of where they want to go.

SPOT should consider what model it prefers as it adapts and changes services. Many of the ideas in this plan are based around trying to grow ridership and develop more frequent service. The reason for this is that ridership growth is an expectation for most funding partners, and more frequent service is more productive, in terms of ridership per hour. In fact, ridership grows disproportionately higher with increased frequency. In other words, doubling frequency from 60 minutes to 30 minutes will often grow ridership by more than double.

In addition to considering the directness and frequency of a route, SPOT needs to ensure that the service provided is high quality, convenient, and consistent. Ridership doesn't happen overnight. You have to invest in a new service with the mindset that you will operate for at least a year, preferably two. Ridership is very hard to build and very easy to lose. You build ridership by developing services thoughtfully and run those new service with the long-term in mind. Unfortunately, ridership can easily be lost a lot, if service is inconsistent or unreliable.

The other key aspects to making a service go are:

### Demand

- Do you have enough confidence that a new service will be successful over the long-term? Have there been a lot of consistent requests for the service?

### Community-driven (political will)

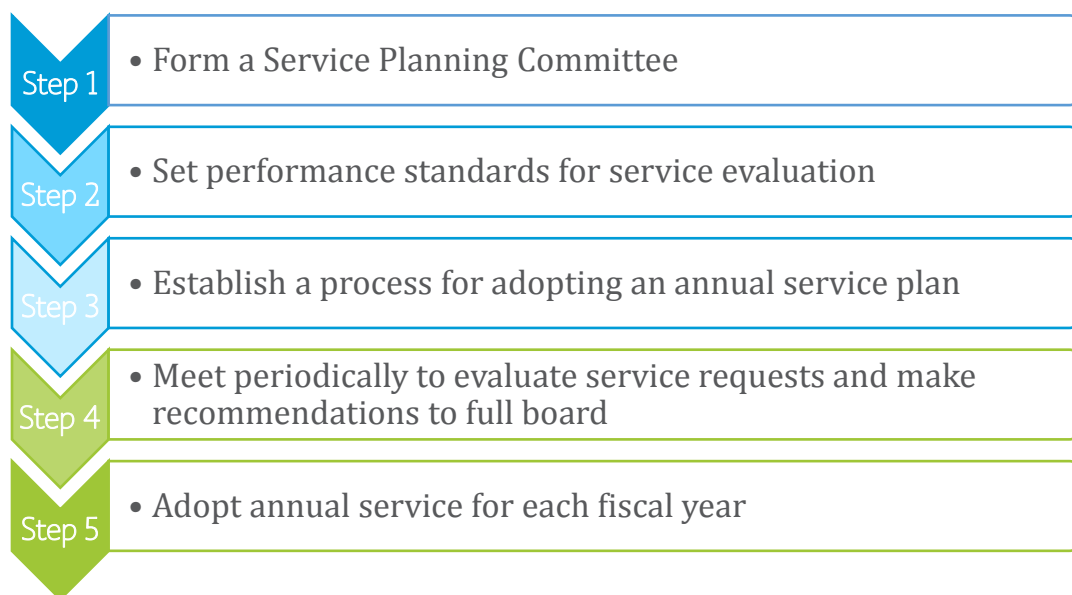
- This is often overlooked, but for a new route to be successful, there must be community interest and political will. Not necessarily from elected officials, political will can come from a new employer who is behind the start of a new vanpool, or a business like Schweitzer, helping to support the expansion of Blue Route to connect to the mountain base.

### Funding

- This one is obvious, but a service must have funding to support it. The funding should be predictable and sustainable, as much as possible with public transportation funding. SPOT should also be looking at both the operating and capital needs of the service. A new bus may be required to start a new route and SPOT needs to include the capital equipment budget impacts, both upfront and ongoing, and plan accordingly.

## THE PLANNING PROCESS: HOW TO BUILD

In order to have a well-functioning service, SPOT needs to establish a well-functioning process for service development. This process should be:



The committee should be made up of 3-4 board members and other stakeholders that have an interest in SPOT services. The existing technical advisory committees could transition onto this SPOT Planning Committee alongside willing SPOT board members. The committee should be no more than 10 people in order to keep meetings efficient. Meetings would be noticed and open to the public, as the Planning Committee would be making recommendations to the full SPOT board.

The first task for the SPOT Planning Committee would be to develop a set of standards for evaluating current services and new services. The committee would use these standards as a reference point for making changes to existing routes, increasing frequency of service, and adding new routes or services. Suggested questions to ask are:

### For Existing Services:

- 1) Is a given service meeting performance goals in terms of ridership and cost?
  - Even if a given service isn't meeting goals, is there a reason to keep operating it, regardless of performance? (e.g., "life-line" services that serve at-risk populations without other transportation options)
- 2) Are there improvements to the service that, on-balance, could provide more upside vs. downside?
- 3) Are bus stops getting too few or too many riders? Do stops need to be added or taken away?
- 4) How can SPOT continuously improve these existing services while still responding to unmet needs?
  - Don't harm existing, base-level of service
- 5) If a service needs to be cut or changed significantly, is there a way to still have another option for those impacted by any change?
  - Perhaps fixed route is replaced by demand response to retain basic mobility?

### For New Services:

- 1) What are the biggest unmet needs in the community?
  - Basis could be a missing connection, an unserved constituency, a change in land use or new land development, economic needs of businesses, or an affordable housing link
- 2) Does it complement existing SPOT services?
  - Is there a way to develop a new service such that it adds value to an existing service?
- 3) Does SPOT have the capacity to operate the service?
  - Administrative staff requirements, vehicle needs, marketing/promotional materials, and partnerships needed for success should all be considered



- 4) What is the funding model?
  - Is it sustainable? Does it have both local matching funds and federal funds?
  - Does it qualify for new sources of funding?
- 5) Does it meet the definition of public transportation?
  - Will it be open and accessible to the general public?

### Federally Mandated Guidelines:

In addition to establishing service change questions/standards, SPOT is required to set service policies and standards for five specific items (requirement of all Federal Transit Administration funding recipients):

- 1) Vehicle load – the maximum number of people per bus type (usually set by bus manufacturer but SPOT can choose to be more restrictive)
- 2) Vehicle assignment – bus sizes for each type of route
- 3) Vehicle headway – minimum service frequency for particular routes or route types
- 4) Distribution of transit amenities – goals for establishing bus shelters, benches, etc.
- 5) Transit access – the proximity of a route to existing population centers or other measure of service distribution like bus stop spacing

Once service standards are in place, the Planning Committee should establish a process for updating and adopting the annual service plan. In terms of timing with a fiscal year start of October 1<sup>st</sup>, the timeline and process for adopting an annual service plan could be:

**January – March:** collect service requests (use a standardized form); notify funding partners of the process

**May:** hold a meeting of the Planning Committee to review current services and evaluate requests for service changes, improvements, or new services.

**June:** put basic service concepts into a service outline that matches a draft budget

**July:** hold another Planning Committee meeting to develop the draft service plan that defines services for coming fiscal year

**August:** solicit public input on draft plan through surveys and community distribution of the plan

**September:** SPOT board adopts service plan, based on available budget and recommendation from Planning Committee

The process needs to allow for input from the leaders of the communities SPOT serves, the riders themselves, general public, and stakeholder organizations. As SPOT is a regional provider of public transportation services, there will always be more service requests than available resources. This process and timeline will provide context and guidance for how to deal with these competing requests.

## CURRENT SPOT FIXED ROUTE SERVICES: WHAT WE HEARD

SPOT today is characterized by strong public support, satisfied riders, and solid ridership. As SPOT considers how to develop transit services, the current services are the best place to start for transit service development.

The easiest and simplest way to grow ridership is to get existing riders to ride more often. By understanding what the existing riders like about the current services, why they ride, what they would like to see in improvements, SPOT will be able to make better decisions with regards to improving the existing routes. The rider survey, which sampled approximately 21% of the daily ridership, provided the following insights.

### Current riders would most like to see:

- 1) More frequent service
- 2) Later evening service
- 3) More stops along the routes
- 4) Connections to unserved places like Sagle and Ponder Point
- 5) Easier to read schedule

### What current riders love about the service today:

- 1) Free!
- 2) Easy and convenient
- 3) Friendly drivers
- 4) Reliable service, that it is available

### Trip purposes:

- 1) Shopping
- 2) Work
- 3) Leisure or social activity
- 4) Medical
- 5) School

### Who's riding:

- 1) Those who can't drive
- 2) Young people
- 3) Those who want to save money
- 4) Retirees

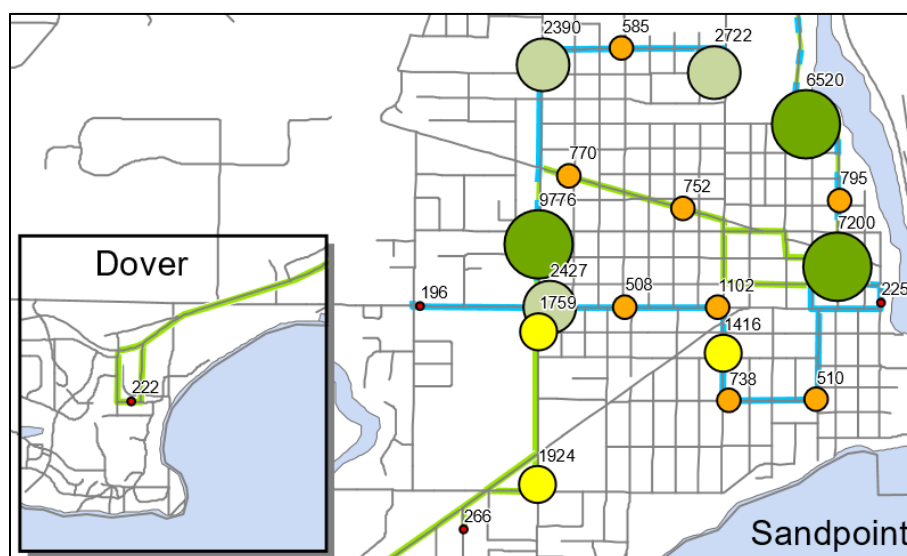
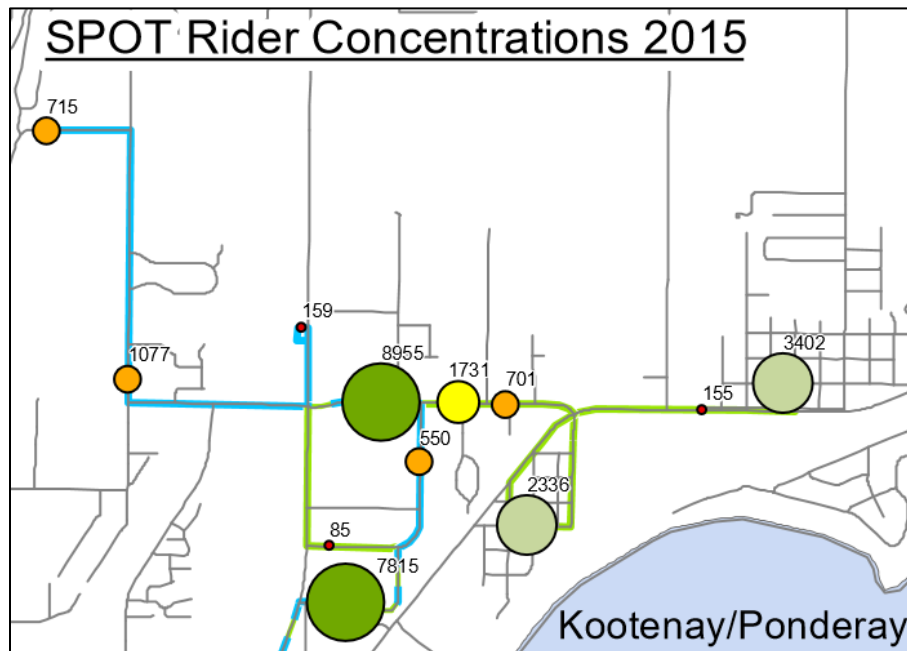
All of this rider feedback is crucial to remember when considering service changes – **SPOT has been successful thanks to its current riders and changes to service must protect the majority of these existing customers to the extent possible.**



*Happy riders and friendly drivers define SPOT today*

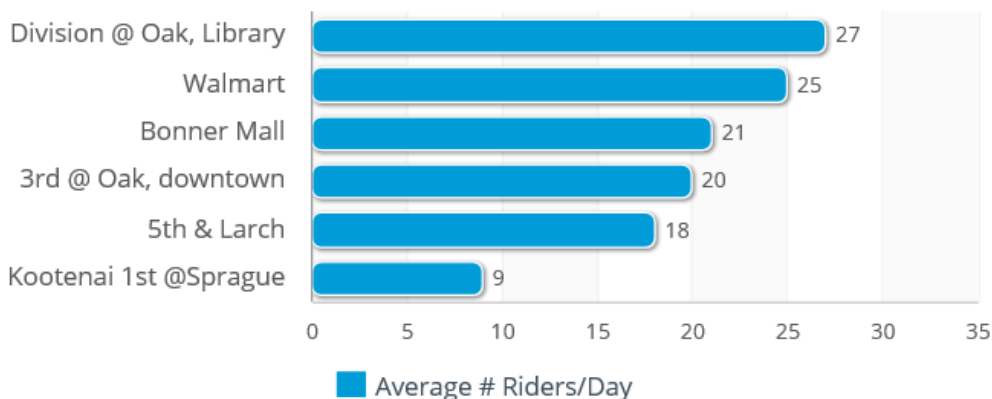
## CURRENT SPOT BUS STOPS: STATS, CONSIDERATIONS, ADDITIONS

Bus stops along the Blue and Green fixed routes are a good starting point to understanding the current service and where the riders are boarding the buses. By looking at bus stop usage, SPOT can start to see where opportunities for route improvement exist. For 2015, SPOT looked at rider concentrations per stop, based on recorded rider boardings. The bigger and more green the bubble, the higher the ride boardings; yellow, orange and red show lower rider concentrations.



*Heat map of rider totals at SPOT stop (Credit: Erik Brubaker, Ponderay City Planner)*

From this data, the top stops in the system, along with average riders per day, are:



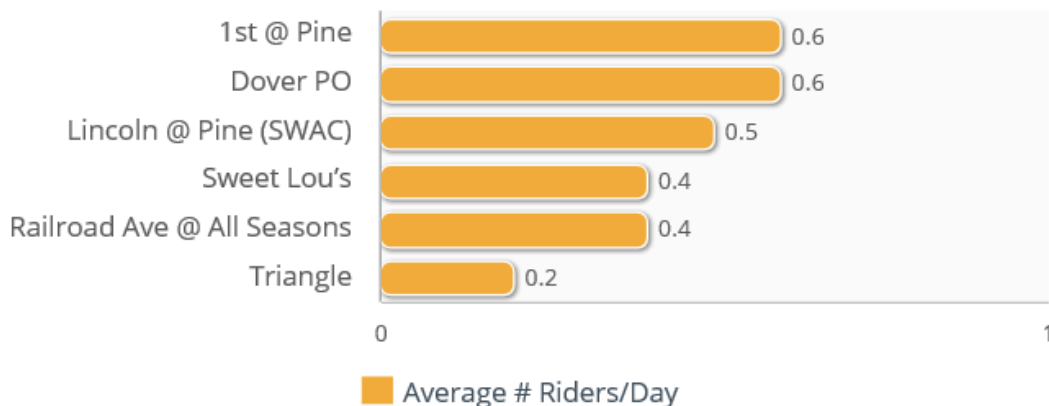
The data show how riders are using the system today – downtown Sandpoint, the library, Walmart, and Bonner Mall are the trip generators of the SPOT system. These stops show solid use and most are planned for bus stop improvements, which will help grow ridership even more.



*The Bonner Mall, one of the high-use stops*

Conversely, there are many stops with such limited use that SPOT must consider eliminating or moving some of these stops as part of the service plan.

The lowest performing stops in the SPOT system are:



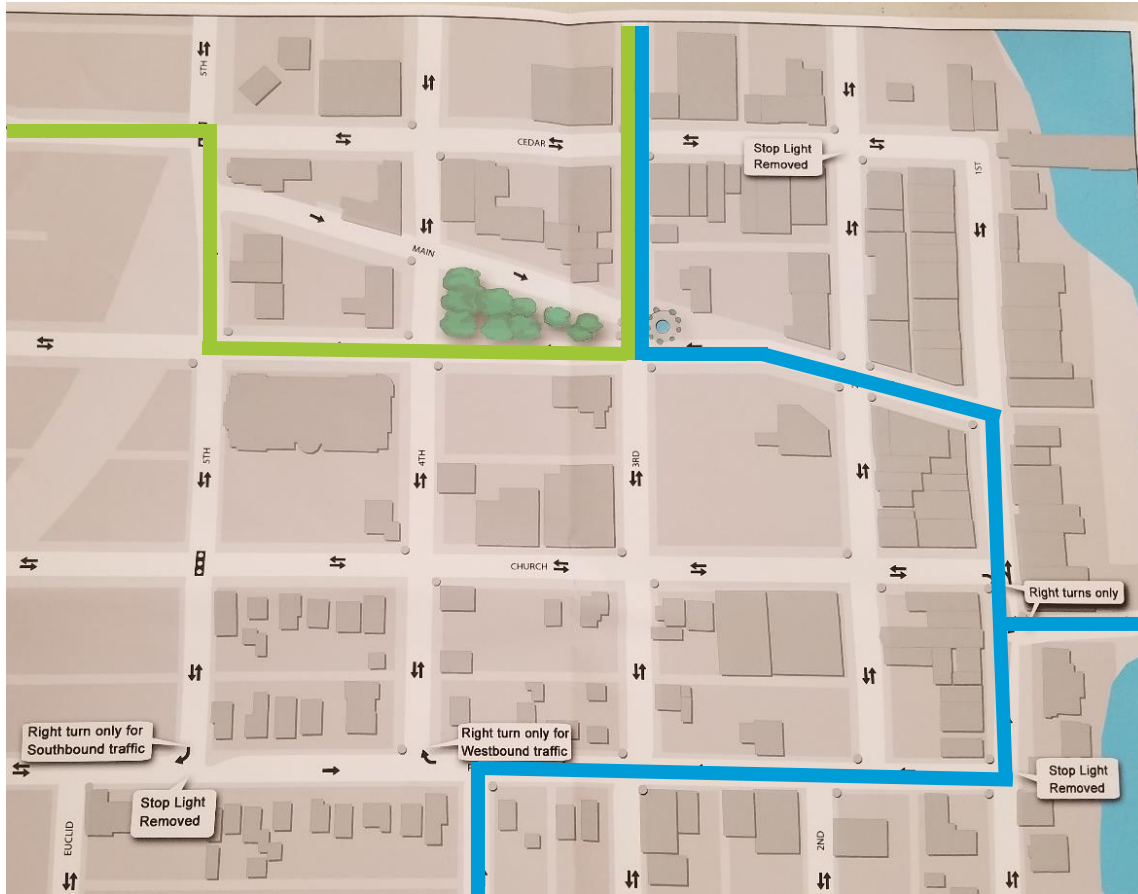
Considering that these stops are served many times each day, these average rider numbers are extremely low. A suggested benchmark would be at least 2 riders per day for any stop, especially if the stop requires a route to travel out of its way to serve that stop. If an underperforming stop is an intermediate point between two higher use stops, it is less of a concern and could remain as a stop. SPOT also needs to consider how planned service changes or improvements might affect whether or not a stop is eliminated. For example, the potential for Schweitzer service may be a reason to keep the Sweet Lou's stop due to potential growth in hotel guest ridership.

SHIFT also analyzed the distance between SPOT bus stops for Blue and Green Routes. In several cases, SPOT bus stop spacing is farther apart than what is typical for fixed route service. Within the transit industry, standards for bus stop spacing vary but are generally 500 to 1000 feet apart for downtown areas, higher density housing, or retail areas. In the SPOT service area, this would be downtown Sandpoint, the Bonner Mall, and Walmart areas. For more suburban housing areas or areas with dispersed retail or services, stops should generally be 1000 to 1500 feet apart (closer to ¼ mile spacing, or 1320 feet, which is the industry accepted maximum distance for how far someone will walk to a bus stop). In the SPOT service areas, this would be the areas along North Division, Chestnut, Michigan, City of Kootenai, Ponderay City Hall. More rural areas could see stop distances of ½ mile to 2 miles, depending on trip demand and safe stop placement. For SPOT, this would be Highway 2 to Dover, and points along Blue Route towards Schweitzer, west of Highway 95/2.

The recommended areas for adding stops are:

- 1) Along Main St., between downtown (3rd and Oak) and Division, 1 to 2 new stops
- 2) Along Division St, between Larch and Ontario, 2 to 3 new stops, especially at the High School and Middle School area
- 3) South downtown area, near Pine and 4th St., 1 new stop

There may be other areas that warrant new bus stops or adjustments to current stops, as services grow or land use changes. One big opportunity for adding new stops, as well as thinking about how to reconfigure Blue and Green routing, is the City of Sandpoint's planned change to downtown street configuration. This new layout will allow both Green and Blue Routes to provide more direct service in the downtown core, as shown.



*City of Sandpoint downtown street reconfiguration (Courtesy: City of Sandpoint)*

This is just one example of how Blue and Green Routes might operate after the streets of Sandpoint are changed. Other options may exist to more efficiently connect downtown destinations, including City Beach and the Library, while still serving the majority of the current stops. SPOT needs to be ready to adjust bus routing once the street project is complete.

## CURRENT SPOT SERVICES: HOW TO IMPROVE

Given the complexities of transit service planning, there is no holy grail or silver bullet that can meet all goals. As mentioned previously, there are inherent trade-offs between serving many communities and destinations versus providing high frequency service. Each route and service is a reflection of the community itself and usually develops from a community-based service planning process. SPOT service has grown up around this concept, and the system is generally working well. The current SPOT system:



- 1) Connects four different communities with consistent fixed route service, operating seven days a week
- 2) Serves major community destinations including the shopping areas of Ponderay, the downtown core of Sandpoint, the hospital, schools, grocery stores, the library, and town centers of Dover and Kootenai
- 3) Provides a base level of service within the Bonner's Ferry area with a growing demand response service
- 4) Gives those how qualify under the Americans with Disabilities Act lifeline service that may not exist otherwise
- 5) Is well-used by a variety of user demographics for a variety of trip purposes





In suggesting improvements to current services, this plan strives to respect the current system and the riders that depend on it. There are always a variety of ways to improve and change a service, **but major changes to the existing routes could be detrimental and counterproductive**. The following are two examples, illustrating the trade-offs between coverage versus frequency (SHIFT does not recommend these changes, they are only provided as an example):

- 1) Just one route running between the library, downtown Sandpoint, and the shopping areas of Ponderay. This route could achieve 20-minute frequency with two buses but would leave many areas unserved. This approach would prioritize frequency above coverage area.
- 2) Add a third route, running every 60 minutes, to connect to more destinations. This would prioritize coverage over frequency of service.

Both of these examples run contrary to what has made SPOT successful to date.

What SHIFT is recommending, after analyzing all of the current routes and services, is a strategic approach that takes the existing routes and services and improves them incrementally over time, making small changes to frequency and/or coverage, where it's appropriate. By implementing small tweaks and adjustments, as opposed to fully rebuilding routes and services, SPOT can best leverage its current system to produce higher ridership and more efficient, effective service with the ideas herein. The added benefit to this approach is it will retain the existing ridership and get existing riders using SPOT more often.

It is worth noting that SPOT operates in a very unique area that is constrained by many factors including: bodies of water that require indirect road routing, railroad tracks with intense train activity, one-way roads, and destinations that are not along direct routes. SPOT has done a commendable job designing a system that account for these many unique factors. The goal of this plan for improvements and service additions is to build on this solid foundation.

## Blue Route

SHIFT believes that Blue Route has the most opportunity for long-term growth due to potential for new Schweitzer and City Beach connections, and the fact that all of the highest use stops are served by Blue Route. When analyzing the route configuration (where it goes and how it gets there), SHIFT determined that the routing of Blue Route for points north of the City of Sandpoint is working well. For Blue Route within Sandpoint, SHIFT has identified options for SPOT to consider:

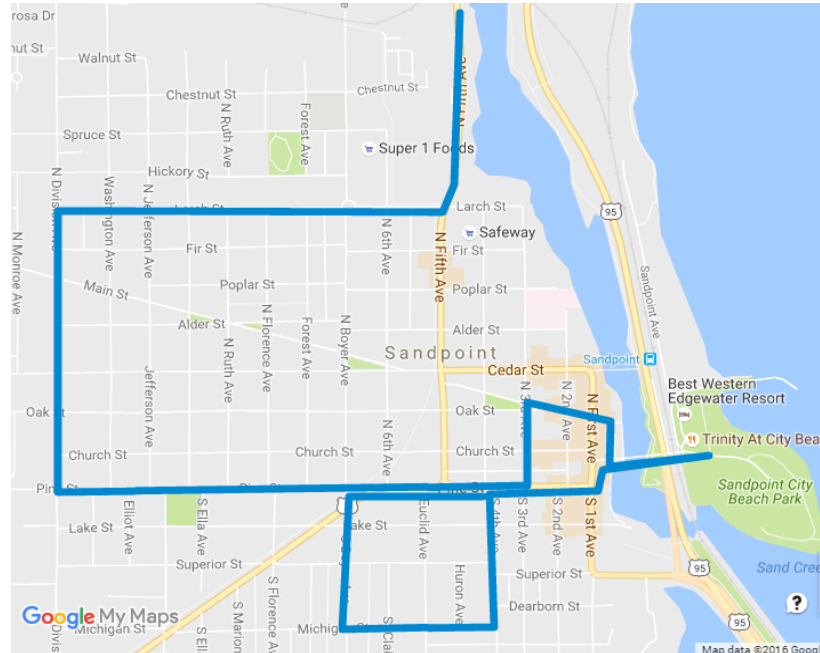
### Option 1 - Keep route as is in Sandpoint

- Blue Route doesn't necessarily need any adjustments, and SPOT could determine that the existing routing is preferred (apart from potential connection to City Beach that is easily added to current routing)



Option 3 - Same as Option 2 with exception of how Michigan neighborhood is served

- This option gets passengers straight to downtown first and then does a one-way loop to serve Michigan via 4<sup>th</sup> and Boyer



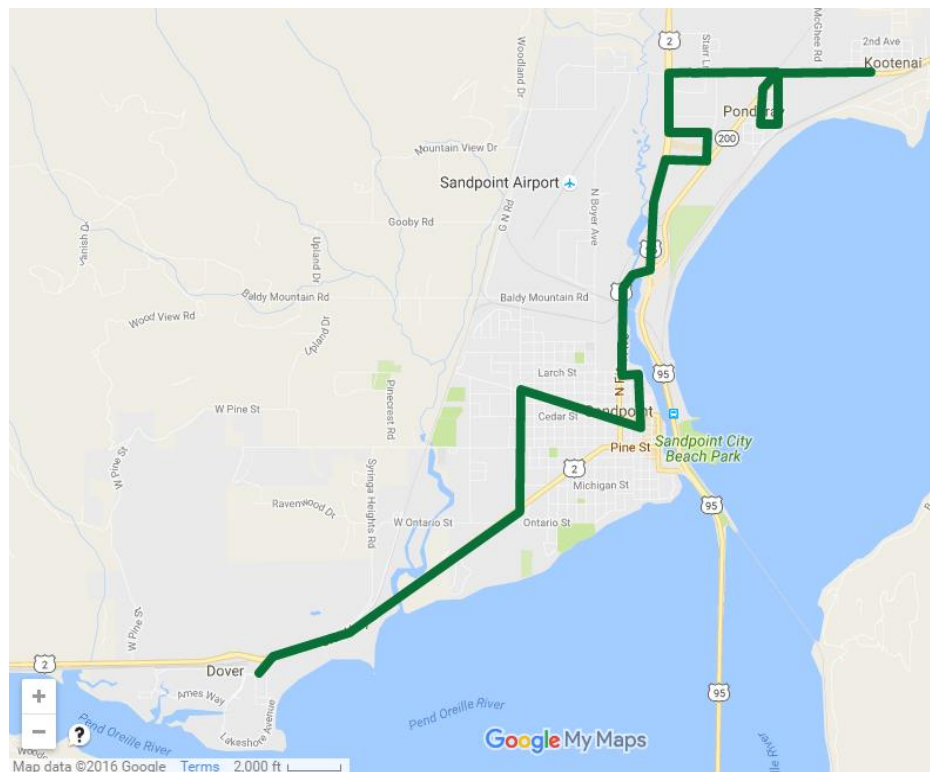
Routing options 2 and 3 make sense if SPOT felt more ridership could be gained from those in north Sandpoint who want a more direct connection to Ponderay, versus current routing that requires them to loop down to Michigan St. and into downtown before going to Ponderay and Kootenai. SPOT would also have to believe that those getting on in Kootenai and Ponderay are more interested in getting to destinations on the north side of Sandpoint, as well as the library, before going to downtown. The downside of both Option 2 and 3 is that the hospital isn't served and that getting to and from downtown isn't as direct.

Apart from potential routing adjustments that could be considered, there are service improvements that SPOT should evaluate to incrementally improve the Blue Route:

- 1) Make connection to City Beach in the summer
- 2) Add a second bus to improve frequency to every 30-minutes during winter and potentially summer; could start as part of Schweitzer for winter service and should be evaluated for eventual year-round service
- 3) Expand late night service to Wednesday through Saturday nights until 9:30p for both winter and summer to start and eventually provide late night Wed-Sat for entire year

## Green Route

The southern “tail” of Green Route currently alternates between two different destinations, resulting in a very low frequency (120 minutes) for the Sandpoint West Athletic Club and Dover. SHIFT recommends that the routing of Green Route be changed such that the connection to the SWAC is eliminated and Dover is served every trip. This will improve frequency for Dover to 60-minutes and will give the Dover ridership a chance to increase. It also provides for a more consistent and easier to understand schedule for the public. Here is the suggested routing change:



SHIFT looked at alternatives for changing how Green Route serves the Ponderay area, but the railroad tracks, lack of pedestrian infrastructure along Route 200, and needed connections to both the retail area and downtown Ponderay caused SHIFT to conclude that the routing in Ponderay should remain the same. Kootenai routing is recommended to remain largely the same as well.

Other opportunities for Green Route improvements include:

- 1) Reestablishing a bus stop at Kootenai City Hall
- 2) Make small adjustments to route timing to give drivers a longer break either in downtown or at the SPOT office

Due to timing constraints, Ponder Point isn't a recommendation for Green Route service, but SHIFT is recommending that this be included in a new demand response service for certain areas of Sandpoint (see separate section on "New Services").

### Paratransit in Sandpoint Area

SHIFT found that the paratransit service that operates within a  $\frac{3}{4}$  mile of the fixed route service area for those who qualify under the Americans with Disabilities Act is well used, is compliant with regulations, and is providing important service. Apart from more marketing to increase awareness of this service, there are no improvement recommendations for the paratransit service; however, there is a suggestion for a new demand response service that would utilize the existing paratransit service as its basis.

### Demand Response in Bonner's Ferry Area

Started in April of 2015, this service is one of the newest for SPOT. Ridership has grown from 92 in the first full month to over 200 per month recently. The service is open to the public and requires passengers to request trips in advance. Current service operates three days a week from 9am until 3pm and includes two days in and around Bonner's Ferry, and one day from Bonner's Ferry to Bonner County.

Given the population size of the area, SHIFT recommends that SPOT continue to improve demand response service for the next few years and not implement fixed route service. Demand response is much more flexible and appropriate for this service area. Demand response should be expanded from three days a week to four days a week with slightly longer hours and potential for larger service area to points:

#### Bonner's Ferry demand response goals (implemented over three years):

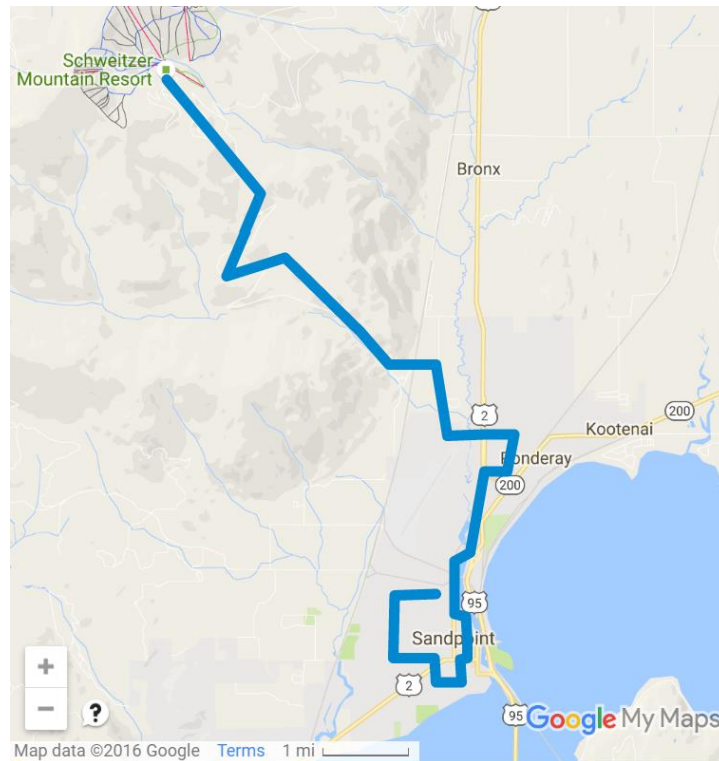
- Demand response service 4 days a week
- Monday through Thursday from 9a until 4p
- Expanded service area

Increasing service will take increased funding from partners in Boundary County and Bonner's Ferry. SPOT needs to continue to communicate about the resources required to grow this service, so that funding partners can plan ahead. It should be noted that the growth of this service is a separate goal from the new regional connection between Bonner's Ferry and Ponderay and Sandpoint, as detailed in the New Service section.

## NEW SPOT SERVICES: HOW TO GROW

### Schweitzer Connection

The extension of Blue Route to Schweitzer Mountain Resort in the winter is a new service that has been discussed by SPOT and Schweitzer in detail for more than a year. This new service idea seems to be viable – the community appears to support this new service, Schweitzer is willing to subsidize the operating and capital of this service, SPOT is willing to operate the service, and ridership should increase significantly. The proposed route, previously discussed by SPOT and Schweitzer, is an extension of Blue Route:



Schweitzer service dovetails into the existing Blue Route timing, but requires additional buses to operate. This timetable shows how buses would be timed for both 60-minute frequency, which requires 2 buses to operate, and 30-minute frequency, which requires 4 buses. (Frequency is calculated by using the time it takes 1 bus to make a full lap and dividing by the number of buses.) Bus times shown are suggested to create times that are easy for passengers to remember going to and from Schweitzer and match relatively close to existing Blue Route timing. Only show major time points, as shown in the table below (route would serve all existing intermediate stops).



<b>BLUE ROUTE TIMING WITH SCHWEITZER</b>	<b>60-minute frequency 2 buses</b>	<b>30-minute frequency 4 buses</b>
<b>TOWARDS SANDPOINT</b> (bus times after the hour)		
Schweitzer	:30	:30, :00
Red Barn	:00	:00, :30
Walmart	:10	:10, :40
Sandpoint downtown	:20	:20, :50
Spruce @ Boyer	:30	:30, :00
<b>TOWARDS SCHWEITZER</b> (bus times after the hour)		
Spruce @ Boyer	:30	:30, :00
Sandpoint downtown	:40	:40, :10
Walmart	:50	:50, :20
Red Barn	:00	:00, :30
Schweitzer	:30	:30, :00

In both scenarios, northbound and southbound buses are crossing paths at the Red Barn. This is a big advantage – if the road were closed and a bus was unable to make it down the hill in time, the other bus would simply turn around at the Red Barn and start running the schedule of the stuck bus.

### Demand Response Addition for Sandpoint Area

With a dedicated bus already operating complimentary paratransit service for ADA passengers in the Dover, Kootenai, Ponderay, and Sandpoint area, SHIFT believes that SPOT should consider using this service to also offer demand response service to specific areas and destinations not currently served. SPOT could offer a demand response service open to the public to connect to the following areas:

#### West Sandpoint, including service to SWAC

- Given recommendation for rerouting the Green Route and eliminating the SWAC stop, this would still give connectivity to this area

#### North Sandpoint

- Foodbank and airport area – demand response could work well to connect to these areas, especially since railroad tracks and deviation time make this area difficult to serve for existing fixed routes



### Ponder Point

- As mentioned, Green Route is very time constrained and cannot afford the time to go to Ponder Point. Demand service could fill this gap and provide service for this area

### Sagle

- The bridge is a challenge for this connection, but demand response with 1-2 standing trips (prescheduled trips that only operate if someone requests in advance) per day could be a place to start for serving Sagle

### Vanpool

With the first route just getting started for Quest Aircraft employees, SPOT vanpool is a brand new expansion of service, and SPOT's first foray into regional commuter transportation. SHIFT believes that vanpool will grow very quickly for SPOT over the coming years. As employers understand the benefits that vanpool offers in terms of employee retention and attraction, vanpool ridership will follow.

SHIFT believes that SPOT should grow vanpool carefully, as resources allow. With the current cost structure of vanpool, some administration costs are built in and SPOT must put that funding first into increasing the hours of an office assistant, and ultimately funding a vanpool coordinator position that could also be responsible for demand response coordination.

**Vanpool should be a core part of SPOT's growth over the coming three years with the goal of adding 1-2 vanpool routes per year**

### Regional Connections

As SPOT is about to expand its joint powers agreement regionally, SHIFT recommends that SPOT start planning for regional scheduled service. Two areas are recommended:

#### Connection between Bonner's Ferry and Ponderay/Sandpoint

**Plan:** transition current demand response run to scheduled fixed route one day a week and add Saturday service for casino goers and general public – both of these could start in 2017 and be expanded as funding and ridership grow.

**Funding:** existing demand response connection already funded; casino could fund weekend service

### Connection between Sandpoint area and Coeur D'Alene (CDA)





















**Plan:** start conversation with regional partners in the CDA area and start planning route and funding. Apply for 5311(f) funding in 2017 and start service in 2018.

**Funding:** 5311(f) intercity funding from the Federal Transit Administration with local match required. Kootenai County and Bonner County partners will have to participate.

SHIFT believes SPOT's role in regional transportation is going to grow in terms of importance and influence. By planning now, SPOT will be more successful in connecting a broader region and delivering economic benefits to all partners.

## SUMMARY OF IMPROVEMENTS

In considering potential improvements to existing services or additional new services, SPOT should be aware of the pros, cons, relative costs, and relative ridership gains.

Improvement or service addition	Analysis-Recommendation	Expense	Estimated Ridership Gain
Later night service for Blue	One of the top requests from riders, but this ridership potential may be limited. Recommended only if resources allow.		
30-minute frequency for Blue	Getting Blue Route to every half-hour will significantly improve ridership, but it is expensive. If resources allow, this is recommended (implement slowly)		
City Beach summer connection for Blue	This is an easy, low-cost change to Blue Route that should yield strong ridership gains and is recommended.		
Reconfigure Blue to operate along Larch	These options could produce more ridership. Not enough data to make a recommendation.		
Reconfigure Green to serve Dover every trip	Having a consistent route is important. This is low cost and is recommended, but ridership may take time to build.		
Demand response for specific areas around Sandpoint	General public demand response could work well for areas that aren't practical for fixed route service but are in need of service. Recommended if resources allow.		
Schweitzer service as Blue extension	This service seems to have the most energy and interest. It is expensive but Schweitzer is willing funding partner. Ridership numbers will be high, based on Schweitzer data. Recommended.		
Regional fixed route w/ limited service from Sandpoint to Bonner's Ferry	Currently the demand response service comes into Ponderay/Sandpoint once a week from Bonner's Ferry. This service is recommended to be transitioned to a fixed route. Saturday service is only recommended if the casino funds it.		
Regional intercity route to CDA	This is longer term project that is recommended for planning only at this point. If funding develops and partners are in place, service could be started in three years.		
Vanpool	Implementing vanpool is fairly low-cost with riders paying costs of the van. Given employer needs and housing, vanpool growth of 1-2 vans per year is recommended for SPOT.		

## THREE-YEAR SERVICE PLAN

There are many opportunities for SPOT – this chart charts illustrates a course for implementation. SPOT will need to determine if all of these opportunities make sense and whether they should happen sooner or later than recommended. As SPOT implements some of these opportunities, this three-year plan will need to be updated to reflect new information resulting from service, land use, and other changes.

EXISTING SERVICE	2017	2018	2019
Blue Route	Connect to city beach, consider route configuration	Increase night service.	Increase to 30-minute for winter and potentially summer service.
Green Route	Realign route to serve Dover every run, add new stops along existing route	Make time adjustment to Green to account for more Blue service	Evaluate long-term potential in 2020 and beyond of increasing to 30-min. freq.
Paratransit in Bonner County	Maintain as is	Maintain as is	Maintain as is
Demand response Boundary County	Maintain as is	Expand hours of service and look at larger service area	Add 4th day of service and keep Boundary bus in Bonner's Ferry for all 4 days
NEW SERVICE	2017	2018	2019
Schweitzer service	Plan ahead for winter 2017-2018 start. Finalize service details.	Start Schweitzer service with 60- minute service	Expand Schweitzer service to 30-min., evaluate peak load needs in partnership w/Schweitzer
Demand response in Bonner County	Add limited service areas and days to existing paratransit bus	Expand to other service areas	Add another bus for 2 hours per weekday
New regional service to Bonner's Ferry	Start with 1 day per week scheduled service with 1 round-trip	Expand to 2 days per week	Expand to 3 days per week with multiple roundtrips
New intercity service	Begin regional discussions and apply for funding	Start service with 1 day per week with 1 roundtrip	Expand service to 2 days per week
Vanpool	3 vanpool routes by end of 2017	5 vanpool routes by end of 2018	7 vanpool routes by end of 2019
RESOURCES REQUIRED	2017	2018	2019
Estimated incremental operating costs	\$50,000 - \$75,000	\$140,000 - \$180,000	\$220,000-\$270,000
Increased administrative staff	Add full-time office assistant	Add part-time vanpool and demand response; add driver trainer position	Make vanpool and demand response coord. full-time; transition management from Ops Manager to Exec Director
RESOURCES AVAILABLE	2017	2018	2019
	Schweitzer operating funding, vanpool fares, funding from casino	Schweitzer, vanpool, casino, 5311(f) for intercity, additional local JPA contributions	Schweitzer, vanpool, casino, 5311(f), additional local JPA contributions, additional 5311 operating funding

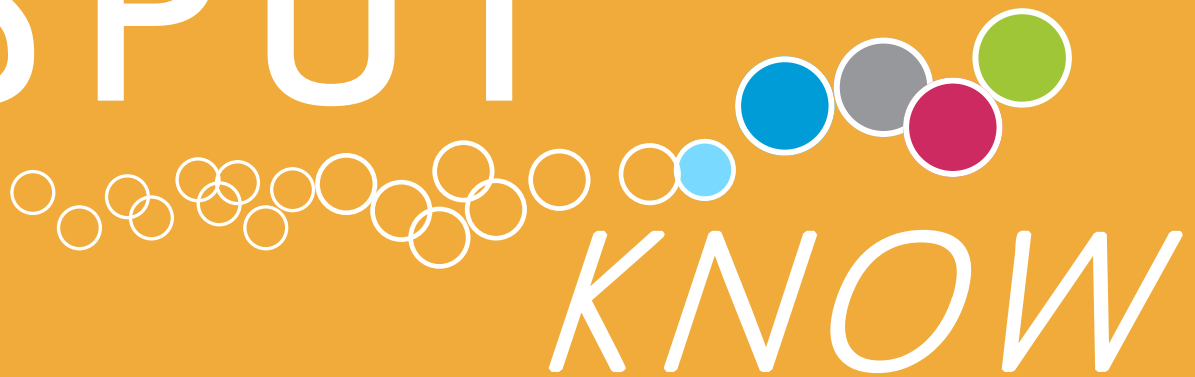
## CONCLUSION

SPOT has tremendous opportunity over the next three years to strengthen and improve existing services. Improving existing services should be SPOT's top priority. New services should be developed as resources allow and must be implemented carefully with a long-term, incremental approach.

See

SPOT

*KNOW*

A decorative graphic consisting of a series of circles. A horizontal line of small white circles leads into a cluster of larger, solid-colored circles in blue, grey, magenta, and green, arranged in a slightly upward-curving path.

Performance Dashboard





# See SPOT Know

## OVERVIEW

A performance dashboard is a monitoring and feedback tool for SPOT to use to evaluate its impact and performance over time. A performance dashboard tracks specific performance indicators and represents them in an easy to read and understand format, typically with graphical data, comparisons against benchmark goals, and historical trends.

Three main performance areas of focus for this dashboard are **ridership, financial, and safety**. In these three areas, the dashboard gives 1-2 specific metrics for each that quantify SPOT's performance (e.g., riders per hour). For each area an appropriate goal is suggested as the benchmark.

The goal of this tool is to give SPOT insight into its performance on an ongoing basis. A performance dashboard is primarily used by staff and the board to understand the organization better, but it can be used to present information to specific stakeholders or the community at large. By creating a feedback loop of information, SPOT can determine if specific projects or initiatives are working and how they impact performance.

It should be noted that a performance dashboard does have limitations; it cannot present the entire organizational performance. A dashboard can't tell you, for example, that there was a big economic slowdown that impacted ridership, or that costs spiked one month due to a large unscheduled maintenance issue. There are so many variables in running a public transportation system that must be recognized. It may make sense for staff to provide descriptive context to the dashboard when it is presented. And there may be good reason to accept lower than desired benchmark performance – a new route may take longer to get established, SPOT's cost structure, especially overhead, may have to increase to support more service growth, and a few back-to-back incidents or accidents may skew safety data temporarily. The key is to look at trends and patterns and use the dashboard data as potential indicators to help inform decisions or make adjustments appropriately.

## AGENCY SNAPSHOT

In order to determine where SPOT should go, it's important to understand where SPOT is today. **The organization is in a great place with solid ridership, low cost structure, satisfied customers, and safe operations.**



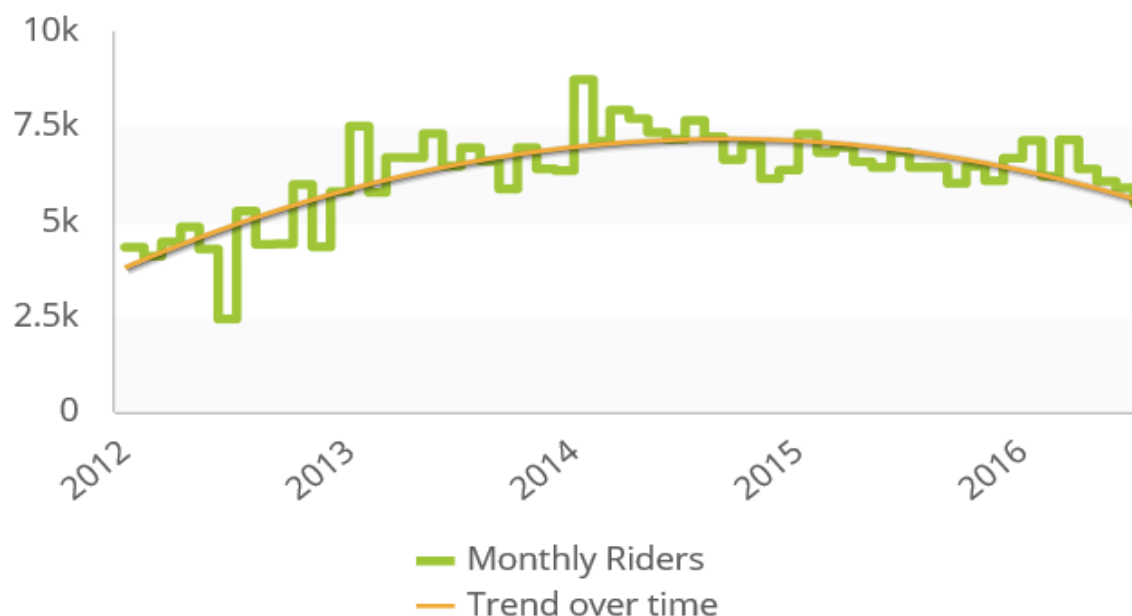
## A Typical Month for SPOT

Riders boarding	6,408
Hours of service provided	1,074
Miles driven	14,526
Monthly expenses to run SPOT	\$38,790
Accidents and incidents	Less than 1 per year

*12-month average for July 2015-July 2016*

Formed in 2011, SPOT is a relatively new organization that grew its ridership quickly from 2012-2014. However, growth has stalled in recent years. **Ridership numbers are relatively stable, but – in the past two years – the trend has been downward.** Based on interviews that SHIFT conducted with SPOT board members, the goal is to reverse this trend and see SPOT ridership grow.

## Trends in Ridership for SPOT



## PERFORMANCE METRICS

Developing performance metrics involves taking available data streams and combining them in ways that make sense for the organization. For SPOT, the data streams that are readily available and currently tracked by staff include:

### Use of service

- Riders per route, riders per month
- Riders per stop

### Quantity of service

- Hours per route, hours per month
- Mileage per route, mileage per month

### Costs of service

- Expenses per month

### Safety of service

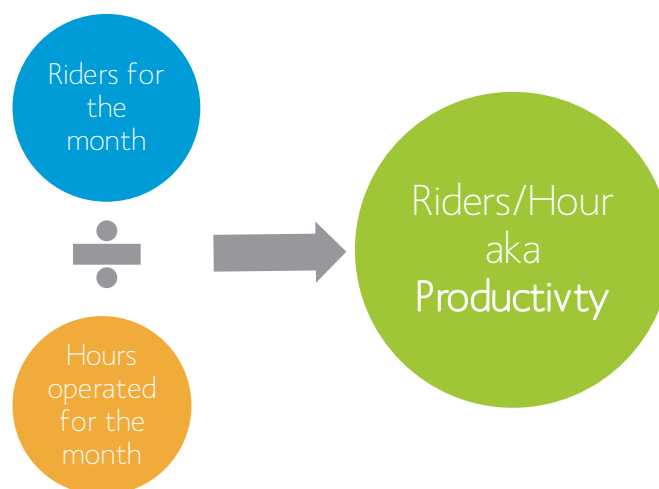
- Number of incidents or accidents

### Historical trends

- The data over a particular time frame

CURRENT  
DATA  
STREAMS

Developing a performance metric takes combines these data streams to develop a ratio that can quantify performance. For example, to understand how productive a particular service is, you would take ridership and divide by hours of service to get ridership per hour:



With so much data and so many different ways to calculate and present the data in an understandable format, it is recommended that the SPOT dashboard track these metrics for each area of performance:

### SPOT Recommended Performance Metrics

METRIC		6 month average for SPOT actual performance	Suggested SPOT benchmark goal for each metric
Ridership	Riders per hour for fixed route service	7.9	9
	Riders per hour for paratransit and demand response	2.1	2.5
Financial	Cost per hour of revenue service	\$38	< \$45
	Cost per passenger (total with both paratransit and fixed route)	\$6.35	< \$7
Safety	Accident and incidents per year	1	< 2

These specific metrics were chosen because they give a picture of data driven performance of the organization in three key areas that are easy to calculate, readily available from existing data, and typical in the public transportation industry.

The suggested benchmarks were chosen as achievable goals for SPOT, which are applicable for a small rural transit agency operating a similar amount of service. Every transit agency is different when it comes to performance, and there is no industry standard benchmark for these metrics. Agency performance varies widely based on the type of service, the amount of service, the density of the areas served, incentives to take public transportation, disincentives to driving, and many other unique factors.

Given that SPOT is serving small towns and rural areas, SPOT is performing well overall. In comparison to neighboring agencies, most of which are serving much larger areas with a much higher level of service, SPOT has a very low cost structure and has solid ridership per hour.

### Comparables: Ridership and Financial

Community	Ridership Total	Hours of service	Ridership per Hour Average	Ridership per Hour By Service	Operating budget	Cost per Hour	Cost per Pass
Spokane, WA (STA)	11,811,344	580,892	20.3	28.9 = Bus 2.96 = Demand	\$58,695,223	\$101	\$4.97
Boise, ID (ValleyRide)	1,466,139	121,563	12.1	15.3 = Bus 2.0 = Demand	\$9,624,981	\$79	\$6.52
Missoula, MT (Mtn Line)	922,768	54,624	16.9	20.1 = Bus 2.2 = Demand	\$5,031,414	\$85	\$5.02
Billings, MT (MET)	671,907	51,461	13.1	16.1 = Bus 4.0 = Demand	\$5,150,741	\$100	\$7.67
SPOT (2015 data)	79,170	12,931	6.2	7.5 = Bus 2.1 = Demand	\$438,601	\$34.04	\$5.54
Idaho Falls, ID (TRPTA)	38,660	32,114	1.2	1.7 = Bus 1.0 = Demand	\$1,118,204	\$34.82	\$28.92

*\*2014 Data from the Federal Transit Administration National Transit Database.*

## THE DASHBOARD

A good dashboard should include these metrics in an attractive presentation and be easy to understand at a glance. The dashboard developed for SPOT combines speedometers that show where SPOT is operating in the range for a particular month alongside graphs that show the trend over a longer period of time. The dashboard is shown in Appendix A for a recent month. This dashboard should be updated by staff on a monthly or quarterly basis and be shared with board members as part of the regular board meetings.

## OTHER METRICS TO CONSIDER

The SPOT dashboard is a quantitative tool to give organizational feedback to staff and the board on an ongoing basis. SPOT should consider tracking other metrics on a less frequent basis. Other potential performance indicators could include:

### Customer satisfaction survey

- The recent survey conducted by SHIFT sampling 45 riders showed that, on average, passengers were very happy with SPOT service, giving it an average of 4.7 out of 5 stars on overall experience

### Driver satisfaction survey

- Happy drivers = happy customers = good community feelings about SPOT

### Ridership per stop

- Looking at how many people are boarding at each stop will give SPOT an idea of which stops may not be effective

### Property values near popular bus stops

- Are they increasing faster than other properties?

These indicators could be looked at annually or as the resources allow. This could be part of a more in-depth annual performance report.



See **SPOT** Know

## APPENDIX A



## RIDERSHIP PERFORMANCE

### Riders per Hour (Fixed Route)

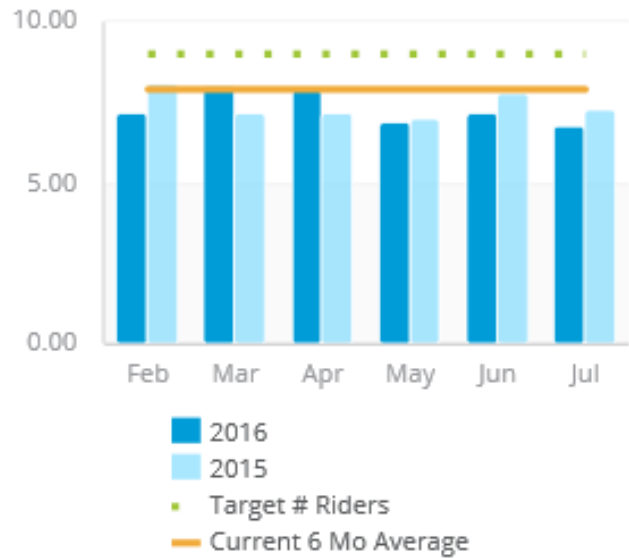
July 2016



Goal of 9 riders/hr

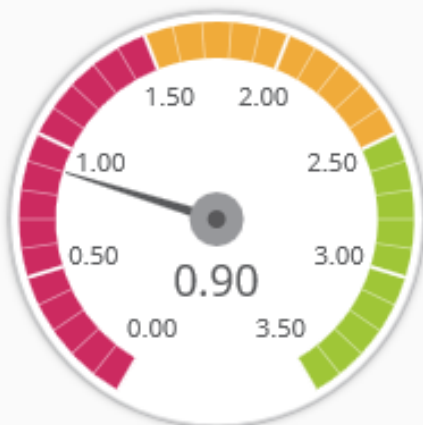
### Riders per Hour (Fixed Route)

Six Months vs. One Year Ago and Target



### Riders per Hour (Para and Demand)

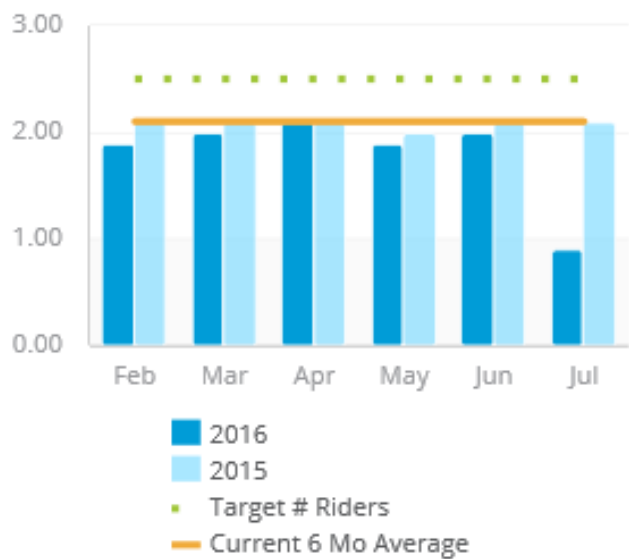
July 2016



Goal of 2.5 riders/hr

### Riders per Hour (Para/Demand)

Six Months vs. One Year Ago and Target



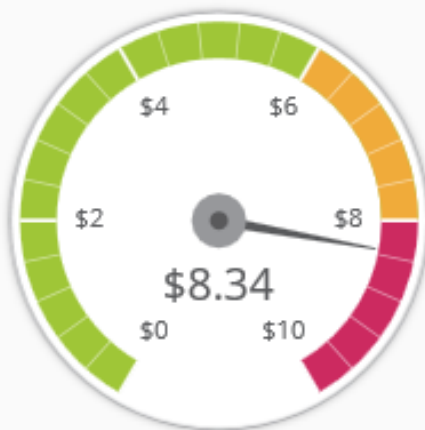




## FINANCIAL PERFORMANCE

### Cost per Passenger

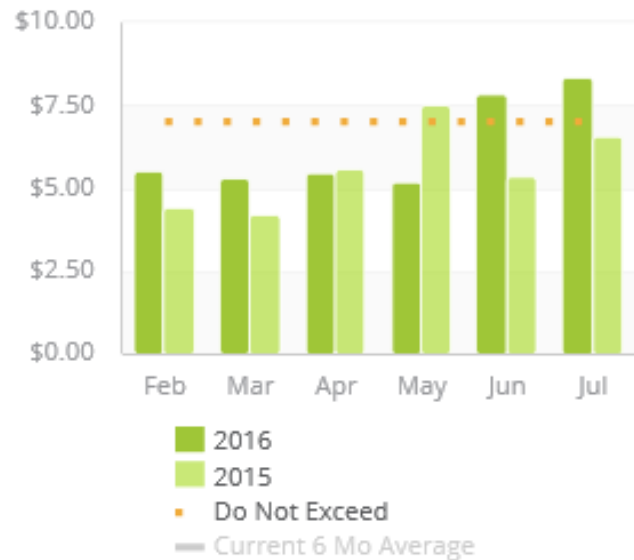
July 2016



**!** Goal of less than \$8/passenger

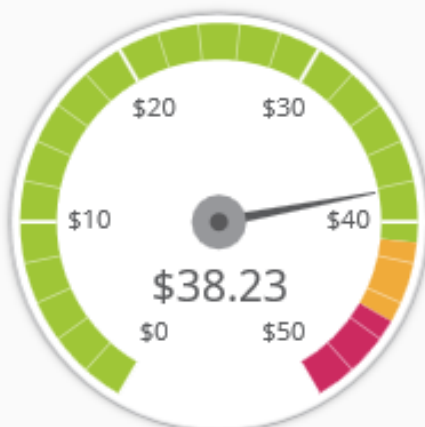
### Cost per Passenger

Six Months vs. One Year Ago and Target



### Cost per Hour of Revenue Service

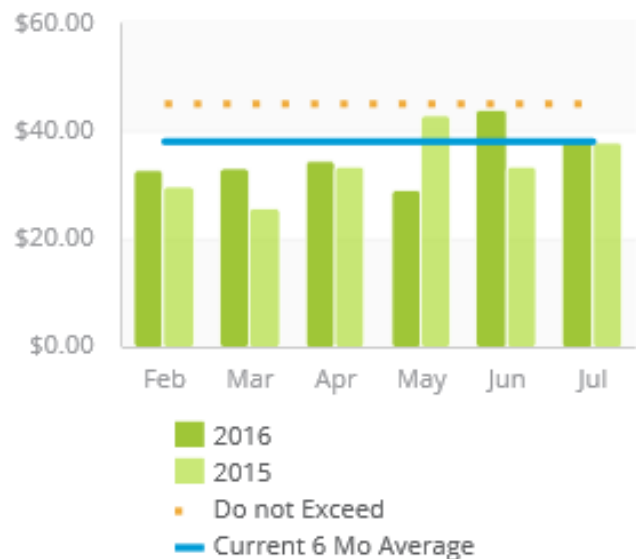
July 2016



**!** Goal of less than \$45/Hour

### Cost per Hour of Revenue Service

Six Months vs. One Year Ago and Target





## SAFETY PERFORMANCE

Accidents and Incidents per Fiscal Year



Goal of less than 2/Year

See

SPOT

  
*BUILD*

Capital Improvement Plan





# See SPOT Build

## OVERVIEW

Capital planning is critical to the success of any public transportation provider. The SPOT Capital Improvement Plan (CIP) will be a valuable planning tool used to assess, predict, and develop capital needs of the organization over a specific time frame. This CIP uses a five-year time horizon as its basis, planning out capital projects for fiscal years 2017-2021 (FY2017 starts 10/1/16 and ends 9/30/17).

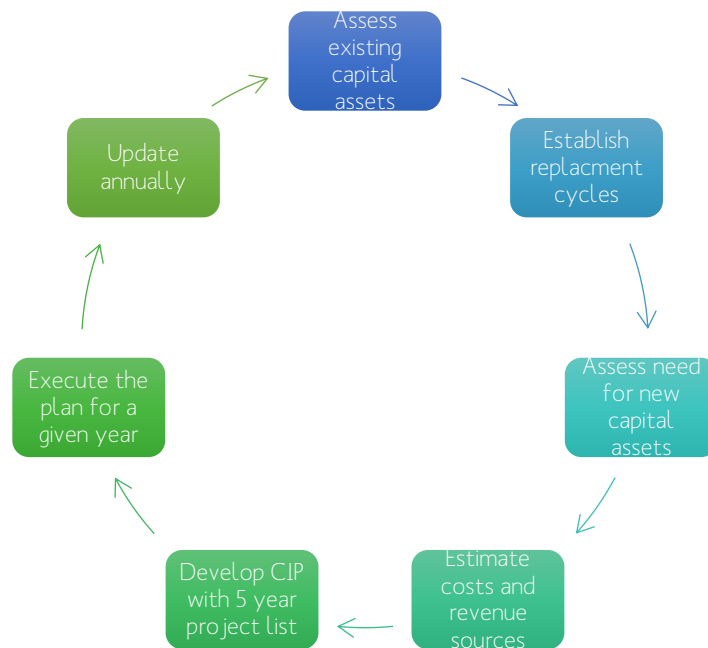
SPOT is at a point in its evolution where there are numerous capital needs to maintain and grow the vehicle fleet, improve bus stops, and look to a future SPOT-owned facility. Having a CIP in place ensures that the SPOT board and staff will be proactive in planning for capital needs and investing in SPOT's continued success.

A CIP ensures that assets are always in a state of good repair, providing safe and reliable service to the community.

## CAPITAL IMPROVEMENT PLANNING PROCESS

Each year SPOT staff, board, and community stakeholders should work together to update this CIP, moving the plan forward one year so that the plan always looks forward to the next five years of capital projects. Capital needs and funding opportunities are always in flux. This plan must be adjusted to match capital needs with capital resources, according to the process below.

## SPOT Capital Project Planning Process



In order to provide predictions about future capital needs, a CIP is formulaic. It assumes that capital assets - especially vehicles – depreciate incrementally and need to be replaced at a certain mileage or after a certain number of years, in accordance with industry standards and guidance. However, actual experience will be different and will have to be accounted for in the annual update.

It is common for a bus expected to go 250,000 miles to need replacement much sooner than expected (the “lemon” effect) and for some buses to go much longer than expected. Staff and board must assess which vehicles, and other assets, are running ahead of or behind the originally planned life cycle and plan accordingly.

By keeping the CIP current and adapting to opportunities and challenges, SPOT can be nimble and responsive in maintaining, replacing, and growing its assets.

## TYPES OF CAPITAL PROJECTS

SPOT’s CIP projects fall into five basic categories:

- bus replacements
- bus expansion (for new service)
- on-street assets like bus shelters
- facilities
- technology

Vanpool vehicles are not included in this CIP, because the leasing model SPOT is using for vanpool should work well going forward. By leasing vehicles and including this in the cost to riders, SPOT doesn't need to include vanpool vans as owned assets in the CIP.

## Bus Replacements

Currently SPOT operates light duty and medium duty buses that have a minimum useful life of 5 years/150,000 miles or 7 years/200,000 miles, as established by the Federal Transit Administration (FTA).

These minimum useful life estimates help a transit agency understand what to expect for minimum life cycle performance of the bus. Many larger transit agencies view these minimums as the point at which a bus should be replaced, but smaller transit agencies like SPOT have to plan to use buses longer than these minimum life estimates.



## Minimum Service-Life Categories for Buses and Vans

Category	Typical Characteristics				Minimum Life	
	Length	Approx. GVW	Seats	Average Cost	Whichever comes First	
					Years	Miles
Heavy-Duty Large Bus	35-48 ft; 60 ft artic.	33,000 to 40,000	27-40	\$325,000 to >\$600,000	12	500,000
Heavy-Duty Small Bus	30 ft	26,000 to 33,000	26-35	\$200,000 to \$325,000	10	350,000
Medium-Duty and Purpose-Built Bus	30 ft	16,000 to 26,000	22-30	\$75,000 to \$175,000	7	200,000
Light-Duty Mid-Sized Bus	25-35 ft	10,000 to 16,000	16-25	\$50,000 to \$65,000	5	150,000
Light-Duty Small Bus, Cutaways, and Modified Van	16-28 ft	6,000 to 14,000	10-22	\$30,000 to \$40,000	4	100,000

*Source: FTA Useful Life of Transit Buses and Vans Final Report, April 2007*

To date, the light and medium-duty buses have served SPOT well, and this vehicle type should continue to do so in the future. The light and medium-duty buses do have limitations – SPOT should be aware of the limitations and how to plan around them.

The current fixed route buses in the SPOT fleet are built on the Ford E450 chassis and can accommodate a maximum of 16-18 passengers without the wheelchair positions occupied. Base price for these buses is approximately \$75,000, for current model year.

The current demand response, paratransit buses are also built on the Ford E450 chassis and can accommodate a maximum of 8 passengers without the wheelchair positions occupied. Base price for these demand response vehicles is approximately \$60,000. All buses have a wheelchair lift and standard safety equipment.

PROS of current buses	CONS of current buses
Cost to purchase and maintain is lower than most other bus options	Expected serviceable life is 250,000 miles or less (engines and transmissions may need to be replaced at 150,000-200,000 miles)
Ford chassis means local dealer can provide maintenance and warranty support	Passenger capacity of 16-18 passengers means system growth could be limited by bus capacity
Gas engine has less issues than modern diesel engine in stop and go operations	Buses have wheelchairs lifts, which require more time and training to operate safely, as opposed to a wheelchair ramp
Sized right for the existing routes, services, and ridership	Buses don't have proper options to serve Schweitzer
Flexible and interchangeable among existing routes and services	Buses have steps which are challenging for some riders



As SPOT continues to evaluate bus needs for fixed route and demand response service, it should consider optional add-ons to the current vehicle chassis that improve carrying capacity and passenger accessibility:

Improvements to current fixed route bus configuration package with stop requests, destination signage, rear bike racks, and rear cameras

Adds \$10,000  
to cost

Increasing carrying capacity of fixed route bus by adding 5-8 passenger capacity

Adds \$30,000  
to cost

Eliminate entry steps and wheelchair lift and replace with a low-floor option (no entry steps and flip-out wheelchair ramp instead of wheelchair lift)

Adds \$40,000  
to cost



*Low floor bus with ramp  
(Credit: Champion Bus)*

If SPOT wanted to purchase heavier duty buses with longer serviceable life, the cost goes up dramatically – as a point of reference, a 28-32 passenger heavy-duty (12 year rated) diesel bus with a low floor (wheelchair ramp) is \$350,000-\$400,000. A 10 year-rated bus with a capacity of 25-30 passengers is \$200,000-\$300,000.

### Bus Expansion for New Service

In evaluating service expansion, SPOT should carefully consider how to grow the fleet. For a small transit system, it's very helpful to have one vehicle platform that is easily interchangeable among different routes and service. Having vehicles that only work on one route is too limiting for a small transit provider like SPOT. By planning around the current Ford vehicle chassis with small adjustments to seating capacity, add-on packages, and potential low-floor option, SPOT will be able to keep a cost-effective fleet that can be used year-round on all routes and services.

With fleet consistency in mind, the biggest challenge in the next 1-2 years will be what type of bus to get for a potential Schweitzer service. If SPOT moves forward with this service, it is recommended that SPOT consider purchasing a bus that has additional passenger capacity but built on a similar Ford chassis as the current SPOT buses. Using the same basic

bus chassis will allow for interchangeability with the current fleet, current routes, and current needs of the service. Especially if the existing Blue Route is lengthened to connect to Schweitzer, SPOT must have a bus that can maneuver easily in town and not be oversized to the year-round usage of the route. This approach will require that Schweitzer retain some of its current buses in order to deal with peak skier demands from the Red Barn parking lot up to the resort.

The buses for Schweitzer are recommended to be built on a Ford E-450 or F-550, or equivalent, chassis and have capacity for 22-26 passengers. They will need to be wheelchair accessible. Additional add-on packages for this bus must include:

- Heavier duty transmission and braking package with retarder system (used to help slow the bus)
- Auto-chains for winter conditions
- Exterior ski racks
- Higher gross vehicle weight to accommodate the additional passenger load

**Estimated per bus cost with these options: \$130,000-\$140,000**



*Auto chain system and driveline retarder system (Credit: left: ONSPOT; right: Telma)*

In addition to the fleet expansion for the Schweitzer service, SPOT will also need to plan for expansion of the bus fleet for potential new services like a scheduled route between the Sandpoint area and Bonner's Ferry to serve commuters or casino goers and a regional intercity connection from the Sandpoint area to Coeur D'Alene. Both of these connections require an additional bus in the fleet and are included in the 5 year CIP. These buses are recommended to be built around a similar specification as the SPOT fixed route buses for Blue and Green Routes.

## On-Street Infrastructure (Stops, Shelters, Park-and-Ride)



*SPOT bus shelter concept  
(Credit: Steve Holt, Eureka Institute)*

SPOT has developed a well-functioning fixed route bus system with over 40 established bus stops served by the Green and Blue Routes within the communities of Dover, Sandpoint, Ponderay, and Kootenai. Most of these stops have limited passenger amenities for safe and comfortable accessibility. SPOT is aware of this need and has already started the capital funding process by applying for and receiving a grant of \$125,000 from the Federal Transit Authority (FTA) for improving bus stops that will become active in the fall of 2016. With matching funds included, this project will result in over \$150,000 in bus stop improvements.

This project will likely not start until 2017 and includes:

- New bus shelters at 10 different higher volume bus stops
  - 4 in Sandpoint
  - 4 in Ponderay
  - 1 in Dover
  - 1 in Kootenai
- Bus stop benches at an additional 9 stops throughout the system.
- Better bus stop signage that shows departure times.

SPOT has built community partnerships for this project including a creative partnership with the Eureka Institute. The Eureka Institute has developed a modern, attractive bus shelter design that fits the community aesthetic. This design will be built by youth, as part of Eureka's Construction Basics Initiative. The partnership leverages the FTA funding that SPOT has secured with the community support for this youth construction program. SPOT has correctly recognized that this effort is only the beginning and needs to be continued in future years, beyond this federal grant. As a result, SPOT and Eureka have started the conversation on ways to keep this project self-funded by looking at bus shelter sponsorship opportunities. This could result in sustained funding for building more shelters and adding more benches.

## Potential Park and Ride Lot in Dover

Another project included in this CIP is the development of a park-and-ride lot in Dover. This lot would become the terminal point for the Green Route in Dover. The City of Dover is a willing partner for acquiring and entitling the land for the park-and-ride, and SPOT would seek grant funding for improvements including paving the lot and building a bus shelter. The project in the [CIP Appendix A](#) includes the cost of these improvements, but excludes the cost of acquiring the land.

SPOT must also work in partnership with the cities in which it operates to help support development of continuously improving bicycle and pedestrian infrastructure. SPOT most likely won't manage the development of better bike lanes, pathways, crosswalks and sidewalks, but SPOT should support and encourage these efforts within the communities that it operates. Every bus trip begins and ends with a walk or bike trip; safe and complete pedestrian and bicycle infrastructure compliments and promotes transit services. Across the nation, ridership numbers are higher in communities that have provided this type of infrastructure.



## Facilities

SPOT currently rents a facility located in Sandpoint. This is its only facility. It is used for office space and bus storage with outdoor parking. This space is meeting the current needs of the organization, but SPOT should be planning for long-term growth. As SPOT expands operations and levels of service, it will need more office space, better bus storage (preferably indoors), and space to perform bus maintenance in-house. Investing in a facility will eliminate rent payments, improve longevity of vehicle fleet, and provide more capacity to grow services.

The CIP includes a facility project that begins with one year of design and planning, followed by a 1-2 year construction process. SPOT may be able to acquire land through one of its partner cities or by working with Schweitzer. The value of this land could be used as match toward the project. Alternatively, SPOT may find that it is able to acquire an existing building that meets the needs of a maintenance and administration facility. Acquiring an existing building would be a quicker process and less costly, avoiding the challenges of having to construct a new facility.

It may seem premature to start planning for a facility, but these projects take years to plan and fund. It is likely that this project will extend beyond the term of this CIP, but SPOT will have a head start if planning and funding development starts now.

## Technology

SPOT currently operates a real-time customer information phone app called DoubleMap. This system utilizes tablets onboard the buses to track bus location and send that information to an app that customers can use to see the bus location. It is unclear how much this system is being used and how much it will cost to maintain the system going forward. The CIP includes funding to keep this program going into 2017, but SPOT should evaluate whether this tool is sustainable. It could be very useful for SPOT customers, but it requires staff time to keep it operating properly.

Other technology projects include:

- Ridership tracking system – this would allow drivers to put ridership directly into a tablet instead of doing this by hand. The data would be readily available to management staff and would eliminate time spent entering this data by hand into a spreadsheet
- Scheduling software – as demand response and paratransit ridership increases, SPOT could benefit from software for entering and scheduling these rides.
- Asset management/maintenance software – as the fleet grows, SPOT will need more sophistication in how it manages and tracks maintenance of its buses.

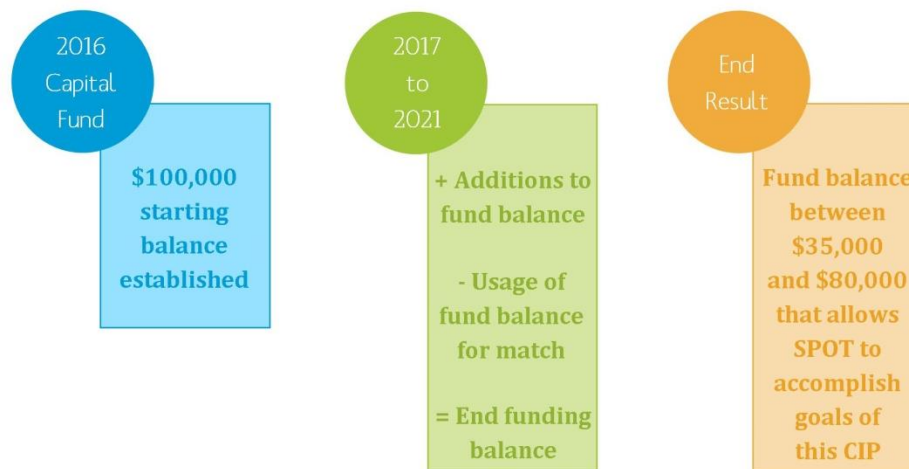


## BASE FUNDING FOR THIS PLAN

Capital planning requires steady capital funding. Currently, SPOT doesn't have a separate budget and account for capital funding. It is recommended that SPOT use its existing "excess funding" that is unallocated in order to establish a capital fund balance. Based on discussions with SPOT staff regarding available fund balances, SHIFT recommends that this starting fund balance be established at \$100,000 for FY2017, beginning October 1<sup>st</sup>, 2016.



## Capital Fund Establishment



For each year going forward, it is recommended that SPOT allocate 10% of local contributions to the newly created capital fund for the purpose of creating a balance of matching funds. Currently SPOT receives approximately \$166,000 of local funding each year. Starting in 2017, SPOT should allocate \$16,000 of this local funding to the capital fund. This allocation creates stability to the capital fund with a growing fund balance that can be leveraged to get new federal funding. Almost all capital projects that SPOT would consider qualify for 80% federal funding from the FTA. Having 20% local funding available and “in the bank” means that SPOT can move forward with capital projects quickly and when needed.

This could be established by creating a separate bank account and establishing a separate capital budget each year, based up the priorities in this plan. This capital budget should be adopted in conjunction with the adoption of the annual operating budget. SPOT’s total adopted budget should include operating and capital funds with estimated revenue and estimated expenses. This new process may require SPOT to ask for more funding from local funding partners to build these capital matching funds in excess of \$166,000 a year.

By establishing this standard of always allocating 10% of every local dollar received, SPOT will be able to show funding partners that there won’t be any surprises when it comes to capital needs. Having to make one-time funding request, outside of the annual budget request, of cities and counties for capital projects creates challenges for the city and county budgeting processes. If funding partners know that SPOT is proactively planning for both operations and capital, then there will be a higher degree of trust in SPOT’s ability to manage its finances.

## FUNDING SOURCES

CIP projects are expensive and require a variety of funding sources to complete. Fortunately, SPOT has been very adept, finding creative ways to make projects happen. SPOT has been successful in competing for federal capital project grants and is using many of the sources listed below to build more capacity for funding future projects.

### Funding from Municipalities and Counties

As previously described, SPOT needs to establish a capital fund and start allocating a percentage of every local dollar received to building and maintaining a fund balance for the capital account. This fund balance can be used as match to federal funding or to complete a capital project in its entirety. SPOT should build this fund in anticipation of large capital projects. The more funding available from local funding sources, the better SPOT can compete for grants that often require or recommend local participation in project funding.

### 5339 Program of the Federal Transit Administration (FTA)

The FTA states that the Grants for Buses and Bus Facilities program (49 U.S.C. 5339) makes federal resources available to states and direct recipients to replace, rehabilitate and purchase buses and related equipment and to construct bus-related facilities including technological changes or innovations to modify low or no emission vehicles or facilities. Funding is provided through formula allocations and competitive grants. For most 5339 projects, the funding from the FTA provides 80% of the cost with a 20% local match requirement.

This 5339 program will fund most major SPOT capital projects, with the assumption that 80% of the cost of a given project for bus replacement/acquisition or new bus facilities, including bus stop improvements, will be paid out of this program. The 5339 program is managed by the Idaho Transportation Department (ITD). ITD has an application cycle of every two years, but periodically ITD has released one-time funding.

### Other Federal Funding

Opportunities for bus and bus facility projects outside of the 5339 program are limited for rural providers like SPOT, but there are still programs that SPOT should look at when considering larger capital projects, especially a new facility. SPOT may be able to access one-time programs like TIGER, 5311(f), and 5310. The SPOT Strategic Plan from 2015 has a list of potential federal sources in Appendix A. SPOT should continue to look for federal funding opportunities for capital projects.

### Creative Community Funding

As a service uniquely positioned in the community, SPOT has the opportunity to continue to grow funding support from a variety of non-profit and business partnerships in order to fund capital projects:



- Eureka Institute and other community minded organizations interested in construction
- Other non-profits like the food bank, the senior center, North Idaho College
- Sponsorship of assets like benches and bus shelters that can be used to continue programs
- Business partnerships

These funding sources can bolster the capital fund balances, be used as matching funds for federal grants, or they could be used entirely to fund a smaller capital project, like bus stop amenities, benches or customer accessibility projects.

### Schweitzer Mountain Resort

SPOT has already received commitment from Schweitzer Mountain Resort to provide the matching funds up to \$170,000 for 4 additional buses to be used to connect Sandpoint and Ponderay with Schweitzer. These matching funds are critical to expanding SPOT's service to Schweitzer. The CIP summary of projects includes two buses for winter 2017-2018 and two buses for winter 2018-2019, based on Schweitzer matching funds.

### Other Grant Opportunities

In the SPOT strategic plan from 2015, many ideas for funding are provided and should be evaluated as opportunities present themselves. Smaller capital projects for bus stop improvements and passenger amenities can often be funded through smaller grant opportunities, as shown in the SPOT strategic plan.

## ANALYSIS OF CURRENT FLEET

SHIFT analyzed the current bus fleet in order to determine necessary vehicle replacement needs to maintain the service. SPOT currently runs a fleet of gas powered light to mid-duty buses in fixed route and demand response service.

Some stats to note:

- Fixed route buses operate a total of 145,000 miles per year.
- Demand response and paratransit buses operate a total of 30,000 miles per year.
- Fleet mileage total of 175,000 miles per year.

This results in the need to replace one bus every other year or sooner, based on current usage.

### Bus Fleet Today

SPOT ID #	Model	Model Year	# of Passengers	Service Mode	Current Mileage 6/30/16	Typical Useful Life for Bus Type (Miles)	Estimated Replacement Cost
<b>106</b>	FORD E450 cutaway	2005	16	Fixed Route Spare	298,301	200,000	\$75,000
<b>107</b>	FORD E450 cutaway	2007	9	Demand Response	195,270	250,000	\$80,000
<b>110</b>	FORD E450 cutaway	2010	16	Demand Response	158,535	250,000	\$78,000
<b>111</b>	FORD E450 cutaway	2011	16	Fixed Route Spare	270,844	250,000	\$75,000
<b>114</b>	FORD E450 cutaway	2014	16	Fixed Route Blue	119,520	250,000	\$82,000
<b>115</b>	FORD E450 cutaway	2015	16	Fixed Route Green	79,919	250,000	\$84,000
<b>BFB#1</b>	FORD E450 cutaway	2011	8	Demand Response Boundary Co.	36,031	200,000	\$80,000

The next step in understanding the fleet is to use mileage data to calculate when a particular bus will be at the end of its useable life, based on how many miles each bus is predicted to accumulate.

Mileage Analysis with Predicted Replacement Year  
Highlight indicates point of replacement

SPOT ID#	Avg miles per year	Estimated Mileage End 2016	Estimated Mileage End 2017	Estimated Mileage End 2018	Estimated Mileage End 2019	Estimated Mileage End 2020	Estimated Mileage End 2021	Notes
<b>106</b>	10,000	303,301	<b>313,301</b>	10,000	20,000	30,000	40,000	<b>replace now no AC, original engine &amp; transmission</b>
<b>107</b>	12,000	201,270	213,270	225,270	<b>237,270</b>	12,000	24,000	<b>replace sooner due to age in 2019</b>
<b>110</b>	12,000	164,535	<b>176,535</b>	12,000	24,000	36,000	48,000	<b>replace sooner due to age and rough condition</b>
<b>111</b>	10,000	275,844	285,844	<b>295,844</b>	10,000	20,000	30,000	<b>run longer due to new engine in 2016</b>
<b>114</b>	60,000	149,520	209,520	239,520	<b>269,520</b>	60,000	90,000	<b>replace when &gt;250k</b>
<b>115</b>	60,000	109,919	169,919	229,919	259,919	<b>289,919</b>	60,000	<b>replace when &gt;250k</b>
<b>BFB#1</b>	12,000	42,031	54,031	66,031	78,031	90,031	<b>102,031</b>	<b>replace due to age</b>

This analysis is the best guess as to how buses will age and how services will grow. Most likely, the SPOT fleet replacement schedule will need to be adjusted to account for numerous unknown factors. The annual CIP update should include adjustments to fleet replacements opportunities.

## CONCLUSION

A CIP is a valuable tool that will allow SPOT to project local and federal funding requirements for achieving capital goals. Capital planning ensures that SPOT can maintain its capital assets in an ongoing state of good repair. Federal funding requires it, local funding partners will appreciate it, and customers will benefit from it.

The CIP addresses acquisition and construction costs of capital projects, but maintaining assets over their lifetime is just as important to the capital asset process. Maintenance costs are not included in the CIP, as they should be included in SPOT's annual operating budget as an ongoing expense.

Given the 5-year timeframe and the many assumptions that have built into this plan, it is necessary that SPOT view the CIP as a living document that should always be as current as possible.

## APPENDIX A - CIP SUMMARY AND SCHEDULE OF PROJECTS 2017-2021

TYPE of PROJECTS	COST OF REPLACEMENT or ACQUISITION by YEAR				
	2017	2018	2019	2020	2021
<b>Existing fleet-replacement</b>					
Fixed route buses (incl. spares)	\$ 75,000	\$ 78,000	\$ 81,000	\$ 84,000	
Demand/paratransit buses (incl. spares)	\$ 60,000		\$ 64,000		\$ 68,000
<b>Fleet expansion</b>					
Schweitzer buses	\$ 270,000	\$ 270,000			
Regional buses			\$ 78,000	\$ 78,000	
<b>On-street assets</b>					
Park and ride lots			\$ 35,000		
Bus stop signage + bike racks	\$ 20,000				
Bus shelters	\$ 130,000	\$ 18,000	\$ 18,000		
<b>Facilities</b>					
Planning/design			\$ 20,000		
Building/construction of facility				\$ 100,000	\$ 150,000
<b>Technology</b>					
DoubleMap App (or other customer tech)	\$ 5,000				
Scheduling software			\$ 15,000		
System for tracking ridership		\$ 10,000			
Asset management/maintenance				\$ 5,000	
<b>TOTAL CAPITAL SPEND BY YEAR</b>	<b>\$ 560,000</b>	<b>\$ 376,000</b>	<b>\$ 311,000</b>	<b>\$ 267,000</b>	<b>\$ 218,000</b>
LESS Federal Funding (80%)	\$ 448,000	\$ 300,800	\$ 248,800	\$ 213,600	\$ 174,400
<b>BALANCE to fund locally (20%)</b>	<b>\$ 112,000</b>	<b>\$ 75,200</b>	<b>\$ 62,200</b>	<b>\$ 53,400</b>	<b>\$ 43,600</b>
<b>ANALYSIS of CAPITAL FUND</b>					
<b>INCOME Sources</b>					
Capital fund balance (Start with \$100k)	\$ 100,000	\$ 75,000	\$ 77,800	\$ 56,600	\$ 40,200
Capital fund additions-10% of local funds	\$ 16,000	\$ 17,000	\$ 18,000	\$ 19,000	\$ 20,000
Misc local funding (private, grants, etc)	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000
Schweitzer	\$ 54,000	\$ 54,000	\$ -	\$ -	\$ -
Tribe or other local business partners	\$ -	\$ -	\$ 16,000	\$ 16,000	\$ -
Community partners for stop improvements	\$ 15,000	\$ 5,000	\$ 5,000	\$ -	\$ -
<b>TOTAL LOCAL FUNDING AVAILABLE</b>	<b>\$ 187,000</b>	<b>\$ 153,000</b>	<b>\$ 118,800</b>	<b>\$ 93,600</b>	<b>\$ 62,200</b>
LESS BALANCE to fund locally for GIVEN YEAR (annual local expense)	\$ 112,000	\$ 75,200	\$ 62,200	\$ 53,400	\$ 43,600
<b>CARRYOVER CAPITAL FUND BALANCE</b>	<b>\$ 75,000</b>	<b>\$ 77,800</b>	<b>\$ 56,600</b>	<b>\$ 40,200</b>	<b>\$ 18,600</b>

### NOTES

1. As of 10/1/16 start of this plan, only funding secure through federal award is \$125,000 of federal funding for bus stop improvements
2. All other projects are contingent upon future federal awards
3. Capital fund balance starts with \$100k, as described in the CIP, and has 10% of local municipal/county funding added to it each year

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Office and Support Equipment for SPOT Transit Operations



**Selkirks - Pend Oreille Transit Authority**  
31656 HWY 200, Box 8 Ponderay, ID 83852 (mailing address)  
31656 HWY 200, Suite 102 Ponderay, ID 83852 (physical address)  
**208-263-3774**

January 10, 2024

Attn: Sam Carroll, Grants & Contracts Officer  
Public Transportation Office  
Idaho Transportation Department  
PO 7129  
Boise, ID 83707

[PTCares@itd.idaho.gov](mailto:PTCares@itd.idaho.gov)

**Re: One-Time CARES Application for Office and Support Equipment for SPOT Transit Operations**

Dear Mr. Carroll,

Attached is an application for One-Time CARES funds and the required attachments.

Please contact us if you need any additional information.

Respectfully Submitted,

*Donna Griffin*

Donna Griffin  
Executive Director  
Selkirks- Pend Oreille Transit Authority



**YOUR Safety ••• ► YOUR Mobility ••• ► YOUR Economic Opportunity**

## CARES Act One-Time Application

Thank you for your interest in this grant application and advancing transportation for the State of Idaho. Questions regarding content within the application will be accepted up to 10 business days before the close of the application. If you have any questions on the application or the submittal process, please feel free to contact the application contact listed below.

### Application Contact:

Sam Carroll, Grants & Contracts Officer

[PTCares@itd.idaho.gov](mailto:PTCares@itd.idaho.gov)

208 334-8139

### Timeline/Review Process

1. October 13, 2023: Application Release
2. January 12, 2024: Application Close
3. February 05 – March 08, 2024: Technical Assistance
4. March 11 – April 10, 2024: Public Comment
5. April 2024: PTAC reviews ITD-PT recommendations and public comments and may concur or recommend changes to projects and/or funding levels.
6. May 2024: Idaho Transportation Board reviews ITD-PT recommendations, PTAC response, and public comment in their determination of final project award and funding levels.
7. Summer 2024: ITD-PT Office programs with FTA
8. October 1, 2024: Funding begins. Please note, capital projects have the possibility of start sooner if funding is programmed with FTA before this date.

### Application Submittal Checklist

- ✓ Cover Sheet
- ✓ Sections 1-5
- ✓ Section 6-7 (ITD-PT Internal Review of Application)
- ✓ Attachments
  - ✓ Attachment A: Budget Sheet
  - ✓ Attachment B: Milestone Reporting
  - ✓ Attachment C: NEPA/SSA/Rolling Stock Worksheet
  - ✓ Attachment D: Demonstration of Need
- ✓ Back-Up Documentation
- ✓ Letters of Support (specific to the project)

### Application Specifications

- Font: Black, Times New Roman, size 12-14
- Paper: 8 1/2 x 11, drawings may be larger
- Format: pdf or word (Attachment A and budget sheets may be in excel)
- Pages must be numbered

### Application Submission

Please submit all items in the submittal checklist formatted as outlined in the application specifications to:

- ITD – Public Transportation Office, Attn: Sam Carroll, PO 7129, Boise, ID 83707
- Or email to: [PTCares@itd.idaho.gov](mailto:PTCares@itd.idaho.gov)





**YOUR Safety ••• ► YOUR Mobility ••• ► YOUR Economic Opportunity**

**Application Information Form**

Applicant: Selkirks - Pend Oreille Transit Authority (SPOT Bus)

Authorized Representative: Donna Griffin

Address: 31656 Hwy 200, Suite 102, Box 8, Ponderay ID 83852

Phone: 208-263-3774

Email Address: dgriffin@spotbus.org

DUNS #: 082358452

Architect/Engineer/Planner if applicable: (Contact Name): NA

Phone: NA

Address: NA

**Project Description:**

To better support the capability of providing efficient public transit services in Bonner County and Boundary County, funding will allow SPOT Bus to purchase office equipment and vehicle diagnostic tools. Items include replacing our internet and phone system, purchasing a printer and computers used to schedule routes, rides, drivers and buses. Computers will support updated operating systems and necessary software. We will also purchase diagnostic tools for diagnosing and fixing SPOT vehicles.

**TOTAL PROJECT COST:** \$29,449.00

**FEDERAL SHARE:** \$29,449.00 **LOCAL MATCH:** \$0.00

## Section 1: Project Description

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### Concise Project Description

For this project we request funding for Office and Support Equipment for SPOT Transit Operations. Funding will allow SPOT Bus to purchase office equipment and vehicle diagnostic tools. This includes replacing our phone system, internet, printer, and computers (\$10,313.00) as well as vehicle diagnostic technology and tools (\$19,136.00). SPOT requests grant funding in the amount of \$29,449.00.

This CARES One-Time funding will directly support the operation of three fixed routes and Paratransit service in Bonner County, demand response service in Boundary County, demand response service between Boundary County and Bonner County, as well as public special event service.

#### **a. FTA Program Eligibility:**

This project meets the FTA funding source program as the purchase of Office and Support Equipment for SPOT Transit Operations is a capital activity normally eligible under Sections 5311. The Coronavirus Aid, Relief, and Economic Security (CARES) Act provides emergency assistance and health care response for individuals, families and businesses affected by the COVID-19 pandemic. Selkirks Pend Oreille Transit is an existing 5311 grant sub recipient, providing fixed route, paratransit service, and demand service in a rural area, and is an eligible recipient for this grant. And, according to the 2024-2026 5311 Rural Congressional Application, Federal program details and related Federal Circulars <https://www.transit.dot.gov/rural-formula-grants-5311purpose>. Selkirks- Pend Oreille Transit Authority (SPOT) is eligible to apply for funding because our service fulfills the purpose of the Section 5311 Program. The project components meet the FTA guidelines for CARES Act funds by providing capital assistance to support public transportation in rural areas with populations with less than 50,000 people where many residents rely on public transit to reach their destination.

This project provides equipment that will improve and speed up office operations as well as increase driver and guest reliability as we continue operations that support the FTA Goals listed below with additional information about SPOT's efforts to meet each goal.

Our operating expenses have skyrocketed. We currently depend on CARES funding to bridge the gap between our current funding level and our actual operating expenses. We expect to exhaust that (greatly appreciated) awarded source of funding next year as we provide transit service. Our ridership continues to increase. We have exceeded our pre-COVID numbers, and we expect to exceed 140,000 rides in 2023. Please see our ridership numbers, through November 2023 attached.

The Section 5311 Program supports both the maintenance of existing public transportation services and the expansion of those services through the following program goals:

*a. Enhancing access in rural areas to health care, shopping, education, employment, public services, and recreation:* SPOT has fixed and demand routes servicing all the above categories.

*b. Assisting in the maintenance, development, improvement, and use of public transportation systems in rural areas:* SPOT uses the FTA funding for these exact purposes. In addition to the work of the Board and Executive Director, SPOT utilizes service development committees to help assess transportation needs in the area and recommend service changes and improvements to the SPOT Board.

*c. Encouraging and facilitating the most efficient use of all transportation funds used to provide passenger transportation in rural areas through the coordination of programs and services:* SPOT diligently looks for ways to increase ridership and increase our operational efficiencies. SPOT is a member of the Bonner County Area Transportation Team (BCATT) and the Boundary Area Transportation Team (BATT). We partner as often as practical on projects and purchases ensuring that we are good stewards of the funding we are entrusted with. We participated in the Urban Area Transportation Plan and in the development of a Multi-Modal Transportation Plan for the city of Sandpoint, which included public transit elements. Please see attached letters of support.

*d. Providing financial assistance to help carry out national goals related to mobility for all, including seniors, individuals with disabilities, and low-income individuals:* SPOT has taken steps to serve the above categories of riders. The Idaho Area Agency on Aging approves and financially supports SPOT's services in both Bonner and Boundary Counties. In **the third quarter 2023**, SPOT buses **provided 5,752 rides for seniors and 1,419 rides for riders with disabilities, and 2,829 youth rides.**

*e. Increasing availability of transportation options through investments in intercity bus services:* SPOT does not provide service in this area. However, Intercity Service is in our Master Plan. SPOT has met with Citylink and Spokane Transit to discuss future connectivity. All three agencies support the concept. SPOT does provide transportation between Boundary County/Bonniers Ferry and Sandpoint with its demand service.

*f. Assisting in the development and support of intercity bus transportation:* Same response as given to item e above. SPOT continues working with Kootenai County Public Transportation gaining information with our involvement in the regional mobility platform.

*g. Encourage mobility management, employment-related transportation alternatives, joint development practices, and transit-oriented development:* We are currently partners with Schweitzer Mountain Resort in providing public transportation from the local communities to the base of the mountain and service from the base to the village, serving both customers of the ski resort and their employees. SPOT is a member of the Bonner County Area Transportation Team (BCATT) and the Boundary Area Transportation Team (BATT). Agencies involved in transportation at all levels meet monthly to provide updates about area transportation projects. SPOT participated in the development of a Multi-Modal Transportation Plan for the city of Sandpoint, which included public transit elements. SPOT works with the City of Ponderay to include transit facilities in new developments in Ponderay. SPOT has worked with the cities of Dover, Sandpoint, and Kootenai to install bus pads, shelters and benches in their cities. Property developers now use the availability of our services in the traffic impact analyses as required when new developments are planned and permitted, demonstrating the positive impact of our services to the overall transportation system.

*h. Providing for the participation of private transportation providers in rural public transportation:* We are currently partners with Schweitzer Mountain Resort in providing public transportation. SPOT contracts with Schweitzer Mountain Resort to provide mountain route services. SPOT buses provide service from the communities to the base of the mountain and the bulk of service from the base of the mountain up to the village.

#### **b. ITD Call for Project Priorities**

This project meets the ITD-PT call for project priorities. Program Priorities:

1. Existing 5311 Services (Capital, Preventative Maintenance).

With this application, SPOT is applying for funds in ITD's number 1 priority to support Existing 5311 Services. The funds will fund the purchase and installation of office equipment and vehicle diagnostic tools. This equipment will greatly enhance our ability to provide fast, accurate, service to our community.

Our service requires funding assistance to support public transportation in our rural area with populations less than 50,000. Many residents rely on public transit to reach their destinations. SPOT expects to provide more than 140,000 rides in 2023 filling a crucial role in safe, reliable transportation services. Ridership continues to increase.

SPOT is an eligible recipient. SPOT was created and operates under a Joint Powers Agreement of six local government authorities. SPOT serves both Bonner and Boundary County with transit service. SPOT endeavors to comply with all required regulations: SPOT gathers community input with appointed Board Members from each joint powers partner; SPOT has a Service Development Committee in each county with members from social service agencies, economic development corporations, municipalities, businesses, and the general public; SPOT adheres to all administration requirements; SPOT applies for NEPA determination when required; SPOT follows ADA regulations. We agree with the terms outlined in the Grant Project Funding Agreement with ITD and Uniform Administrative Requirements (2 CFR 200). The NEPA requirements do not apply to this project.

#### **c. Application Scope of Work**

The scope of work entails SPOT purchasing office equipment and vehicle diagnostic tools for \$29,449.00. This includes replacing our phone system, internet provider, printer and computers used to schedule routes, rides, drivers, and buses. It also includes purchasing a laptop for use in and out of the office. Computers, printer, internet, and phones are estimated to cost \$10,313.00. We will also purchase vehicle diagnostic technology and tools that will save us vehicle maintenance miles and expense; estimated to cost \$19,136.00.

Current office equipment does not support the needs of SPOT Bus in providing efficient transportation services. Our phone system is antiquated, limited to one line, and cannot forward calls to cell phones as needed. As demand for our services increases, many complain that when they call, they get a busy signal, and they can't reach us because the phone line is always busy. Our current computers that we use primarily for scheduling rides, are excruciatingly slow when we input or change ride requests and they

do not connect to our printer consistently, partly due to internet connectivity, computer limitations and age, and printer capabilities and age. The printer functions intermittently. SPOT purchased our current computers prior to February 2016. In addition, our aged, inefficient laptop and office computers most likely will not support operating systems after October 14, 2025. Microsoft will end support of Windows 10 in October 2025. Due to the age and capabilities, our PCs might become unusable due to compatibility issues with Windows 11. Our laptop computer works intermittently as the card is going bad. I currently use my personal laptop computer for work so I can dependably access and save work documents. I also use my own (second) monitor since we do not have any at the office.

Since we need new computers, we will prepare for this future situation. Computers will support updated operating systems and necessary software. Please see the quote attached which details what we need to purchase. Microsoft calls for technology that includes a 64-bit processor listed by Microsoft as a 'supported CPU,' at least 4 GB of RAM, a minimum of 64GB storage, and UEFI firmware with Secure Boot capability. We will refine this as needed when we finalize our order.

With today's technology in buses and rising demand for our services, we work hard to keep vehicles on the road transporting passengers. To put buses back into service, we need a rugged duty diagnostic computer to facilitate vehicle repairs. Currently, our (part-time) mechanic uses the diagnostic computer that belongs to the school district when it is imperative to get a vehicle operating. Quite often we wait days or weeks for an appointment, 40 to 80 miles away, and they charge \$150.00 to hook up plus staff time to diagnose the problem. Our buses and staff spend a lot of fuel and time for diagnostics, certifications, and repairs (such as air conditioning units) that we can address in our parking lot with a few technological tools.

With this funding we will purchase diagnostic tools for diagnosing and fixing SPOT vehicles including an Autel Scanner, a Heavy-Duty Air Conditioning Machine, a "rugged duty" Cummins Insite Diagnostic Laptop Kit with NEXIQ Adapters, Cummins Insite software and Bendix ACom PRO Diagnostics Software. Equipping our staff with up-to-date technology will create efficiencies for staff and for transit users. Replacing office equipment and purchasing diagnostic tools for diagnosing and fixing SPOT vehicles, will greatly support and improve the capability of providing efficient public transit services in Bonner County and Boundary County as we continue operations that support the ITD priorities.

The purchase of office equipment and vehicle diagnostic tools will streamline processes and perpetuate SPOT's ability to provide safe, reliable, public transit services in the two most northern counties in Idaho – Bonner County and Boundary County. We operate three fixed routes and Paratransit service in Bonner County, demand response service in Boundary County, demand response service between Boundary County and Bonner County, as well as public special event service. SPOT expects to provide 140,000 rides in 2023 filling a crucial role in safe, reliable transportation services. For this project we request CARES funding in the amount of \$29,404.00 which accounts for a 15% increase in price between the time of submission of this application and when we place the order. This purchase will support the operation of our existing service.

## Section 2: Project Planning

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This project was developed out of necessity. We currently waste a lot of time waiting and waiting. Waiting for our computers to load as we make reservations for our clients when they request rides. Waiting for our printer to print route schedules for drivers. Waiting and driving or towing vehicles for repair.

### **a. Project ties to specific goals in the ITD Statewide Transportation Plan**

#### ***Goal: Ensure the Safety and Security of Public Transportation***

1. SPOT strives to ensure the safety and security of the public.
2. SPOT holds regular training meetings with the staff to review procedures and policies. Guest speakers are sometimes brought in. The police have spoken to review the gun policies and give the drivers directions on how to handle situations involving guns.
3. SPOT now orders all buses with multiple cameras on both the inside and outside.
4. SPOT is up to date in training drivers on how to operate the lifts safely.
5. SPOT buses provide safe transportation services.

#### ***Goal: Encourage Public Transportation as an Important Element of an Effective Multi-Modal Transportation System in Idaho***

1. SPOT equips all our buses with bike racks and posts training videos on the website instructing riders on their use.
2. SPOT participated in the development of Sandpoint's Multi Modal Transportation Plan and the Urban Area Transportation Plan.
3. Property developers use the availability of our services in the traffic impact analyses as required when new developments are planned and permitted, demonstrating the positive impact of our services to the overall transportation system.

#### ***Goal: Preserve the Existing Public Transportation Network***

1. SPOT continues to look to the future. Growth is our goal. SPOT has no intention of maintaining the status quo.
2. SPOT continues to cultivate resourceful partnerships to efficiently provide excellent service in accordance with, and respectful of various organizations missions, goals, objectives, plans, policies, and procedures.
3. SPOT is dedicated to continuing operations for the benefit of the public indefinitely.

#### ***Goal: Provide a Transportation System that Drives Economic Opportunity***

1. The economy of the service area of SPOT is largely based on tourism. SPOT has a financial partnership with Schweitzer Mountain Resort driven by the desire to move both locals and tourists between the resort and the communities below. The hotels, restaurants, and shops are major benefactors of this partnership.
2. SPOT is the sole source of transportation for many riders, providing daily access to employment, doctors, services and recreation. City planning departments report that developers chose to invest in the

Sandpoint area because it has public transportation. The Chamber of Commerce reports people visit our area because there is public transportation.

3. Project planning and coordination is a continuous ongoing effort. SPOT provides public transportation services in two counties and is a sub-jurisdiction of six Idaho government entities. In addition to the work of the Board and Executive Director, SPOT utilizes service development committees to help assess transportation needs in the area and recommend service changes and improvements to the SPOT Board.

***SPOT requires funding to achieve our operational benefits stated below:***

**Improve Efficiency and Increase Ridership**

We expect this grant to accomplish both improved efficiency and increases in ridership. The continuation of reliable fixed route and demand service will continue to increase SPOT's ridership and lower our overall cost per ride. Using radios as our key source of communication will cut down on the number of times drivers will need to pull over to acquire up to minute information on their routes.

**Improve Safety**

As with any public transportation system, the roads are always safer with less vehicles on them. Safety also increases when vehicles are operated by professional drivers. Installing radios will let drivers focus on their driving task instead of having the distraction of a ringing phone. Sometimes having the ability to report situations immediately makes a big difference in safety and security.

**Improve Mobility**

SPOT continues to explore new avenues of service to the communities in which we operate. We always have the attitude of "come join us". Whenever someone suggests new service options, the response of SPOT to engage them to help us work out how that idea can become a reality. Growth does not happen by just responding "We can't do that". There are a lot of creative people that can help SPOT provide new and better service to Bonner and Boundary Counties.

**b. Project Development Process**

**1. Describe coordination with local stakeholders**

A primary source of our project development process is relying on our Strategic Plan. The Strategic Plan was developed with a broad range of community input. The Strategic Plan outlines the goals of SPOT. Our Strategic Plan is included as an attachment.

**SPOT Mission Statement**

A COOPERATIVE EFFORT OF AREA MUNICIPALITIES TO PROVIDE CONVENIENT,  
SAFE AND RELIABLE PUBLIC TRANSPORTATION FOR RESIDENTS AND VISITORS TO  
EMPLOYMENT, RECREATION AND SERVICE DESTINATIONS.



This mission statement is the result of a community visioning process which resulted in the following vision statement:

**SPOT Vision Statement**

SPOT is the people's choice for travel throughout North Idaho.  
We will continue to help preserve North Idaho's human and natural environments for generations to come.  
We are innovative, taking advantage of new technology to stay cost effective and affordable.  
SPOT is recognized and leveraged as a valuable asset for economic development and community vitality.  
Our partnerships and strategies for self-reliance are a national model.

Our Marketing and Public Outreach Plan outlines a clear path towards growing ridership and building community support. SPOT continues to grow its awareness, usage, and impact Bonner and Boundary Counties in a positive manner. We included our Marketing and Public Outreach Plan as an attachment.

SPOT also commissioned Shift Community Solutions to produce "See SPOT Run, A Comprehensive Success Guide". This guide included a survey of riders to help guide route development, service improvements, and marketing efforts. "See SPOT Run, A Comprehensive Success Guide" is included as an attachment.

The SPOT Board of Directors is comprised of representatives from the cities of Dover, Sandpoint, Kootenai, Ponderay, Bonners Ferry, and Boundary County. This ensures that the needs of each community are represented in the decision-making process. SPOT also utilizes local service development advisory committees that include a range of community stakeholders. Based on input from our Boundary County service development committee and the Boundary County Commissioners, SPOT has expanded its service area in Boundary County over the last four years to include the City of Moyie Springs, the Three Mile area and the Paradise Valley area.

SPOT enjoys enormous and continued support in the communities that we serve. Due to the support, we secured the match required to support our 5311-grant request. Match funds are provided by the Cities of Bonners Ferry, Dover, Kootenai, Moyie Springs, Ponderay, and Sandpoint, the Area Agency on Aging, Boundary County, Festival at Sandpoint, Schweitzer Mountain Resort, as well as the Schweitzer Mountain Homeowners Association and private donations. We also receive and continue to explore in-kind donations including radio ads, construction materials, planning resources, and site accesses.

**2. Describe efforts undertaken to coordinate and include Minority and Low-Income populations (Title VI)**

North Idaho is an area of the state with very few minorities. There is minority representation on the Service Development Committees.

There is representation from social service agencies that work with low-income populations on the community development committees. Input on service needs have been given by the Bonner Community Food Bank, the Sandpoint Senior Center, the Bonners Ferry Senior Center, the Bonners Ferry Food Bank, riders from low-income housing, and local elected officials regarding their constituents. This input represents the low-income population.

**3. What is your plan to include Disadvantaged Business Enterprises (DBE's) in this project?**

SPOT utilizes ITD's DBE program and submits reports to ITD as requested.

**4. Identify any local Labor Unions (if applicable) as identified by the Department of Labor**

There are no local labor unions covering workers employed under this grant application.

SPOT Authority does not discriminate in any way and provides transportation services to all of those who need it. We provide transportation to various stops that allow riders to access many businesses for personal care, shopping, recreation and work.

**c. Provide Attachment B: Milestone Reporting**

Attachment B is attached.

### Section 3: Project Benefits/Evaluation

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**Project Benefits:** The key benefit of this project is to continue providing safe, reliable, transit service in North Idaho that takes people where they want and need to go. The strategic planning team established goals (and objectives). Please see our goals and several objectives below that relate directly to our service:

*Goal 1: To increase ridership*

- Implement our marketing and public information plan to expanding SPOT's customer base, improving information on how to ride, and protecting/enhancing SPOT's brand.
- Perform community and rider surveys to identify barriers for current and potential customers, and to gauge the popularity of potential expansion options.
- Increase public awareness through various options including press release about SPOT activities.

*Goal 2: Improve rider access, convenience, and amenities*

- Evaluate routes and requests for service according to location and access to destinations
- Add shelters and benches to stop locations
- Expand on-board bicycle accommodation on all coaches
- Work to increase frequency of fixed route services (ongoing).

*Goal 3: Leverage partnerships to expand service and improve the system*

- Integrate SPOT with Schweitzer Mountain Resort's transportation needs and funding.
- Coordinate with Bonner County and/or other partners to become active participants in SPOT.
- As roadway projects are proposed, coordinate with BCATT, BATT, ITD, local cities and counties, to include stop furnishings, pedestrian access and safety features, and other transit infrastructure needs.
- Develop a sponsorship program for stop furnishings ("adopt a stop")
- Coordinate with land use agencies to incorporate SPOT needs in development reviews.
- Coordinate with social services agencies to implement Demand-Response service within in the Sandpoint area
- Provide regular (annual) updates to local government agencies and civic groups.

*Goal 4: Increase organizational financial stability*

- We evaluated alternate governance structures and revised current governance structure to reduce political risks and allow for easier service area expansion.
- On an ongoing basis, develop and expand SPOT's internal capacity and resources through training and grant opportunities.
- Create an endowment or other long-term donation opportunity for SPOT.

*Goal 5: Promote environmental stewardship*

- Explore other public transportation services including park and ride, vanpool and rideshare, as program champions are found.
- Add a seat on the TAC for a designated environmental advocate.

**a. Improve safety**

During daily operations drivers, administration staff and our mechanic keep in close contact regarding clients, vehicles, and service updates. The ability to streamline our efforts, save time, and keep vehicles operating on the road, will minimize frustration and create efficiencies. We will have safer vehicles operating and less distraction of drivers. This will also help with reliability and long-term vehicle care.

The general population benefits by having a public transit service in the region. As with any public transportation system, the roads are always safer with fewer vehicles on them and more so, when the vehicles on the roadways are reliable. When people use our transit service, the riders as well as the general public are safer on the roadways. Another factor in North Idaho is the lack of daylight in the Wintertime. For those who find it difficult to see in the dark, we provide a safe option for people to get to where they need to go before 7:00 a.m. and after 4:00 p.m. Our Bonner County Paratransit and Demand route ridership continues to grow the fastest. Between our mechanic and the local repair shops our buses continue driving miles to get people where they want to go. We require safe reliable vehicles to accommodate the increased ridership.

We continue working with local jurisdictions to improve the safety of our riders as they wait for the bus. SPOT consciously included safety considerations in all our decisions. SPOT utilizes RTAP funding for first aid and CPR training for the drivers. We also remove snow at bus stops to increase safety. SPOT also includes instructional videos on our website to increase rider safety.

**b. Improve mobility**

SPOT continues to explore new avenues service to the community. We always have the attitude of “come join us”. Whenever someone suggests new service options, SPOT responds by working with them to help us work out how that idea can become a reality. Growth does not happen with a response of “We can’t do that”. There are a lot of creative people that help SPOT provide new and better service to Bonner and Boundary County. SPOT participated in Sandpoint’s multi-modal transportation plan. As a member of the Bonner County Area Transit Team (BCATT) and Boundary Area Transportation Team (BATT), we receive the first word on all area transportation projects. We have the opportunity to share our perspective and request inclusion - that they accommodate public transit in the projects.

We also expect this grant to accomplish both improved efficiency and increases in ridership to increase mobility. The continuation of reliable fixed route and demand route service will continue to increase SPOT’s ridership and lower our overall cost per ride. Convenient communication with our riders and community as well as diminished vehicle downtime will keep us on time and dependable. Not to mention the benefit of immediate diagnostics to aid and speed up vehicle repairs. In some places we serve, there is limited or no parking and traffic congestion as a result. Drivers working together to navigate the situations will keep everyone safe and rolling. The general population benefits because of

access to various venues, expedited ingress and egress from events, as well as improved efficiency, increased ridership, improved mobility and improved service times/areas.

**c. Support local economic development and expand economic opportunity**

SPOT strives to increase economic opportunity in its service area. First, we shop locally and employ local citizens. We buy our supplies and parts from local vendors as practical. We utilize local services such as local repair shops, our attorney, and our CPA. Routes such as the Festival at Sandpoint service and the Schweitzer service support tourism and recreation in our area. These services have had high ridership counts and a very positive effect on our local economy while increasing convenience for riders and reducing vehicle and parking congestion.

In Bonner County, both our fixed route service and our paratransit service are used by employees to get to work. Riders use public transportation services to get to shopping and medical appointments. Property developers use the availability of our services in the traffic impact analyses as required when new developments are planned and permitted, demonstrating the positive impact of our services to the overall transportation system.

Our community and businesses benefit because workers and those with appointments show up on time. Our hours cater to many who need prompt access to their appointments. Our businesses strive to in turn, accommodate our riders with their schedules.

**Project Evaluation:**

**a. SPOT bus will continually evaluate success of the project**

SPOT will maintain and sustain the vehicle equipment through our high standard of upkeep and maintenance. Our ability to keep vehicles on the road will result in less down time and better service. Our buses and equipment continuously have a long productive life. Maintenance costs are evaluated monthly. We anticipate that our costs for air conditioning service and diagnostics will drop drastically. Changes to the maintenance program will occur based on evaluations to ensure the safety of staff and the vehicles, and to extend the life of the equipment. We also receive daily reports if something malfunctions on each vehicle. This allows us to address concerns and fix problems immediately. Please see our Vehicle Inspection Form. Upon notification of an alarm or the igniting of a warning light, our mechanic can diagnose and usually fix items or recommend the vehicle go to a repair shop due to the diagnostic reading.

The following data will be collected and evaluated:

- ✓ Ridership is collected and tabulated weekly and evaluated monthly by our Board and Committees. Ridership data includes general boardings, youth, senior and disabled. Stop utilization is also recorded and regularly evaluated. In calendar year 2022, SPOT's total ridership was 136,253. The pandemic reduced ridership in 2020 to 90,609.
- ✓ Ridership by Youth and Young Adults. SPOT has identified these two groups of riders as having large growth potential. We have targeted a 20% growth in this ridership. Many of our riders on the Mountain Route, up and down Schweitzer Mountain Road fall in these categories.
- ✓ Vehicle mileage and tire wear/replacement.

- ✓ Website and Social Media Usage. SPOT monitors its website traffic and social media reach.

**The following data will also be collected and evaluated regularly as follows:**

- ✓ Cost “Dashboard”. SPOT has developed a cost “dashboard” to monitor the cost per ride and cost per mile for our fixed route and paratransit routes. This enables us to monitor and increase our operating efficiencies monthly.
- ✓ Website and Social Media Use. SPOT monitors its website traffic and social media reach.
- ✓ We collect and tabulate mileage sheets weekly.
- ✓ Budgets are evaluated weekly or more by staff and monthly by the Finance Committee and the SPOT Board.

**SPOT will sustain the project after the end of the grant period**

The maintenance of the asset purchased under this grant will be covered by the operating budget, and the equipment will have a useful life beyond the end of the grant period. Future 5311 grants will fund continued maintenance and operation costs.

SPOT plans to continue to apply for operating funds after this grant period in order to continue the project. Our partners have agreed to continue with the Joint Powers agreement.

**SPOT has the capacity to carry out the project as proposed**

a. The reorganization of the SPOT administration team has brought a higher level of management capability to the organization. The creation of a Finance Committee provides excellent financial oversight. The SPOT bookkeeper provides detailed monthly financial statements. Copies of the latest income statement and balance statement are attached.

SPOT has demonstrated its ability to manage the grant funding by having a technical rating of “Low” by ITD’s Public Transportation Division.

b. While the governmental agencies that provide match cannot commit to match amounts beyond the current fiscal year, all are strongly supportive of the system and are expected to continue to financially support SPOT.

## Section 4: Project Budget

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### a. Budget Narrative:

For this project we request funding for Office and Support Equipment for SPOT Transit Operations. Funding will allow SPOT Bus to purchase office equipment and vehicle diagnostic tools. This includes replacing our phone system, internet, printer, and computers (\$10,313.00) as well as vehicle diagnostic technology and tools (\$19,136.00). SPOT requests grant funding in the amount of \$29,449.00.

This CARES One-Time funding will directly support the operation of three fixed routes and Paratransit service in Bonner County, demand response service in Boundary County, demand response service between Boundary County and Bonner County, as well as public special event service.

The amount of \$29,449.00 will fund cost of all office and vehicle components and installation. The equipment will aid us in becoming more efficient and allow us to provide better service for our existing operations in Bonner County and Boundary County. We provide service for Boundary County residents transporting them to Sandpoint one day each week and service to Bonners Ferry three days each week. SPOT also provides Bonner County service on three fixed routes and two to three paratransit routes. This varies daily due to demand.

1. We can scale down this project, if we eliminate the vehicle diagnostic tools for the Deisel buses (\$3,500.00+\$800.00+\$1,700.00+\$1,500.00 = \$7,500.00). The cost would drop from \$29,449.00 to \$21,949.00. We could also eliminate the air conditioning machine. But we spend \$6,930.00 per year to charge our AC systems.

2. SPOT has the financial capability to make the purchases on a reimbursement basis with careful planning on the delivery and reimbursement schedule. See the Balance Sheet in the attached current financial statement.

The cost estimates for the project budget are based on the attached quotes for the office equipment and from shopping the vehicle diagnostic and repair tools.

Please note that SPOT currently depends on CARES Funding to cover current operating shortfalls. We expect to exhaust our CARES operating grant this fiscal year.

SPOT receives strong financial support from the joint powers agreement partners and other supporters. The list includes the Cities of Bonners Ferry, Moyie Springs, Dover, Sandpoint, Ponderay and Kootenai; Boundary County, Area Agency on Aging; Schweitzer Mountain Resort; and the Schweitzer Mountain Homeowners Association. While the governmental agencies that provide match cannot commit to match amounts beyond the current fiscal year, all are strongly supportive of the system and are expected to continue to financially support SPOT.



**b. Itemized Estimated Project Budget for Office Equipment - \$10,313.00. Please see quotes attached.**

This includes a margin of 15% to account for possible price increases.

Description	Quantity	Price each	Amount
<b><i>Office Equipment</i></b>			
<b>Computers and printer include the following:</b>			
- Custom Business Workstation	2	\$ 930.00	\$1,860.00
- VIVO Dual Monitor Adjustable Desk Mounts	2	\$ 38.00	\$ 76.00
- ViewSonic 22 Inch IPS 1080p Monitor	4	\$ 110.00	\$ 440.00
- LG gram 15.6" Lightweight Laptop	1	\$1,449.99	\$1,449.99
- Brother All-in-One Wireless Printer	1	\$ 699.99	\$ 699.99
- 3 Year Protection Plan - Printer	1	\$ 86.99	\$ 86.99
- System delivery and setup	6 hours	\$ 50.00	\$ 300.00
			\$4,912.97
15% possible increase			\$ 736.95
<b>Total</b>			<b>\$5,649.92</b>

Description	Quantity	Price each	Yearly Fee
<b><i>Office Equipment</i></b>			
<b>Phones and Internet includes the following:</b>			
- Business Wireless Installation	1	\$ 0.00	\$ 0.00
- 2 years of service	1	\$ 2,136.00	\$1,068.00
- 2 years of Calix Router support	1	\$ 312.00	\$ 156.00
- New phones w/ 2 years of phone service	1	\$ 1,800.00	\$ 900.00
- 2 years of E911 fees	1	\$ 54.25	\$ 27.13
- Voice - FCC Regulatory Fees and Surcharge	1	\$ 360.00	\$ 180.00
		\$4,662.24	\$2,331.13
15% possible increase			\$ 349.67
<b>Total</b>		<b>\$4,662.24</b>	<b>\$2,680.80</b>

**b. Itemized Estimated Project Budget for Vehicle Diagnostic and Repair Equipment - \$19,136.00.**

**Please see quotes attached.**

This estimate includes a margin of 15% to account for possible price increases.

Description	Quantity	Price each	Yearly Fee
<b>Vehicle Equipment</b>			
<b><i>Equipment includes the following:</i></b>			
- Autel Scanner	1	\$1,500.00	\$ 500.00
- Heavy-Duty Air Conditioning Machine	1	\$7,639.99	
<b><i>Deisel bus equipment includes:</i></b>			
- Cummins Insite Diagnostic Laptop Kit	1	\$3,500.00	
- NEXIQ	1	\$ 800.00	
- Cummins Insite	1	\$1,700.00	\$1,018.00 subscription
- Bendix ACom PRO Diagnostics Software	1	\$1,500.00	\$ 700.00
		\$16,639.99	
15% possible increase		\$ 2,496.01	
<b>Total</b>		<b>\$19,136.00</b>	

***Product descriptions for vehicle equipment:***

**The Autel Scanner** is a powerful diagnostic tool that truly stands out in the industry. Its extensive compatibility allows it to work with a wide range of vehicles. This all systems scanner and service tablet can read and erase codes, view Freeze Frame and, view and graph Live Data, and perform bi-directional Active Tests and Special Functions. It also a features more than 40 Service and maintenance tasks, including Brake Bleed, Oil and Service lights resets, Battery registration, DPF regen, and Electronic Parking Brake and Steering Angle resets. ***Estimated cost = \$1,500.00***

**Heavy-Duty Air Conditioning Machine:** The Robinair 34888HD heavy duty machine recovers, recycles, evacuates, leak-tests and recharges R-134a with 98.5 percent efficiency in both small and large mobile air conditioning systems. The new design features a large capacity, removable tank and a liquid pump to tackle those larger A/C systems typically found in buses. The product also is equipped with a nitrogen port which allows a technician to use nitrogen to dry and leak test the vehicle's A/C system. The machine is fully automatic and is capable of recovering, evacuating, leak testing, charging and oil drain/inject - putting A/C lubricant back into the system. The 34888HD also boasts the ability to add a printer for capturing and retaining vehicle service data. ***Estimated cost = \$7,639.99***

**Cummins Insite Diagnostic Laptop Kit.** Cummins is one of the most popular engines used in commercial trucks, and this kit covers it all. This kit has everything installed, licensed, and ready to go out of the box. With this kit, you can perform all the dealer level diagnostic commands such as diesel

particulate filter (DPF) regens, cylinder cut-out tests, parameter changes, NOx sensor resets, and more.  
***Estimated cost = \$3,500.00***

**NEXIQ Blue-Link™** - NEXIQ.com. Adapters. The NEXIQ Blue-Link is a mobile vehicle interface that enables you to use either your iOS or Android devices (e.g., smartphones or tablets) to communicate with heavy duty vehicles for quick access to basic diagnostic information. ***Estimated cost = \$800.00***

**Cummins INSITE™ Engine Diagnostics.** INSITE performs engine diagnostics and displays electronic engine information on your PC. With step-by-step diagnostics, built-in engine drawings and schematic diagrams, working with INSITE is easy. Using this software application will reduce troubleshooting time, errors and incorrect procedures and quickly get vehicles back on the road. Features include: • Quick access to trip information • Adjust parameters and review/clear fault information quickly and easily • Easy-to-follow troubleshooting assistance • Wiring and sensor location diagrams • Store engine and trip information for future use, or as programming templates. ***Estimated cost = \$1,700.00***

**Bendix® ACom® PRO™ Diagnostic Software** - a PC-based, diagnostic software which provides fleets and technicians with a leap forward in troubleshooting. ACom PRO uses a comprehensive system-level approach which allows the technician to get a much more complete picture of which Diagnostic Trouble Codes (DTCs) are active and inactive to quickly judge what needs to be addressed first. Some tests that used to require two technicians can be run with just one. A more intuitive graphical user interface, and clearer, menu-driven operation are also designed to smooth and speed the maintenance process. ***Estimated cost = \$1,500.00***

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Office and Support Equipment for SPOT Transit Operations

## Attachments

**Attachment A: Budget Sheet** This is a picture. Please see the excel version attached to this application.

Project Budget Request														
		<table border="1"> <tr> <td>Subrecipient</td> <td>Selkirks- Pend Oreille Transit Authority (SPOT Bus)</td> </tr> <tr> <td>Agreement Term</td> <td>October 1, 2024 - September 30, 2025</td> </tr> <tr> <td>Contact Name</td> <td>Donna Griffin</td> </tr> <tr> <td>Address</td> <td>31656 Hwy 200, Suite 102, Box 8 Ponderay, ID 83852</td> </tr> <tr> <td>Phone Number</td> <td></td> </tr> </table>			Subrecipient	Selkirks- Pend Oreille Transit Authority (SPOT Bus)	Agreement Term	October 1, 2024 - September 30, 2025	Contact Name	Donna Griffin	Address	31656 Hwy 200, Suite 102, Box 8 Ponderay, ID 83852	Phone Number	
Subrecipient	Selkirks- Pend Oreille Transit Authority (SPOT Bus)													
Agreement Term	October 1, 2024 - September 30, 2025													
Contact Name	Donna Griffin													
Address	31656 Hwy 200, Suite 102, Box 8 Ponderay, ID 83852													
Phone Number														
FTA Grant	100/0													
5311 CARES	Total	Federal	Match											
	\$ 29,449.00	\$ 29,449.00	\$ -											
<table border="1"> <tr> <td>Total Project Cost</td> <td>Total Federal Request</td> <td>Total Match Needed</td> </tr> <tr> <td>\$ 29,449.00</td> <td>\$ 29,449.00</td> <td>\$ -</td> </tr> </table>		Total Project Cost	Total Federal Request	Total Match Needed	\$ 29,449.00	\$ 29,449.00	\$ -	<table border="1"> <tr> <td>Scope of Work</td> </tr> <tr> <td>For this project we request funding for Office and Support Equipment for SPOT Transit Operations. Funding will allow SPOT Bus to purchase office equipment and vehicle diagnostic tools.</td> </tr> </table>			Scope of Work	For this project we request funding for Office and Support Equipment for SPOT Transit Operations. Funding will allow SPOT Bus to purchase office equipment and vehicle diagnostic tools.		
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**Attachment B: Milestone Reporting**  
**CARES One-Time Application**  
**Attachment B: Milestone Reporting**

Agency Name	Selkirks-Pend Oreille Transit Authority (SPOT Bus)		
Agency Contact	Donna Griffin		
Phone #	208-263-3774	Email	dgriffin@SPOTBus.org
Grant Program	5311 CARES	Rural	One Time
Federal Award Amount	\$29,449.00		

Scope of Work: SPOT will purchase office and support equipment for SPOT Transit Operations. Funding will allow SPOT Bus to purchase office equipment and vehicle diagnostic tools.

**Milestone Progress Report:** Target of major tasks to be achieved by specific dates.

The report should include information such as: data for each activity line item within the approved project; a discussion of all

- budget or schedule changes; original, estimated and actual estimated completion date
- description of projects, status, specification preparation, bid solicitation, resolution of protests, and contract awards;
- breakout of the costs incurred and those costs required to complete the project; reasons why any scheduled milestone or completion dates were not met, identifying problem areas and discussing how the problems will be solved; and discuss the expected impacts of delays and the steps planned to minimize these impacts.

Add additional milestones to the table below as needed.

Name	Estimated Completion Date	Description
ITD-PT Application Award timeline.	May 2024 ITD Board will determine project awards and funding level.	Hopefully, we will be awarded our request for this project. We will review our quotes, shop for the best buys on needed equipment.
Prepare for installation of equipment at our office spaces	June 2024	Evaluate and finalize Specifications based on our needs and the availability of computer and other equipment.
RFP/RFQ Issue Date	NA	We obtained quotes from specialized vendors who sell specific products and work in our area. We will continue exploring options for the best equipment in our price range and that works in our area, We will use local vendors to streamline the process and capitalize on complimenting what others have in place
ITD PT Funding Begins	October 1, 2024	
Start Date or Order Date for Rolling Stock, Equipment, and Technology Purchases	October 15, 2024 – May 30, 2025	Place the order for computers, phones, internet service and equipment.
Construction Completion Date or Delivery Date for Rolling Stock, Equipment, or Technology Purchases	May 15, 2025, through May 15, 2026	Install and program equipment. We actually expect completion and operation no later than September 2025.
Contract Completion Date	September 15, 2026	Complete paperwork and close the contract.

## Attachment C: NEPA/SSA/Rolling Stock Worksheet

[illegible]

**3. Environmental Justice**

Determine the presence of minority and low income populations. Examine census, land use, and residential address information of the project area. Indicate whether the project will have disproportionate high and adverse effects on minority or low income populations. Describe any potential adverse effects. Describe any such effects on equal availability of minority to low income populations. Please see Environmental Justice Policy. Review the Federal Transit Administration's Response here: <http://www.fhwa.dot.gov/epa/transportationandenvironment/2004/040101.htm>

**4. Procedures**

The applicant project located within the Federal Emergency Management Agency (FEMA) 100-year floodplain, the wetland adjacent to the project, and the Water Pollution Control Plant (WPCP) located near the project.

For more information, see the FEMA Flood Mapping <http://www.fema.gov/floodmap> and the National Wetlands Inventory <http://www.fws.gov/nwis/>

☐ No

☐ Yes

Describe the potential impacts of the project will impact the base flood elevation and describe to the FEMA, FEMA's role, and how they will comply with the project location listed.

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Office and Support Equipment for SPOT Transit Operations

**Reaction Methods**

If there are known or potential contaminants at the project site? If yes, include, but not limited to, the following information in the assessment building or building materials at the project site: **Full description of the history of the use of the site.**

If/No, please describe steps taken to determine the absence of hazardous materials on the site.

☐ Yes

If yes, please describe steps taken to determine the presence of hazardous materials on the site. Please also describe any mitigation and cleanup measures that will be taken if hazardous materials are present from the project site. If the project is located in a Superfund site, please provide information on the Superfund site and the project site. Please also provide information on the project site and the project site. Please also provide information on the project site and the project site.

**Financial/Operating Procedures for PFA include:**

☐ Yes

If yes, please provide information on the project site and the project site. Please also provide information on the project site and the project site. Please also provide information on the project site and the project site.

**Wastewater Management**

If the project site is located in a potentially sensitive area, please provide information on the project site and the project site. Please also provide information on the project site and the project site. Please also provide information on the project site and the project site.

☐ Yes

If yes, please describe the control impacts and any coordination with the U.S. Army Corps of Engineers and the U.S. Army Corps of Engineers.

**B. Notes and Visitation**

Does the project have the potential to increase noise or vibration?

- ☐ Yes
- ☐ No

If yes, describe the impacts and provide credible identifying analysis of noise and vibration as follows: impacts, impacts by location, and impacts by time. If the project will result in a change in noise and/or vibration exposure, you must conduct an analysis following the procedures in FDOT's "Visual Noise and Vibration Impact Assessment Manual".

<https://www.dot.state.fl.us/traffic-transportation/programs-and-services/transportation-planning/visual-noise-and-vibration-impact-assessment-manual.pdf>

**C. Prices and Output Payments**

Does the project involve the use of any price or output payments, regardless of the size of the project? (Include all payments for the acquisition of materials, with the exception of "Fixed and Certain Payments" or the "CERCLA" website.)

<https://www.epa.gov/cercla/cercla-requirements>

- ☐ Yes
- ☐ No

If yes, please describe potential payments and any coordination with the Federal Reserve Commission Section of the FRB.

[illegible]

6. **Recreational Resources**  
 The project is located in or adjacent to a park or recreation area? (For additional information on Recreational Resources and the Section 101 Regulations: National Operating Procedures on FONSI website: <http://www.dhs.gov/eis-planning/section101-nop>)

☐ No  
☐ Yes

If "Yes," please provide information on potential impacts to the park or recreation area. Please include if the park involved is local and/or State Conservation Fund (SCF) Designated (RFP) (For additional information on the State and Water Conservation Fund Act, please refer to Part 3, Section 101.1 and the Conservation Fund Act website: <http://www.dhs.gov/eis-planning/section101-nop>)

7. **Estuaries and Bays**  
 Are there any estuarine wetlands or estuarine and bays within the project context? If so, please state project name and describe the estuarine wetlands within the project and its design.

☐ No  
☐ Yes

If "Yes," please describe the estuaries.

[illegible][illegible]

C.	<p><b>Strategy</b></p> <p>Does the project include consideration or incorporation of a building, design, or materials management strategy aimed at the employment of the following building materials and techniques used for construction or material incorporation (select applicable features):</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Recycled, salvaged, and sustainable and alternative non-toxic materials</li> <li><input type="checkbox"/> No</li> </ul> <p>If "Yes, please describe:</p>
D.	<p><b>Public Involvement</b></p> <p>Please describe how you intend to address other stakeholders on behalf of the project, including the following (select applicable features):</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Public involvement</li> <li><input type="checkbox"/> No</li> </ul>
E.	<p><b>Mitigation Measures</b></p> <p>Please describe the measures you intend to take to better understand project impacts, both during construction and after operations:</p>
F.	<p><b>Other Federal Approval</b></p> <p>Please provide a list of other federal (DFO) actions related to the proposed project or in the vicinity of the project, if applicable:</p>
G.	<p><b>State and Local Public and Stakeholder</b></p> <p>Please provide a list of state and local public and stakeholder actions related to the proposed project or in the vicinity of the project, if applicable:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> No</li> <li><input type="checkbox"/> Yes, please describe the non-compliance:</li> <li><input type="checkbox"/> No</li> </ul>

[illegible]



## **Attachment C: NEPA/SSA/Rolling Stock Worksheet, Cont.**

### **Sole Source Aquifer Checklist**

**PROJECT NAME: Office and Support Equipment for SPOT Transit Operations**

**NAME OF SOLE SOURCE AQUIFER OR SOURCE AREA:**

- 1. Location of project:**
- 2. Project description.**
- 3. Is there any increase of impervious surface? If so, what is the area?**
- 4. Describe how storm water is currently treated on the site?**
- 5. How will storm water be treated on this site during construction and after the project is complete?**
- 6. Are there any underground storage tanks present or to be installed? Include details of such tanks.**
- 7. Will there be any liquid or solid waste generated? If so how will it be disposed of?**
- 8. What is the depth of excavation?**
- 9. Are there any wells in the area that may provide direct routes for contaminants to access the aquifer and how close are they to the project?**
- 10. Are there any hazardous waste sites in the project area....especially if the waste site has an underground plume with monitoring wells that may be disturbed? Include details.**
- 11. Are there any deep pilings that may provide access to the aquifer?**
- 12. Are Best Management Practices planned to address any possible risks or concerns?**

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Office and Support Equipment for SPOT Transit Operations

**13. Is there any other information that could be helpful in determining if this project may have an affect on the aquifer?**

**14. Does this Project include any improvements that may be beneficial to the aquifer, such as improvements to the wastewater treatment plan?**

The EPA Sole Source Aquifer Program may request additional information if impacts to the aquifer are questionable after this information is submitted for review.

### Attachment C: NEPA/SSA/Rolling Stock Worksheet, Cont.

#### Rolling Stock Worksheet

Subrecipient	Vehicle #	Year	Make/Model/Description	In Service	Out of Service	Current Mileage	Award ID	Fed Share			
Example	1FTNS2EL0DD802363	2022	E250 Van	11/04/22	05/01/23	5,600	C2376XX	\$ 42,238.00			
<b>Out of service or ready for replacement</b>											
106	1FDXE45SX5HB50140	2005	Ford STARCRAFT	12/01/11	12/01/16	311,797	NA		NFPA – Non-Federal Public Funds		
107	1FDWE35L67DB26555	2007	Ford Starcraft	06/01/11	09/01/23	236,339		\$ 35,232.00			
110	1FDXE45S6ADA55814	2010	Ford STARCRAFT	3/1/2011	NA	247,417		\$ 55,443.00			
111	1FDXE45S2BDA29759	2011	Ford Goshen	07/01/11	05/01/19	343,366		\$ 53,485.00			
114	1FDXE45S3EDA48325	2014	Ford Champion	05/01/14	NA	286,811		NA	VIP		
115	1FDXE45S3FDA14905	2015	Ford Elkhart	05/01/15	NA	308,071		\$ 46,732.00			
BFB	1FDEE3FL9BDA63289	2011	Ford STARCRAFT	06/01/11	NA	134,716		\$ 44,068.00			
<b>In service buses</b>											
117	1FDEE3FL0GDC33207	2017	Ford Eldorado Advantage	07/01/23	NA	52,014		NA			
217	1FDEE3FLXGDC18939	2017	Ford Eldorado Advantage	07/01/23	NA	68,926		NA			
118	1FDXE45S3JDC01506	2018	Ford Elkhart	05/01/18	NA	86,013		\$ 56,562.00			
119	1FDXE45S9KDC18439	2019	Ford STARTRANS	05/16/19	NA	205,329		\$ 56,909.00			
219	1FDXE45S9KDC18434	2019	Ford STARTRANS	06/06/19	NA	215,500		\$ 56,909.00			
319	1FDXE45S6KDC14428	2019	Ford STARTRANS	06/06/19	NA	175,162		\$ 56,909.00			
MT31	4DRBXTAR8KB549533	2019	IC RE	02/14/19	NA	68,068		\$128,000.00			
MT32	4DRBXTARXKB549534	2019	IC RE	02/14/19	NA	68,305		\$128,000.00			
MT33	1BAKJCSA3MF372250	2021	Bluebird Vision	12/27/19	NA	71,053		\$ 93,310.00			
MT34	1BABNB6A0PF388774	2023	Bluebird All American	12/01/23	NA	15,512					
MT35	1BABNB6A2PF388775	2023	Bluebird All American	12/01/23	NA	18,200					

## Attachment D: Demonstration of Need

### Congressional Application Attachment D: Demonstration of Need

1. Type of Service (Check all that apply):

- ☒ Fixed Route  
☐ Deviated Fixed Route  
☒ Demand/ Response

2. Service Area (Check one)

- ☐ City  
☐ County  
☒ Multi-County  
☐ Other (Please Specify):

3. Connectivity:

Do you connect with other modes of transportation? Check all that apply.

- ☐ Urban Public Systems  
☐ Intercity Carriers  
☐ Airports/ Trains  
☐ Other transit operators in your region (please list below):

---

---

4. Ridership:

Estimate the average number of rides: Per Day \_\_\_\_\_ Per Year 138,000

Briefly describe your ridership over the last two years: -

Our ridership in Bonner County continues to increase. We will exceed 138,000 rides this year based on a very conservative estimate. We actually expect to reach this year's goal of 150,000 rides. We surpassed one million rides in February 2023.

5. Days/ Hours of Service:

List days of the week and hours transit provider is in service

Seven days a week, 12 hours day in Bonner County. Four days per week, 7 hours each day in Boundary County.

---

## Back up Documentation

### SPOT Ridership

2023	Fixed	Para	Bonnors Ferry	Mountain Route	Total
23-Jan	4672	563	230	22489	27954
23-Feb	4200	509	204	19502	24415
23-March	4835	600	261	19601	25297
23 April	4197	477	152	4612	9438
23 May	4489	548	139	0	5176
23 June	4199	565	190	0	4,954
23 July	5986	489	129	628	7232
23 August	6820	536	216	0	7572
23 September	4231	547	149	2810	7737
23 October	4185	511	152	0	4848
23 November	4079	565	145	1214	6003
2023 TOTAL	51,893	5,910	1,967	70,856	130,626

2022	Fixed	Para	Bonnors Ferry	Mountain Route	Total
22-Jan	3986	365	136	20650	25137
22-Feb	3795	447	187	16777	21206
22-Mar	4399	538	277	12794	18008
22-Apr	3639	482	189	3470	7780
22-May	3752	467	191		4410
22-Jun	3827	588	185		4600
22-Jul	4417	480	202	494	5593
22-Aug	5132	596	217		5945
22-Sep	3888	545	223	2419	7075
22-Oct	4027	509	179		4715
22-Nov	3577	498	195	1815	6085
22-Dec	3776	478	237	21208	25699
2022 TOTAL	48,215	5,993	2,418	79,627	136, 253

2021	Fixed	Para	Bonnors Ferry	Mountain Route	Total
January	3334	270	111	9300	13015
February	3278	311	96	7894	11579
March	4345	414	111	6715	11585
April	3513	331	97	1531	5472
May	3949	299	69		4317
June	3782	375	119		4276
July	4420	388	169	524	5501
August	3965	460	139		4564
September	3392	459	123	3382	7356
October	3471	425	190		4086
November	3478	429	200	562	4669
December	3873	401	256	14,413	18943
2021 TOTAL	44,800	4,562	1,680	44,321	95,363

2019	Fixed	Para	Bonnors Ferry	Mountain Route	Total
September	4042	401	230	1269	5,942
October	4310	457	239		5,006
November	4473	395	226	393	5,487
December	4806	383	258	13013	18,460
2019 TOTAL	56,599	5,019	2,924	35,514	100,056

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Office and Support Equipment for SPOT Transit Operations

5:27 PM  
10/13/23  
Accrual Basis

**Selkirks-Pend Oreille Transit Authority**  
**Summarized Balance Sheet**  
**As of September 30, 2023**

<b>ASSETS</b>	<b>Bonner County</b>	<b>Boundary County</b>	<b>Total</b>
<b>Current Assets</b>			
Checking/Savings	227,569.74	15,406.48	242,976.22
Accounts Receivable	1,038.00	342.00	1,380.00
Grant Funds Receivable	182,246.01	10,767.00	193,013.01
Total Other Current Assets	40,997.33	3,078.67	44,076.00
<b>Total Current Assets</b>	<b>451,851.08</b>	<b>29,594.15</b>	<b>481,445.23</b>
<b>Total Fixed Assets</b>	<b>1,427,011.11</b>	<b>72,360.37</b>	<b>1,499,371.48</b>
<b>TOTAL ASSETS</b>	<b>1,878,862.19</b>	<b>101,954.52</b>	<b>1,980,816.71</b>
<b>LIABILITIES &amp; EQUITY</b>			
<b>Liabilities</b>			
Current Liabilities	19,503.10	620.93	20,124.03
<b>Equity</b>	<b>1,859,359.09</b>	<b>101,333.59</b>	<b>1,960,692.68</b>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>1,878,862.19</b>	<b>101,954.52</b>	<b>1,980,816.71</b>

5:27 PM  
10/13/23  
Accrual Basis

**Selkirks-Pend Oreille Transit Authority**  
**Summary Profit & Loss Budget vs. Actual**  
**September 2023**

	<b>Bonner County</b>		<b>Boundary County</b>		<b>Mountain Route</b>		<b>Total</b>	
	<b>Actual</b>	<b>Budget</b>	<b>Actual</b>	<b>Budget</b>	<b>Actual</b>	<b>Budget</b>	<b>Actual</b>	<b>Budget</b>
<b>Total Income</b>	92,150.00	126,206.82	7,168.00	6,297.00	13,029.00	7,464.88	112,347.00	139,968.70
<b>Expenses:</b>								
Administration	9,616.07	11,760.26	732.11	609.78	244.09	1,189.70	10,592.27	13,559.74
Operations	57,127.34	75,087.49	4,854.64	7,005.29	10,833.19	10,314.95	72,815.17	92,407.73
Preventative Maintenance	6,465.79	6,518.00	0.00	515.45	688.39	0.00	7,154.18	7,033.45
<b>Total Expenses</b>	<b>73,209.20</b>	<b>93,365.75</b>	<b>5,586.75</b>	<b>8,130.52</b>	<b>11,765.67</b>	<b>11,504.65</b>	<b>90,561.62</b>	<b>113,000.92</b>
<b>Net Ordinary Income</b>	<b>18,940.80</b>	<b>32,841.07</b>	<b>1,581.25</b>	<b>-1,833.52</b>	<b>1,263.33</b>	<b>-4,039.77</b>	<b>21,785.38</b>	<b>26,967.78</b>
<b>Other Income/Expense</b>	<b>85.47</b>	<b>-74,060.08</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>85.47</b>	<b>-74,060.08</b>
<b>Net Income</b>	<b>19,026.27</b>	<b>-41,219.01</b>	<b>1,581.25</b>	<b>-1,833.52</b>	<b>1,263.33</b>	<b>-4,039.77</b>	<b>21,870.85</b>	<b>-47,092.30</b>



Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Office and Support Equipment for SPOT Transit Operations

5:27 PM  
10/13/23  
Accrual Basis

**Selkirks-Pend Oreille Transit Authority**  
**Summary Profit & Loss Budget vs. Actual**  
**September 2023**

	Bonner County		Boundary County		Mountain Route		Total	
	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget
Total Income	92,150.00	126,206.82	7,168.00	6,297.00	13,029.00	7,464.88	112,347.00	139,968.70
Expenses:								
Administration	9,616.07	11,760.26	732.11	609.78	244.09	1,189.70	10,592.27	13,559.74
Operations	57,127.34	75,087.49	4,854.64	7,005.29	10,833.19	10,314.95	72,815.17	92,407.73
Preventative Maintenance	6,465.79	6,518.00	0.00	515.45	688.39	0.00	7,154.18	7,033.45
Total Expenses	73,209.20	93,365.75	5,586.75	8,130.52	11,765.67	11,504.65	90,561.62	113,000.92
Net Ordinary Income	18,940.80	32,841.07	1,581.25	-1,833.52	1,263.33	-4,039.77	21,785.38	26,967.78
Other Income/Expense	85.47	-74,060.08	0.00	0.00	0.00	0.00	85.47	-74,060.08
Net Income	19,026.27	-41,219.01	1,581.25	-1,833.52	1,263.33	-4,039.77	21,870.85	-47,092.30

5:27 PM  
10/13/23  
Accrual Basis

**Selkirks-Pend Oreille Transit Authority**  
**Summary Profit & Loss Budget vs. Actual**  
**October 2022-September 2023**

	Bonner County		Boundary County		Mountain Route		Total	
	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget
Total Income	811,519.10	1,120,732.30	74,685.18	82,303.82	555,672.40	329,254.86	1,441,876.68	1,532,290.98
Expenses:								
Administration	146,053.04	151,923.06	16,320.98	8,377.40	10,377.50	24,088.00	172,751.52	184,388.46
Operations	482,525.48	621,816.34	47,468.68	69,012.64	166,107.10	184,550.70	696,101.26	875,379.68
Preventative Maintenance	106,943.79	80,935.72	4,598.25	6,785.42	39,613.95	105,740.71	151,155.99	193,461.85
Total Expenses	735,522.31	854,675.12	68,387.91	84,175.46	216,098.55	314,379.41	1,020,008.77	1,253,229.99
Net Ordinary Income	75,996.79	266,057.18	6,297.27	-1,871.64	339,573.85	14,875.45	421,867.91	279,060.99
Other Income/Expense	-20,400.69	-392,481.00	-171.33	0.00	-329,382.60	0.00	-349,954.62	-392,481.00
Net Income	55,596.10	-126,423.82	6,125.94	-1,871.64	10,191.25	14,875.45	71,913.29	-113,420.01

**MEETING MINUTES  
SPOT**



**SELKIRK PEND OREILLE TRANSIT  
November 16, 2023**

**Nancy Lewis CALLED THE MEETING TO ORDER AT 11:00 A.M.**

**PRESENT:** Clif Warren, Colleen Culwell, Donna Griffin, Gary Kunzeman, Nancy Lewis, Ron Smith, Shannon Pittman, Zale Palmer

**Absent:** Wally Cossairt

**Public Comment Period:** No comments.

**MINUTES:** Approve minutes of the October 19, 2023 regular meeting as presented.

**Motion to approve the minutes of the October 19, 2023 regular meeting as presented. Zale Palmer/ Gary Kunzeman. All in favor. Approved**

**FINANCIAL REPORTS:**

Accept Financial Reports for October.

**Motion to accept the financial reports for October. Clif Warren/ Zale Palmer. All in favor. Approved**

Approve payment of prepaid bills and outstanding bills.

**Motion to approve payment of prepaid bills and outstanding bills. Zale Palmer/ Ron Smith. All in favor. Approved**

**STAFF REPORTS:**

**Ridership:** Donna Griffin reported that ridership for the fixed route overall is on track to exceed last year's ridership. Same for the para transit. Boundary County ridership is still lower. Ridership might come out to match last year. Donna is still working on more marketing – meeting in person with groups that may utilize the service. Schweitzer is planning to open for the season November 24<sup>th</sup>.

**Operations:** Donna Griffin reported AAA sent a contract extension that includes \$10,500 more in funding than the original contract. Disposing of three old buses that have previously been declared surplus property. They are not worth stripping for parts. Attorney has provided a checklist to follow. Buses to be disposed of are 107, 111, 106. Received approval to install a bench at the fairgrounds. The fairgrounds is removing their porta potty that our drivers use. Drivers will be told to utilize the facilities at the Red Barn once ski season opens. Feds are requiring that we use the GTSF system to upload our fixed route stop locations into their system.

**COMMITTEE REPORTS:**

- A. Boundary County Service Development Committee:** Ron Smith reported they are watching the ridership numbers. Discussing discontinuing the Tuesday trips to Sandpoint. May possibly change it to an in-town day.



Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Office and Support Equipment for SPOT Transit Operations

- B. Finance Committee Update:** The financial reports were reviewed and approved. Zale reported the committee discussed mechanic pay increase not covered last month's discussions of driver & admin pay increases. Committee recommends an increase. It has been one year since the krugerrand was placed in lost and found, however the prosecutors office has not released it to us yet. Committee reviewed the shelter grant balance. ITD approved to remove the installation of bike racks from the scope of work. Eureka is requesting additional funds for shelter construction due to increased cost of materials.

**ACTION & DISCUSSION ITEMS:**

- A. Action Item: Executive Session. Tabled.**
- B. Action Item: Authorize advertisement for Safety and Operations Manager position.** Donna distributed the job description for review. Board discussed various points. A special meeting has been scheduled for 10am November 28, 2023 to discuss further.  
**No action taken.**
- C. Action Item: SPOT staff pay increase**
- a. Mechanic.** Donna presented school district rate for entry level mechanic is \$23.39 up to \$29.63 for skilled mechanic. Looking for pay increase to \$24.50. An 8% pay increase for SPOT's mechanic would bring him to \$22.60/hr plus \$1 hazard pay.  
**Motion to increase mechanic base pay rate to \$22.60 effective October 1, 2023 plus \$1 hazard pay already in place. Zale Palmer/ Gary Kunzeman. All in favor. Passed.**
  - b. Assistant Director.** Donna presented Shannon was awarded a 5% pay increase as approved for admin staff, but drivers were awarded an 8% pay increase. She does occasionally drive vehicles and assist with moving them for repair purposes. The Finance Committee recommends not awarding the additional 3%. This would raise her pay rate to \$24.50/hr including hazard pay.  
**No action taken.**
- D. Action Item: Consider a Christmas Bonus for employees.**  
Donna mentioned drivers would prefer gift cards instead of cash bonuses.  
**Motion to award \$50 Christmas bonus for all employees via gift cards. Zale Palmer/ Gary Kunzeman. All in favor. Approved.**

- E. Action Item: Grant Applications 2024 - 2026.**
- a. Two Year Congressional Application suggestions**
    - i. Existing Services** – Donna plans to apply for funding for existing services, including Mountain Route which Schweitzer expects to continue past this current ski season.
    - ii. Capital/Asset Replacement – Buses (replacement for existing services)** – Would include two Mountain buses, two Fixed Route buses, two Para Transit buses.
    - iii. Add Demand Service in Bonner County** – Need county participation before this can move forward.
    - iv. Transit facility** – Need a place where buses can be worked on, parked, etc. Donna is discussing various options with Bonner County and with City of Ponderay.**Motion to authorize Donna to proceed with 5311 grant request for 2024-2026 and 5339 grant for capital/asset replacement. Gary Kunzeman/ Zale Palmer. All in favor. Passed.**  
**Grant requests for Bonner County demand service and transit facility tabled.**
  - b. One-time CARES Application suggestions** – Available in October 2024 and no match requirements.
    - i. Communication Equipment**
    - ii. Office Equipment**
      - 1. Computers, phones, printer/scanner, and operating system.**

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Office and Support Equipment for SPOT Transit Operations

Motion to apply for one-time CARES grant for communication and office equipment. Zale Palmer.  
Ron Smith. All in favor. Passed.

- c. VIP or CARES funding Bus replacement or rehab (fixed) – Available in October 2024 and no match requirements for CARES grant. Bus 219 requires a new engine and other substantial work. Or it may need to be replaced.

Motion to apply for funding via either VIP or CARES grants for replacement or rehab. Zale Palmer/  
Ron Smith. All in favor. Passed.

- F. Action Item: Schweitzer Mountain Route. Contract received back from Schweitzer with federally required wording removed. ITD stated the wording is required. Wording was added back and ITD has approved the contract. Clif and Donna will deliver the contract to Schweitzer for signature.

Motion to authorize Nancy Lewis to sign the contract if it meets all requirements. Zale Palmer/ Gary  
Kunzeman. All in favor. Passed.



- G. Action Item: Boundary County Service. Discussed changing Tuesday s  
Motion to discontinue Tuesday service to Sandpoint and change it to local service day effective January 1,  
2024. Ron Smith/ Zale Palmer. All in favor. Approved.

- H. Action Item: Financial Considerations.  
None.

COMMENTS FROM THE CHAIR AND BOARD MEMBERS: No comments.

Meeting adjourned 12:26 p.m.



**SPECIAL MEETING MINUTES  
SPOT**



**SELKIRK PEND OREILLE TRANSIT  
December 12, 2023**

Gary Kunzeman **CALLED THE MEETING TO ORDER AT 8:20 A.M.**

**PRESENT:** Clif Warren, Colleen Culwell, Donna Griffin, Gary Kunzeman, Nancy Lewis, Ron Smith, Shannon Pittman, Zale Palmer

**Absent:** Wally Cossairt

**Public Comment Period:** No comments.

**MINUTES:** Approve minutes of the November 16, 2023 regular meeting as corrected.

Motion to approve the minutes of the November 16, 2023 regular meeting as corrected. Clif Warren/ Ron Smith. All in favor. Approved

Approve minutes of the November 28, 2023 special meeting as presented.

Motion to approve the minutes of the November 28, 2023 special meeting as presented. Zale Palmer/ Gary Kunzeman. All in favor. Approved

**FINANCIAL REPORTS:**

Approve payment of prepaid bills and outstanding bills.

Motion to approve payment of prepaid bills and outstanding bills. Zale Palmer/ Clif Warren. All in favor. Approved

**STAFF REPORTS:**

**Ridership:** Donna Griffin reported that ridership for the Fixed and Para Transit routes for this year should exceed pre-Covid levels and also last year. Boundary County ridership is still lower. Mountain Route ridership for November was good even with little snow.

**Operations:** Donna Griffin reported 15 applications have been received so far for the Safety and Operations Manager position. There are 4-5 that look good. The hiring committee should plan to meet towards the end of December. The Mountain bus repair costs are still running high. Two of the rear engine buses are being worked on at RWC. The 2019 route buses are also encountering high repairs - mainly ball joints, brakes, etc. The drivers appreciated the holiday gathering and gift cards.

**COMMITTEE REPORTS:**

A. Boundary County Service Development Committee: Nothing to report.

B. Finance Committee: Nothing to report.

**ACTION & DISCUSSION ITEMS:**

- A. **Action and Discussion Item: Approve an option for funding for the cost of buses.** Revisited numerous cost increases from Northwest Bus Sales on three buses on order. ITD has approved an additional \$50,000 of funding to cover latest cost increase. This is sufficient to cover the \$24,000 additional cost of the bodies. Donna and Clif met with the attorney to review the options. Because the contract is with the WA purchasing group, we have no standing. The WA contract allows for cost increases up to 50%. The latest proposed cost of these buses is comparable to other recent purchases of similar items. Another option is to order under the GA contract. This contract allows for August/September 2023 delivery date with no price increases after the PO's are issued. GA quoted Turtle Top buses, which also have a heavy-duty AC. Donna needs to confirm change of scope with ITD changing from three buses to two buses. Noted quotes do not include interior cameras, which need to be added.

Motion to cancel the PO with the WA group, purchase two Turtle Top buses per GA contract with changes discussed, and also contingent on ITD approval of change of scope. Clif Warren/ Zale Palmer. All in favor. Approved.

B. **Action Item: Grant Applications 2024 - 2026.**

- i. **One-time CARES Application** – Donna plans to apply for funding for updating office computers and phone system, purchase AC compressor diagnostic machine, and scanning tool for codes. Total still to be determined.
- ii. **VIP or CARES or Two-Year Congressional Application** – VIP grant does not have enough available funds to cover the purchase of an additional demand bus. CARES has \$795k for the District and no match funds required. The 2-year congressional has \$1.1M available with match as a 5339. According to Donna, we don't have to decide on which funding path – can leave that up to ITD to decide which one would be a best fit. Will have a total of six buses under grant applications.

Motion to authorize Donna to proceed with applying for grants for six buses (2 Mountain buses + 4 Regular buses), marking the grant applications as scalable. Clif Warren/ Zale Palmer. All in favor. Passed.

- C. **Action Item: Financial Considerations.**  
None.

**COMMENTS FROM THE CHAIR AND BOARD MEMBERS:** No comments.

Meeting adjourned 9:21 a.m.


## Hosted Phones Quote

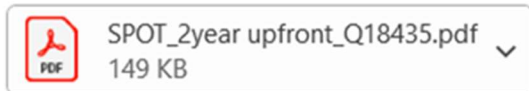


Avery Cheeley <acheeley@intermaxvoice.com>  
To dgriffin@spotbus.org



4:31 PM

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.



Hi Donna,

It was great to talk with you! I've attached a quote for hosted phones and wireless internet. This bill will replace your existing phone and internet bills, and it includes phone service as well as brand new phones on desks.

Do you have a desired install date in mind? It typically takes 2-4 weeks for your current carrier to release your numbers, so the sooner we sign contracts, the sooner we can start the clock on that.

Please feel free to reach out if you have any questions or want to discuss. If you're ready to get the ball rolling, let me know and I'll send over the paperwork.

All the best!



**Avery Cheeley**

Corporate Sales Associate

**o:** 509-325-8500 **d:** 509-362-9848

**w:** [intermaxvoice.com](http://intermaxvoice.com)

**a:** 7311 E Broadway Ave Suite B, Spokane Valley, WA 99212





Selkirks Pend Oreille Transit Authority (SPOT)  
 One-Time CARES Application for Office and Support Equipment for SPOT Transit Operations

**Intermax Networks**  
 Phone: (208) 762-8065  
 7400 N Mineral Drive, Suite 300  
 Coeur d'Alene, ID 83815



**Quote**  
 No.: **18435**  
 Date: **1/8/2024**

Prepared for:	Ship To:
Selkirks Pend Oreille Transit SPOT 31656 Highway 200 Box 8 Ponderay, ID 83852 U.S.A.	Selkirks Pend Oreille Transit SPOT 31656 Highway 200 Box 8 Ponderay, ID 83852 U.S.A.

<u>Prepared By</u>	<u>Account No.</u>	<u>Account Phone</u>	<u>Account Fax</u>	<u>Job</u>
Avery Cheeley	22718	(208) 263-3774		

Quantity	Item ID	Description	UOM	Discount	Sell	Total
1.00	BNDW - BUSI - WLS - INST	Business Wireless Installation	EA	\$0.00	\$0.00	\$0.00
1.00	BNDW - BUSI - WLS - 25Mbps x 3Mbps	2 years of service	EA	\$0.00	\$2,136.00	\$2,136.00
1.00	Calix U4 Router Support	2 years of Calix Router support	EA	\$0.00	\$312.00	\$312.00
3.00	Voice - IP Hosted with Handset - Standard	New phones with 2 years of phone service	EA	\$0.00	\$600.00	\$1,800.00
1.00	Voice - E911 Fees and Surcharge	2 years of E911 fees	EA	\$0.00	\$54.24	\$54.24
1.00	Voice - FCC Regulatory Fees and Surcharge	Voice - FCC Regulatory Fees and Surcharge	EA	\$0.00	\$360.00	\$360.00

Your Price:	<b>\$4,662.24</b>
<b>Total:</b>	<b>\$4,662.24</b>


Prices are firm until 2/7/2024      Terms: 24 Month Service Agreement

**Prepared by:** Avery Cheeley, [acheeley@intermaxteam.com](mailto:acheeley@intermaxteam.com)      **Date:** 1/8/2024

This quote is exclusive of any voice taxes, fees, and government charges that may apply. Router support includes our state of the art Calix router with remote troubleshooting and support. Voice service includes new phones, phone service, and troubleshooting/support. Quote includes free calling in the U.S., Canada, and North Mexico. For rates on calls to other countries, please consult with your Account Manager.

**Accepted by:** \_\_\_\_\_ **Date:** \_\_\_\_\_

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Office and Support Equipment for SPOT Transit Operations

	<b>D. R. Douglas Technologies, LLC</b>		<b>Quote</b>
	105 Vermeer Dr. #2 Ponderay, ID 83852 208-290-7817		Number: 24002
			Date: 4 January 2024

Billing Address:		Shipping Address:	
Company:	Selkirks Pend Oreille Transit	Company:	
Name:	ATTN: Donna Griffin	Name:	
Address:	31656 Hwy 200 Box 8	Address:	
City/State/Zip	Ponderay, Idaho 83852	City/State/Zip	

Terms: Please Pay Upon Receipt.

Qty	Product Description	Amount Each	Amount
2	Custom Business Workstation – Thermaltake Versa H21 ATX Mid Tower Case, Thermaltake Smart Power Supply 800W 80+ Bronze Certified PSU, AMD Ryzen 5 5600G 6 Core 3.9 GHZ (4.4 GHZ Max Boost) CPU, GIGABYTE B550 AORUS ELITE AX V2 AM4 AMD B550 ATX Motherboard with Dual M.2, SATA 6Gb/s, USB 3.2 Gen 2, 2.4/5 GHz Dual-Band, 2.5 GbE LAN, PCIe 4.0 Motherboard, G.SKILL Ripjaws V-Series 32 GB (2 x 16 GB) DDR4-3200 Memory, ASUS 24 x DVD-RW Optical Drive, 1 TB M.2 Gen4 Solid State (SSD) Primary Drive, 1 TB CX2 SATA III Solid State Data Drive, Logitech MK 540 Advanced Wireless Mouse and Keyboard Combo, MS Windows 11 Professional, MS Office 2021 Professional, and Webroot SecureAnywhere Anti-virus	\$ 930.00	\$ 1860.00
2	VIVO Dual Monitor Adjustable Desk Mounts	\$ 38.00	\$ 76.00
4	ViewSonic VA2256-MHD 22 Inch IPS 1080p Monitor with Ultra-Thin Bezels, HDMI, DisplayPort and VGA Inputs for Home and Office	\$ 110.00	\$ 440.00
1	LG gram 15.6" Lightweight Laptop, Intel 13 <sup>th</sup> Gen Core i7, Windows 11, 32 GB Ram, 1 TB SSD	\$ 1449.99	\$ 1449.99
1	Brother MFC-L8905CDW Business Color Laser All-in-One Wireless Printer	\$ 699.99	\$ 699.99
1	3 Year Allstate Protection Plan for MFC-L8905CDW Printer	\$ 86.99	\$ 86.99
6	System delivery and setup, network setup, data backup/transfer, printer setup and connect to network.	\$ 50.00	\$ 300.00
<b>Thank You For Your Business!</b>			
		Subtotal:	\$ 4612.97

	Tax:	\$ 258.78
	Shipping/Handling:	\$ 30.00
	<b>Total:</b>	<b>\$ 4901.75</b>

**Notes:** Pending order timeline components may be replaced by similar item(s) in function and value. This Quote is good for 30 days from above date. Upon acceptance of quote 50% is due with balance due on delivery.  
A SERVICE CHARGE OF 1.5% PER MONTH (18% ANNUAL) WILL BE CALCULATED ON PAST DUE AMOUNTS.  
STATEMENT BALANCE DUE ON RECEIPT. PLEASE MAKE CHECKS PAYABLE TO:

D.R. Douglas Technologies, LLC.  
105 Vermeer Dr. #2  
Ponderay, ID 83852

Current:	31-60 Days:	61-90 Days:	91-120 Days:	120-Over:
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Rates: Residential/Business: \$ 50.00/Hr. Networking: \$ 60.00/Hr. Data Backup/Recovery: \$ 70.00. System Wipe/Reload/Update: \$ 200.00 (Same for new Hard Drive install. Not including data backup.)



## Letters of Support

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January 10, 2024

Idaho Transportation Department  
Public Transportation Office  
PO Box 7129  
Boise, ID 83709-1129

Re: SPOT CARES Grant Application for Office Equipment

Public Transportation Team:

As the Director of the Boundary Economic Development Council, I would like to express strong support for the CARES grant application submitted for Selkirks Pend Oreille Transit Authority (SPOT).

The mission of the BEDC is to promote public infrastructure improvements that will lend themselves to the future growth and development of our community and its people. The services provided by SPOT are vital for the growth of our community and the well-being of our citizens, and contribute to the economic vitality of our county.

I understand that this grant will provide funds to replace aging office and communication equipment. I am quite familiar with the office equipment currently in use, and it is essential that this equipment be updated and modernized to provide an acceptable service level for the public.

Thank you for giving their grant application your full consideration.

Sincerely,

A handwritten signature in blue ink, appearing to read "David Sims", is written over a light blue horizontal line.

David Sims  
Director

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Office and Support Equipment for SPOT Transit Operations



**BOUNDARY COUNTY**  
**P. O. Box 419**  
**Bonnors Ferry, ID 83805**

01/09/2024

Idaho Transportation Department Public Transportation Office  
311 W State St  
Boise, ID 83706

Attention: Cares Act- One-Time Application

To Whom It May Concern:

This Letter will serve to endorse Cares Act- One Time Application for Office and support equipment being submitted by SPOT (Selkirks- Pend Oreille Transit). The Boundary County Board of Commissioners has discussed supporting all applications submitted by jurisdictions for support and are in full support of this project. This Project promotes the coordination, planning, development and maintenance of the transportation infrastructure in Boundary County.”

SPOT BUS’s need for reliable communication and support equipment is a great need. Funding will help SPOT upgrade their phone system, computers, printers, and diagnostic tools for buses. Having adequate office equipment will help the efficiency of SPOT in getting rides scheduled and communicating with those in need of reliable and safe transportation around Bonner and Boundary County. Having a diagnostic tool will help SPOT with diagnosing and fixing buses rather than taking them into a repair shop and making them out of service while waiting. Commissioners feel that SPOT’s need for effective and reliable office and support equipment would be extremely valuable to not only SPOT but also those it serves.

Boundary County Commissioners would appreciate your consideration of this project.

**BOUNDARY COUNTY**  
**BOARD OF COMMISSIONERS**

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Office and Support Equipment for SPOT Transit Operations



Tim Bertling, Chairman



Wally Cossairt, Commissioner



Ben Robertson, Commissioner



Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Office and Support Equipment for SPOT Transit Operations



January 4, 2024

Idaho Transportation Department  
PO Box 7129  
Boise, Idaho 83707-1129

RE: *Letter of Support for Public Transportation Funding- SPOT (Selkirk Pend Oreille Transit)*

Dear ITD Reviewers:

The Bonner County Area Transportation Team (BCATT), which is one of the longest-standing coordination groups in Idaho, is made up of member jurisdictions and local coordination groups which are dedicated to the planning, development, and maintenance of multi-modal transportation in northern Idaho. Membership includes ITD-D1, LHTAC, Bonner County, Sandpoint Independent Highway District, ten local communities, two school-districts, the non-vehicular trails/pathways group, and Selkirk Pend Oreille Public Transit (SPOT). This group's membership regularly seeks sources for transportation funding from all available entities- public and private, at the state and federal levels due to the ever-present statewide growth rate in ridership.

As longtime advocates for the development and advancement of public transit services to serve the ever-growing population in northern Idaho, BCATT is proud to comment on the status of this regional provider who has successfully woven public transit into all types of transportation planning throughout the geographic area. Our support covers five distinct areas of need which are briefly described below in terms of utilization and funding source(s):

- 1) Operations, Admin., Preventive Maintenance for Existing Services- (5311 Rural Congressional)  
This category of funding covers the continuation of existing services, including three fixed routes and paratransit services in Bonner County; demand response service in Boundary County; and the same service category between Boundary and Bonner counties.
- 2) Office and Support Equipment for Operations- (CARES Act One-Time Application)  
This category covers replacement of outdated systems, including telephone, updated operating systems and software; purchase of diagnostic tools for needed bus repairs.
- 3) Communication Equipment (CARES Act One-Time Application)- These funds will be used to purchase Nine-TM9300 40 W UHF Dash-mount mobile radios, one base-radio, as well as the programming and installation of the same.
- 4) Purchase of three new buses (fixed route) and one new demand-response bus; replace the outdated/high-maintenance vehicles for use in the two-county service area. (Cares Act One-Time Application)
- 5) Replace high mileage/ high maintenance **Mountain Route buses** with two new heavy-duty vehicles which will transport larger groups of passengers on mountainous route to and from Schweitzer Mountain ski destination (2024-2026 / 5339 Rural Congressional Application)

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Office and Support Equipment for SPOT Transit Operations

(2)

BCATT is very proud of the dedication and sincere perseverance that the Selkirk-Pend Oreille Transit Authority (SPOT), exudes in every action it has taken in serving the people who live, shop and recreate in the two Northern-most counties of Idaho.

Over the decade of growth, and cooperation with the other local jurisdictions/organizations that value their innovative approach to public service, SPOT has manifest a model community- partnership with the entire geographic area that North Idaho occupies. Its involvement with the local jurisdictions, service groups, and individual riders has rendered it a Community Star.

BCATT will continue to support this outstanding model of community service and outreach and urge your positive consideration of this request for funding.

Respectfully submitted,



Commissioner Luke Omodt, Chair





## CITY OF BONNERS FERRY

7232 Main Street  
P.O. Box 149  
Bonners Ferry, Idaho 83805  
Phone: 208-267-3105 Fax: 208-267-4375

---

January 11, 2024

Idaho Transportation Department  
Public Transportation Office

**RE: Grant Application for Office and Support Equipment for SPOT Operations**

To Whom It May Concern:

The City of Bonners Ferry wholeheartedly supports the Selkirks-Pend Oreille Transit Authority (SPOT) application for grant funding for office and support equipment for the SPOT bus service. The City understands that this equipment is critical to the successful operation of the SPOT bus program.

Our City residents, and the entire community, benefit greatly from the services offered by SPOT. Currently, a demand service is offered in Bonners Ferry and Moyie Springs where people call in and are picked up at their homes and taken to requested destinations. They are then transported back to their homes a few hours later. It is a much-needed service for people in our community. SPOT also offers a route from Bonners Ferry to Sandpoint that is very popular, since many Bonners Ferry residents have doctor appointments or need to shop in Sandpoint.

A significant portion of our population does not have the ability to drive. And we have heard specifically from Bonners Ferry City residents that the SPOT bus service has been a tremendous help to them in getting to doctor appointments, shopping, and performing other errands. Please approve the request for grant funding for SPOT from now through September 2026, so these services can continue in our area.

Sincerely,

A handwritten signature in blue ink that reads "Rick Alonzo".

Rick Alonzo  
Mayor

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Office and Support Equipment for SPOT Transit Operations

---



Boundary Area Transportation Team  
P.O. Box 1418  
Bonners Ferry, ID 83805  
208-267-3838

01/05/2024

Idaho Transportation Department Public Transportation Office  
311 W State St  
Boise, ID 83706

Attention: Cares Act- One-Time Application

To Whom It May Concern:

This Letter will serve to endorse Cares Act- One Time Application for Office and support equipment being submitted by SPOT (Selkirks- Pend Oreille Transit). Boundary Area Transportation Team members have discussed supporting all applications submitted by jurisdictions for support and are in full support of this project. This Project meets BATT's mission statement of "promoting the coordination, planning, development and maintenance of the transportation infrastructure in Boundary County."

SPOT BUS's need for reliable communication and support equipment is a great need. Funding will help SPOT upgrade their phone system, computers, printers, and diagnostic tools for buses. Having adequate office equipment will help the efficiency of SPOT in getting rides scheduled and communicating with those in need of reliable and safe transportation around Bonner and Boundary County. Having a diagnostic tool will help SPOT with diagnosing and fixing buses rather than taking them into a repair shop and making them out of service while waiting. BATT members feel that SPOT's need for effective and reliable office and support equipment would be extremely valuable to not only SPOT but also those it serves.

The Boundary Area Transportation Team would appreciate your consideration of this project.

Thank You,

  
Commissioner Wally Cossairt  
Chairman Boundary Area Transportation Team



Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Office and Support Equipment for SPOT Transit Operations



KOOTENAI MAYOR  
Nancy Lewis

CITY Clerk-Treasurer  
Manda B. Corbett

COUNCIL  
MEMBERS  
David Sundquist  
Stephen Ferris  
Joseph Bafferty  
Daniel Schock

January 04, 2024

Federal Transit Administration  
Boise, ID

Re: Rural Transit System Award

To Whom It May Concern,

Mayor Lewis of the City of Kootenai would like to support the Selkirk Pend Oreille Transit Service (SPOT) as a consideration for the 2024-2026 5311 Rural Congressional Application supporting the following:

- Continuation of existing services
- Office and Support Equipment
- Communication Equipment
- CARES Act one-time application (3 new fixed route buses)
- 2024-2026 Rural Congressional Application (Purchase of two new mountain buses)

I, Nancy Lewis Mayor of the city of Kootenai have always held SPOT in the highest of standards.

The city of Kootenai has a long and proud history of collaboration between the City and SPOT. I recognize the importance of SPOT's commitment to provide efficient and responsive public transportation services that are coordinated in a manner to encourage ease of ridership and quality services.

The SPOT system is a very valued resource. SPOT services supply public transportation for resident visitors, and workers not only commuting to employment and medical centers but ensure connectivity to other surrounding city resources.

I, Nancy Lewis Mayor of the City of Kootenai am excited for the opportunity to help support this award. Please consider SPOT for the Rural Transit System of the Year Award.

Sincerely,

Nancy Lewis, Mayor

**City of  
Moyie Springs**



TELEPHONE (208) 267-5161  
POST OFFICE BOX 573  
MOYIE SPRINGS, IDAHO 83845  
FAX (208) 267-5161

January 10<sup>th</sup>, 2024

**Idaho Transportation Public Transit Office**

**RE: Selkirks – Pend Oreille Transit Authority (SPOT Bus)**

**Project : CARES ACT One-Time Application**

To Whom It May Concern,

The City of Moyie Springs would like to give our total support for the Selkirks -Pend Oreille Transit Authority (SPOT Bus) in their 2024-2026 5311 Rural Congressional Applications. The service they are providing to our City and community in assisting residents in their transportation needs and is very welcomed. This service in our rural area providing transportation for groceries, and doctor or other appointments is a necessity for some residents and the City appreciates the SPOT Bus including our area in their routes. The City benefits as well as the riders.

Please consider the Selkirk -Pend Orielle Transit Authority (SPOT Bus) for grant funding to continue to provide their services. The City of Moyie Springs acknowledges the costs associated with these systems for maintenance and operations and we support the SPOT Bus in their efforts of find funding solutions to make our community a better place to live.

Thank you for your consideration,

A handwritten signature in blue ink, which appears to read "Donna Wilson-Funkhouser". The signature is fluid and cursive.

Donna Wilson-Funkhouser, City Clerk/Treasurer

Selkirks Pend Oreille Transit Authority (SPOT)  
One-Time CARES Application for Office and Support Equipment for SPOT Transit Operations



January 3, 2024

RE: Selkirk – Pend Oreille Transit

To Whom It May Concern:

The Area Agency on Aging of North Idaho (AAANI) has a vested interest in transportation for the senior population in the northern five counties of Idaho. In accordance with Section 306 of the Older American's Act, we are required to assure that continuing efforts are made to make transportation services available to older individuals residing within the geographical boundaries of our Area. We are also mandated to provide transportation services by the Idaho Senior Services Act, which states: "Transportation Services (IDAPA 15.01.01.013.03.I) designed to transport eligible clients to and from community facilities/resources for the purposes of applying for and receiving services, reducing isolation, or otherwise promoting independence."

AAANI clients are provided transportation to healthcare services, pharmacies, shopping (including grocery stores), senior centers, and miscellaneous excursions to help maintain their independence. The populations that we primarily serve include seniors aged 60 and over. Our goal is to enable older adults to live in their own homes as long as they can, safely and with independence.

The Selkirk-Pend Oreille Transit (SPOT) is critical to our goal of helping seniors maintain their independence and enjoy an increased quality of life. SPOT services have significantly helped address the need for public transportation with fixed route buses for many seniors in the Sandpoint area in Bonner County, and curb to curb service in Bonners Ferry area in Boundary County. SPOT's paratransit service for individuals with disabilities is essential for homebound seniors to access needed services, such as for medical services or social assistance agencies. The SPOT transportation service is an intricate and necessary process for the senior population to achieve their goals of remaining safely in their own homes.

Please let me know if you have any questions or need further clarification regarding transportation for seniors. It is a vital service that we need to provide in our state.

Sincerely,

Sage Stoddard  
Director  
Area Agency on Aging of North Idaho

## **Selkirk Pend Oreille Transit VEHICLE MAINTENANCE PROGRAM**

A schedule for vehicle maintenance on all every transportation vehicle is kept to maintain all vehicles in good operating condition.

### **Schedule -**

**Daily** – Pre trip and Post trip inspections will be performed on all vehicles that will be in service that day

**Monthly** – Maintenance inspection and lubrication for wheelchair lifts, wheelchair ramps and all vehicles door tracts, hinges and latches.

**Quarterly** – A vehicle inventory report is conducted. This report is done to check to see if equipment is missing or needs replace in each transit vehicle.

**Six Months** – This includes but is not limited to: Change seasonal tires and replace as needed; Inspect Brake Pads; Inspect Shocks / Struts; Inspect Front and Back suspension; and inspect lug bolts.

**Annually** – The following will be performed at least annually or every 35,000 – 45,000 miles, whichever comes first. This includes but is not limited to: Inspect and/or replace Air filter; Flush radiator and replace anti-freeze; Inspect and/or replace battery and cables; replace Spark Plugs, spark plug wires, distributor cap / ignition rotor; inspect and/or replace power steering fluid, belts, fuel pressure regulator, hoses, and cabin air filter.

**As Needed** – This will includes but is not limited to: oil changes (see requirements for services to be performed during an oil change) to be performed every 3,000 –5000 miles or sooner if needed; windshield repair; upholstery repair and chaise repairs.

A Service record (Appendix6) is kept on an ongoing basis to record all services performed and vehicles. This report is kept by vehicle with the receipts following in the vehicle binder.

### **DAILY MAINTENANCE SCHEDULE**

Prior to putting a vehicle into service each day a pre-inspection will be performed by the driver on the vehicle. At the end of that vehicle's service day the driver will perform a post-inspection on the vehicle. This inspection includes under the hood fuel levels and hoses and/or belts.

## **MONTHLY MAINTENANCE AND LUBRICATION INSPECTION**

This inspection is to check and lubricate wheelchair lifts, ramps, door tracts, hinges and latches.

## **TWICE A YEAR MAINTENANCE SCHEDULE – Typically spring and fall**

- Change and/or Replace Tires
- Inspect Brakes-Pads
- Inspect Shocks / Struts
- Inspect Front and Back suspension
- Inspect Lug bolts

## **ANNUAL MAINTENANCE SCHEDULE**

The following services will be performed on each vehicle annually or every 35,000 to 45,000 miles, whichever comes first.

- Inspect and/or Replace Air filter
- Flush radiator and Replace Anti-freeze
- Inspect and/or Replace Battery and Cables
- Replace Spark plugs
- Replace Spark plug wires
- Replace Distributor cap / Ignition rotor
- Inspect and/or replace Power steering fluid
- Inspect CV boots/joints or Drive shaft/U-joints
- Inspect/Replace Belts
- Inspect/ Replace Fuel pressure regulator
- Inspect and/or Replace Hoses
- Inspect and/or Replace Cabin air filter

**AS NEEDED** - OIL CHANGE will be performed on each vehicle every 3,000-5,000 miles or sooner if needed. The following will be included during each oil change.

- Check Coolant fluid & level
- Inspect Lug bolt
- Top off Washer fluid
- Check/Top off Power steering fluid & level
- Check/ Top off Brake fluid & level
- Check differential fluids & level
- Check Transmission fluids & level
- Check transfer case fluids & levels
- Replace Oil filter
- Change engine oil
- Perform a 14 Point inspection
- Test Drive

Lube Chassis fittings  
Wash Windows inside & out  
Dust interior  
Vacuum interior  
Check/ Replace Wiper blades  
Check? Replace Air filter  
Check/ Replace Battery  
Check Exhaust system  
Check Tires  
Check Air Pressure in tires  
Lube Fittings on Steering linkages  
Lube Ball joints  
Lube Drive shaft  
Check all Gas filters  
Install next Oil change sticker  
Lube Drive shaft  
Check all Gas filters  
Install next Oil change sticker

## **EVERY SPRING AND FALL**

Change and/or Replace Tires  
Inspect Brakes-Pads  
Inspect Shocks / Struts  
Inspect Front and Back suspension  
Inspect Lug bolts





# SELKIRKS-PEND OREILLE TRANSIT STRATEGIC PLAN

*NOVEMBER, 2015*





## Table of Contents

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## ACKNOWLEDGMENTS

The following people contributed to the development of this strategic plan:

Erik Brubaker, City of Ponderay

George Eskridge, Idaho Public Transportation Advisory Council

Marion Johnson, SPOT Manager

Susan Kiebert

Carol Kunzeman, City of Ponderay

Nancy Lewis, City of Kootenai

Carrie Logan, City of Sandpoint

Devin Marks, Schweitzer Mountain Resort

Saegen Neiman, Bonner County

Carole Richardson, Plangineering

Annie Shaha, City of Dover

Clif Warren

Bill Williamson, Schweitzer Mountain Resort

Bill Wright, SPOT Driver

Jared Yost, City of Sandpoint

## 1. INTRODUCTION

In 2011, the cities of Dover, Sandpoint, Ponderay and Kootenai launched a public transportation system offering fixed route service connecting each of the four cities. The City of Dover assumed the role of operator for the community transit system, using Federal Transit Administration funding with matching funds provided by Sandpoint and Ponderay.

The Selkirk-Pend Oreille Transit (SPOT) system was an immediate success, and ridership has grown steadily over the past four years. SPOT's early achievements are a testament to the effectiveness of our collaborative approach. SPOT successes and lessons learned offer a valuable statewide model for other transit systems in Idaho, demonstrating the power of partnerships in addressing critical community needs.

Our transit system's success has caught the attention of the Idaho Transportation Department and other organizations who are interested in seeing the system expand to serve new geographic areas. Recently, SPOT was encouraged to initiate demand-response service to serve a critical transportation need in Boundary County. SPOT has stepped to the plate and is currently providing limited demand response service within Boundary County, with a weekly inter-city connection between Bonners Ferry and Sandpoint.

Looking ahead, SPOT's leadership team desires a deliberate, informed approach to future expansion opportunities, so that the system's growth does not outpace available resources.

## PLANNING PROCESS

In the summer of 2015, SPOT's leadership team developed this strategic plan to set priorities, focus energy and resources, validate investment decisions, and enhance the organization's legitimacy in the eyes of funders, customers and stakeholders.

In discussing a vision for the organization, our team recognized that forward momentum would require sustained motivation and commitment by SPOT's leaders and partners.

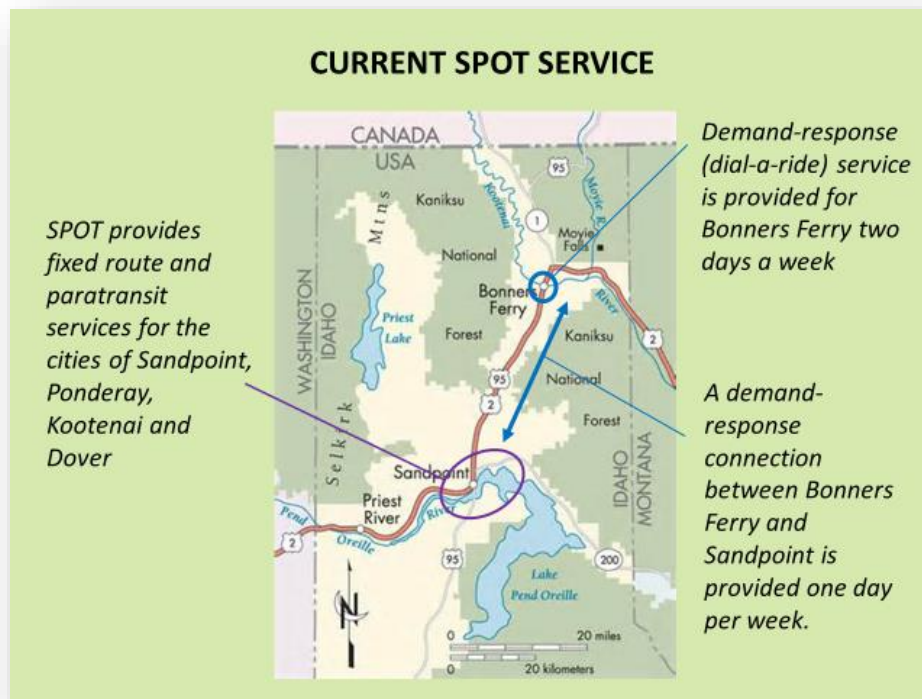
Understanding that each person is motivated by his or her own values, identifying common values for our leadership team and the communities we serve was a critical first step.

Values that could be positively influenced by SPOT led to the development of SPOT's vision statement. We then established a set of goals and objectives to be accomplished within the next five years to support the vision, and confirmed that SPOT's current mission provides a solid footing on which to start.



## 2. CURRENT ORGANIZATION, MISSION AND SERVICE

SPOT is a cooperative effort, formed through a memorandum of understanding between the cities of Dover, Sandpoint, Ponderay and Kootenai. Our oversight board, which includes the mayors of each city and an ex-officio member at large, is supported by a technical committee of staff members from each city plus a representative from Schweitzer Mountain Resort.



### MISSION

A COOPERATIVE EFFORT OF AREA MUNICIPALITIES TO PROVIDE CONVENIENT, SAFE AND RELIABLE PUBLIC TRANSPORTATION FOR RESIDENTS AND VISITORS TO EMPLOYMENT, RECREATION AND SERVICE DESTINATIONS.

Our mission is to provide convenient, safe and reliable public transportation for residents and visitors to employment, recreation and service destinations in the area.

Currently, fixed route service in the Sandpoint Area includes two routes connecting the four cities, with hourly service seven days per week. SPOT also provides paratransit service within the four city area.

For residents of Boundary County, SPOT recently initiated essential demand-response service within Bonners Ferry two days per week. We also offer a connection from Bonners Ferry to Sandpoint one day per week, which allows access to critical health care services, shopping and other basic needs.

### 3. WHAT WE VALUE

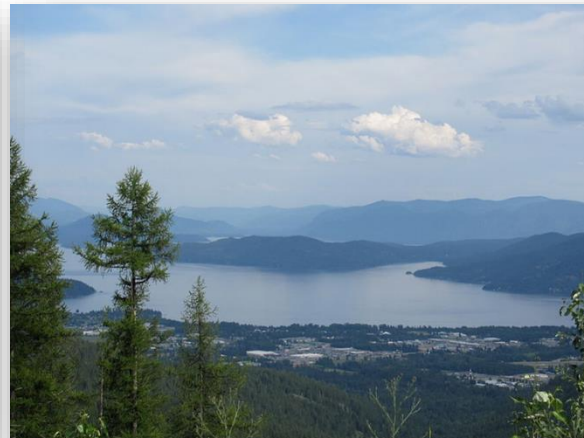
#### PEOPLE

SPOT riders inspire us! Coming from all walks of life, their appreciation for SPOT is a source of pride for us. We work hard to earn their trust and to keep it through friendly, excellent service. Hearing customers refer to SPOT as “my” bus, not just “the” bus, is music to our ears.



#### PLACES

From the Pend Oreille River to the scenic Selkirk Mountains, a ride with SPOT showcases magnificent natural beauty, clean air and water, and artistic, livable communities with a small-town feel. SPOT is privileged to help preserve these advantages for future generations, by reducing traffic congestion and fossil fuel emissions.





## PROSPERITY

Prosperity has many faces. SPOT fosters economic prosperity by providing businesses with access to the regional workforce, and helping to reduce employee commuting costs.

Elderly, disabled, low income and other socio-economically disadvantaged people depend on affordable, accessible transportation. Without it, many could not access medical services, shop for necessities, or get to work, and may become isolated in their homes. SPOT provides essential travel options to reduce these serious health and safety risks.



## PASSION

There is no better feeling than helping others. We get a big charge out of solving problems for people, and sharing lessons learned so that other transit systems can also succeed.

## 4. OUR VISION



### Vision Statement

- SPOT is the people's choice for travel throughout North Idaho.
- We will continue to help preserve North Idaho's human and natural environments for generations to come.
- We are innovative, taking advantage of new technology to stay cost-effective and affordable.
- SPOT is recognized and leveraged as a valuable asset for economic development and community vitality.
- Our strong partnerships and strategies for self-reliance are a national model.



## 5. STRATEGIC PLAN

SPOT's strategic plan covers goals and objectives for these five areas, to support SPOT's ultimate vision:

- Ridership
- Rider Access and Convenience
- Partnerships
- Stability and Sustainability
- Environmental Stewardship.

The strategic planning team established long-range goals for each of these areas, and developed objectives to be accomplished over the next five years. The "SMART" principle was used to make goals and objectives *specific, measurable, achievable, realistic and time-bound*. Table 1 lists goals and objectives along with the anticipated year for action. SPOT's technical advisory committee will maintain an action plan (Appendix C) to monitor progress and accomplishments.



Table 1. SPOT Strategic Plan

SPOT STRATEGIC PLAN		2015	2016	2017	2018	2019
<b>GOAL 1: INCREASE RIDERSHIP</b>						
1A	Prepare and implement a marketing and public information plan by December, 2016, aimed at expanding SPOT's customer base, improving information on how to ride, and protecting/enhancing SPOT's brand.		◆			
1B	Get SPOT's routes and stops on Google Transit by December, 2015.	◆				
1C	Fully implement the Double Map app by December, 2015.	◆				
1D	Perform community and rider surveys in 2016 to identify barriers for current and potential customers, and to gauge the popularity of potential expansion options.		◆			
1E	Work to increase public awareness by issuing regular press releases about SPOT activities.		◆	◆	◆	◆
<b>GOAL 2: IMPROVE RIDER ACCESS, CONVENIENCE AND AMENITIES</b>						
2A	Add third route to serve airport, food bank, residential and medical area.		◆			
2B	Perform an annual review of routes, stop frequencies, and operating hours; make adjustments if appropriate to improve convenience for riders.	◆	◆	◆	◆	◆
2C	Add shelters and bicycle racks to 10% of stop locations by 2016 and an additional 10% by 2018.		◆		◆	



SPOT STRATEGIC PLAN		2015	2016	2017	2018	2019
2D	Expand on-board bicycle accommodation on all coaches by 2018.				◆	
2E	Work to increase frequency of fixed route services (ongoing).	◆	◆	◆	◆	◆
<b>GOAL 3: LEVERAGE PARTNERSHIPS TO EXPAND SERVICE AND IMPROVE THE SYSTEM</b>						
3A	Integrate SPOT with Schweitzer Mountain Resort's transportation needs and funding. Implement a new route serving the mountain beginning November 2016.		◆			
3B	Coordinate with Bonner County and/or other partners to become active participants in SPOT by 2017.			◆		
3D	As roadway projects are proposed, coordinate with BCATT, BATT, ITD, local cities and counties, to include stop furnishings, pedestrian access and safety features, and other transit infrastructure needs.	◆				
3E	Develop a sponsorship program for stop furnishings ("adopt a stop") by 2016.		◆			
3F	Coordinate with land use agencies to incorporate SPOT needs in development reviews by December 2015.	◆				
3G	Coordinate with social services agencies to implement Demand-Response service within in the Sandpoint area by 2016.		◆			
3H	Provide regular (annual) updates to local government agencies and civic groups.	◆	◆	◆	◆	◆

SPOT STRATEGIC PLAN		2015	2016	2017	2018	2019
<b>GOAL 4: INCREASE ORGANIZATIONAL AND FINANCIAL STABILITY</b>						
4A	Evaluate alternate governance structures and select desired approach by 2017.	◆				
4B	By 2017, revise current governance structure to reduce political risks and allow for easier service area expansion.			◆		
4C	On an ongoing basis, develop and expand SPOT's internal capacity and resources through training and grant opportunities.	◆	◆	◆	◆	◆
4D	Update this list of objectives and action items quarterly.	◆	◆	◆	◆	◆
4E	Identify and select performance measures for SPOT and report on them annually		◆			
4F	Create an endowment or other long-term donation opportunity for SPOT, after Objective 4B is complete.				◆	
<b>GOAL 5: PROMOTE ENVIRONMENTAL STEWARDSHIP</b>						
5A	Explore other public transportation services including park and ride, vanpool and rideshare, as program champions are found.					◆
5B	Report annual emission reductions due to rides on SPOT on the SPOT website, beginning in 2017.			◆	◆	◆
5C	Add a seat on the TAC for a designated environmental advocate.	◆				



SPOT STRATEGIC PLAN		2015	2016	2017	2018	2019
5D	Consider energy efficiency options with next bus purchase.					◆
5E	Consider solar technology and other energy efficient options for shelters with next significant installation project.					◆

## APPENDICES

## APPENDIX A – FUNDING INVENTORY



## STATE AND FEDERAL FUNDING SOURCES

In 2012, Congress enacted new federal transportation funding legislation known as “MAP-21” (Moving Ahead for Progress in the 21<sup>st</sup> Century). The majority of funding for transit systems and services in the country comes from this federal transportation act.

MAP-21 contains provisions for funding programs administered by the Federal Transit Administration (FTA), and the Federal Highway Administration (FHWA), which are found in Chapter 53 and 23 of the Code of Federal Regulations respectively. While the lion’s share

of transit funding is contained in Chapter 53, there are some transit funding opportunities within the Highway program in Chapter 23.

Much of the federal transportation funding that is available to rural areas in Idaho State will flow through the Idaho Transportation Department (ITD), however there are several direct-federal programs that SPOT could explore; specifically direct-federal funding that is available to tribes and for projects that improve access to federal lands. A summary of MAP-21 programs for which transit activities may be eligible follows.

---

### *FEDERAL TRANSIT PROGRAMS ADMINISTERED BY ITD*

#### **5310 Enhanced Mobility of Seniors and Individuals with Disabilities**

- Former New Freedom program has been rolled into the 5310 program
- At least 55% of Idaho’s program funds must be spent on capital project planning, design and implementation specifically for seniors and individuals with disabilities when public transportation is insufficient, inappropriate or unavailable.
- Remaining 45% can be used for projects that improve access to fixed route service and decrease reliance by individuals with disabilities on paratransit.
- Capital 80% federal funding; 20% match
- Operating 50% federal funding; 50% match
- Projects must be identified within a Coordinated Public Transportation Human Services Transportation Plan

#### **5311 Rural Formula Funding**

- Eligible recipients are states and Indian tribes. Subrecipients may be state or local governments, nonprofits, public transportation operators or intercity bus services.
- Eligible activities are planning, capital, operating, JARC projects, and acquisition of public transportation services.
- Amount that comes to Idaho is dependent on vehicle revenue miles. SPOT can help increase Idaho’s share by increasing ridership.

- Low-income populations in rural areas is also a formula factor.
- Data collection required
  - Annual revenue
  - Sources of revenue
  - Total annual operating costs
  - Total annual capital costs
  - Fleet size and type, related facilities
  - Vehicle revenue miles
  - Ridership
- Capital 80% federal funding; 20% match
- Operating 50% federal funding; 50% match

**5311(f) Intercity**

- 15% of the state's 5311 funds have to go to intercity service
- Planning and marketing for intercity transportation
- Capital
- Operating through purchase of service agreements, etc
- Coordinating rural connections between small public transportation operations and intercity bus carriers

**5319 Bicycle Facilities**

- Providing shelters and parking facilities for bikes near transit facilities
- Installing equipment for bikes on buses
- 90% federal funding; 10% local match

**5324 Emergency Relief**

- Capital projects to protect, repair, reconstruct or replace equipment and facilities after a governor-declared disaster
- Transit agency operating costs related to evacuation, rescue, temporary service or changing routes before, during or after an emergency in an a directly-affected area.

**5326 Transit Asset Management**

- Will be a future requirement for recipients to manage capital assets and prioritize investments.
- There will likely be a technical assistance program.

**5339 Bus and Bus Facilities Formula grants**

- Capital 80% federal funding; 20% local match

**RTAP**

- Supports a variety of technical services and training opportunities for transit operators in rural areas.
- Includes scholarships to cover tuition and expenses for individuals to attend training courses, workshops and conferences.

---

**OTHER FEDERAL FUNDING****5311(c) Tribal Transit Program** (\$25M for tribes by formula and \$5M discretionary nationally)

- This program is administered directly by the Federal Transit Administration (FTA), not ITD.
- \$25 million annually is available nationally, and is allocated to tribes by formula. There is no match required for the formula funds.
- A recipient that is an Indian tribe may use funds apportioned under this subsection to finance public transportation services provided by a non-tribal provider of public transportation that connects residents of tribal lands with surrounding communities, improves access to employment or health care, or otherwise addresses the mobility needs of tribal members.
- Award amounts are based on revenue miles and number of low-income individuals residing on tribal lands
- There has been no formula allocation for the Kootenai Tribe in Idaho under this program, however other neighboring tribes do receive apportionments. 2015 apportionments included:
  - Confederated Salish and Kootenai Tribes (Montana) \$473,565
  - Coeur d'Alene Tribe/Citylink (Idaho) \$302,689
  - Kalispel Tribe (Washington) \$40,998
- An additional \$5 million annually is available nationally for competitive application. (The Idaho Kootenais should be eligible applicants for this portion of the program.) There is a 10% match required for the competitively awarded funds.

**Tribal Transportation Program**

- Separate from the Tribal Transit Program
- This program is jointly administered by the Federal Highway Administration and Bureau of Indian Affairs.
- Historically used for roadways, but eligible activities include planning, design and construction of transit and non-motorized transportation projects.

**Transportation Investment Generating Economic Recovery (TIGER)**

- TIGER is a nationally competitive funding program for transportation projects that have a significant national or regional impact. A broad array of projects are eligible for TIGER funding.
- Competition is typically fierce, however, and projects must demonstrate significant benefits for safety, economic competitiveness, state of good repair, livability and/or environmental sustainability.
- Most of SPOT's smaller capital improvements and bus purchases would not have the broader regional or national significance to compete well in this program. However, as the SPOT team continues to collaborate, the team may identify larger initiatives requiring the participation of multiple partners, for which the TIGER program could be considered.
- This is a direct federal program that is not administered by ITD.

**Surface Transportation Program (STP)**

- \$10 billion nationally in STP flexible funding. Non-motorized transportation facilities, transit capital projects and public bus terminals and facilities are eligible.
- In Idaho, STP funding for local agencies is administered by the Local Highway Technical Assistance Council (LHTAC). Projects within Bonner County are prioritized by the Bonner County Area Transportation Team (BCATT) and within Boundary County by the Boundary Area Transportation Team (BATT).

**Transportation Alternatives Program (TAP)**

- Construction, planning, and design of on-road and off-road trail facilities for pedestrians, bicyclists, and other non-motorized forms of transportation, including sidewalks, bicycle infrastructure, pedestrian and bicycle signals, traffic calming techniques, lighting and other safety-related infrastructure, and transportation projects to achieve compliance with the Americans with Disabilities Act of 1990.
- Construction, planning, and design of infrastructure-related projects and systems that will provide safe routes for non-drivers, including children, older adults, and individuals with disabilities to access daily needs.
- This program is administered by ITD.

**Federal Lands Access Program**

- This program is administered by the Federal Highway Administration, although ITD participates in project selection.
- Eligible recipients: State, county, town, township, tribal, municipal, or local government
- Eligible projects must address access to or within federal lands:
  - Preventive maintenance, rehabilitation, restoration, construction and reconstruction
  - Adjacent vehicular parking areas
  - Acquisition of necessary scenic easements and scenic or historic sites
  - Provisions for pedestrian and bicycles
  - Environmental mitigation in or adjacent to Federal land to improve public safety and reduce vehicle-wildlife mortality while maintaining habitat connectivity
  - Construction and reconstruction of roadside rest areas, including sanitary and water facilities.
  - Operation and maintenance of transit facilities

**Federal Lands Transportation Program**

- Only federal land management agencies are eligible for this program. Includes National Parks, US Forest Service, US Fish and Wildlife Service, Bureau of Land Management and Corps of Engineers.
- Operation and maintenance of transit programs are eligible.

**USDA Rural Development - Community Facilities Programs**

- Administered by the Idaho office of the US Department of Agriculture Rural Development Division
- Provide low-interest loans, grants and loan guarantees for projects to develop essential community facilities for public use in rural areas. An essential community facility is defined as a facility that provides an essential service to the local community for the orderly development of the community in a primarily rural area, and does not include private, commercial or business undertakings.
- Eligible borrowers include public bodies, community-based non-profit corporations, federally-recognized Tribes.
- Rural areas including cities, villages, townships and towns including Federally Recognized Tribal Lands with no more than 20,000 residents according to the latest [U.S. Census Data](#) are eligible for this program.
- Funds can be used to purchase, construct, and / or improve essential community facilities, purchase equipment and pay related project expenses.

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*COMMUNITY DEVELOPMENT BLOCK GRANTS***CDBG Public Facilities and Downtown Revitalization Grants**

- Eligible agencies are incorporated cities with a population under 50,000, or counties. Special service providers must be sponsored by a city or county.
- Funds public utility systems, fire stations, removal of architectural barriers and other public infrastructure.

**CDBG Job Creation Grant**

- Eligible agencies are incorporated cities with a population under 50,000, or counties. Special service providers must be sponsored by a city or county.
- Funds public facility construction and improvements that support companies who are expanding, or new companies that will be creating jobs.

## PRIVATE FUNDING SOURCES

Most private sources of funds grant small amounts. As many federal funding sources require a local match amount, private funding can be important as a source for required match amounts. Many private foundation grants require a nonprofit (non-government) recipient.

### *UNION PACIFIC FOUNDATION*

The UP Foundation provides grants to public charities or municipalities located in communities that are served by Union Pacific Railroad. Grants are typically modest – in 2015 grants made in Idaho totaled \$180,000, with an average individual award of roughly \$5,000.

### *STATE FARM COMMUNITY GRANTS*

Nationally, State Farm supports communities through social investments and countrywide relationships. At a local level, the company grants focus on two areas: safety and education.

#### Safety Grants

- Auto and roadway safety
- Teen Driver Education
- Home safety and fire prevention
- Disaster preparedness
- Disaster recovery

#### Education Grants

- Basic Economics
- Budget Counseling
- Employable Skills Training
- First Time Homebuyers Workshop
- Foreclosure Prevention Counseling

### *FORD FOUNDATION*

<http://www.fordfoundation.org/grants/organizations-seeking-grants>

Each year the Ford Foundation receives about 40,000 proposals and makes about 1,400 grants. Requests range from a few thousand to millions of dollars and are accepted in categories such as project planning and support; general support; and endowments. Grant applications are reviewed at our New York headquarters and in our regional offices.

Grant types include:

- General/core support
- Project
- Planning



- Competition
- Matching
- Recoverable
- Individual
- Endowment
- Foundation-administered project

The foundation has numerous grant interest areas. Those most applicable to SPOT will likely be found under the categories of Economic Fairness, Democratic and Accountable Government, and Sustainable Development. Inquiries can be submitted on-line throughout the year.

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*MJ MURDOCK CHARITABLE TRUST*

<http://www.murdock-trust.org/grants/index.php>

Description and Eligible Activities

The trust provides grants for a broad range of activities. These generally include education, culture and the arts, health and human services, scientific research, and youth leadership. The trust does not fund normal ongoing operations, including existing staff, or for the continuation of existing projects, or the continuation of programs previously financed from other external sources.

Amount and Match Requirement

Grant award size varies depending upon organization and project; however, past practices inform future decisions. Because the Trust's application and evaluation process is rigorous, thorough, and time intensive, requests for less than \$50,000 are generally discouraged.

Eligibility

To be eligible to apply for a grant, organizations must:

- Be a 501(c)(3) organization
- Operate in the Alaska, Idaho, Montana, Oregon, or Washington

Organizations must submit a letter of inquiry.

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*THE ROBERT WOOD JOHNSON FOUNDATION: MULTIPLE PROGRAMS*

[http://www.rwjf.org/applications/solicited/cfp.jsp?ID=21390&cid=XEM\\_A5734](http://www.rwjf.org/applications/solicited/cfp.jsp?ID=21390&cid=XEM_A5734)

Description and Eligible Activities

The Robert Wood Johnson foundation has multiple funding programs focusing on improving health and health care for Americans. Specific programs and funding initiatives vary year to year. Access to health care may be funded under various initiatives by this foundation.

Amount and Match Requirement

To be eligible for funding, applicants must typically secure 100 percent matching support. Matching funds may come from private organizations, or from city, county, state and federal funds. Usually, at least 50 percent of the match must be a cash match from one or more local, state, regional or national funding partners. The balance may be in-kind support provided by organizations other than the applicant organization.

Timing

Proposals are solicited at various time throughout the year. Watch the website for applicable opportunities.

Eligibility

To be eligible, an applicant organization must be located in the United States or its territories and be a:

- Nonprofit organization that is tax-exempt under Section 501(c)(3) of the Internal Revenue Code;
- Tribal group recognized by the U.S. federal government; or
- State or local agency.

In addition, grantees must be organizations that participate in established coalitions or networks that span multiple sectors and perspectives and may include representatives from business; education; public health; health care; community organizations; community members; policy advocates; foundations; and policy-makers.

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STATE FARM COMPANY GRANTS

<http://www.statefarm.com/aboutus/community/grants/company/company.asp>

Description and Eligible Activities

The grants focus on three areas: safety, community development and education.

- Safety Grants—Auto and Roadway Safety, Home Safety and Fire Prevention, Disaster Preparedness, Disaster Recovery, Personal Financial Safety/Security
- Community Development Grants—Affordable Housing, 1st Time Homeowners, Community Revitalization, Economic Development

- Education—Grants for K-12 public schools

Amount and Match Requirement

N/A.

Timing

Applications for 2016 funding were available from Tuesday, September 1 through Friday, October 30, 2015. Expect a similar timeframe for 2017.

Eligibility

The applicant must be an educational Institution, government entity, 501(c)(3) charitable nonprofit organizations, a 501(c)(4) volunteer fire companies, or a 501(c)(6) chambers of commerce.

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*TOM'S OF MAINE 50 STATES FOR GOOD*

<http://www.tomsofmaine.com/community-involvement/living-well/project-sponsorships>

Description and Eligible Activities

Tom's of Maine 50 States for Good initiative supports grassroots organizations throughout the country working to do good in their communities. Eligible projects must have a positive impact on the community in one of the following areas:

- Environmental Goodness
- Healthy Goodness
- Human Goodness

An internal panel narrows applications down to the top 100. An external panel narrows the 100 nominees down to 51 finalists (one from each state and the District of Columbia). 15 Final awards are made based on a consumer vote on Tom's of Maine's Facebook page.

Amount and Match Requirement

\$150,000 is available nationally; individual grants are \$10,000.

Eligibility

To be eligible to apply for a grant, organizations must:

- Nonprofit 501(c)(3) organizations, in good standing, for funding requests related to community events, projects or program support

- Nonprofit must have an operating budget of less than \$2 million

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#### *WALMART FOUNDATION*

<http://foundation.walmart.com/apply-for-grants/>

#### Description and Eligible Activities

Walmart has national, state and community grant programs. Funding requests should align with the Foundation's areas of focus. Current focus areas are:

- Hunger Relief and Healthy Eating
- Sustainability
- Women's Economic Empowerment
- Career Opportunity

The Community Grant Program considers additional focus areas.

#### Amount and Match Requirement

The Community Grants Program awards grants of \$250 to \$2,500.

Larger grants - \$25,000 minimum -- are possible through Walmart's National and State Giving Programs.

#### Eligibility

Organizations must be described as one of the following:

- An organization holding a current tax-exempt status under Section 501(c)(3), (4), (6) or (19) of the Internal Revenue Code;
- A recognized government entity: state, county, or city agency, including law enforcement or fire departments, that are requesting funds exclusively for public purposes;
- A K-12 public or private school, charter school, community/junior college, state/private college or university; or
- A church or other faith-based organization with a proposed project that benefits the community at large.

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*US BANCORP FOUNDATION*

<http://www.usbank.com/community/index.html>

Description and Eligible Activities

The U.S. Bancorp Foundation offers grants for unrestricted general operating support, program support, capital support, and contributions of equipment and property.

The Foundation has the following funding priorities:

- Affordable Housing
- Self-Sufficiency for low and moderate income populations
- Economic Development
- Education
- Cultural and Artistic Enrichment
- United Way

Eligibility

Only nonprofit organizations are funded. Organizations receiving primary funding support from a United Way organization are not eligible for a direct grant from the Foundation.

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*BULLITT FOUNDATION*

<http://www.bullitt.org/>

Description and Eligible Activities

The mission of the Bullitt Foundation is to safeguard the natural environment by promoting responsible human activities and sustainable communities in the Pacific Northwest. The Foundation supports nonprofit organizations that serve Idaho, Oregon, Washington, western Montana (including the Rocky Mountain range), coastal Alaska from Cook Inlet to the Canadian border, and British Columbia, Canada.

The Foundation's current focus is on the following areas:

- Urban Ecology
- Ecosystem Services

- Energy, Industry, and Technology
- Leadership and Civic Engagement

The Foundation will consider special requests in response to unforeseen emergencies or time- sensitive needs. However, funds for such grants are limited, and approval standards are high. Interested applicants should contact a program officer to determine eligibility. The Foundation does not fund capital projects or university overhead costs, nor does it fund candidates for political office or lobbying activities.

Applicants must begin the application process by completing an online proposal inquiry form available on the Foundation's website.

#### Amount and Match Requirement

Total Annual Giving: \$5,394,000; Grant Range: \$5,000 - \$200,000; Average Grant: \$25,000 - \$50,000

#### Timing

Proposal inquiry forms are available annually on March 15 and September 15, annually. Invited proposals are solicited May 1 and November 1, annually

#### Eligibility

Applicants must have a 501(c)(3) determination letter, or identify themselves as a validly organized and operating municipal corporation, public agency, or Native American tribe.

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#### *PEOPLE FOR BIKES GRANT PROGRAM*

<http://www.peopleforbikes.org/pages/grant-guidelines>

#### Description and Eligible Activities

Formerly the Bikes Belong Grant Program, People for Bikes is aimed at providing funding to those who strive to improve bicycling in America through efforts such as the building of trails and paths, or through promoting general bicycling advocacy and awareness. Fundable projects include paved bike paths, lanes, and rail-trails as well as mountain bike trails, bike parks, BMX facilities, and large-scale bicycle advocacy initiatives. A key goal of the Bikes Belong grants program is to support bicycling in as many places as possible.

Amount and Match Requirement

People for Bikes will accept requests for funding of up to \$10,000 for facility and advocacy projects. It does not require a specific percentage match, but prefers leverage and funding partnerships. The fund does not consider grant requests in which its funding would amount to 50 percent or more of the project budget.

Timing

People for Bikes generally holds 1-2 open grant cycles every year, historically in the spring and fall.

Eligibility

While SPOT is not specifically eligible for this funding program, it is included here for informational purposes as the planning team looks to partner with bicycling groups in the future. The program funds end-of-trip facilities for bicycles, such as bike racks, bike parking, and bike storage. Applications are accepted from nonprofit organizations whose missions are bicycle and/or trail specific. They also accept applications from public agencies and departments at the national, state, regional, and local levels; however, they encourage these municipalities to align with a local bicycle advocacy group that will help develop and advance the project or program. Because of its limited funds, People for Bikes rarely awards grants to organizations and communities that have received People for Bikes funding within the past three years.



## TECHNICAL ASSISTANCE, TRAINING AND OTHER RESOURCES

Technical assistance grants can help SPOT to build their internal knowledge and capacity. Grants are typically small, and usually in the form of time donated by technical experts rather than cash. The following programs may be of interest.

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### *AMERICAN PLANNING ASSOCIATION'S COMMUNITY PLANNING ASSISTANCE TEAM PROGRAM—PLANNING ASSISTANCE*

<http://www.planning.org/communityassistance/teams/>

#### Description

APA's Community Planning Assistance Team program considers applications from communities seeking pro bono planning assistance. If you live in or know of a community that lacks planning resources and could benefit from a team of planning experts, you're encouraged to apply. There is a \$50 application fee.

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### *GOOGLE GRANTS—FREE ADVERTISING*

<http://www.google.com/grants/>

#### Description

Google Grants provides \$10,000 per month in in-kind AdWords™ advertising (Google's online advertising tool), to nonprofit organizations to promote their missions and initiatives on Google.com. Grantees build and manage their own AdWords accounts just like paying advertisers, but participate with the following restrictions:

- A daily budget set to \$330, which is equivalent to about \$10,000 per month
- A maximum cost-per-click (CPC) limit of \$1.00 USD
- Only run keyword-targeted campaigns
- Only appear on Google.com
- Only run text ads

#### Timing

Google will run the ads run for as long as the organization remains actively engaged with their Grants AdWords account.

Eligibility

Only registered 501(c)(3) nonprofit organizations are eligible. Applicants must register on “Google for Nonprofits.”

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*MJ MURDOCK CHARITABLE TRUST FUNDRAISING & CAPACITY BUILDING ESSENTIALS OF DEVELOPMENT SEMINAR—FUNDRAISING SEMINARS*

<http://www.murdock-trust.org/enrichment-programs/essentials-development-seminar.php>

Description

The Essentials of Development Seminar helps organizations create a diversified funding development structure. Designed for smaller or start-up organizations, the program’s goal is to help these groups sustain the long-term accomplishment of their mission. The seminar is a pair of two-day workshops in Vancouver, Washington.

Among the topics covered in the seminar are:

- Principles of Fundraising
- Development of a case for support
- Donor list segmentation and management
- Donor contact and care
- Multiple approaches to fundraising

Participants

Each year, a group of about ten organizations is invited to participate in this program. Each organization brings its executive director, development personnel, and at least two board members

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*BENEVON—FUNDRAISING FROM INDIVIDUALS*

<http://www.benevon.com/welcome>

Description

Benevon trains and coaches nonprofit organizations in its system for developing individual donor programs. Benevon programs and services provide step-by-step process and the tools—training, templates, scripts, and rigorous coaching—to put non-profit organizations on the pathway

to financial sustainability. Benevon offers free 17-minute and 55-minute video training sessions on its website. It also offers free seminars and conference calls.

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*COMMUNITY TRANSPORTATION ASSOCIATION OF AMERICA*

The Community Transportation Association of America (CTAA) provides technical assistance for a wide variety of alternative transportation issues and activities. [www.ctaa.org](http://www.ctaa.org)

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*THE CHRONICLE OF PHILANTHROPY*

<http://philanthropy.com/section/Home/172/>

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*ASSOCIATION OF FUNDRAISING PROFESSIONALS*

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

## APPENDIX B – STAKEHOLDER ASSESSMENT

The SPOT strategic planning team brainstormed potential stakeholders in order to identify potential partners, and also discuss key outreach tactics that may be useful to consider as a marketing plan is prepared.

SPOT STRATEGIC PLAN: STAKEHOLDER ASSESSMENT NOTES							
Stakeholder or Stakeholder Group	Interests or “Stake”	Outreach Tactics/Key Messages	Possible Source of:				Best Team Contacts(s)
			Money	Time	Materials or Equipment	Political/ Moral Support	
Tourists	Ease of use Hassle factor Want to spend their time doing, not figuring out how to get around.	Sightsee with SPOT PR Campaign Educational Materials Provide info at hotels, chamber of commerce/visitor center, Schweitzer, and on line travel sites	X			X	Devon
Seniors	Access to essential shopping and services Safety Independence Combat Social isolation	Education Promote SPOT’s understanding of senior needs and issues Convenience Outreach through assisted living facilities, medical offices, and area aging agency	X			X	Susan
ITD (Upper Levels)	Funding levels Impacts on roads	Economic benefits of transit Private/public partnerships Safety					
Anti-Government	Cost/taxes	Economic return to community and benefits of getting people to employment and medical care in a cost-effective way					

SPOT STRATEGIC PLAN: STAKEHOLDER ASSESSMENT NOTES							
Stakeholder or Stakeholder Group	Interests or “Stake”	Outreach Tactics/Key Messages	Possible Source of:				Best Team Contacts(s)
			Money	Time	Materials or Equipment	Political/ Moral Support	
Rural Residents	Cost of travel Commuting	Drive in, park once and take SPOT Use mailers and advertising to reach this group					
Un-served Residents	Funding (taxpayer dollars going to services that they do not benefit from) General lack of awareness about the service						
Private Transportation Providers (Taxi’s)	Effects on their income	Partner with taxis for off-hour service needs Consider SPOT as a complementary service		X	X		Clif
Taxpayers	They pay the bill – can that be reduced by reduced costs for roads	Need clear statement of benefits.	X			X	All Team Members
Environmentalists/EPA	Clean air and water	Highlight SPOT’s environmental goals	X		X	X	
Government Agencies (All)	Financial impacts	Bring local elected officials into the “inner circle” – give them first-to-know status on SPOT’s activities	X			X	Mayors on SPOT Board
City Governments	Service to citizens / public welfare Cost-effectiveness Increased visitors to cities for business, shopping, entertainment; school	Keep them updated – presentations Encourage participation in SPOT advisory board	X	X	X	X	

SPOT STRATEGIC PLAN: STAKEHOLDER ASSESSMENT NOTES							
Stakeholder or Stakeholder Group	Interests or “Stake”	Outreach Tactics/Key Messages	Possible Source of:				Best Team Contacts(s)
			Money	Time	Materials or Equipment	Political/ Moral Support	
Road Departments	Road construction and maintenance	Benefits of transit for helping to reduce traffic Teaming with SPOT on road projects helps make the multi-modal case – may help to increase competitive position for funding	X			X	
SPOT Staff, Board and Committees	Ability to operate the system well Sustainability of the system Providing quality service		X	X	X	X	
Bus Riders	Expanded travel options Get to work Get to recreation	Use social media Provide info about SPOT at places of employment and recreational destinations	X			X	
Retailers	Impacts on business revenues; access to workforce; parking for customers	Reach them through DBA. Communicate benefits of transit for recruiting/retaining employees. Be seen as an environmentally friendly/ socially responsible/ community caring business.	X			X	
Cyclists	Safe commuting Access to recreation/nature/outdoors	Take the bus on days when you can’t have helmet hair. Reach them through cycle clubs	X	X		X	



SPOT STRATEGIC PLAN: STAKEHOLDER ASSESSMENT NOTES							
Stakeholder or Stakeholder Group	Interests or “Stake”	Outreach Tactics/Key Messages	Possible Source of:				Best Team Contacts(s)
			Money	Time	Materials or Equipment	Political/ Moral Support	
Pedestrians	Aesthetics/pleasant walking environment Avoiding car trips	SPOT is a great option for long distances or inclement weather Make buses, stops, signs easily identifiable Make schedule info available at stops	X			X	
Children (and Parents)	Independence Safety	Provide info on SPOT to teachers, PTA’s, libraries, child care businesses, recreational/sports/after school programs					
Low Income	Transportation affordability Access to jobs, medical and essential shopping	Outreach through health and welfare/social services agencies		X		X	
Disabled	Independence Transportation affordability	Outreach through medical offices		X		X	
Public At-Large	Traffic congestion Travel options/automobile dependence May not know much about SPOT	Advertising/radio/TV Word of mouth	X	X	X	X	

## APPENDIX C – ACTION PLAN

## SPOT ACTION PLAN 2015-2017

To be updated quarterly by the SPOT Technical Advisory Committee

Date of Last Update: \_\_\_\_\_

GOALS AND OBJECTIVES		2015	2016	2017	2018	2019	ACTION ITEMS
<b>GOAL 1: INCREASE RIDERSHIP</b>							
1A	Prepare and implement a marketing and public information plan by December, 2016, aimed at expanding SPOT's customer base, improving information on how to ride, and protecting/enhancing SPOT's brand.		X				<b>Marion</b> - secure funding <b>SPOT Board</b> - work on increasing budget for marketing <b>Jared and TAC</b> – Develop and analyze market info using Census and other available demographic data <b>Annie</b> – look for a marketing coordinator
1B	Get SPOT's routes and stops on Google Transit by December, 2015.	X					<b>Jared</b>
1C	Fully implement the Double Map app by December, 2015.	X					<b>Jared</b>
1D	Perform community and rider surveys in 2016 to identify barriers for current and potential customers, and to gauge the popularity of potential expansion options.		X				<b>Clif, Marion and Bill Wright</b> - design survey questions <b>Jared</b> - provide online survey <b>Marion and Bill</b> - Administer on-board survey <b>TAC</b> - Synthesize results for Board
1E	Work to increase public awareness by issuing regular press releases about SPOT activities.	X	X	X	X	X	<b>Annie</b> – add standing item to Board agenda to decide whether to issue a press release each month and agree on key messages.

GOALS AND OBJECTIVES		2015	2016	2017	2018	2019	ACTION ITEMS
<b>GOAL 2: IMPROVE RIDER ACCESS, CONVENIENCE AND AMENITIES</b>							
2A	Add third route to serve airport, food bank, residential and medical area.		X				<b>Marion</b> - submit grant applications for operations funding and capital funding in 2015
2B	Perform an annual review of routes, stop frequencies, and operating hours; make adjustments if appropriate to improve convenience for riders.	X	X	X	X	X	<b>Marion, Bill Wright and TAC</b>
2C	Add shelters and bicycle racks to 10% of stop locations by 2016, and an additional 10% by 2018.		X		X		<b>Marion</b> - submit grant application in 2015 and 2017
2D	Expand on-board bicycle accommodation on all coaches by 2018.				X		<b>Marion</b> - look for grant opportunity in 2016
2E	Work to increase frequency of fixed route services. (On-going objective.)	X	X	X	X	X	<b>TAC</b> – begin with peak hour frequencies in 2016.
<b>GOAL 3: LEVERAGE PARTNERSHIPS TO EXPAND SERVICE AND IMPROVE THE SYSTEM</b>							
3A	Integrate SPOT with Schweitzer Mountain Resort's transportation needs and funding. Implement a new route serving the mountain beginning November 2016.		X				<b>Clif and Devon</b> - negotiate service and payment schedule <b>Clif</b> - draft agreement for Board and Schweitzer approval.
3B	Coordinate with Bonner County and/or other partners to become active participants in SPOT by 2017.			X			<b>Saegen, Annie and George</b> - begin dialogue with county commissioners after community survey (Objective 1D) is complete.
3D	As roadway projects are proposed, coordinate with BCATT, BATT, ITD, local cities and counties, to include stop furnishings, pedestrian access and safety features, and other transit infrastructure needs.	X					<b>Susan</b> - discuss with BCATT and BATT members; implement a transit checkoff process for LHTAC projects starting this fall.

GOALS AND OBJECTIVES		2015	2016	2017	2018	2019	ACTION ITEMS
3E	Develop a sponsorship program for stop furnishings ("adopt a stop") by 2016.		X				<b>Erik</b> – Develop the program and secure initial sponsors. Consider a “top SPOT stop adopter” award.
3F	Coordinate with land use agencies to incorporate SPOT needs in development reviews by December 2015.	X					Implement a process for SPOT feedback prior to subdivision and commercial building permit approvals: <b>Carrie</b> (Sandpoint), <b>Carol K/Erik</b> (Ponderay), <b>Nancy</b> (Kootenai), <b>Annie</b> (Dover), <b>Saegen</b> (County).
3G	Coordinate with social services agencies to implement Demand-Response service within in the Sandpoint area by 2016.		X				<b>TAC</b> to make assignments for this task.
3H	Provide regular (annual) updates to local government agencies and civic groups.	X	X	X	X	X	<b>Plangineering</b> - prepare initial powerpoint for SPOT team's use <b>Marion and Clif</b> - update the powerpoint annually <b>Carrie, Annie, Carol K, and Nancy</b> – present the strategic plan to the Idaho Transportation Board <b>TAC</b> – schedule presentations to SURA, SDBA and PCDC
<b>GOAL 4: INCREASE ORGANIZATIONAL AND FINANCIAL STABILITY</b>							
4A	Evaluate alternate governance structures and select desired approach by 2017.	X	X	X			<b>Clif and Annie</b> - Compare pros and cons of: Joint Powers Agreement, 501(c)(3) or(4); Regional Public Transportation Authority; for-profit structure; or refinements to current structure. Provide information for Board discussion.

GOALS AND OBJECTIVES		2015	2016	2017	2018	2019	ACTION ITEMS
4B	By 2017, revise current governance structure to reduce political risks and allow for easier service area expansion.			X			Lead person for this action item to be decided after Objective 3A is complete.
4C	On an ongoing basis, develop and expand SPOT's internal capacity and resources through training and grant opportunities.	X	X	X	X	X	<b>Marion</b> - watch for RTAP training
4D	Update this list of objectives and action items quarterly.	X	X	X	X	X	<b>Marion</b> or designated TAC member
4E	Identify and select performance measures for SPOT and report on them annually		X				<b>Clif and Erik</b>
4F	Create an endowment or other long-term donation opportunity for SPOT after governance structure has been revised (see Objective 4B).				X		Action items to be assigned after 4B is complete.
<b>GOAL 5: PROMOTE ENVIRONMENTAL STEWARDSHIP</b>							
5A	Explore other public transportation services including park and ride, vanpool and rideshare, as program champions are found.					X	<b>TAC</b> – look for potential program champions/volunteer coordinators. Action items to be assigned after coordinators are found.
5B	Report annual emission reductions due to rides on SPOT on the SPOT website, beginning in 2017.			X	X	X	<b>Plangineering</b> - Provide simple spreadsheet tool for SPOT to estimate fossil fuel savings due to transit use.
5C	Add a seat on the TAC for a designated environmental advocate	X					<b>Erik</b> – Recruit a person for this position in consultation with other TAC members and the Board.
5D	Consider energy efficiency options with next bus purchase					X	<b>Marion, Clif and TAC</b>
5E	Consider solar technology and other energy efficient options for shelters with next significant installation project.				X		<b>Marion, Clif and TAC</b>



# See SPOT Engage

## OVERVIEW

The goal of this SPOT Marketing and Public Outreach Plan is to provide a clear path towards continuing to grow ridership and build community support. SPOT has a solid foundation on which to build increased marketing and public outreach efforts. It has a strong brand, solid ridership, enthusiastic community support, and positive political momentum. This plan will leverage all of these assets in a thoughtful and strategic way.

The Marketing and Public Outreach Plan addresses the following:

- Current marketing efforts
- Who is riding today, why they ride, and how to get them to ride more
- Who isn't riding much today and how to get them onboard
- A toolkit of strategies, rated by cost and complexity, and mapped to target audiences
- A three-year approach to implementation
- Partnerships required to successfully implement this plan

Informing this plan are stakeholder interviews, two community surveys – from riders and stakeholders, and market research performed by SHIFT. This plan uses industry best practices, opportunities unique to SPOT and the communities it serves, and successful efforts from other communities.

Implementation of this plan will result in a stronger SPOT that continues to weave itself more tightly into the fabric of the community. In several of our community interviews, the idea of making SPOT “just the way you get around” and “what our community does” and “a community institution” were expressed and embody exactly what a good marketing and public outreach plan can do for SPOT, along with strategic implementation.



## SPOT MARKETING EFFORTS TO DATE

The SPOT brand is very strong for a small transit system. SPOT's brand reflects the community and is easily identifiable. The logo, bus graphics and generally positive community perception of SPOT are tremendous assets that can be leveraged towards a new infusion of energy, excitement, and growth.

As SPOT moves forward with the marketing and outreach efforts of this plan, the brand and what it represents should be infused into all the various outputs. The brand should remain the same and be adapted and leveraged to connect more people to the bus and get more people on board. The main goal of this plan is for the community to view the SPOT brand synonymously with economic vitality and development.



*The SPOT Brand = fun, interesting, community-oriented*

SPOT has gone through a common cycle for new services in rural areas with a limited budget. Initially, SPOT had a lot of buzz, the awareness of SPOT grew quickly, there was initial money to market the service, and ridership grew quickly. Now, SPOT has hit a 5-year plateau where ridership is steady but not growing, awareness among non-riders has dropped, money for marketing is very limited, and customer information needs improvement. SPOT must invest more in marketing in order to reverse this trend. The baseline budget for marketing is very small:

*The current SPOT marketing and advertising budget  
is only \$1500-\$2000 per year.*

This current spend consists of limited print advertising, printed brochures, and website costs. Bus graphics and bus stop signage are not included in this total, but are included as part of the Capital Improvement Plan (bus graphics are included in the cost of a new bus and bus stop signage project already funded and slated for 2017). The advertising budget is so limited that SPOT is not able to build awareness or grow ridership through marketing or outreach.

SPOT should start planning for how to grow funding for these marketing investments. This is a challenge that will be addressed later in this plan with ideas on how to partner and trade for market exposure. The good news is that SPOT has strong brand fundamentals and is ready to build on this foundation to renew itself and look for more support and use in the coming three years.

## COMMUNITY SURVEYS

SHIFT conducted two similar surveys, from two distinct community groups – existing riders and community stakeholders. The goal of the surveys was to understand a variety of aspects including the markets and identify marketing opportunities, service improvement needs and perceptions of SPOT. Only a portion of the questions from each survey were asked of both groups, the rest were tailored specifically to either existing riders or community stakeholders.

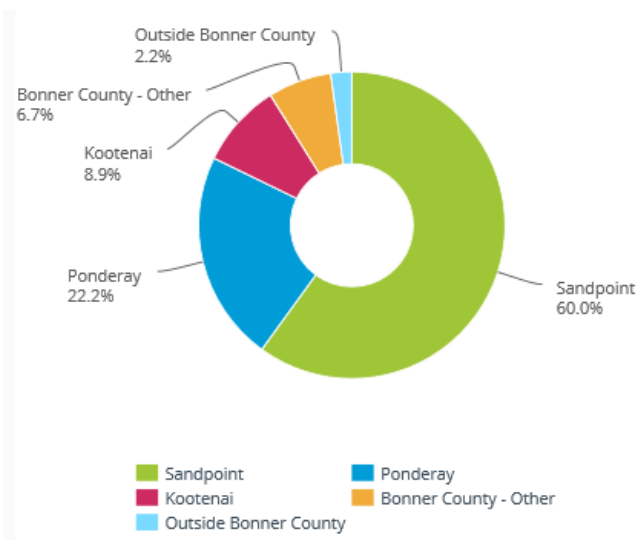
This plan focuses only on the survey responses that inform the markets and marketing opportunities. The existing riders group responded to marketing questions about how they use SPOT and why, how they plan their trip, and where they get their SPOT and other community information. The stakeholder group represented key decision makers and responded to some rider questions, such as why they ride or don't ride and what could get them to ride or ride more frequently, as well as marketing ideas for increasing ridership.

### Existing Riders Survey - Results

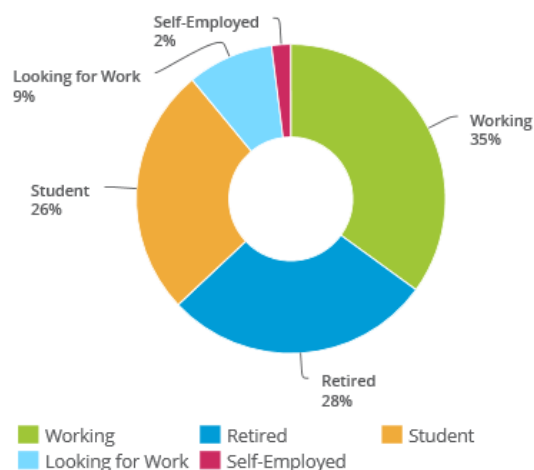
SHIFT conducted a survey of existing riders to understand who is using SPOT, why they are riding, and how they use the bus. 45 riders responded to the survey, which represents approximately 3% of the average weekly ridership, and 21% of the average daily ridership.

The survey shows 25% of respondents use SPOT 10 or more times a week, while 50% of respondents use it between 1-5 times a week. All respondents ride on weekdays and almost all ride on weekends too. The large majority live in Sandpoint, and most are employed, followed closely by retirees (retirees includes those no longer working, not necessarily retirement age).

Rider Residency

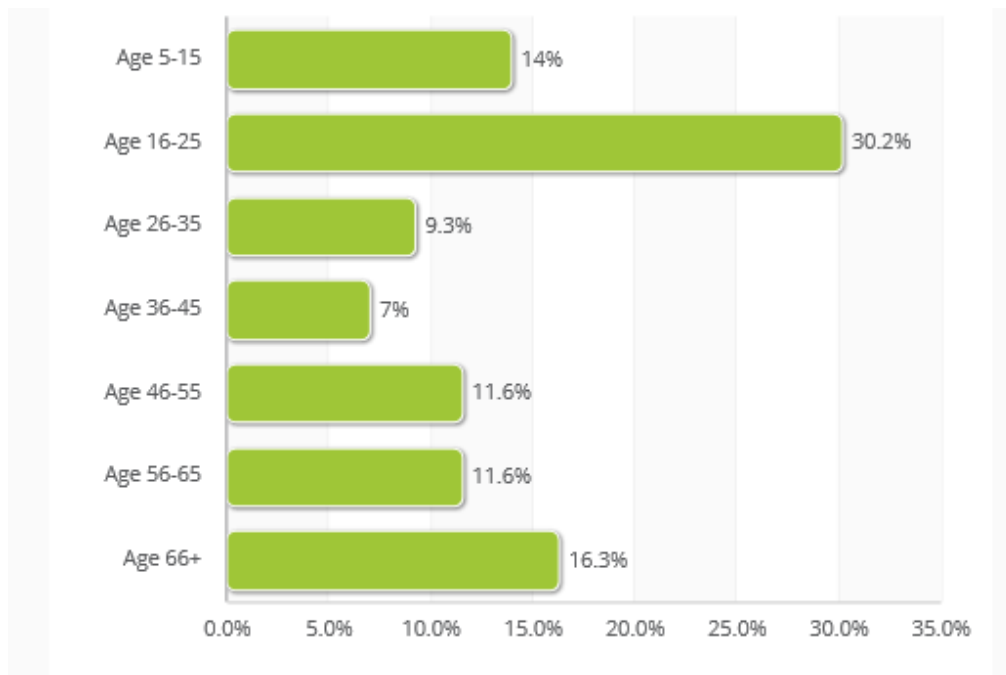


Employment Status



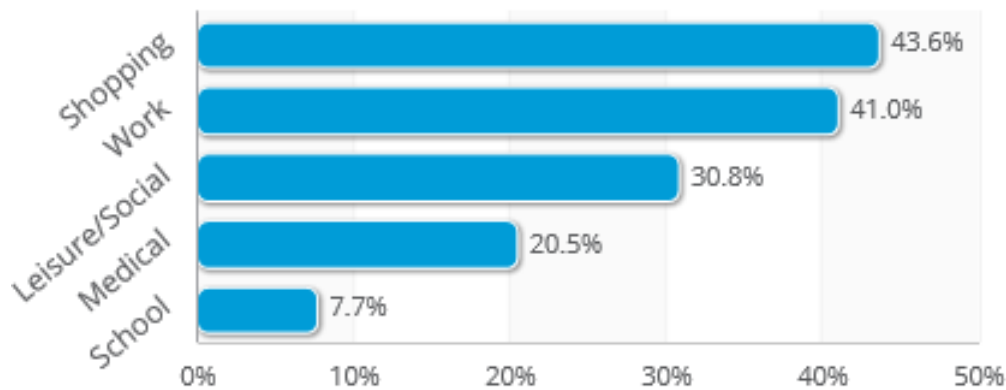
In terms of age, SPOT riders tend to be either younger riders, with 44% of riders aged 25 or younger, or older riders, with 28% of riders aged 56 or older. Middle-aged riders make up the smallest percentage of riders.

Rider Age



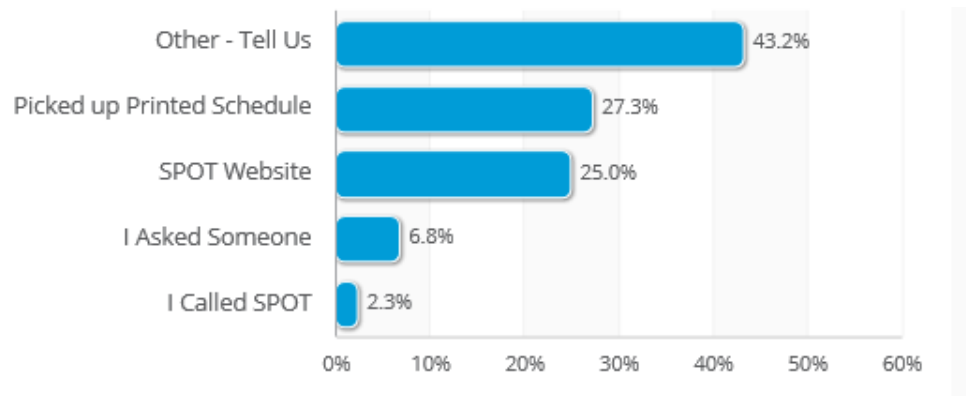
When asked about trip purpose, SHIFT found that most SPOT riders were using the bus for shopping, followed closely by work, but the results show that SPOT is being used for a wide variety of trip purposes. The data show that SPOT has a diverse ridership that counts on the service for all types of trips:

Reason for Trip



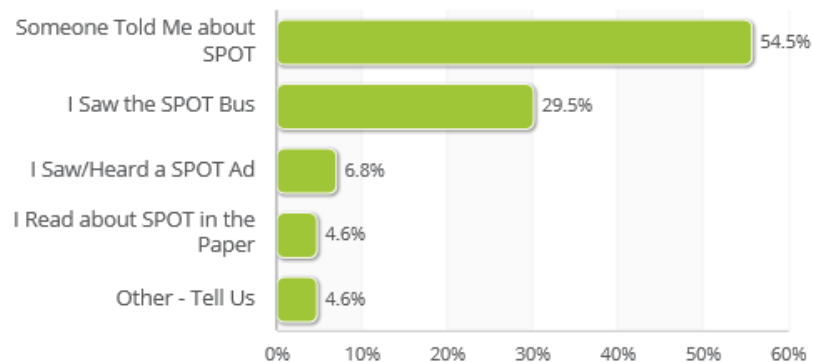
Another goal of the survey was to find out how riders are doing their trip planning, how they originally found out about the bus, and why they ride:

### How Did You Plan Your Trip Today?

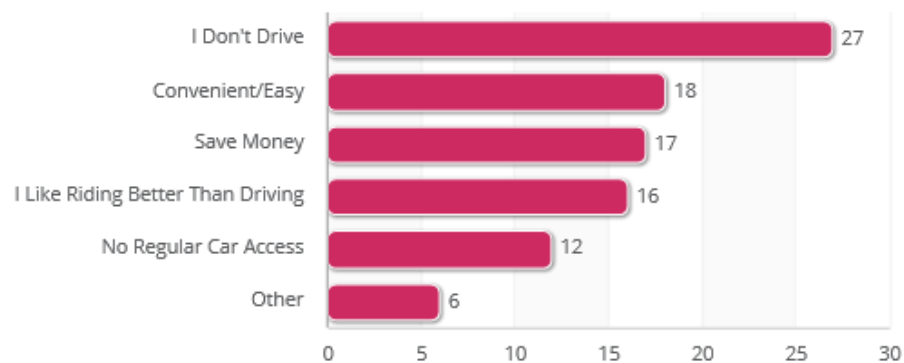


The “other” responses were predominately that the rider knows the schedule and doesn’t need to pre-plan their trip. The two additional responses received as “other” are: 1) schedule on phone; 2) called paratransit.

### How Did You Hear about SPOT?



### Why Do You Ride SPOT?



## Existing Riders Survey - Discussion

SPOT is used by a diverse group of people, representing many age groups with varying reasons for using SPOT. There were a few patterns identified in the responses received that lead to assumptions regarding who the majority of riders are today and what groups of riders are not as prevalent. The survey results highlight three target market opportunities:



- 1) Youth/young adults
- 2) Seniors
- 3) Employees (middle ages)

The youth/young adult segment of SPOT respondents can be summarized as follows:

- They form the majority of riders responding to the survey
- They don't drive or have access to a vehicle
- They are almost solely use SPOT for shopping and work trips
- 70% live in Sandpoint
- They use both routes equally
- They predominately get their information from the SPOT website

The survey was conducted in August; therefore, youth respondents were not in school and no responses were collected reflecting that this age demographic is using SPOT for school transportation. Additional information or survey data would need to be collected to identify whether they are using SPOT for transportation to and from school. Without knowing the results, assumptions can be made that this is likely occurring during the school year. Gaining more youth ridership during the school year is certainly a marketing opportunity through outreach and promotion at the schools.

Riders greater than 65 in age made up 16% of respondents. This group's responses can be summarized as follows:

- They use SPOT primarily for shopping and leisure trips
- 50% live in Ponderay
- They get their SPOT information from a variety of places – website, brochures around town, newspaper, and at community centers

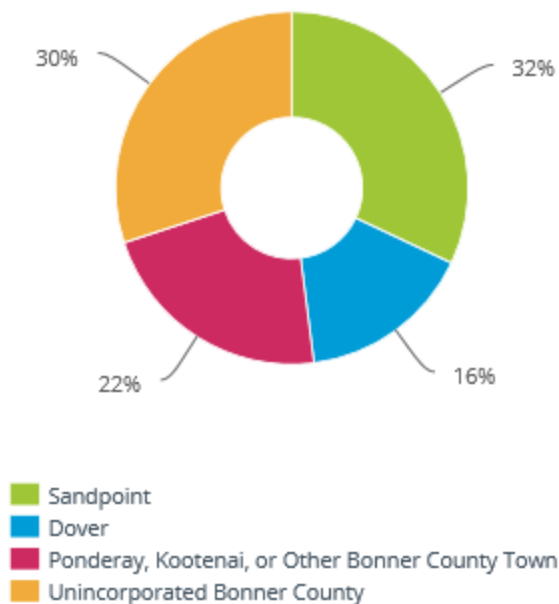
- Their trips tend to be longer in miles, which might be because 50% of the respondents from this demographic reported to live in Ponderay and are likely traveling to Sandpoint or another location outside of Ponderay for their shopping and leisure trips
- They ride SPOT predominately because they would rather not drive and because it's easy and convenient

Almost 56% of all respondents heard about SPOT from someone (word of mouth), with about 30% finding out about SPOT by seeing the bus. This leaves about 14% of respondents learning about SPOT from other forms of marketing. This is an indicator that either SPOT has invested little in advertising or riders are not receptive to the types of advertising that SPOT has pursued. The former is likely the primary reason, but strategically selecting the type of advertising is also an important consideration.

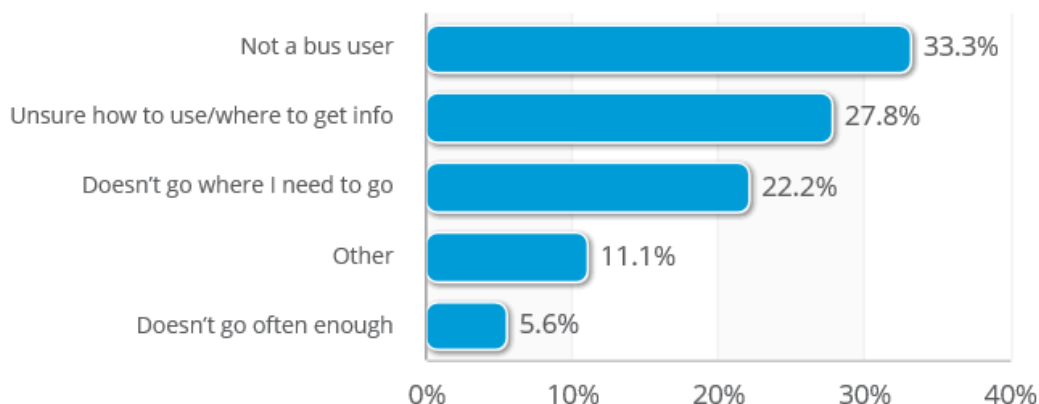
### Stakeholder Survey (Riders and Non-Riders) - Results and Discussion

SHIFT polled community stakeholders by designing an online survey and distributing it electronically through a variety of means including the Sandpoint Chamber, city and county electronic mailing lists, a link on the SPOT website, a feature in the Bonner County Bee, and a feature on Sandpoint Online. Here are the results of 49 respondents who took the survey.

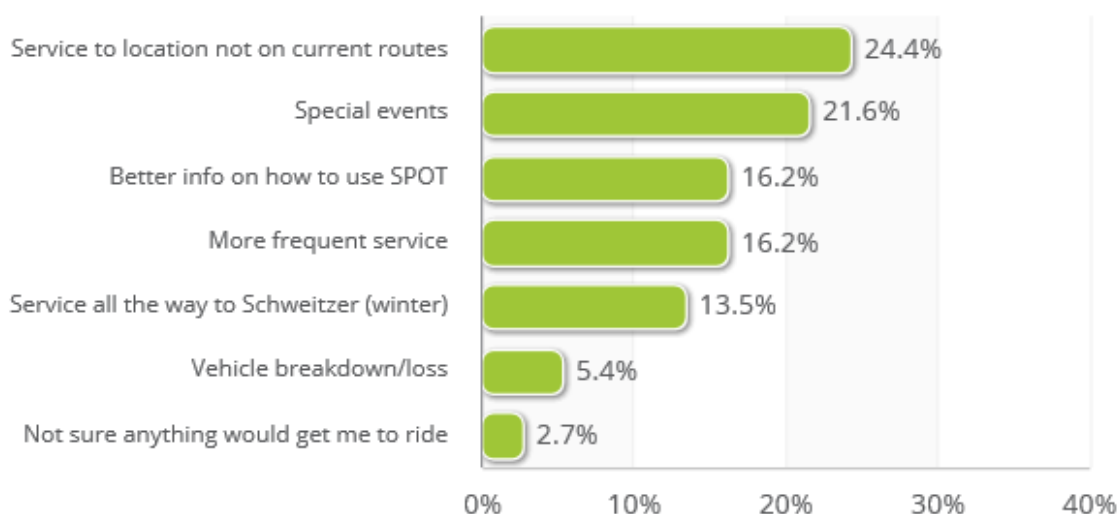
#### Rider Residency



43.5% have never taken SPOT before. Of these respondents, the following reasons for not riding were received:



When this group was asked what could get them to ride spot, they responded as follows:

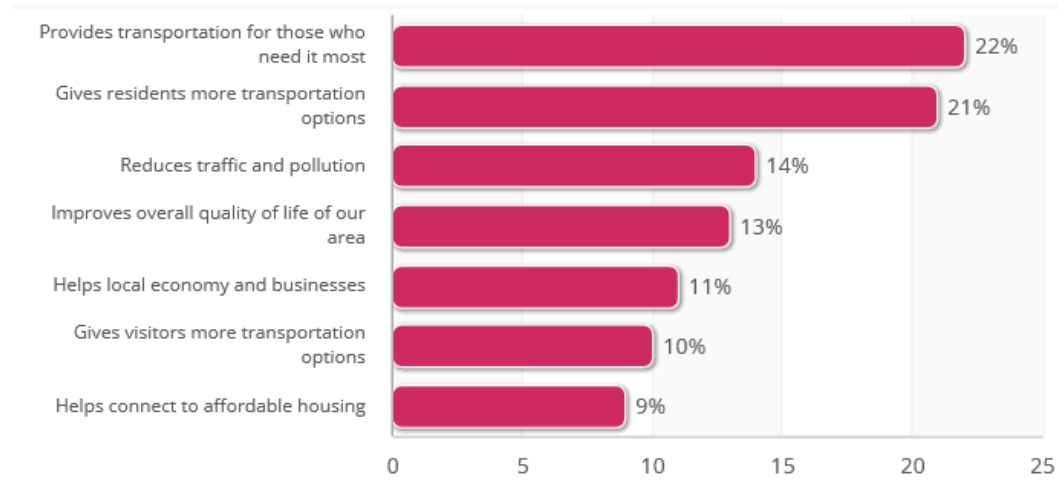


In addition to the choices provided above, the group was also given the option to write in their own ideas that might get them to ride SPOT. Their feedback was predominately split between two responses: 1) clearer information and route maps; 2) expanded service to Sagle, Baldy Road, and shuttle service between parking areas and City Beach/downtown during the weekends.

56.5% of the stakeholder group has taken SPOT. When asked their reasons for riding, the top three responses among respondents were: 1) transportation while their car was repaired; 2) leisure or social activity; 3) shopping. These results are consistent with the results of the rider survey; few middle-age respondents are using SPOT for transportation to and from work. The stakeholder group likely uses SPOT for infrequent trips, on occasion, not for daily commuting.

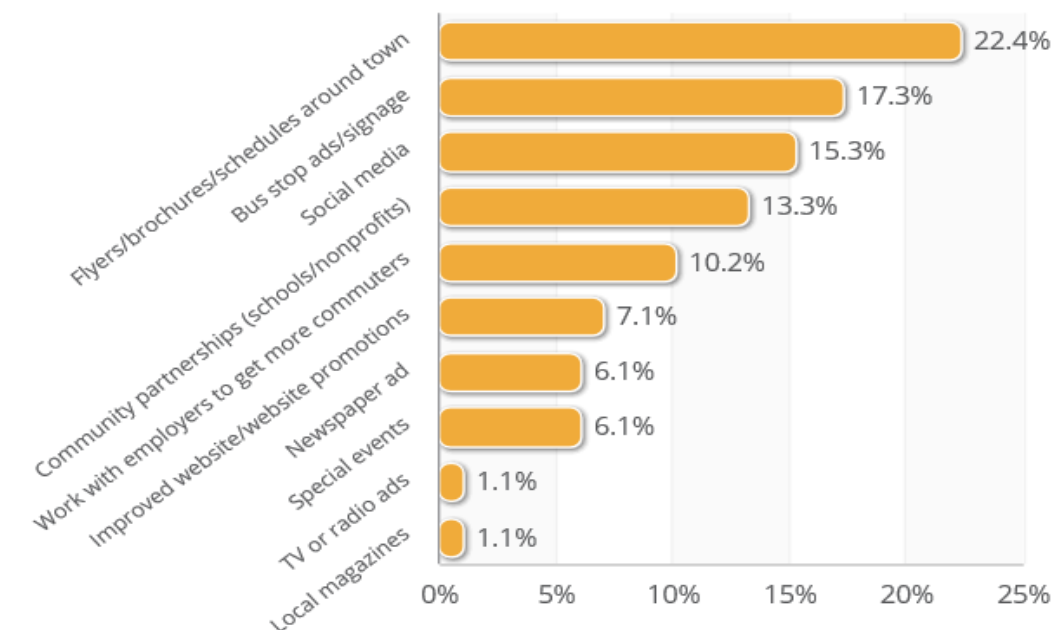


The stakeholder group was asked to respond to what the perception of SPOT is and its role in the community. Here were the responses:



These results indicate that stakeholders perceive SPOT as a necessary service for those that need it and as a benefit to residents to allow them more transportation options. They see SPOT less as helping the local economy and businesses and even less as giving visitors more transportation options. These are two areas where more targeted marketing can change the community's perception of SPOT from offering limited, but necessary, transportation benefits to SPOT being "a community institution" and "just the way we get around," as heard during several stakeholder interviews.

The stakeholder group was asked what the most cost effective marketing strategies/tools are to attract more riders and improve awareness of SPOT and the following responses were received:



Getting more information out about SPOT around town is a common theme in the results of both community surveys that could help increase ridership with the general community as well as visitors and establish SPOT as beneficial to the economy and businesses.

There can be a relationship between increased ridership and economic and community vitality. SPOT riders walk or bike to and from each bus stop when they begin and end their trip. Walking by businesses creates opportunities for more economic activity around these bus stops. When parking is limited people may decide not to visit downtown areas at all, whereas SPOT could provide a hassle free and easy way to get people to a location without the stress and inconvenience of parking.

## Marketing for Boundary County, Paratransit, and Vanpool

Much of the research, discussion, and tools in this plan are focused on riders of the fixed route system – Blue and Green Route riders. This market represents one of the largest opportunities for growth through marketing and outreach. Many of the marketing ideas in the toolkit section of the plan can be used for these services, but it is important to discuss specific marketing tactics for Boundary County, paratransit and vanpool and the communities they serve. These groups weren't specifically surveyed, but SHIFT conducted many interviews and drew on best practices when marketing to these groups.

### Boundary County-Bonner's Ferry Demand Response Service

This service is still relatively new, running less than eighteen months, and has done a good job of attracting a base of riders that need the service. It routinely runs at better than two riders per hour, which is good for a demand response service.

In a small community such as Bonner's Ferry, word of mouth and grassroots marketing are the best approach. As a new service, SPOT needs to educate the community about what SPOT is, how it operates, and why it's good for everyone.

The first step is creating a simple marketing piece that can be printed and distributed in several forms including as a rack card, a flyer, and electronically. The purpose of this would be two-fold: to promote the service itself and how to use it (hours of service, destinations, etc.), and to educate on what public transportation is.



The educational message should be:

- Public transportation is a public service and is open to everyone
- The city and county support and sponsor SPOT services
- With more demand and use, SPOT could add more service to the Bonner's Ferry area
- Public transportation is good for the community – it provides vital mobility, saves riders money, and provides more independence to those who use SPOT



*SPOT strengthens the community by providing mobility and independence*

*Credit: Bonner's Ferry Herald*

Recommended distribution of this marketing piece is:

- posting around town
- city mailings
- local businesses
- hospital
- assisted living facilities (e.g. Restorium)
- visitor center
- city hall

SPOT should also consider being interviewed on the local radio show and presenting to as many community groups as possible. It should also be distributed electronically through Bonner's Ferry online, Facebook groups, and city and county online resources.

## Bonner County Paratransit Service

Paratransit service is a federal requirement of a fixed route service, when federally funded. SPOT should consider marketing this service in conjunction with marketing the fixed route service. There are numerous benefits to increased awareness of paratransit service:

- 1) providing mobility to those that need it most
- 2) increasing efficiency/productivity of paratransit service by linking multiple trips together instead of only single rider trips
- 3) providing positive community perception

Currently, this service is marketed very little. There is a very small mention of it on the SPOT schedule, with no detailed information about the service, and the website doesn't have any section about this service. SPOT should increase the information about paratransit on the SPOT printed schedule and website as a first step to better marketing this service. The next step would be to create a dedicated informational card on this service, much like the one suggested for the Bonner's Ferry demand response service, that would describe hours of service, prequalification process, area of service, and other helpful information. This should be distributed to all social service organizations in the Sandpoint area, as well as at assisted living facilities, the hospital, disability organizations, and the senior center.

## Vanpool

Based on the current lack of affordable housing and challenges that employers have in finding skilled workers, SHIFT anticipates that SPOT will see significant growth in this program. Employers will find that vanpool can provide them with skilled workers from outside the area, and employees will find that vanpool links affordable housing locations with high paying jobs in a cost-effective way.



Vanpool marketing is straightforward:

### Put together an informational piece on how vanpool works

- Include example pricing and commuter tax benefit information (vanpool qualifies for pre-tax consideration under the Commuter Benefits program)
- Describe benefits of vanpool for employee and employer
- Adapt for flyer/brochure and electronic dissemination

### Set-up meetings with owners and managers of local businesses and present vanpool basics

- Find how vanpool can solve the employee challenges
- Vanpool delivers happier, safer, better rested employees to the job

### Follow-up with interested employers to build interest among employees

- Employee staff meetings, email communications, and drop-in coffee talks are all ways to build employee interest

The Sandpoint area employers should be very receptive to vanpool, and SPOT could see this program grow quickly with some basic promotion and direct outreach.

## Marketing to Those Who Will Never Ride

Riders or non-rider aside, the public perception of SPOT is critical to ongoing partnerships and funding. SPOT is a public agency receiving local tax dollars that aren't guaranteed year-to-year; therefore, marketing to the community itself is a necessity. It's not enough to have regular riders taking more trips, new demographics getting on the bus, and routes connecting to new destinations. Elected officials, business leaders, non-profit organizations, and the community at large must know about SPOT and understand why SPOT is important to the community, regardless of whether someone rides or not. SPOT needs the community to feel that public transportation is an important community asset and something worthy of supporting.

SPOT can tailor the message for a particular group, but some of the resonating talking points that board and staff can use include:

### SPOT is good for quality of life

- Communities with good public transportation are nicer, easier, more connected places to live and work
- Public transportation makes the community more attractive – those living here are more likely to stay and those thinking of living here are more likely to relocate
- Communities that rely less on single occupancy vehicles are more resilient

### SPOT is good for business

- With a tight job market, employers are looking for ways to attract and retain employees – public transportation options make this easier
- Consistent transportation means employees get to work safely and are often more rested and ready to work
- Those people riding SPOT save money and can spend it on other things
- Bus trips end and begin with walking or biking, which means bus riders are more likely to frequent businesses while enroute

### SPOT is good for housing

- With limited affordable housing within walking distance to most amenities, SPOT can better link jobs and services with housing in outlying areas
- Vanpool can be used as a tool to link areas of regional activity

### SPOT is good for biking and walking and community health

- Public transportation can reduce depression and isolation among those who use it
- Every bus trip on SPOT starts and end with a walk or a bike trip, which helps improve health
- SPOT takes an average of 400 cars off the road per day, which improves the downtown experience for biking and walking









SPOT is good for the environment and congestion

- With an average of 6 people an hour getting on the bus, that means the effective miles per gallon of the bus is 72MPG!
- More people on the bus = less people in cars
- SPOT must continually talk about the community benefits of public transportation and build specific outreach efforts towards building general awareness. By growing ridership and this community awareness, the political support and overall goodwill will happen naturally.









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## THE TOOLKIT









TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Better bus stop amenities</b>	One of the top requests from the surveys was better bus stops with amenities like benches, shelters, and lighting. All of these improve the overall riding experience and make new riders more likely to ride again. Bus stops are also the most visible aspect of the service and impact the community perception.	All current and potential riders; the community at-large		
<b>Better bus stop signage</b>	Through its work on this plan, SHIFT heard that bus stop signage needs to improve to show the system map and the bus times at a particular stop. The signage should also identify the stop itself. In addition, larger and more visible signs can have an advertising benefit.	Current riders and general community impression		
<b>Invest in better buses that all have route identification</b>	Many of SPOT buses are in need of replacement and hurt the rider experience, especially for those buses that don't have adequate air conditioning for cooling in the summer. Also, many riders requested desire to know what route a bus is running through bus identification. Although this is a capital improvement issue, it impacts marketing and ridership growth. Buses with better passenger amenities that are easier to board and are more comfortable will help market the service.	Current riders, new riders, and general community impression		
<b>Improve the service</b>	Although this is part of the transit service plan, improving the service is certainly a marketing tool. Especially for tourists who might use the service to get around and for skiers going to Schweitzer. And later night service might encourage 25-45 demographic ridership.	New riders (millennials, young families), tourists, skiers, seniors, employees/commuters		











TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Invest in the drivers as marketers</b>	Drivers are SPOT's ambassadors. By keeping drivers happy and informed, they can be effective marketing tools for growing the service. Training drivers in how to provide the highest quality customer service will pay dividends every time someone rides the bus.	Current riders, first time riders		
<b>New website</b>	Redesigning and updating the SPOT website is recommended and is a key customer information tool. This effort would include completely overhauling the existing site to create a much easier user experience; update website content with more complete SPOT information; include real-time bus information tools; and have better maps and timetables. Once the new site is built, SPOT should plan to use the site for timely news and rider alerts, as service changes.	Youth, tourists, businesses, existing riders		
<b>Press releases</b>	SPOT should celebrate its successes and regularly update the community on SPOT through periodic press releases. SPOT should have a standard press release template and list of press contacts for distribution of press releases. The Bonner County Bee, Sandpoint Reader, Sandpoint Online Town Crier, and KXLY should all receive SPOT press releases.	Community at large; those who may never ride		
<b>Business partner campaign "I'm on the SPOT"</b>	This idea is to create a campaign where supporting businesses would display a "I'm on the SPOT – ask me about the free bus" window sticker to show support of SPOT. The business would also have SPOT schedules available, preferably in a holder on the counter, and know the basics about SPOT. Also promoting it to specific businesses with built-in ridership needs like auto repair shops.	Visitors, new riders, businesses		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>School partnerships and outreach</b>	Since youth are such a big part of SPOT's current ridership, SPOT should work to encourage more students to ride the bus by promoting SPOT at school events, in youth publications (like the high school newspaper), and by having SPOT bus information at all of the schools. SPOT should also look for opportunities to partner with schools on transportation needs – taking a SPOT route for a field trip is a great way to introduce SPOT.	Youth, school staff		
<b>Re-do printed schedule and distribute more widely</b>	Through surveys conducted for this project, we know that the SPOT bus schedule needs to be updated for easier comprehension and made more readily available throughout the community. The SPOT printed schedule needs a better map and easier to understand timetable for each route, and it needs to include information on paratransit and vanpool. A separate information rack card should be developed for Bonner's Ferry service for distribution in that area. SPOT should consider paying to have the schedule distributed in local brochure racks.	Community at large; those who may never ride		
<b>Quick reference guides and training of staff near bus stops</b>	Businesses closest to the bus stops can be one of the best ambassadors for the service. This idea involves creating a simple quick reference card or handout that shows the nearest bus stop location in relation to the system map ("you are here") and gives the schedule for just that bus stop location (northbound bus at :45 from 6:45 until 5:45). This allows local businesses to know and share information with their customers.	All		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Flyers and posters around town</b>	From market and community research, flyers and posters around town seem to be an effective communication tool. SPOT should develop flyers and posters that build awareness of the bus service, its benefits, and any new and interesting services. This tool could be particularly effective when SPOT grows or changes its service. Flyers could be placed at many locations around town – senior centers, social service offices, the library, non-profits, and community centers would all make good poster locations.	Locals, seniors, youth, visitors, employees/commuters		
<b>SPOT as a vehicle for better health</b>	According to a study presented at the American Heart Association's Scientific Sessions 2015, riding the bus or train to work is associated with significant health improvements. Promoting this fact and partnering with public health organizations can be a great way to build ridership. The ParkRx program, a health initiative to get people healthier by exercising in parks, of the Kanisku Land Trust is a developing partnership for SPOT. By linking the SPOT bus into a trip to a park, SPOT can attract new riders. This tool is simply partnering with ParkRx and other healthcare organizations to cross-promote SPOT services.	Those with physical or mental health problems		
<b>Presentations to partners, especially city councils, business groups</b>	Making presentations is one of the most effective ways to educate the community about SPOT services and their importance. Although this is a time consuming effort, it is low cost and very effective. SPOT should work to develop a standard set of talking points, service highlights, and organizational statistics. Depending on the presentation, this might be a PowerPoint, a 1-2 page handout, or use the flyers. This tool will help build general community support for SPOT.	Decision makers, community leadership		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Rider of the month spotlight and/or bus schedule in newspaper</b>	Advertising in the newspaper isn't something recommended for SPOT due to high costs; however, SPOT may be able to work with the Bee or Reader to get free or discounted placement of monthly rider profiles or perhaps having the bus schedule in the newspaper. The rider profile could be a recurring feature that would have a picture and quote from a SPOT rider in order to highlight why SPOT is awesome and showcase a daily rider who's story helps illustrate the paradigm, that SPOT is "just the way we get around."	All		
<b>"Get on the SPOT" campaign for coffee sleeves and coasters</b>	Having a simple message printed on coffee sleeves and coasters at local coffee shops and restaurants could be a low-cost way to create exposure to SPOT. This tool would hopefully be something that the local business partner (restaurant or coffee shop) would want to help underwrite.	New riders, millennials, choice riders (those who drive but might choose to ride occasionally)		
<b>Employer outreach</b>	Local businesses need to know about SPOT and how SPOT can help solve employee commuting challenges. SPOT should meet with and present to major employers and their employees details about SPOT services. This tool will be particularly helpful in building vanpools. Attending employee staff meetings, dropping by with donuts for a meet and greet, and working with HR staff on flyers and emails to employees are all ways to implement.	Commuters		
<b>Facebook page, social media</b>	Facebook and select regional Facebook groups could be effective ways to send periodic updates about SPOT with interesting and timely content. In order to be effective, the SPOT social media account must be regularly monitored and actively managed.	Youth, millennials, community at large		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Troubleshoot phone app and promote as part of all other campaigns, along with other technology</b>	SPOT has an app that shows customers where the bus is in real-time, but it isn't working consistently and isn't promoted. The DoubleMap app could be an excellent tool, especially for tech savvy riders, but it must be managed and promoted (i.e. included on all SPOT materials). This technology does take a lot of time to manage and keep up to date; SPOT doesn't have this expertise or time today. If SPOT does have the capacity, integrating SPOT schedule information into Google Maps through the GTFS file spec could be another way to reach technology-savvy riders.	Youth, millennials, visitors		
<b>Targeted radio and magazine advertising</b>	Radio seems to be an effective advertising tool for ongoing messages to build awareness. SPOT should pursue trade or public service announcements (PSAs) on radio. Additionally, SPOT could look at ads in local magazines, although this is higher cost and harder to trade or get free submissions. SPOT has been in Sandpoint Magazine in the past and needs to evaluate the effectiveness of this ad and its cost relative to other marketing potentials. Cost dependent on trade or PSA.	New riders, general community		
<b>Special events</b>	SPOT could consider providing additional bus service for many special events throughout the year. This would introduce the bus to new riders and increase SPOT's visibility in the community; however, special events can be challenging. SPOT will need a partner who will promote the extra event service and limit parking around the event venue, or the special event service can be underutilized and ineffective.	New riders		
<b>Links to local partners</b>	SPOT should work to integrate awareness into as many efforts of the cities and counties as possible. This could include SPOT on municipal websites or having SPOT at city or county sponsored events. SPOT should be integrated into the cities and the county, as the transportation arm.	The community at-large		

## The Plan Year by Year

For the coming three years, SPOT should begin to put into action some of the information, ideas, and tools presented. SPOT can take its limited budgeted and staff time and slowly and incrementally implement the Marketing and Outreach Plan.

Year	Goal and Theme	Tools	Resources*
Year 1	To improve the basic marketing and outreach building blocks, in order to setup SPOT for future success. SPOT must invest in basic customer information tools, rider amenities, PR strategies, and partnerships.	<ul style="list-style-type: none"> <li>Bus stop signage and amenities</li> <li>Website rebuild</li> <li>Bus branding and ID</li> <li>Driver training</li> <li>Press releases</li> <li>Update bus schedule format</li> <li>Links to local partners</li> </ul>	<p>\$5,000-\$10,000 in direct marketing spend plus in-kind partner support</p> <p>Staff, board, and in-kind partners time total of 10-20 hours per month</p>
Year 2	<p>Continue work from Year 1 and begin to leverage those efforts to:</p> <ol style="list-style-type: none"> <li>1. Get regular riders riding more</li> <li>2. Start attracting new markets.</li> </ol> <p>With basics in place, SPOT can now go to work on getting more people on board and building community awareness.</p>	<ul style="list-style-type: none"> <li>Employer outreach</li> <li>School partnerships</li> <li>Rider of the month spots</li> <li>SPOT for better health</li> <li>Flyers and posters</li> <li>Facebook and social media</li> <li>Quick reference guides</li> </ul>	<p>\$10,000-\$15,000 in marketing plus in-kind partner support</p> <p>Staff, board, contracted, and in-kind time total of 20-25 hours per month</p>
Year 3	Years 1 and 2 create opportunity for Year 3 to be year of significant external marketing and ridership growth among new marketing. This is the year to make SPOT omnipresent in the community.	<ul style="list-style-type: none"> <li>Business partner "I'm on the SPOT"</li> <li>Presentations to the community</li> <li>Phone app and other technology</li> <li>Coffee sleeves and coasters</li> <li>Targeted ads</li> <li>Special events</li> </ul>	<p>\$20,000-\$25,000 in marketing plus in-kind</p> <p>Time of 25-30 hours per month</p>

*\*This is direct marketing and out expense. Capital and operating expenses that have marketing benefits, such as service improvements, bus stop amenities and new buses, are not included in Resources.*



Each year builds on the next and efforts started in Year 1 must be continually developed through Years 2 and 3. Once an effort is started, it is recommended that it be continued going forward, unless it is thoroughly reviewed and there is an identified reason it is deemed ineffective (effectiveness often increases with time). Budgeting and staffing must grow to support increasing SPOT marketing and outreach efforts over the next three years.

### Getting This Work Done (Limitations and Need for Partnerships)

The challenge to implementing this plan is figuring how to fund these efforts and how to improve marketing without impacting existing service. Every public transportation system faces the same challenge of finding enough funding for marketing and outreach when the direct costs of running bus service are a higher priority. But funding this marketing plan is critical to SPOT's success; running SPOT buses without good marketing means the service will not reach its full potential. Acknowledging that SPOT has budget and staff limitations in implementing the ideas of this plan, SPOT must seek creative partnerships, cost share, schedule the work slowly, and use low-cost approaches.

The budget constraint is one of the biggest challenges to plan implementation. SPOT should look to allocate more funding to marketing, but this approach will take time – SPOT has a fixed budget and service commitments that use almost all the current budget. It is recommended that SPOT also pursue a more immediate solution for accomplishing marketing goals – set-up an interior and exterior bus advertising program with the goal of trading ads on buses for SPOT ads in a variety of media. SPOT should trade bus ad space for radio spots, online advertising, putting the bus schedule in the newspaper, getting SPOT into businesses (like on coffee cups or coasters), or any other creative trades SPOT can establish. The goal of ads on SPOT buses wouldn't be to generate direct revenue – the goal would be to generate trade dollars for SPOT marketing and outreach. Bus ads could also be used as trade for staff time from partners who can help market and promote.

The other biggest constraint is available staff time. Currently, SPOT is not staffed to carry out much of this plan. SPOT has one full-time employee whose time is consumed with day to day operations. Given this time constraint, SPOT must look to other ways to get this work completed and rely on its partners to help.

#### Workhorse board of directors

- The SPOT board has shown that it is willing to work and will need to give time to these marketing efforts

#### Schweitzer Mountain Resort

- With in-house marketing resources, Schweitzer could provide marketing staff time to help SPOT implement this plan, which could be done as part of a trade for bus ad space or as in-kind donation as part of a partnership for bus service to the mountain



#### Municipal partners

- SPOT could reach out to its partner cities to ask for help with specific marketing and outreach initiatives from city staff or officials who may have expertise or access to helpful resources like existing city newsletters

## CONCLUSION

SPOT has a strong, recognizable community brand with loyal and happy customers. Building upon this base of support, SPOT is ready to grow its awareness, usage, and community impact. By implementing this Marketing and Outreach Plan, SPOT will become a community institution that is positively viewed throughout the region. Many more opportunities and new ideas will result from starting down the path of better marketing and outreach – SPOT should plan to incorporate this evolution of marketing and outreach through periodic updates to this plan.

See

SPOT



A Comprehensive Success Guide





# See SPOT Run

## A Comprehensive Success Guide

developed by



September 2016

See

SPOT

*ENGAGE*

A decorative graphic consisting of a series of overlapping circles in various colors (blue, grey, orange, green, and light blue) arranged in a curved path that follows the word 'ENGAGE'.

Marketing and Public Outreach





# See SPOT Engage

## OVERVIEW

The goal of this SPOT Marketing and Public Outreach Plan is to provide a clear path towards continuing to grow ridership and build community support. SPOT has a solid foundation on which to build increased marketing and public outreach efforts. It has a strong brand, solid ridership, enthusiastic community support, and positive political momentum. This plan will leverage all of these assets in a thoughtful and strategic way.

The Marketing and Public Outreach Plan addresses the following:

- Current marketing efforts
- Who is riding today, why they ride, and how to get them to ride more
- Who isn't riding much today and how to get them onboard
- A toolkit of strategies, rated by cost and complexity, and mapped to target audiences
- A three-year approach to implementation
- Partnerships required to successfully implement this plan

Informing this plan are stakeholder interviews, two community surveys – from riders and stakeholders, and market research performed by SHIFT. This plan uses industry best practices, opportunities unique to SPOT and the communities it serves, and successful efforts from other communities.

Implementation of this plan will result in a stronger SPOT that continues to weave itself more tightly into the fabric of the community. In several of our community interviews, the idea of making SPOT “just the way you get around” and “what our community does” and “a community institution” were expressed and embody exactly what a good marketing and public outreach plan can do for SPOT, along with strategic implementation.

## SPOT MARKETING EFFORTS TO DATE

The SPOT brand is very strong for a small transit system. SPOT's brand reflects the community and is easily identifiable. The logo, bus graphics and generally positive community perception of SPOT are tremendous assets that can be leveraged towards a new infusion of energy, excitement, and growth.

As SPOT moves forward with the marketing and outreach efforts of this plan, the brand and what it represents should be infused into all the various outputs. The brand should remain the same and be adapted and leveraged to connect more people to the bus and get more people on board. The main goal of this plan is for the community to view the SPOT brand synonymously with economic vitality and development.



*The SPOT Brand = fun, interesting, community-oriented*

SPOT has gone through a common cycle for new services in rural areas with a limited budget. Initially, SPOT had a lot of buzz, the awareness of SPOT grew quickly, there was initial money to market the service, and ridership grew quickly. Now, SPOT has hit a 5-year plateau where ridership is steady but not growing, awareness among non-riders has dropped, money for marketing is very limited, and customer information needs improvement. SPOT must invest more in marketing in order to reverse this trend. The baseline budget for marketing is very small:

*The current SPOT marketing and advertising budget is only \$1500-\$2000 per year.*

This current spend consists of limited print advertising, printed brochures, and website costs. Bus graphics and bus stop signage are not included in this total, but are included as part of the Capital Improvement Plan (bus graphics are included in the cost of a new bus and bus stop signage project already funded and slated for 2017). The advertising budget is so limited that SPOT is not able to build awareness or grow ridership through marketing or outreach.

SPOT should start planning for how to grow funding for these marketing investments. This is a challenge that will be addressed later in this plan with ideas on how to partner and trade for market exposure. The good news is that SPOT has strong brand fundamentals and is ready to build on this foundation to renew itself and look for more support and use in the coming three years.

## COMMUNITY SURVEYS

SHIFT conducted two similar surveys, from two distinct community groups – existing riders and community stakeholders. The goal of the surveys was to understand a variety of aspects including the markets and identify marketing opportunities, service improvement needs and perceptions of SPOT. Only a portion of the questions from each survey were asked of both groups, the rest were tailored specifically to either existing riders or community stakeholders.

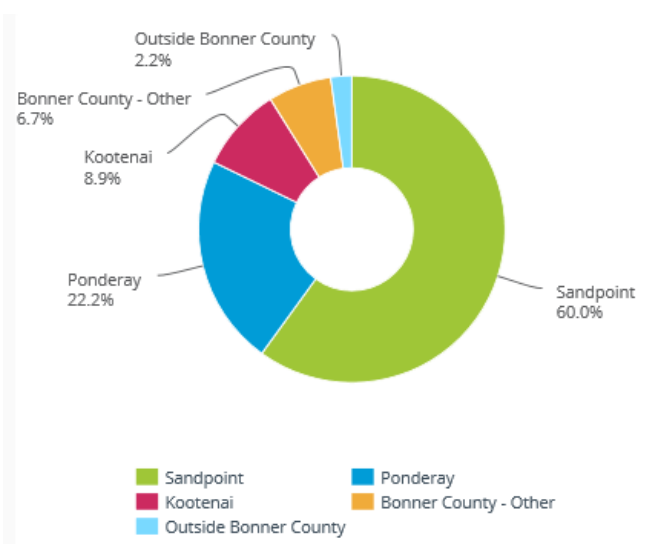
This plan focuses only on the survey responses that inform the markets and marketing opportunities. The existing riders group responded to marketing questions about how they use SPOT and why, how they plan their trip, and where they get their SPOT and other community information. The stakeholder group represented key decision makers and responded to some rider questions, such as why they ride or don't ride and what could get them to ride or ride more frequently, as well as marketing ideas for increasing ridership.

### Existing Riders Survey - Results

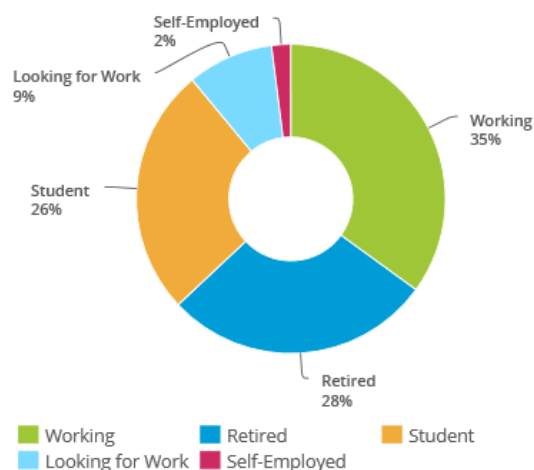
SHIFT conducted a survey of existing riders to understand who is using SPOT, why they are riding, and how they use the bus. 45 riders responded to the survey, which represents approximately 3% of the average weekly ridership, and 21% of the average daily ridership.

The survey shows 25% of respondents use SPOT 10 or more times a week, while 50% of respondents use it between 1-5 times a week. All respondents ride on weekdays and almost all ride on weekends too. The large majority live in Sandpoint, and most are employed, followed closely by retirees (retirees includes those no longer working, not necessarily retirement age).

Rider Residency



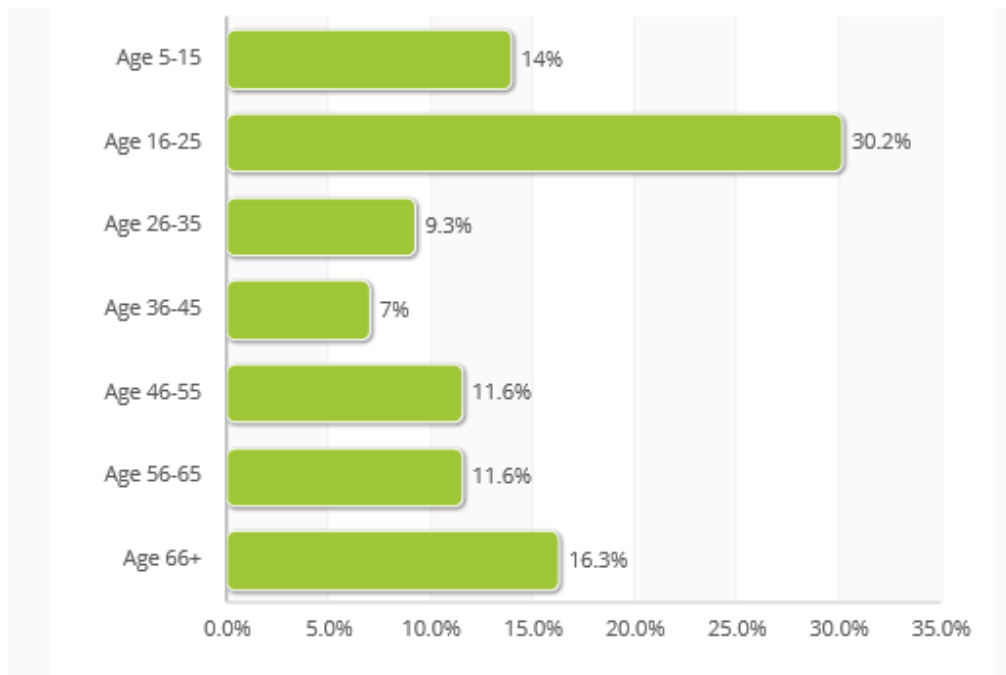
Employment Status





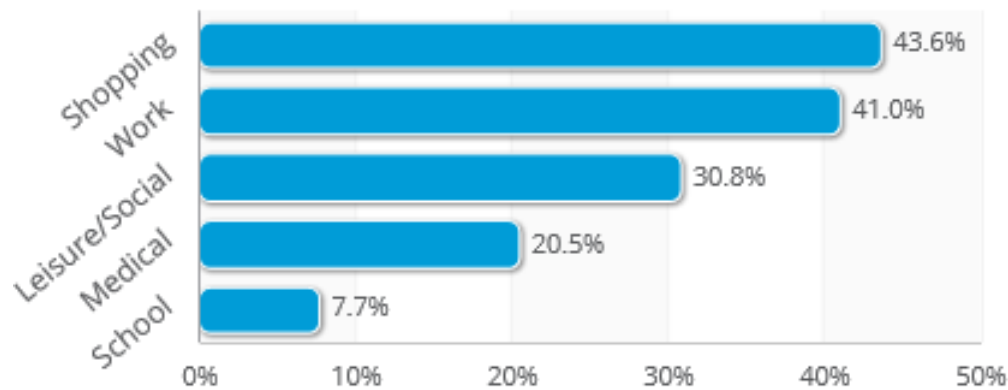
In terms of age, SPOT riders tend to be either younger riders, with 44% of riders aged 25 or younger, or older riders, with 28% of riders aged 56 or older. Middle-aged riders make up the smallest percentage of riders.

Rider Age



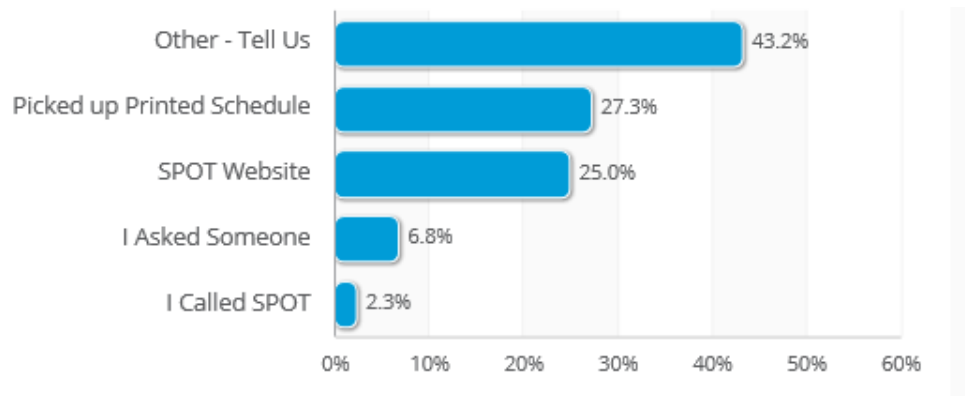
When asked about trip purpose, SHIFT found that most SPOT riders were using the bus for shopping, followed closely by work, but the results show that SPOT is being used for a wide variety of trip purposes. The data show that SPOT has a diverse ridership that counts on the service for all types of trips:

Reason for Trip



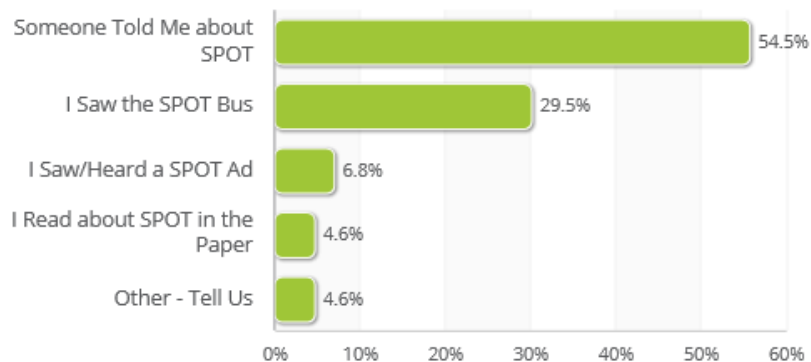
Another goal of the survey was to find out how riders are doing their trip planning, how they originally found out about the bus, and why they ride:

### How Did You Plan Your Trip Today?

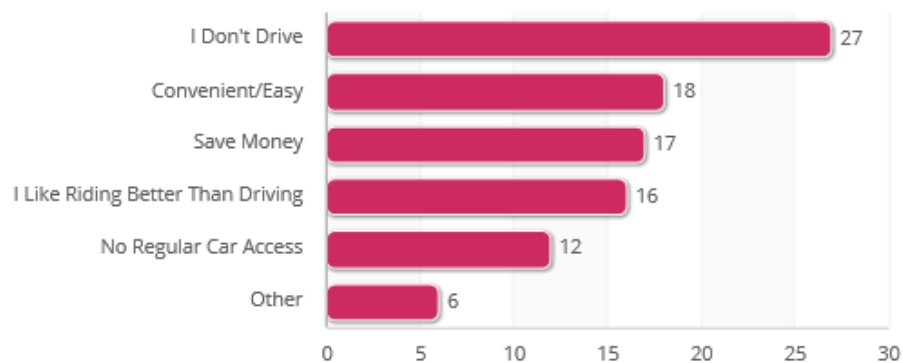


The “other” responses were predominately that the rider knows the schedule and doesn’t need to pre-plan their trip. The two additional responses received as “other” are: 1) schedule on phone; 2) called paratransit.

### How Did You Hear about SPOT?



### Why Do You Ride SPOT?



## Existing Riders Survey - Discussion

SPOT is used by a diverse group of people, representing many age groups with varying reasons for using SPOT. There were a few patterns identified in the responses received that lead to assumptions regarding who the majority of riders are today and what groups of riders are not as prevalent. The survey results highlight three target market opportunities:



- 1) Youth/young adults
- 2) Seniors
- 3) Employees (middle ages)

The youth/young adult segment of SPOT respondents can be summarized as follows:

- They form the majority of riders responding to the survey
- They don't drive or have access to a vehicle
- They are almost solely use SPOT for shopping and work trips
- 70% live in Sandpoint
- They use both routes equally
- They predominately get their information from the SPOT website

The survey was conducted in August; therefore, youth respondents were not in school and no responses were collected reflecting that this age demographic is using SPOT for school transportation. Additional information or survey data would need to be collected to identify whether they are using SPOT for transportation to and from school. Without knowing the results, assumptions can be made that this is likely occurring during the school year. Gaining more youth ridership during the school year is certainly a marketing opportunity through outreach and promotion at the schools.

Riders greater than 65 in age made up 16% of respondents. This group's responses can be summarized as follows:

- They use SPOT primarily for shopping and leisure trips
- 50% live in Ponderay
- They get their SPOT information from a variety of places – website, brochures around town, newspaper, and at community centers

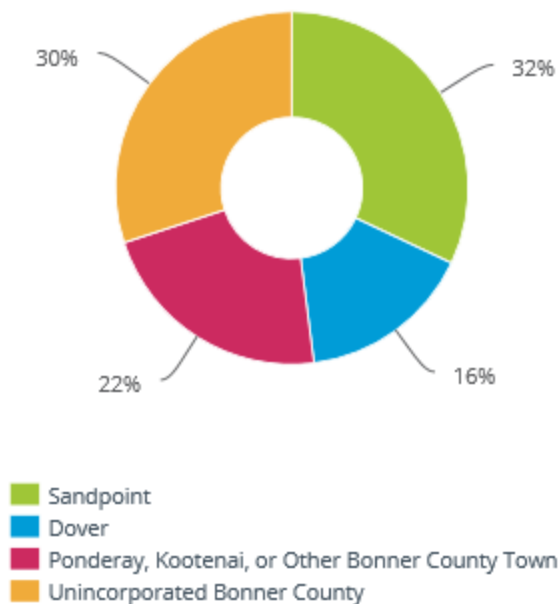
- Their trips tend to be longer in miles, which might be because 50% of the respondents from this demographic reported to live in Ponderay and are likely traveling to Sandpoint or another location outside of Ponderay for their shopping and leisure trips
- They ride SPOT predominately because they would rather not drive and because it's easy and convenient

Almost 56% of all respondents heard about SPOT from someone (word of mouth), with about 30% finding out about SPOT by seeing the bus. This leaves about 14% of respondents learning about SPOT from other forms of marketing. This is an indicator that either SPOT has invested little in advertising or riders are not receptive to the types of advertising that SPOT has pursued. The former is likely the primary reason, but strategically selecting the type of advertising is also an important consideration.

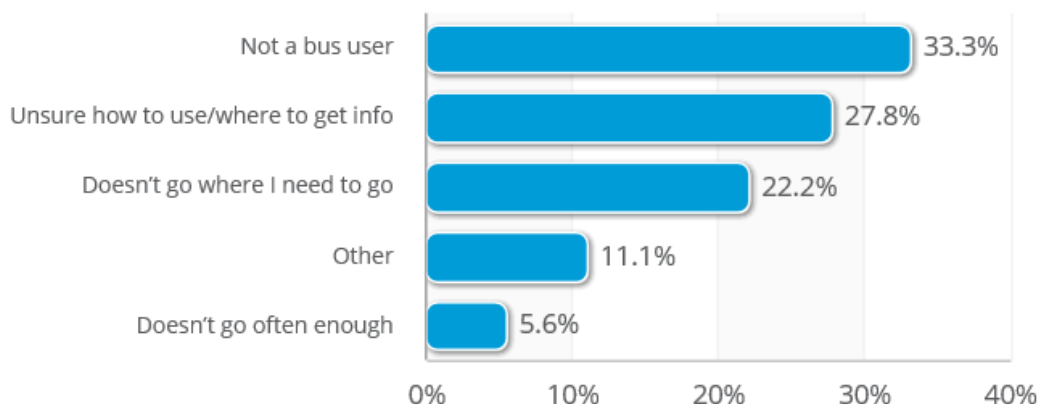
### Stakeholder Survey (Riders and Non-Riders) - Results and Discussion

SHIFT polled community stakeholders by designing an online survey and distributing it electronically through a variety of means including the Sandpoint Chamber, city and county electronic mailing lists, a link on the SPOT website, a feature in the Bonner County Bee, and a feature on Sandpoint Online. Here are the results of 49 respondents who took the survey.

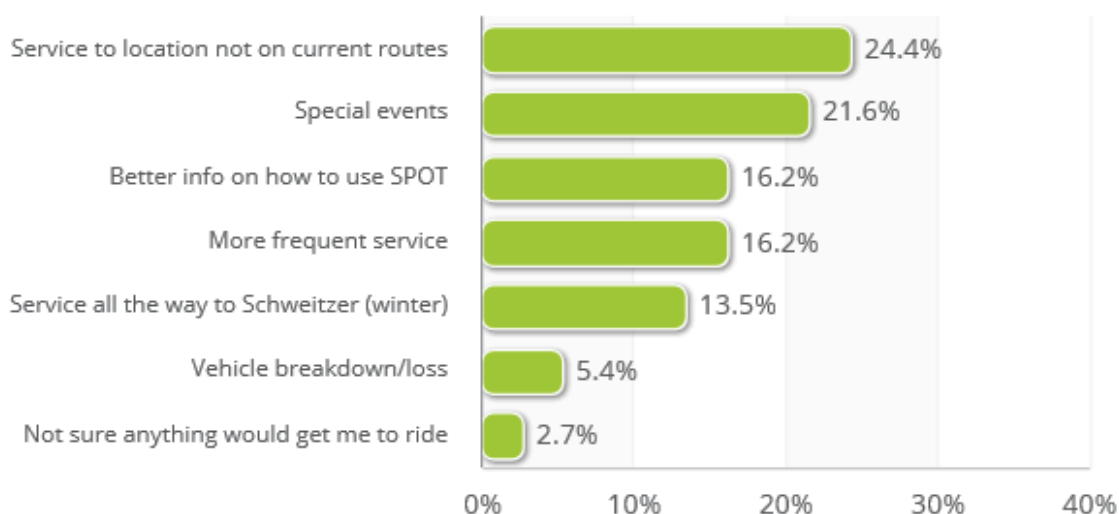
#### Rider Residency



43.5% have never taken SPOT before. Of these respondents, the following reasons for not riding were received:



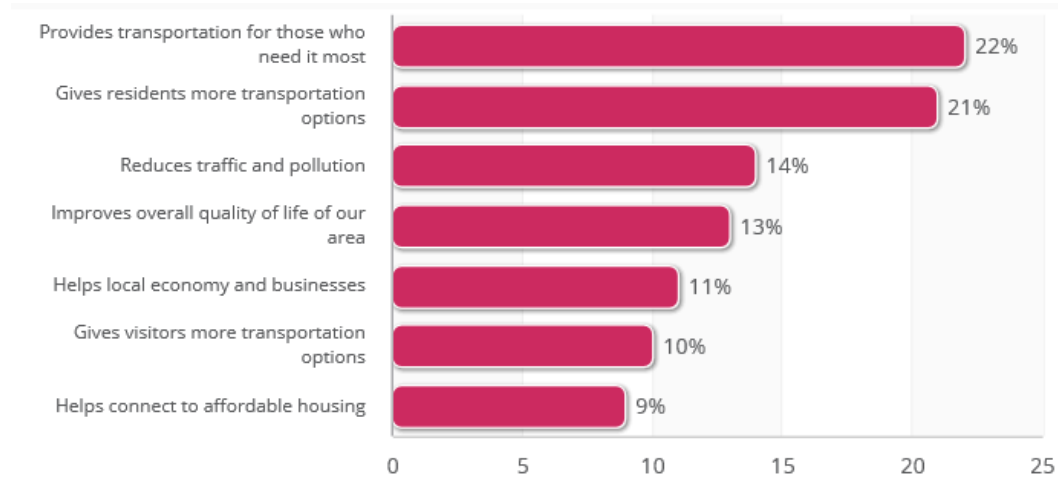
When this group was asked what could get them to ride spot, they responded as follows:



In addition to the choices provided above, the group was also given the option to write in their own ideas that might get them to ride SPOT. Their feedback was predominately split between two responses: 1) clearer information and route maps; 2) expanded service to Sagle, Baldy Road, and shuttle service between parking areas and City Beach/downtown during the weekends.

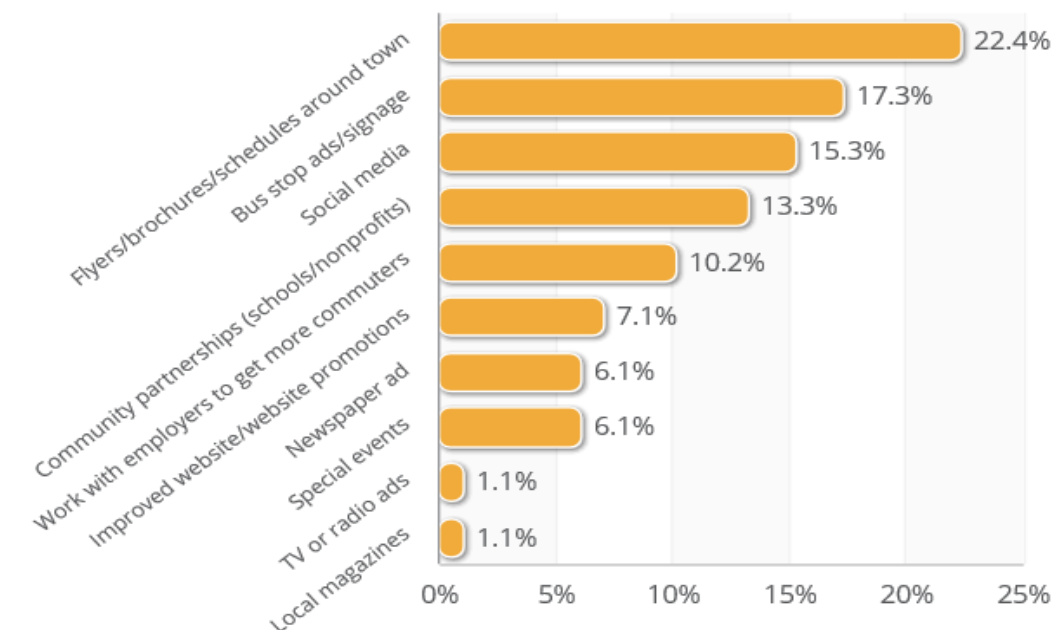
56.5% of the stakeholder group has taken SPOT. When asked their reasons for riding, the top three responses among respondents were: 1) transportation while their car was repaired; 2) leisure or social activity; 3) shopping. These results are consistent with the results of the rider survey; few middle-age respondents are using SPOT for transportation to and from work. The stakeholder group likely uses SPOT for infrequent trips, on occasion, not for daily commuting.

The stakeholder group was asked to respond to what the perception of SPOT is and its role in the community. Here were the responses:



These results indicate that stakeholders perceive SPOT as a necessary service for those that need it and as a benefit to residents to allow them more transportation options. They see SPOT less as helping the local economy and businesses and even less as giving visitors more transportation options. These are two areas where more targeted marketing can change the community's perception of SPOT from offering limited, but necessary, transportation benefits to SPOT being "a community institution" and "just the way we get around," as heard during several stakeholder interviews.

The stakeholder group was asked what the most cost effective marketing strategies/tools are to attract more riders and improve awareness of SPOT and the following responses were received:



Getting more information out about SPOT around town is a common theme in the results of both community surveys that could help increase ridership with the general community as well as visitors and establish SPOT as beneficial to the economy and businesses.

There can be a relationship between increased ridership and economic and community vitality. SPOT riders walk or bike to and from each bus stop when they begin and end their trip. Walking by businesses creates opportunities for more economic activity around these bus stops. When parking is limited people may decide not to visit downtown areas at all, whereas SPOT could provide a hassle free and easy way to get people to a location without the stress and inconvenience of parking.

## Marketing for Boundary County, Paratransit, and Vanpool

Much of the research, discussion, and tools in this plan are focused on riders of the fixed route system – Blue and Green Route riders. This market represents one of the largest opportunities for growth through marketing and outreach. Many of the marketing ideas in the toolkit section of the plan can be used for these services, but it is important to discuss specific marketing tactics for Boundary County, paratransit and vanpool and the communities they serve. These groups weren't specifically surveyed, but SHIFT conducted many interviews and drew on best practices when marketing to these groups.

### Boundary County-Bonner's Ferry Demand Response Service

This service is still relatively new, running less than eighteen months, and has done a good job of attracting a base of riders that need the service. It routinely runs at better than two riders per hour, which is good for a demand response service.

In a small community such as Bonner's Ferry, word of mouth and grassroots marketing are the best approach. As a new service, SPOT needs to educate the community about what SPOT is, how it operates, and why it's good for everyone.

The first step is creating a simple marketing piece that can be printed and distributed in several forms including as a rack card, a flyer, and electronically. The purpose of this would be two-fold: to promote the service itself and how to use it (hours of service, destinations, etc.), and to educate on what public transportation is.





The educational message should be:

- Public transportation is a public service and is open to everyone
- The city and county support and sponsor SPOT services
- With more demand and use, SPOT could add more service to the Bonner's Ferry area
- Public transportation is good for the community – it provides vital mobility, saves riders money, and provides more independence to those who use SPOT



*SPOT strengthens the community by providing mobility and independence*

*Credit: Bonner's Ferry Herald*

Recommended distribution of this marketing piece is:

- posting around town
- city mailings
- local businesses
- hospital
- assisted living facilities (e.g. Restorium)
- visitor center
- city hall

SPOT should also consider being interviewed on the local radio show and presenting to as many community groups as possible. It should also be distributed electronically through Bonner's Ferry online, Facebook groups, and city and county online resources.

## Bonner County Paratransit Service

Paratransit service is a federal requirement of a fixed route service, when federally funded. SPOT should consider marketing this service in conjunction with marketing the fixed route service. There are numerous benefits to increased awareness of paratransit service:

- 1) providing mobility to those that need it most
- 2) increasing efficiency/productivity of paratransit service by linking multiple trips together instead of only single rider trips
- 3) providing positive community perception

Currently, this service is marketed very little. There is a very small mention of it on the SPOT schedule, with no detailed information about the service, and the website doesn't have any section about this service. SPOT should increase the information about paratransit on the SPOT printed schedule and website as a first step to better marketing this service. The next step would be to create a dedicated informational card on this service, much like the one suggested for the Bonner's Ferry demand response service, that would describe hours of service, prequalification process, area of service, and other helpful information. This should be distributed to all social service organizations in the Sandpoint area, as well as at assisted living facilities, the hospital, disability organizations, and the senior center.

## Vanpool

Based on the current lack of affordable housing and challenges that employers have in finding skilled workers, SHIFT anticipates that SPOT will see significant growth in this program. Employers will find that vanpool can provide them with skilled workers from outside the area, and employees will find that vanpool links affordable housing locations with high paying jobs in a cost-effective way.



Vanpool marketing is straightforward:

### Put together an informational piece on how vanpool works

- Include example pricing and commuter tax benefit information (vanpool qualifies for pre-tax consideration under the Commuter Benefits program)
- Describe benefits of vanpool for employee and employer
- Adapt for flyer/brochure and electronic dissemination

### Set-up meetings with owners and managers of local businesses and present vanpool basics

- Find how vanpool can solve the employee challenges
- Vanpool delivers happier, safer, better rested employees to the job

### Follow-up with interested employers to build interest among employees

- Employee staff meetings, email communications, and drop-in coffee talks are all ways to build employee interest

The Sandpoint area employers should be very receptive to vanpool, and SPOT could see this program grow quickly with some basic promotion and direct outreach.

## Marketing to Those Who Will Never Ride

Riders or non-rider aside, the public perception of SPOT is critical to ongoing partnerships and funding. SPOT is a public agency receiving local tax dollars that aren't guaranteed year-to-year; therefore, marketing to the community itself is a necessity. It's not enough to have regular riders taking more trips, new demographics getting on the bus, and routes connecting to new destinations. Elected officials, business leaders, non-profit organizations, and the community at large must know about SPOT and understand why SPOT is important to the community, regardless of whether someone rides or not. SPOT needs the community to feel that public transportation is an important community asset and something worthy of supporting.

SPOT can tailor the message for a particular group, but some of the resonating talking points that board and staff can use include:

### SPOT is good for quality of life

- Communities with good public transportation are nicer, easier, more connected places to live and work
- Public transportation makes the community more attractive – those living here are more likely to stay and those thinking of living here are more likely to relocate
- Communities that rely less on single occupancy vehicles are more resilient

### SPOT is good for business

- With a tight job market, employers are looking for ways to attract and retain employees – public transportation options make this easier
- Consistent transportation means employees get to work safely and are often more rested and ready to work
- Those people riding SPOT save money and can spend it on other things
- Bus trips end and begin with walking or biking, which means bus riders are more likely to frequent businesses while enroute

### SPOT is good for housing

- With limited affordable housing within walking distance to most amenities, SPOT can better link jobs and services with housing in outlying areas
- Vanpool can be used as a tool to link areas of regional activity

### SPOT is good for biking and walking and community health









- Public transportation can reduce depression and isolation among those who use it
- Every bus trip on SPOT starts and end with a walk or a bike trip, which helps improve health
- SPOT takes an average of 400 cars off the road per day, which improves the downtown experience for biking and walking









SPOT is good for the environment and congestion

- With an average of 6 people an hour getting on the bus, that means the effective miles per gallon of the bus is 72MPG!
- More people on the bus = less people in cars
- SPOT must continually talk about the community benefits of public transportation and build specific outreach efforts towards building general awareness. By growing ridership and this community awareness, the political support and overall goodwill will happen naturally.







SPOT must continually talk about the community benefits of public transportation and build specific outreach efforts towards building general awareness. By growing ridership and this community awareness, the political support and overall goodwill will happen naturally.

## THE TOOLKIT







TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Better bus stop amenities</b>	One of the top requests from the surveys was better bus stops with amenities like benches, shelters, and lighting. All of these improve the overall riding experience and make new riders more likely to ride again. Bus stops are also the most visible aspect of the service and impact the community perception.	All current and potential riders; the community at-large		
<b>Better bus stop signage</b>	Through its work on this plan, SHIFT heard that bus stop signage needs to improve to show the system map and the bus times at a particular stop. The signage should also identify the stop itself. In addition, larger and more visible signs can have an advertising benefit.	Current riders and general community impression		
<b>Invest in better buses that all have route identification</b>	Many of SPOT buses are in need of replacement and hurt the rider experience, especially for those buses that don't have adequate air conditioning for cooling in the summer. Also, many riders requested desire to know what route a bus is running through bus identification. Although this is a capital improvement issue, it impacts marketing and ridership growth. Buses with better passenger amenities that are easier to board and are more comfortable will help market the service.	Current riders, new riders, and general community impression		
<b>Improve the service</b>	Although this is part of the transit service plan, improving the service is certainly a marketing tool. Especially for tourists who might use the service to get around and for skiers going to Schweitzer. And later night service might encourage 25-45 demographic ridership.	New riders (millennials, young families), tourists, skiers, seniors, employees/commuters		









TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Invest in the drivers as marketers</b>	Drivers are SPOT's ambassadors. By keeping drivers happy and informed, they can be effective marketing tools for growing the service. Training drivers in how to provide the highest quality customer service will pay dividends every time someone rides the bus.	Current riders, first time riders		
<b>New website</b>	Redesigning and updating the SPOT website is recommended and is a key customer information tool. This effort would include completely overhauling the existing site to create a much easier user experience; update website content with more complete SPOT information; include real-time bus information tools; and have better maps and timetables. Once the new site is built, SPOT should plan to use the site for timely news and rider alerts, as service changes.	Youth, tourists, businesses, existing riders		
<b>Press releases</b>	SPOT should celebrate its successes and regularly update the community on SPOT through periodic press releases. SPOT should have a standard press release template and list of press contacts for distribution of press releases. The Bonner County Bee, Sandpoint Reader, Sandpoint Online Town Crier, and KXLY should all receive SPOT press releases.	Community at large; those who may never ride		
<b>Business partner campaign "I'm on the SPOT"</b>	This idea is to create a campaign where supporting businesses would display a "I'm on the SPOT – ask me about the free bus" window sticker to show support of SPOT. The business would also have SPOT schedules available, preferably in a holder on the counter, and know the basics about SPOT. Also promoting it to specific businesses with built-in ridership needs like auto repair shops.	Visitors, new riders, businesses		











TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>School partnerships and outreach</b>	Since youth are such a big part of SPOT's current ridership, SPOT should work to encourage more students to ride the bus by promoting SPOT at school events, in youth publications (like the high school newspaper), and by having SPOT bus information at all of the schools. SPOT should also look for opportunities to partner with schools on transportation needs – taking a SPOT route for a field trip is a great way to introduce SPOT.	Youth, school staff		
<b>Re-do printed schedule and distribute more widely</b>	Through surveys conducted for this project, we know that the SPOT bus schedule needs to be updated for easier comprehension and made more readily available throughout the community. The SPOT printed schedule needs a better map and easier to understand timetable for each route, and it needs to include information on paratransit and vanpool. A separate information rack card should be developed for Bonner's Ferry service for distribution in that area. SPOT should consider paying to have the schedule distributed in local brochure racks.	Community at large; those who may never ride		
<b>Quick reference guides and training of staff near bus stops</b>	Businesses closest to the bus stops can be one of the best ambassadors for the service. This idea involves creating a simple quick reference card or handout that shows the nearest bus stop location in relation to the system map ("you are here") and gives the schedule for just that bus stop location (northbound bus at :45 from 6:45 until 5:45). This allows local businesses to know and share information with their customers.	All		



TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Flyers and posters around town</b>	From market and community research, flyers and posters around town seem to be an effective communication tool. SPOT should develop flyers and posters that build awareness of the bus service, its benefits, and any new and interesting services. This tool could be particularly effective when SPOT grows or changes its service. Flyers could be placed at many locations around town – senior centers, social service offices, the library, non-profits, and community centers would all make good poster locations.	Locals, seniors, youth, visitors, employees/commuters		
<b>SPOT as a vehicle for better health</b>	According to a study presented at the American Heart Association's Scientific Sessions 2015, riding the bus or train to work is associated with significant health improvements. Promoting this fact and partnering with public health organizations can be a great way to build ridership. The ParkRx program, a health initiative to get people healthier by exercising in parks, of the Kanisku Land Trust is a developing partnership for SPOT. By linking the SPOT bus into a trip to a park, SPOT can attract new riders. This tool is simply partnering with ParkRx and other healthcare organizations to cross-promote SPOT services.	Those with physical or mental health problems		
<b>Presentations to partners, especially city councils, business groups</b>	Making presentations is one of the most effective ways to educate the community about SPOT services and their importance. Although this is a time consuming effort, it is low cost and very effective. SPOT should work to develop a standard set of talking points, service highlights, and organizational statistics. Depending on the presentation, this might be a PowerPoint, a 1-2 page handout, or use the flyers. This tool will help build general community support for SPOT.	Decision makers, community leadership		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Rider of the month spotlight and/or bus schedule in newspaper</b>	Advertising in the newspaper isn't something recommended for SPOT due to high costs; however, SPOT may be able to work with the Bee or Reader to get free or discounted placement of monthly rider profiles or perhaps having the bus schedule in the newspaper. The rider profile could be a recurring feature that would have a picture and quote from a SPOT rider in order to highlight why SPOT is awesome and showcase a daily rider who's story helps illustrate the paradigm, that SPOT is "just the way we get around."	All		
<b>"Get on the SPOT" campaign for coffee sleeves and coasters</b>	Having a simple message printed on coffee sleeves and coasters at local coffee shops and restaurants could be a low-cost way to create exposure to SPOT. This tool would hopefully be something that the local business partner (restaurant or coffee shop) would want to help underwrite.	New riders, millennials, choice riders (those who drive but might choose to ride occasionally)		
<b>Employer outreach</b>	Local businesses need to know about SPOT and how SPOT can help solve employee commuting challenges. SPOT should meet with and present to major employers and their employees details about SPOT services. This tool will be particularly helpful in building vanpools. Attending employee staff meetings, dropping by with donuts for a meet and greet, and working with HR staff on flyers and emails to employees are all ways to implement.	Commuters		
<b>Facebook page, social media</b>	Facebook and select regional Facebook groups could be effective ways to send periodic updates about SPOT with interesting and timely content. In order to be effective, the SPOT social media account must be regularly monitored and actively managed.	Youth, millennials, community at large		

TOOL	DESCRIPTION	TARGET AUDIENCE	COST	LEVEL OF DIFFICULTY
<b>Troubleshoot phone app and promote as part of all other campaigns, along with other technology</b>	SPOT has an app that shows customers where the bus is in real-time, but it isn't working consistently and isn't promoted. The DoubleMap app could be an excellent tool, especially for tech savvy riders, but it must be managed and promoted (i.e. included on all SPOT materials). This technology does take a lot of time to manage and keep up to date; SPOT doesn't have this expertise or time today. If SPOT does have the capacity, integrating SPOT schedule information into Google Maps through the GTFS file spec could be another way to reach technology-savvy riders.	Youth, millennials, visitors		
<b>Targeted radio and magazine advertising</b>	Radio seems to be an effective advertising tool for ongoing messages to build awareness. SPOT should pursue trade or public service announcements (PSAs) on radio. Additionally, SPOT could look at ads in local magazines, although this is higher cost and harder to trade or get free submissions. SPOT has been in Sandpoint Magazine in the past and needs to evaluate the effectiveness of this ad and its cost relative to other marketing potentials. Cost dependent on trade or PSA.	New riders, general community		
<b>Special events</b>	SPOT could consider providing additional bus service for many special events throughout the year. This would introduce the bus to new riders and increase SPOT's visibility in the community; however, special events can be challenging. SPOT will need a partner who will promote the extra event service and limit parking around the event venue, or the special event service can be underutilized and ineffective.	New riders		
<b>Links to local partners</b>	SPOT should work to integrate awareness into as many efforts of the cities and counties as possible. This could include SPOT on municipal websites or having SPOT at city or county sponsored events. SPOT should be integrated into the cities and the county, as the transportation arm.	The community at-large		

## The Plan Year by Year

For the coming three years, SPOT should begin to put into action some of the information, ideas, and tools presented. SPOT can take its limited budgeted and staff time and slowly and incrementally implement the Marketing and Outreach Plan.

Year	Goal and Theme	Tools	Resources*
Year 1	To improve the basic marketing and outreach building blocks, in order to setup SPOT for future success. SPOT must invest in basic customer information tools, rider amenities, PR strategies, and partnerships.	<ul style="list-style-type: none"> <li>Bus stop signage and amenities</li> <li>Website rebuild</li> <li>Bus branding and ID</li> <li>Driver training</li> <li>Press releases</li> <li>Update bus schedule format</li> <li>Links to local partners</li> </ul>	<p>\$5,000-\$10,000 in direct marketing spend plus in-kind partner support</p> <p>Staff, board, and in-kind partners time total of 10-20 hours per month</p>
Year 2	<p>Continue work from Year 1 and begin to leverage those efforts to:</p> <ol style="list-style-type: none"> <li>1. Get regular riders riding more</li> <li>2. Start attracting new markets.</li> </ol> <p>With basics in place, SPOT can now go to work on getting more people on board and building community awareness.</p>	<ul style="list-style-type: none"> <li>Employer outreach</li> <li>School partnerships</li> <li>Rider of the month spots</li> <li>SPOT for better health</li> <li>Flyers and posters</li> <li>Facebook and social media</li> <li>Quick reference guides</li> </ul>	<p>\$10,000-\$15,000 in marketing plus in-kind partner support</p> <p>Staff, board, contracted, and in-kind time total of 20-25 hours per month</p>
Year 3	Years 1 and 2 create opportunity for Year 3 to be year of significant external marketing and ridership growth among new marketing. This is the year to make SPOT omnipresent in the community.	<ul style="list-style-type: none"> <li>Business partner "I'm on the SPOT"</li> <li>Presentations to the community</li> <li>Phone app and other technology</li> <li>Coffee sleeves and coasters</li> <li>Targeted ads</li> <li>Special events</li> </ul>	<p>\$20,000-\$25,000 in marketing plus in-kind</p> <p>Time of 25-30 hours per month</p>

*\*This is direct marketing and out expense. Capital and operating expenses that have marketing benefits, such as service improvements, bus stop amenities and new buses, are not included in Resources.*

Each year builds on the next and efforts started in Year 1 must be continually developed through Years 2 and 3. Once an effort is started, it is recommended that it be continued going forward, unless it is thoroughly reviewed and there is an identified reason it is deemed ineffective (effectiveness often increases with time). Budgeting and staffing must grow to support increasing SPOT marketing and outreach efforts over the next three years.

### Getting This Work Done (Limitations and Need for Partnerships)

The challenge to implementing this plan is figuring how to fund these efforts and how to improve marketing without impacting existing service. Every public transportation system faces the same challenge of finding enough funding for marketing and outreach when the direct costs of running bus service are a higher priority. But funding this marketing plan is critical to SPOT's success; running SPOT buses without good marketing means the service will not reach its full potential. Acknowledging that SPOT has budget and staff limitations in implementing the ideas of this plan, SPOT must seek creative partnerships, cost share, schedule the work slowly, and use low-cost approaches.

The budget constraint is one of the biggest challenges to plan implementation. SPOT should look to allocate more funding to marketing, but this approach will take time – SPOT has a fixed budget and service commitments that use almost all the current budget. It is recommended that SPOT also pursue a more immediate solution for accomplishing marketing goals – set-up an interior and exterior bus advertising program with the goal of trading ads on buses for SPOT ads in a variety of media. SPOT should trade bus ad space for radio spots, online advertising, putting the bus schedule in the newspaper, getting SPOT into businesses (like on coffee cups or coasters), or any other creative trades SPOT can establish. The goal of ads on SPOT buses wouldn't be to generate direct revenue – the goal would be to generate trade dollars for SPOT marketing and outreach. Bus ads could also be used as trade for staff time from partners who can help market and promote.

The other biggest constraint is available staff time. Currently, SPOT is not staffed to carry out much of this plan. SPOT has one full-time employee whose time is consumed with day to day operations. Given this time constraint, SPOT must look to other ways to get this work completed and rely on its partners to help.

#### Workhorse board of directors

- The SPOT board has shown that it is willing to work and will need to give time to these marketing efforts

#### Schweitzer Mountain Resort

- With in-house marketing resources, Schweitzer could provide marketing staff time to help SPOT implement this plan, which could be done as part of a trade for bus ad space or as in-kind donation as part of a partnership for bus service to the mountain

#### Municipal partners

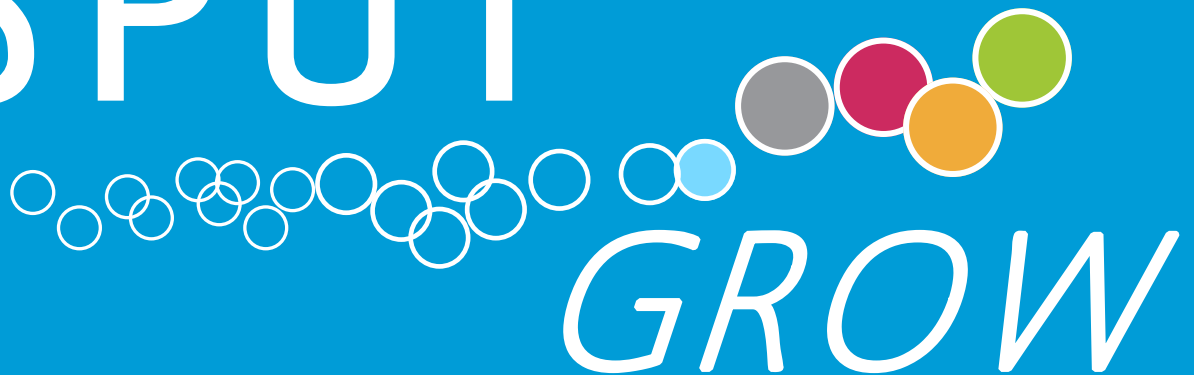
- SPOT could reach out to its partner cities to ask for help with specific marketing and outreach initiatives from city staff or officials who may have expertise or access to helpful resources like existing city newsletters

## CONCLUSION

SPOT has a strong, recognizable community brand with loyal and happy customers. Building upon this base of support, SPOT is ready to grow its awareness, usage, and community impact. By implementing this Marketing and Outreach Plan, SPOT will become a community institution that is positively viewed throughout the region. Many more opportunities and new ideas will result from starting down the path of better marketing and outreach – SPOT should plan to incorporate this evolution of marketing and outreach through periodic updates to this plan.

See

SPOT



Transit Service Development Plan







# See SPOT Grow

## OVERVIEW

A Transit Service Development Plan is an organizational planning tool that describes how existing transit routes and transportation services will be analyzed, developed, and operated, all of which is internally valuable to SPOT staff and board. This tool is also used to communicate externally with SPOT stakeholders and the community about transit service needs.

This plan will define the planning process by which the Transit Service Development Plan is updated annually. Included in this process is a mechanism for soliciting public comment on planned transit service and vet new service requests. This will allow for a transparent process to create more buy-in from the community. Not all the needs can be met, but SPOT must give an opportunity to hear from riders, the communities SPOT serves, and the general public about how SPOT service should grow.

The core of the Transit Service Development Plan is an evaluation of how to improve and grow services. Ideas in the plan are based upon several factors:

- The existing service operated
- Interviews with key stakeholders
- Survey results from riders and non-riders
- Analysis of the services operated and associated statistics
- Funding available now and in the future
- Industry best practices

The plan attempts to reconcile needs with available resources, while protecting existing services that are succeeding. The goal is to give SPOT a context for considering how to improve existing services and how to evaluate new services.

Finally, the plan will address existing services, ideas for improvement, new services, and make recommendations for the coming three years. Included will be route statistics, operating costs, trade-off analysis, and growth projections.

## FIXED ROUTE SERVICE: THE FUNDAMENTALS

When planning a fixed route bus system, there are two ends of the service spectrum to consider. On the one side of the spectrum are systems designed to cover the largest amount of geographic area with routes that offer a relatively low level of service. These routes run circuitously over longer distances to many different destinations that are geographically dispersed with frequencies often 60 minutes or longer. These routes are designed to provide equity and access. On the other side of the spectrum are bus routes that run more like rail service, with direct connections along an efficient, linear route, that are commonly referred to as high frequency service. Frequency routes run with buses departing every 30 minutes or less and often connect major destinations. Frequency routes require people to walk more, but people will often walk further to get more frequent service than wait for an hour to catch a bus closer.

SPOT's current system has aspects of both a coverage and a frequency system. Service between the shopping areas of Ponderay and downtown Sandpoint are direct and more frequent with the combined effect of coupled service on both Blue and Green Routes, but other areas are served with lower frequency routes of 60 minutes or more, which often wind around to get passengers directly in front of where they want to go.

SPOT should consider what model it prefers as it adapts and changes services. Many of the ideas in this plan are based around trying to grow ridership and develop more frequent service. The reason for this is that ridership growth is an expectation for most funding partners, and more frequent service is more productive, in terms of ridership per hour. In fact, ridership grows disproportionately higher with increased frequency. In other words, doubling frequency from 60 minutes to 30 minutes will often grow ridership by more than double.

In addition to considering the directness and frequency of a route, SPOT needs to ensure that the service provided is high quality, convenient, and consistent. Ridership doesn't happen overnight. You have to invest in a new service with the mindset that you will operate for at least a year, preferably two. Ridership is very hard to build and very easy to lose. You build ridership by developing services thoughtfully and run those new service with the long-term in mind. Unfortunately, ridership can easily be lost a lot, if service is inconsistent or unreliable.

The other key aspects to making a service go are:

### Demand

- Do you have enough confidence that a new service will be successful over the long-term? Have there been a lot of consistent requests for the service?

### Community-driven (political will)

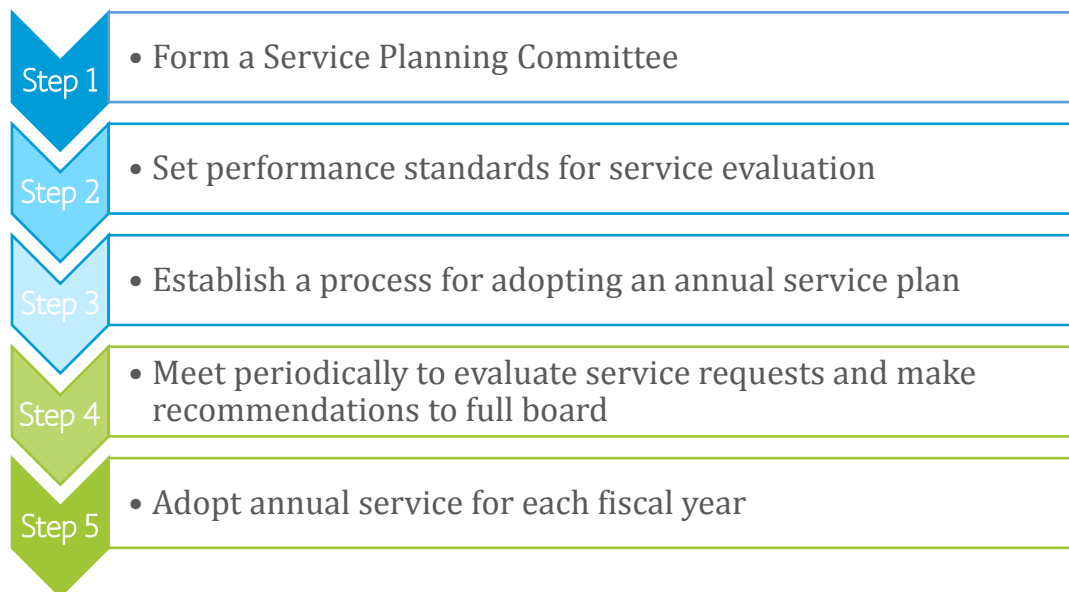
- This is often overlooked, but for a new route to be successful, there must be community interest and political will. Not necessarily from elected officials, political will can come from a new employer who is behind the start of a new vanpool, or a business like Schweitzer, helping to support the expansion of Blue Route to connect to the mountain base.

### Funding

- This one is obvious, but a service must have funding to support it. The funding should be predictable and sustainable, as much as possible with public transportation funding. SPOT should also be looking at both the operating and capital needs of the service. A new bus may be required to start a new route and SPOT needs to include the capital equipment budget impacts, both upfront and ongoing, and plan accordingly.

## THE PLANNING PROCESS: HOW TO BUILD

In order to have a well-functioning service, SPOT needs to establish a well-functioning process for service development. This process should be:



The committee should be made up of 3-4 board members and other stakeholders that have an interest in SPOT services. The existing technical advisory committees could transition onto this SPOT Planning Committee alongside willing SPOT board members. The committee should be no more than 10 people in order to keep meetings efficient. Meetings would be noticed and open to the public, as the Planning Committee would be making recommendations to the full SPOT board.

The first task for the SPOT Planning Committee would be to develop a set of standards for evaluating current services and new services. The committee would use these standards as a reference point for making changes to existing routes, increasing frequency of service, and adding new routes or services. Suggested questions to ask are:

### For Existing Services:

- 1) Is a given service meeting performance goals in terms of ridership and cost?
  - Even if a given service isn't meeting goals, is there a reason to keep operating it, regardless of performance? (e.g., "life-line" services that serve at-risk populations without other transportation options)
- 2) Are there improvements to the service that, on-balance, could provide more upside vs. downside?
- 3) Are bus stops getting too few or too many riders? Do stops need to be added or taken away?
- 4) How can SPOT continuously improve these existing services while still responding to unmet needs?
  - Don't harm existing, base-level of service
- 5) If a service needs to be cut or changed significantly, is there a way to still have another option for those impacted by any change?
  - Perhaps fixed route is replaced by demand response to retain basic mobility?

### For New Services:

- 1) What are the biggest unmet needs in the community?
  - Basis could be a missing connection, an unserved constituency, a change in land use or new land development, economic needs of businesses, or an affordable housing link
- 2) Does it complement existing SPOT services?
  - Is there a way to develop a new service such that it adds value to an existing service?
- 3) Does SPOT have the capacity to operate the service?
  - Administrative staff requirements, vehicle needs, marketing/promotional materials, and partnerships needed for success should all be considered

- 4) What is the funding model?
  - Is it sustainable? Does it have both local matching funds and federal funds?
  - Does it qualify for new sources of funding?
- 5) Does it meet the definition of public transportation?
  - Will it be open and accessible to the general public?

### Federally Mandated Guidelines:

In addition to establishing service change questions/standards, SPOT is required to set service policies and standards for five specific items (requirement of all Federal Transit Administration funding recipients):

- 1) Vehicle load – the maximum number of people per bus type (usually set by bus manufacturer but SPOT can choose to be more restrictive)
- 2) Vehicle assignment – bus sizes for each type of route
- 3) Vehicle headway – minimum service frequency for particular routes or route types
- 4) Distribution of transit amenities – goals for establishing bus shelters, benches, etc.
- 5) Transit access – the proximity of a route to existing population centers or other measure of service distribution like bus stop spacing

Once service standards are in place, the Planning Committee should establish a process for updating and adopting the annual service plan. In terms of timing with a fiscal year start of October 1<sup>st</sup>, the timeline and process for adopting an annual service plan could be:

**January – March:** collect service requests (use a standardized form); notify funding partners of the process

**May:** hold a meeting of the Planning Committee to review current services and evaluate requests for service changes, improvements, or new services.

**June:** put basic service concepts into a service outline that matches a draft budget

**July:** hold another Planning Committee meeting to develop the draft service plan that defines services for coming fiscal year

**August:** solicit public input on draft plan through surveys and community distribution of the plan

**September:** SPOT board adopts service plan, based on available budget and recommendation from Planning Committee

The process needs to allow for input from the leaders of the communities SPOT serves, the riders themselves, general public, and stakeholder organizations. As SPOT is a regional provider of public transportation services, there will always be more service requests than available resources. This process and timeline will provide context and guidance for how to deal with these competing requests.

## CURRENT SPOT FIXED ROUTE SERVICES: WHAT WE HEARD

SPOT today is characterized by strong public support, satisfied riders, and solid ridership. As SPOT considers how to develop transit services, the current services are the best place to start for transit service development.

The easiest and simplest way to grow ridership is to get existing riders to ride more often. By understanding what the existing riders like about the current services, why they ride, what they would like to see in improvements, SPOT will be able to make better decisions with regards to improving the existing routes. The rider survey, which sampled approximately 21% of the daily ridership, provided the following insights.

### Current riders would most like to see:

- 1) More frequent service
- 2) Later evening service
- 3) More stops along the routes
- 4) Connections to unserved places like Sagle and Ponder Point
- 5) Easier to read schedule

### What current riders love about the service today:

- 1) Free!
- 2) Easy and convenient
- 3) Friendly drivers
- 4) Reliable service, that it is available

### Trip purposes:

- 1) Shopping
- 2) Work
- 3) Leisure or social activity
- 4) Medical
- 5) School

### Who's riding:

- 1) Those who can't drive
- 2) Young people
- 3) Those who want to save money
- 4) Retirees

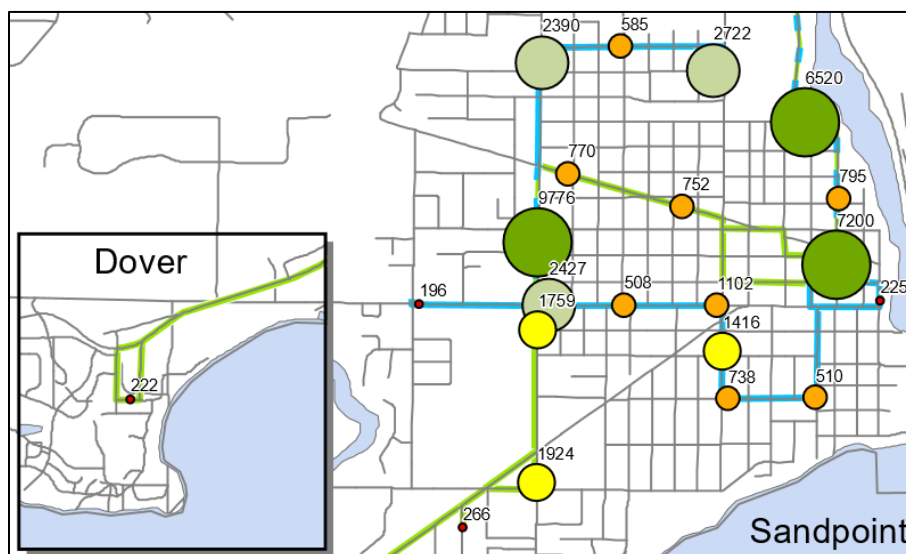
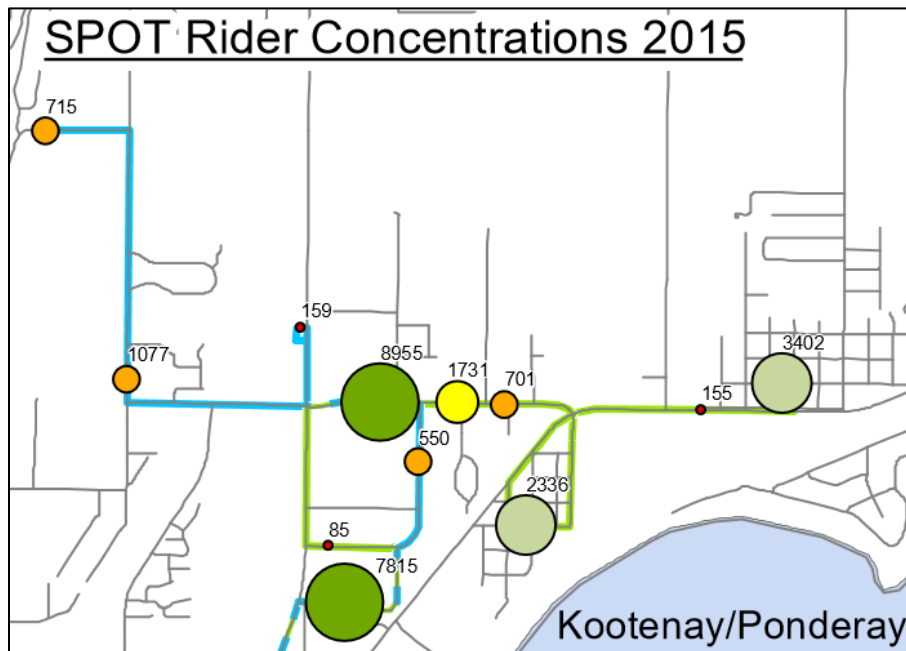
All of this rider feedback is crucial to remember when considering service changes – **SPOT has been successful thanks to its current riders and changes to service must protect the majority of these existing customers to the extent possible.**



*Happy riders and friendly drivers define SPOT today*

## CURRENT SPOT BUS STOPS: STATS, CONSIDERATIONS, ADDITIONS

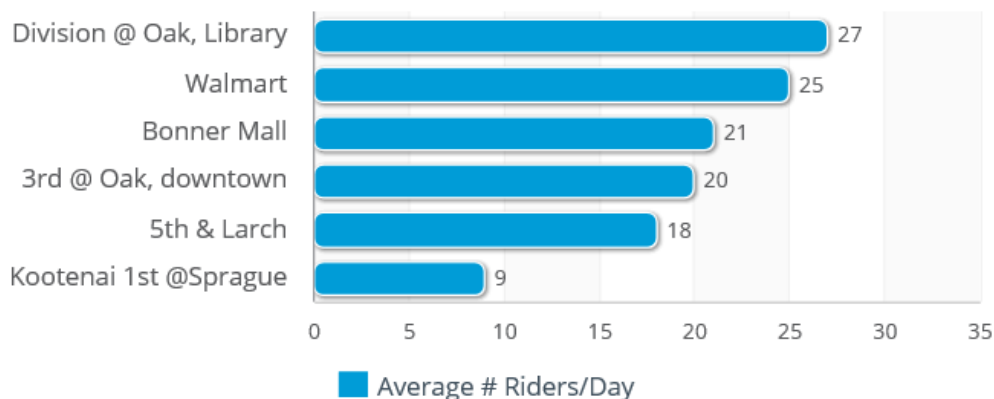
Bus stops along the Blue and Green fixed routes are a good starting point to understanding the current service and where the riders are boarding the buses. By looking at bus stop usage, SPOT can start to see where opportunities for route improvement exist. For 2015, SPOT looked at rider concentrations per stop, based on recorded rider boardings. The bigger and more green the bubble, the higher the ride boardings; yellow, orange and red show lower rider concentrations.



Heat map of rider totals at SPOT stop (Credit: Erik Brubaker, Ponderay City Planner)



From this data, the top stops in the system, along with average riders per day, are:



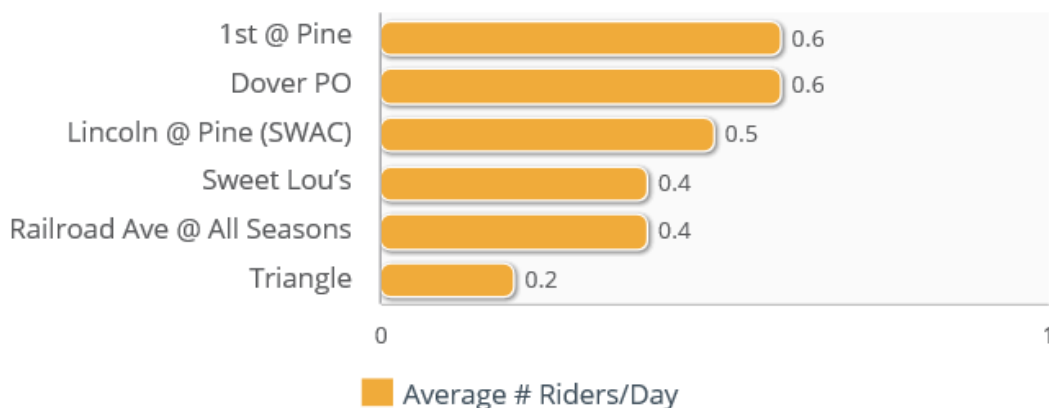
The data show how riders are using the system today – downtown Sandpoint, the library, Walmart, and Bonner Mall are the trip generators of the SPOT system. These stops show solid use and most are planned for bus stop improvements, which will help grow ridership even more.



*The Bonner Mall, one of the high-use stops*

Conversely, there are many stops with such limited use that SPOT must consider eliminating or moving some of these stops as part of the service plan.

The lowest performing stops in the SPOT system are:



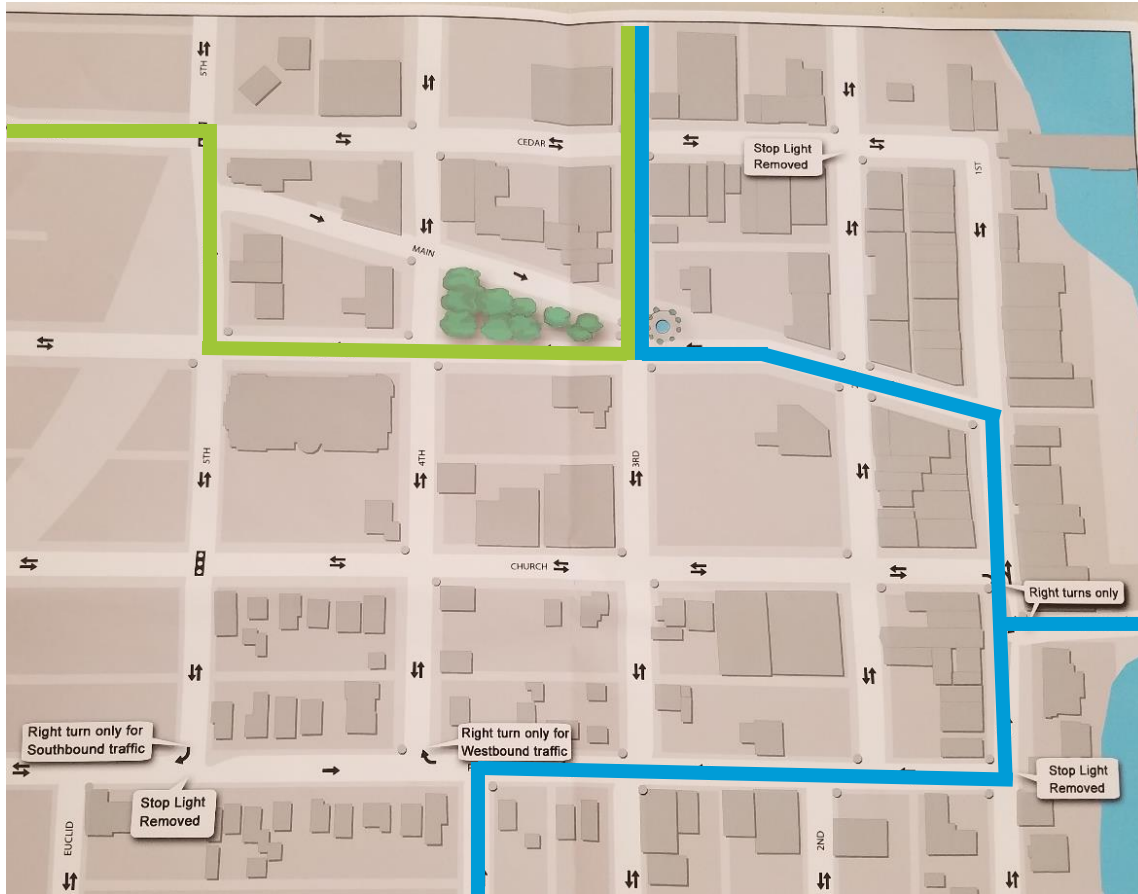
Considering that these stops are served many times each day, these average rider numbers are extremely low. A suggested benchmark would be at least 2 riders per day for any stop, especially if the stop requires a route to travel out of its way to serve that stop. If an underperforming stop is an intermediate point between two higher use stops, it is less of a concern and could remain as a stop. SPOT also needs to consider how planned service changes or improvements might affect whether or not a stop is eliminated. For example, the potential for Schweitzer service may be a reason to keep the Sweet Lou's stop due to potential growth in hotel guest ridership.

SHIFT also analyzed the distance between SPOT bus stops for Blue and Green Routes. In several cases, SPOT bus stop spacing is farther apart than what is typical for fixed route service. Within the transit industry, standards for bus stop spacing vary but are generally 500 to 1000 feet apart for downtown areas, higher density housing, or retail areas. In the SPOT service area, this would be downtown Sandpoint, the Bonner Mall, and Walmart areas. For more suburban housing areas or areas with dispersed retail or services, stops should generally be 1000 to 1500 feet apart (closer to ¼ mile spacing, or 1320 feet, which is the industry accepted maximum distance for how far someone will walk to a bus stop). In the SPOT service areas, this would be the areas along North Division, Chestnut, Michigan, City of Kootenai, Ponderay City Hall. More rural areas could see stop distances of ½ mile to 2 miles, depending on trip demand and safe stop placement. For SPOT, this would be Highway 2 to Dover, and points along Blue Route towards Schweitzer, west of Highway 95/2.

The recommended areas for adding stops are:

- 1) Along Main St., between downtown (3rd and Oak) and Division, 1 to 2 new stops
- 2) Along Division St, between Larch and Ontario, 2 to 3 new stops, especially at the High School and Middle School area
- 3) South downtown area, near Pine and 4th St., 1 new stop

There may be other areas that warrant new bus stops or adjustments to current stops, as services grow or land use changes. One big opportunity for adding new stops, as well as thinking about how to reconfigure Blue and Green routing, is the City of Sandpoint's planned change to downtown street configuration. This new layout will allow both Green and Blue Routes to provide more direct service in the downtown core, as shown.



*City of Sandpoint downtown street reconfiguration (Courtesy: City of Sandpoint)*

This is just one example of how Blue and Green Routes might operate after the streets of Sandpoint are changed. Other options may exist to more efficiently connect downtown destinations, including City Beach and the Library, while still serving the majority of the current stops. SPOT needs to be ready to adjust bus routing once the street project is complete.

## CURRENT SPOT SERVICES: HOW TO IMPROVE

Given the complexities of transit service planning, there is no holy grail or silver bullet that can meet all goals. As mentioned previously, there are inherent trade-offs between serving many communities and destinations versus providing high frequency service. Each route and service is a reflection of the community itself and usually develops from a community-based service planning process. SPOT service has grown up around this concept, and the system is generally working well. The current SPOT system:

- ## SPOT BUS SCHEDULE

*Effective July, 2014*

### GREEN ROUTE

Starts at 6:27 am	7 days a week every hour	Ends at 9:24 pm
6:27 pm	Three late runs Fri. & Sat. (Winter Only)	9:24 pm
South	North	
27	1st between Sprague & Hope	27
28	Railroad Ave. @ All Seasons	23
	Ponderay City Hall	20
31	Kootenai Cutoff @ Moody	19
32	Kootenai Cutoff @ Larkspur	18
34	Kootenai Cutoff @ Walmart	17
36	Triangle (Alpine Motors)	15
40	Bonner Mall	12
41	Larch @ 5th	11
42	3rd @ Alder (Hospital)	10
45	3rd @ Oak (Downtown)	02
46	Main @ Florence	01
47	Main @ Washington	00
48	Library-Division @ Oak	59
49	Division @ Lake (SHS/SMS)	58
	Division @ Ontario	

### WEST SANDPOINT Alternate stops

On "Even" hours (dashed line on map)

50	Lincoln @ Mt. Meadow	57
51	Lincoln @ Pine (SWAC)	56

### DOVER Alternate stops

On "Odd" hours (dashed line on map)

53	Ridley Village	57
	Dover Post Office	53

No service Easter, Thanksgiving and Christmas  
- No Stop

### BLUE ROUTE

NORTH Starts at 6:24 am	Every hour 7 days a week	SOUTH Ends at 6:24 pm
6:24 pm	Three late runs Fri & Sat (Winter Only)	9:24 pm
24	Spruce @ Boyer	24
25	Chestnut @ Ella	23
26	Division @ Spruce	22
27	Division @ Main	21
28	Division @ Oak (Library)	20
29	Pine @ Division	20
30	Pine @ Ella	19
31	Pine @ Boyer	18
32	Boyer @ Superior	16
33	Michigan @ Boyer	16
34	Michigan @ Fourth	15
35	1st @ Pine	14
36	3rd @ Oak (Downtown)	13
37	3rd @ Alder (Hospital)	12
41	Larch @ 5th	08
42	Bonner Mall	05
44	Triangle Drive (Dialysis Cnt.)	04
46	Wal-Mart Kootenai Cut-off	02
49	Holiday Inn Express	02
52	Fairgrounds	57
	Schweitzer Red Barn (Winter only)	

### BUS ROUTES

  - BUS STOPS
  - GREEN ROUTE
  - BLUE ROUTE
  - TRANSFER STOP (both lines stop)

*Includes: Post Office, Transit*

**SPOT**  
*Subsidiary: Post Office, Transit*

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**SPOT**  
*Subsidiary: Post Office, Transit*

**BUS ROUTES**

  - BUS STOPS
  - GREEN ROUTE</

In suggesting improvements to current services, this plan strives to respect the current system and the riders that depend on it. There are always a variety of ways to improve and change a service, **but major changes to the existing routes could be detrimental and counterproductive**. The following are two examples, illustrating the trade-offs between coverage versus frequency (SHIFT does not recommend these changes, they are only provided as an example):

- 1) Just one route running between the library, downtown Sandpoint, and the shopping areas of Ponderay. This route could achieve 20-minute frequency with two buses but would leave many areas unserved. This approach would prioritize frequency above coverage area.
- 2) Add a third route, running every 60 minutes, to connect to more destinations. This would prioritize coverage over frequency of service.

Both of these examples run contrary to what has made SPOT successful to date.

What SHIFT is recommending, after analyzing all of the current routes and services, is a strategic approach that takes the existing routes and services and improves them incrementally over time, making small changes to frequency and/or coverage, where it's appropriate. By implementing small tweaks and adjustments, as opposed to fully rebuilding routes and services, SPOT can best leverage its current system to produce higher ridership and more efficient, effective service with the ideas herein. The added benefit to this approach is it will retain the existing ridership and get existing riders using SPOT more often.

It is worth noting that SPOT operates in a very unique area that is constrained by many factors including: bodies of water that require indirect road routing, railroad tracks with intense train activity, one-way roads, and destinations that are not along direct routes. SPOT has done a commendable job designing a system that account for these many unique factors. The goal of this plan for improvements and service additions is to build on this solid foundation.

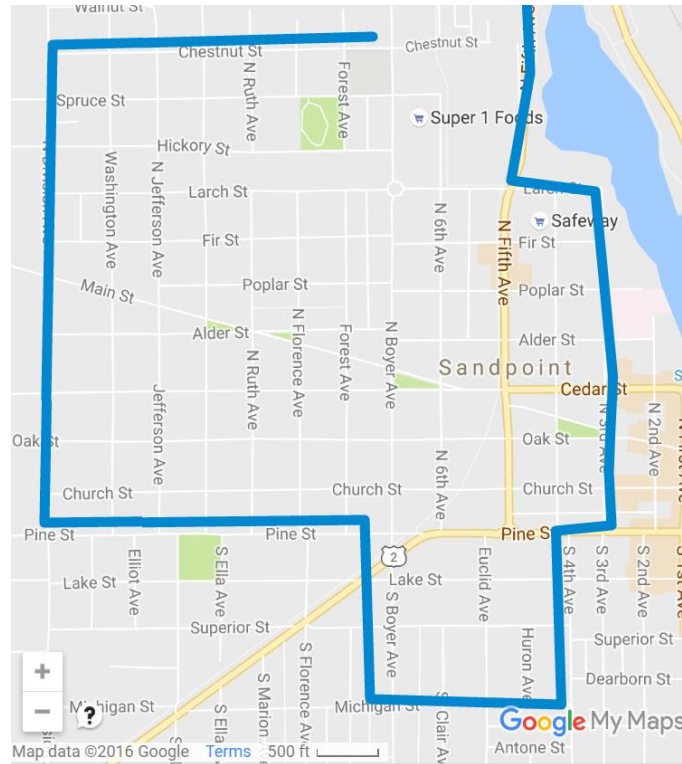
## Blue Route

SHIFT believes that Blue Route has the most opportunity for long-term growth due to potential for new Schweitzer and City Beach connections, and the fact that all of the highest use stops are served by Blue Route. When analyzing the route configuration (where it goes and how it gets there), SHIFT determined that the routing of Blue Route for points north of the City of Sandpoint is working well. For Blue Route within Sandpoint, SHIFT has identified options for SPOT to consider:

### Option 1 - Keep route as is in Sandpoint

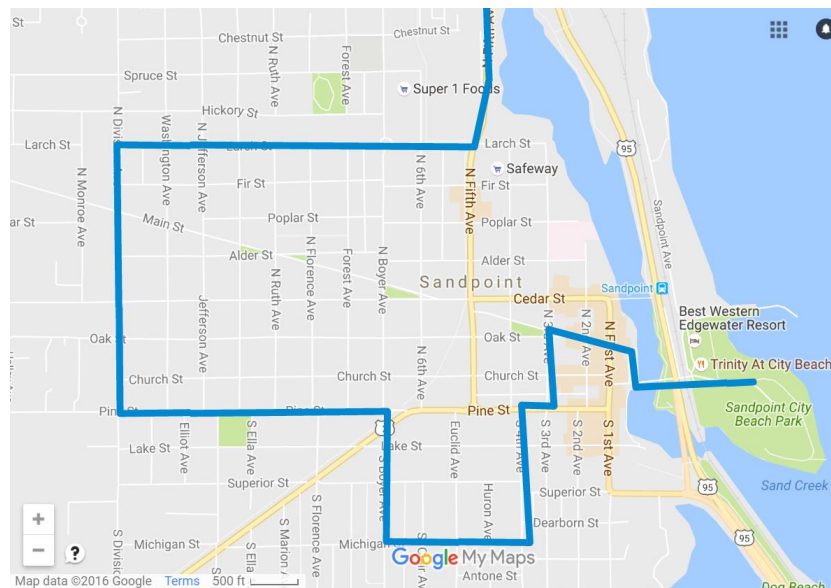
- Blue Route doesn't necessarily need any adjustments, and SPOT could determine that the existing routing is preferred (apart from potential connection to City Beach that is easily added to current routing)





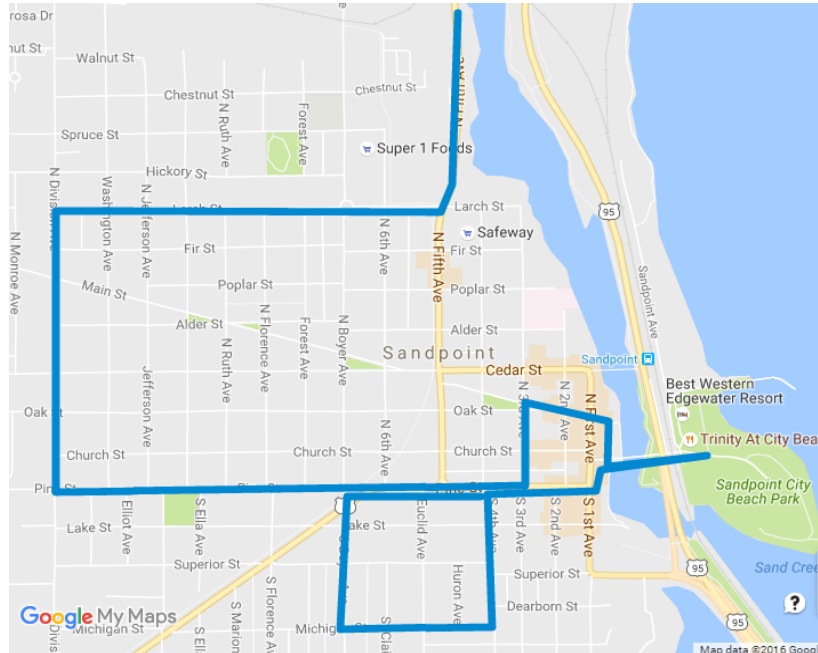
### Option 2 - Use Larch to Division as route into and out of Sandpoint

- Keeps current routing for neighborhood area off of Michigan



Option 3 - Same as Option 2 with exception of how Michigan neighborhood is served

- This option gets passengers straight to downtown first and then does a one-way loop to serve Michigan via 4<sup>th</sup> and Boyer



Routing options 2 and 3 make sense if SPOT felt more ridership could be gained from those in north Sandpoint who want a more direct connection to Ponderay, versus current routing that requires them to loop down to Michigan St. and into downtown before going to Ponderay and Kootenai. SPOT would also have to believe that those getting on in Kootenai and Ponderay are more interested in getting to destinations on the north side of Sandpoint, as well as the library, before going to downtown. The downside of both Option 2 and 3 is that the hospital isn't served and that getting to and from downtown isn't as direct.

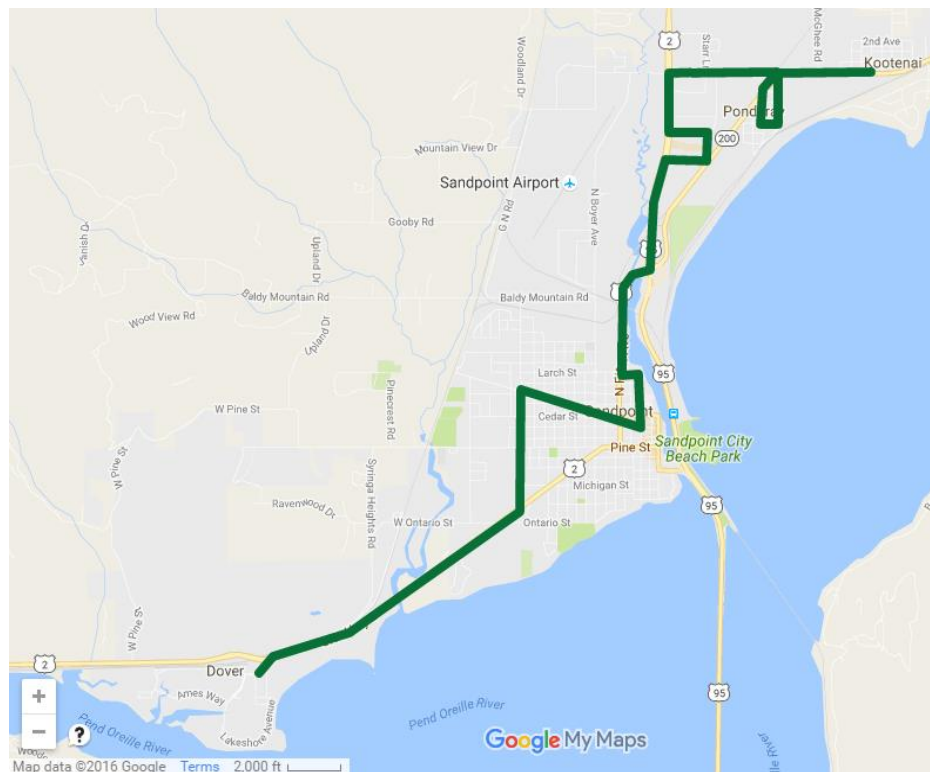
Apart from potential routing adjustments that could be considered, there are service improvements that SPOT should evaluate to incrementally improve the Blue Route:

- 1) Make connection to City Beach in the summer
- 2) Add a second bus to improve frequency to every 30-minutes during winter and potentially summer; could start as part of Schweitzer for winter service and should be evaluated for eventual year-round service
- 3) Expand late night service to Wednesday through Saturday nights until 9:30p for both winter and summer to start and eventually provide late night Wed-Sat for entire year



## Green Route

The southern “tail” of Green Route currently alternates between two different destinations, resulting in a very low frequency (120 minutes) for the Sandpoint West Athletic Club and Dover. SHIFT recommends that the routing of Green Route be changed such that the connection to the SWAC is eliminated and Dover is served every trip. This will improve frequency for Dover to 60-minutes and will give the Dover ridership a chance to increase. It also provides for a more consistent and easier to understand schedule for the public. Here is the suggested routing change:



SHIFT looked at alternatives for changing how Green Route serves the Ponderay area, but the railroad tracks, lack of pedestrian infrastructure along Route 200, and needed connections to both the retail area and downtown Ponderay caused SHIFT to conclude that the routing in Ponderay should remain the same. Kootenai routing is recommended to remain largely the same as well.

Other opportunities for Green Route improvements include:

- 1) Reestablishing a bus stop at Kootenai City Hall
- 2) Make small adjustments to route timing to give drivers a longer break either in downtown or at the SPOT office

Due to timing constraints, Ponder Point isn't a recommendation for Green Route service, but SHIFT is recommending that this be included in a new demand response service for certain areas of Sandpoint (see separate section on "New Services").

### Paratransit in Sandpoint Area

SHIFT found that the paratransit service that operates within a  $\frac{3}{4}$  mile of the fixed route service area for those who qualify under the Americans with Disabilities Act is well used, is compliant with regulations, and is providing important service. Apart from more marketing to increase awareness of this service, there are no improvement recommendations for the paratransit service; however, there is a suggestion for a new demand response service that would utilize the existing paratransit service as its basis.

### Demand Response in Bonner's Ferry Area

Started in April of 2015, this service is one of the newest for SPOT. Ridership has grown from 92 in the first full month to over 200 per month recently. The service is open to the public and requires passengers to request trips in advance. Current service operates three days a week from 9am until 3pm and includes two days in and around Bonner's Ferry, and one day from Bonner's Ferry to Bonner County.

Given the population size of the area, SHIFT recommends that SPOT continue to improve demand response service for the next few years and not implement fixed route service. Demand response is much more flexible and appropriate for this service area. Demand response should be expanded from three days a week to four days a week with slightly longer hours and potential for larger service area to points:

#### Bonner's Ferry demand response goals (implemented over three years):

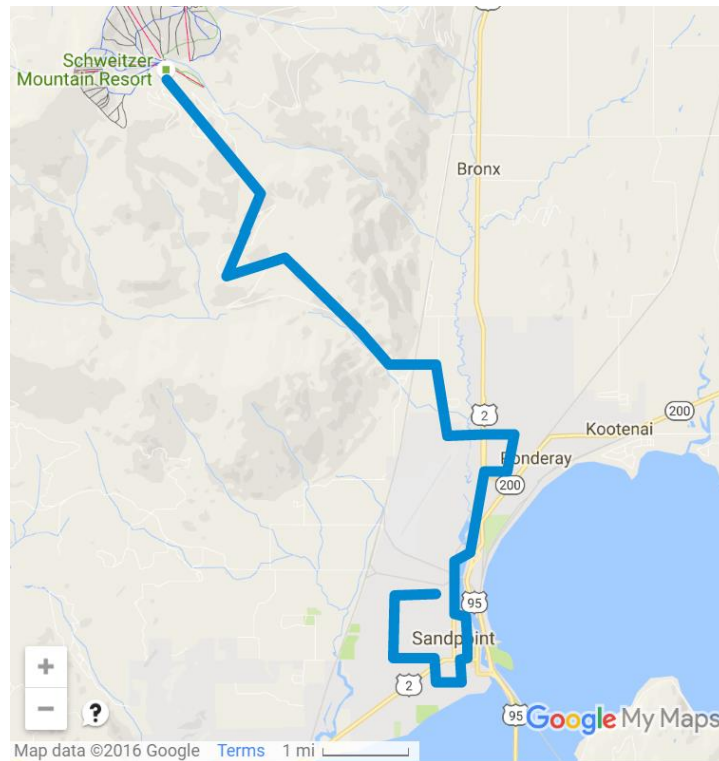
- Demand response service 4 days a week
- Monday through Thursday from 9a until 4p
- Expanded service area

Increasing service will take increased funding from partners in Boundary County and Bonner's Ferry. SPOT needs to continue to communicate about the resources required to grow this service, so that funding partners can plan ahead. It should be noted that the growth of this service is a separate goal from the new regional connection between Bonner's Ferry and Ponderay and Sandpoint, as detailed in the New Service section.

## NEW SPOT SERVICES: HOW TO GROW

### Schweitzer Connection

The extension of Blue Route to Schweitzer Mountain Resort in the winter is a new service that has been discussed by SPOT and Schweitzer in detail for more than a year. This new service idea seems to be viable – the community appears to support this new service, Schweitzer is willing to subsidize the operating and capital of this service, SPOT is willing to operate the service, and ridership should increase significantly. The proposed route, previously discussed by SPOT and Schweitzer, is an extension of Blue Route:



Schweitzer service dovetails into the existing Blue Route timing, but requires additional buses to operate. This timetable shows how buses would be timed for both 60-minute frequency, which requires 2 buses to operate, and 30-minute frequency, which requires 4 buses. (Frequency is calculated by using the time it takes 1 bus to make a full lap and dividing by the number of buses.) Bus times shown are suggested to create times that are easy for passengers to remember going to and from Schweitzer and match relatively close to existing Blue Route timing. Only show major time points, as shown in the table below (route would serve all existing intermediate stops).

<b>BLUE ROUTE TIMING WITH SCHWEITZER</b>	<b>60-minute frequency 2 buses</b>	<b>30-minute frequency 4 buses</b>
<b>TOWARDS SANDPOINT</b> (bus times after the hour)		
Schweitzer	:30	:30, :00
Red Barn	:00	:00, :30
Walmart	:10	:10, :40
Sandpoint downtown	:20	:20, :50
Spruce @ Boyer	:30	:30, :00
<b>TOWARDS SCHWEITZER</b> (bus times after the hour)		
Spruce @ Boyer	:30	:30, :00
Sandpoint downtown	:40	:40, :10
Walmart	:50	:50, :20
Red Barn	:00	:00, :30
Schweitzer	:30	:30, :00

In both scenarios, northbound and southbound buses are crossing paths at the Red Barn. This is a big advantage – if the road were closed and a bus was unable to make it down the hill in time, the other bus would simply turn around at the Red Barn and start running the schedule of the stuck bus.

### Demand Response Addition for Sandpoint Area

With a dedicated bus already operating complimentary paratransit service for ADA passengers in the Dover, Kootenai, Ponderay, and Sandpoint area, SHIFT believes that SPOT should consider using this service to also offer demand response service to specific areas and destinations not currently served. SPOT could offer a demand response service open to the public to connect to the following areas:

#### West Sandpoint, including service to SWAC

- Given recommendation for rerouting the Green Route and eliminating the SWAC stop, this would still give connectivity to this area

#### North Sandpoint

- Foodbank and airport area – demand response could work well to connect to these areas, especially since railroad tracks and deviation time make this area difficult to serve for existing fixed routes

### Ponder Point

- As mentioned, Green Route is very time constrained and cannot afford the time to go to Ponder Point. Demand service could fill this gap and provide service for this area

### Sagle

- The bridge is a challenge for this connection, but demand response with 1-2 standing trips (prescheduled trips that only operate if someone requests in advance) per day could be a place to start for serving Sagle

### Vanpool

With the first route just getting started for Quest Aircraft employees, SPOT vanpool is a brand new expansion of service, and SPOT's first foray into regional commuter transportation. SHIFT believes that vanpool will grow very quickly for SPOT over the coming years. As employers understand the benefits that vanpool offers in terms of employee retention and attraction, vanpool ridership will follow.

SHIFT believes that SPOT should grow vanpool carefully, as resources allow. With the current cost structure of vanpool, some administration costs are built in and SPOT must put that funding first into increasing the hours of an office assistant, and ultimately funding a vanpool coordinator position that could also be responsible for demand response coordination.

**Vanpool should be a core part of SPOT's growth over the coming three years with the goal of adding 1-2 vanpool routes per year**

### Regional Connections

As SPOT is about to expand its joint powers agreement regionally, SHIFT recommends that SPOT start planning for regional scheduled service. Two areas are recommended:

#### Connection between Bonner's Ferry and Ponderay/Sandpoint

**Plan:** transition current demand response run to scheduled fixed route one day a week and add Saturday service for casino goers and general public – both of these could start in 2017 and be expanded as funding and ridership grow.

**Funding:** existing demand response connection already funded; casino could fund weekend service

### Connection between Sandpoint area and Coeur D'Alene (CDA)





















**Plan:** start conversation with regional partners in the CDA area and start planning route and funding. Apply for 5311(f) funding in 2017 and start service in 2018.

**Funding:** 5311(f) intercity funding from the Federal Transit Administration with local match required. Kootenai County and Bonner County partners will have to participate.

SHIFT believes SPOT's role in regional transportation is going to grow in terms of importance and influence. By planning now, SPOT will be more successful in connecting a broader region and delivering economic benefits to all partners.

## SUMMARY OF IMPROVEMENTS

In considering potential improvements to existing services or additional new services, SPOT should be aware of the pros, cons, relative costs, and relative ridership gains.

Improvement or service addition	Analysis-Recommendation	Expense	Estimated Ridership Gain
Later night service for Blue	One of the top requests from riders, but this ridership potential may be limited. Recommended only if resources allow.		
30-minute frequency for Blue	Getting Blue Route to every half-hour will significantly improve ridership, but it is expensive. If resources allow, this is recommended (implement slowly)		
City Beach summer connection for Blue	This is an easy, low-cost change to Blue Route that should yield strong ridership gains and is recommended.		
Reconfigure Blue to operate along Larch	These options could produce more ridership. Not enough data to make a recommendation.		
Reconfigure Green to serve Dover every trip	Having a consistent route is important. This is low cost and is recommended, but ridership may take time to build.		
Demand response for specific areas around Sandpoint	General public demand response could work well for areas that aren't practical for fixed route service but are in need of service. Recommended if resources allow.		
Schweitzer service as Blue extension	This service seems to have the most energy and interest. It is expensive but Schweitzer is willing funding partner. Ridership numbers will be high, based on Schweitzer data. Recommended.		
Regional fixed route w/ limited service from Sandpoint to Bonner's Ferry	Currently the demand response service comes into Ponderay/Sandpoint once a week from Bonner's Ferry. This service is recommended to be transitioned to a fixed route. Saturday service is only recommended if the casino funds it.		
Regional intercity route to CDA	This is longer term project that is recommended for planning only at this point. If funding develops and partners are in place, service could be started in three years.		
Vanpool	Implementing vanpool is fairly low-cost with riders paying costs of the van. Given employer needs and housing, vanpool growth of 1-2 vans per year is recommended for SPOT.		



## THREE-YEAR SERVICE PLAN

There are many opportunities for SPOT – this chart charts illustrates a course for implementation. SPOT will need to determine if all of these opportunities make sense and whether they should happen sooner or later than recommended. As SPOT implements some of these opportunities, this three-year plan will need to be updated to reflect new information resulting from service, land use, and other changes.

EXISTING SERVICE	2017	2018	2019
Blue Route	Connect to city beach, consider route configuration	Increase night service.	Increase to 30-minute for winter and potentially summer service.
Green Route	Realign route to serve Dover every run, add new stops along existing route	Make time adjustment to Green to account for more Blue service	Evaluate long-term potential in 2020 and beyond of increasing to 30-min. freq.
Paratransit in Bonner County	Maintain as is	Maintain as is	Maintain as is
Demand response Boundary County	Maintain as is	Expand hours of service and look at larger service area	Add 4th day of service and keep Boundary bus in Bonner's Ferry for all 4 days
NEW SERVICE	2017	2018	2019
Schweitzer service	Plan ahead for winter 2017-2018 start. Finalize service details.	Start Schweitzer service with 60- minute service	Expand Schweitzer service to 30-min., evaluate peak load needs in partnership w/Schweitzer
Demand response in Bonner County	Add limited service areas and days to existing paratransit bus	Expand to other service areas	Add another bus for 2 hours per weekday
New regional service to Bonner's Ferry	Start with 1 day per week scheduled service with 1 round-trip	Expand to 2 days per week	Expand to 3 days per week with multiple roundtrips
New intercity service	Begin regional discussions and apply for funding	Start service with 1 day per week with 1 roundtrip	Expand service to 2 days per week
Vanpool	3 vanpool routes by end of 2017	5 vanpool routes by end of 2018	7 vanpool routes by end of 2019
RESOURCES REQUIRED	2017	2018	2019
Estimated incremental operating costs	\$50,000 - \$75,000	\$140,000 - \$180,000	\$220,000-\$270,000
Increased administrative staff	Add full-time office assistant	Add part-time vanpool and demand response; add driver trainer position	Make vanpool and demand response coord. full-time; transition management from Ops Manager to Exec Director
RESOURCES AVAILABLE	2017	2018	2019
	Schweitzer operating funding, vanpool fares, funding from casino	Schweitzer, vanpool, casino, 5311(f) for intercity, additional local JPA contributions	Schweitzer, vanpool, casino, 5311(f), additional local JPA contributions, additional 5311 operating funding

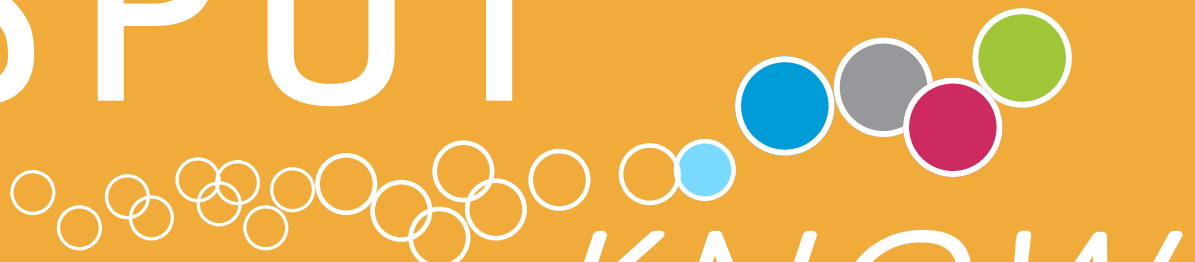
## CONCLUSION

SPOT has tremendous opportunity over the next three years to strengthen and improve existing services. Improving existing services should be SPOT's top priority. New services should be developed as resources allow and must be implemented carefully with a long-term, incremental approach.

See

SPOT

*KNOW*

A decorative graphic consisting of a series of circles of varying sizes and colors (blue, grey, pink, green, and light blue) arranged in a curved path that follows the word 'KNOW'.

Performance Dashboard





# See SPOT Know

## OVERVIEW

A performance dashboard is a monitoring and feedback tool for SPOT to use to evaluate its impact and performance over time. A performance dashboard tracks specific performance indicators and represents them in an easy to read and understand format, typically with graphical data, comparisons against benchmark goals, and historical trends.

Three main performance areas of focus for this dashboard are **ridership, financial, and safety**. In these three areas, the dashboard gives 1-2 specific metrics for each that quantify SPOT's performance (e.g., riders per hour). For each area an appropriate goal is suggested as the benchmark.

The goal of this tool is to give SPOT insight into its performance on an ongoing basis. A performance dashboard is primarily used by staff and the board to understand the organization better, but it can be used to present information to specific stakeholders or the community at large. By creating a feedback loop of information, SPOT can determine if specific projects or initiatives are working and how they impact performance.

It should be noted that a performance dashboard does have limitations; it cannot present the entire organizational performance. A dashboard can't tell you, for example, that there was a big economic slowdown that impacted ridership, or that costs spiked one month due to a large unscheduled maintenance issue. There are so many variables in running a public transportation system that must be recognized. It may make sense for staff to provide descriptive context to the dashboard when it is presented. And there may be good reason to accept lower than desired benchmark performance – a new route may take longer to get established, SPOT's cost structure, especially overhead, may have to increase to support more service growth, and a few back-to-back incidents or accidents may skew safety data temporarily. The key is to look at trends and patterns and use the dashboard data as potential indicators to help inform decisions or make adjustments appropriately.

## AGENCY SNAPSHOT

In order to determine where SPOT should go, it's important to understand where SPOT is today. **The organization is in a great place with solid ridership, low cost structure, satisfied customers, and safe operations.**

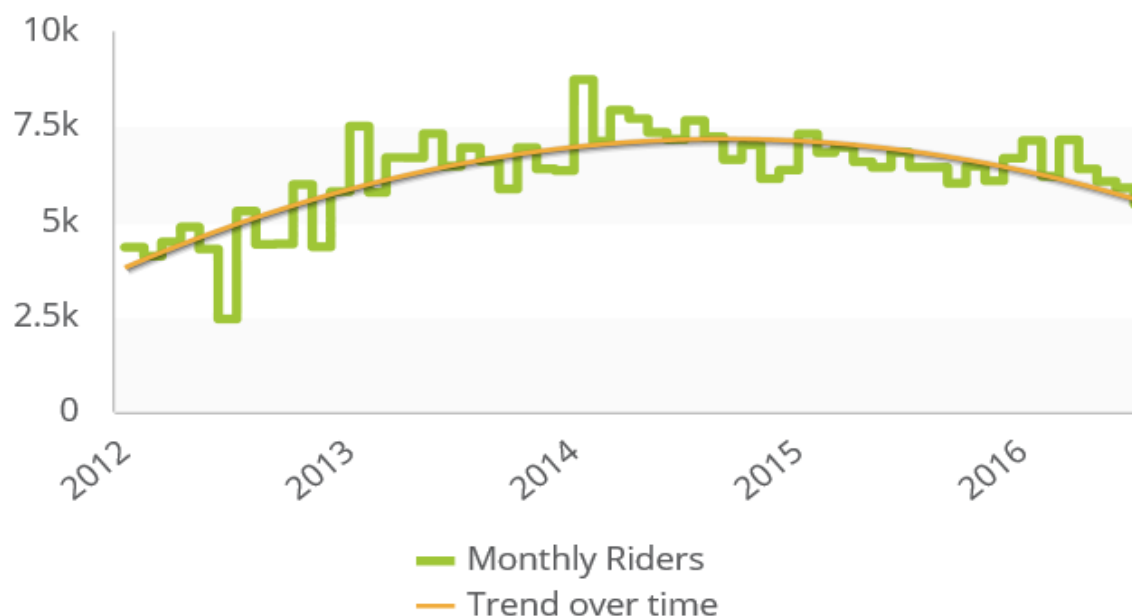
## A Typical Month for SPOT

<b>Riders boarding</b>	6,408
<b>Hours of service provided</b>	1,074
<b>Miles driven</b>	14,526
<b>Monthly expenses to run SPOT</b>	\$38,790
<b>Accidents and incidents</b>	Less than 1 per year

*12-month average for July 2015-July 2016*

Formed in 2011, SPOT is a relatively new organization that grew its ridership quickly from 2012-2014. However, growth has stalled in recent years. **Ridership numbers are relatively stable, but – in the past two years – the trend has been downward.** Based on interviews that SHIFT conducted with SPOT board members, the goal is to reverse this trend and see SPOT ridership grow.

## Trends in Ridership for SPOT



## PERFORMANCE METRICS

Developing performance metrics involves taking available data streams and combining them in ways that make sense for the organization. For SPOT, the data streams that are readily available and currently tracked by staff include:

### Use of service

- Riders per route, riders per month
- Riders per stop

### Quantity of service

- Hours per route, hours per month
- Mileage per route, mileage per month

### Costs of service

- Expenses per month

### Safety of service

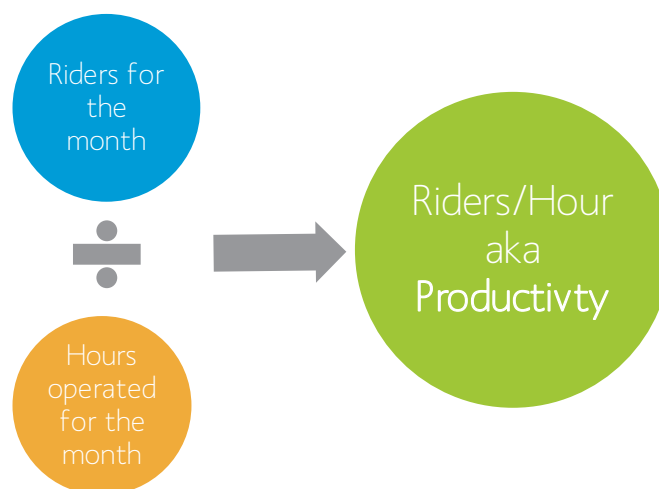
- Number of incidents or accidents

### Historical trends

- The data over a particular time frame

CURRENT  
DATA  
STREAMS

Developing a performance metric takes combines these data streams to develop a ratio that can quantify performance. For example, to understand how productive a particular service is, you would take ridership and divide by hours of service to get ridership per hour:



With so much data and so many different ways to calculate and present the data in an understandable format, it is recommended that the SPOT dashboard track these metrics for each area of performance:

### SPOT Recommended Performance Metrics

METRIC		6 month average for SPOT actual performance	Suggested SPOT benchmark goal for each metric
Ridership	Riders per hour for fixed route service	7.9	9
	Riders per hour for paratransit and demand response	2.1	2.5
Financial	Cost per hour of revenue service	\$38	< \$45
	Cost per passenger (total with both paratransit and fixed route)	\$6.35	< \$7
Safety	Accident and incidents per year	1	< 2

These specific metrics were chosen because they give a picture of data driven performance of the organization in three key areas that are easy to calculate, readily available from existing data, and typical in the public transportation industry.



The suggested benchmarks were chosen as achievable goals for SPOT, which are applicable for a small rural transit agency operating a similar amount of service. Every transit agency is different when it comes to performance, and there is no industry standard benchmark for these metrics. Agency performance varies widely based on the type of service, the amount of service, the density of the areas served, incentives to take public transportation, disincentives to driving, and many other unique factors.

Given that SPOT is serving small towns and rural areas, SPOT is performing well overall. In comparison to neighboring agencies, most of which are serving much larger areas with a much higher level of service, SPOT has a very low cost structure and has solid ridership per hour.

### Comparables: Ridership and Financial

Community	Ridership Total	Hours of service	Ridership per Hour Average	Ridership per Hour By Service	Operating budget	Cost per Hour	Cost per Pass
Spokane, WA (STA)	11,811,344	580,892	20.3	28.9 = Bus 2.96 = Demand	\$58,695,223	\$101	\$4.97
Boise, ID (ValleyRide)	1,466,139	121,563	12.1	15.3 = Bus 2.0 = Demand	\$9,624,981	\$79	\$6.52
Missoula, MT (Mtn Line)	922,768	54,624	16.9	20.1 = Bus 2.2 = Demand	\$5,031,414	\$85	\$5.02
Billings, MT (MET)	671,907	51,461	13.1	16.1 = Bus 4.0 = Demand	\$5,150,741	\$100	\$7.67
SPOT (2015 data)	79,170	12,931	6.2	7.5 = Bus 2.1 = Demand	\$438,601	\$34.04	\$5.54
Idaho Falls, ID (TRPTA)	38,660	32,114	1.2	1.7 = Bus 1.0 = Demand	\$1,118,204	\$34.82	\$28.92

*\*2014 Data from the Federal Transit Administration National Transit Database.*

## THE DASHBOARD

A good dashboard should include these metrics in an attractive presentation and be easy to understand at a glance. The dashboard developed for SPOT combines speedometers that show where SPOT is operating in the range for a particular month alongside graphs that show the trend over a longer period of time. The dashboard is shown in Appendix A for a recent month. This dashboard should be updated by staff on a monthly or quarterly basis and be shared with board members as part of the regular board meetings.

## OTHER METRICS TO CONSIDER

The SPOT dashboard is a quantitative tool to give organizational feedback to staff and the board on an ongoing basis. SPOT should consider tracking other metrics on a less frequent basis. Other potential performance indicators could include:

### Customer satisfaction survey

- The recent survey conducted by SHIFT sampling 45 riders showed that, on average, passengers were very happy with SPOT service, giving it an average of 4.7 out of 5 stars on overall experience

### Driver satisfaction survey

- Happy drivers = happy customers = good community feelings about SPOT

### Ridership per stop

- Looking at how many people are boarding at each stop will give SPOT an idea of which stops may not be effective

### Property values near popular bus stops

- Are they increasing faster than other properties?

These indicators could be looked at annually or as the resources allow. This could be part of a more in-depth annual performance report.



See **SPOT** Know

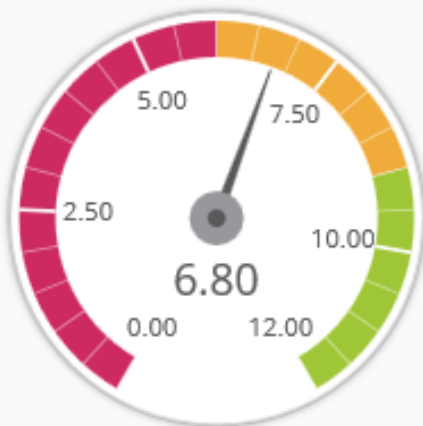
## APPENDIX A



## RIDERSHIP PERFORMANCE

### Riders per Hour (Fixed Route)

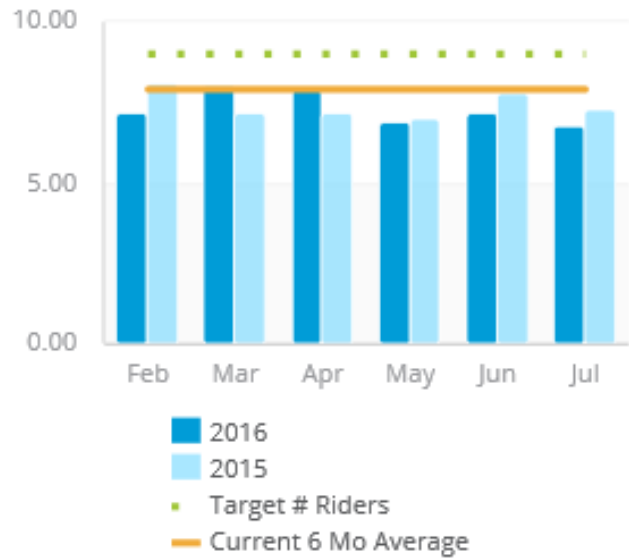
July 2016



Goal of 9 riders/hr

### Riders per Hour (Fixed Route)

Six Months vs. One Year Ago and Target



### Riders per Hour (Para and Demand)

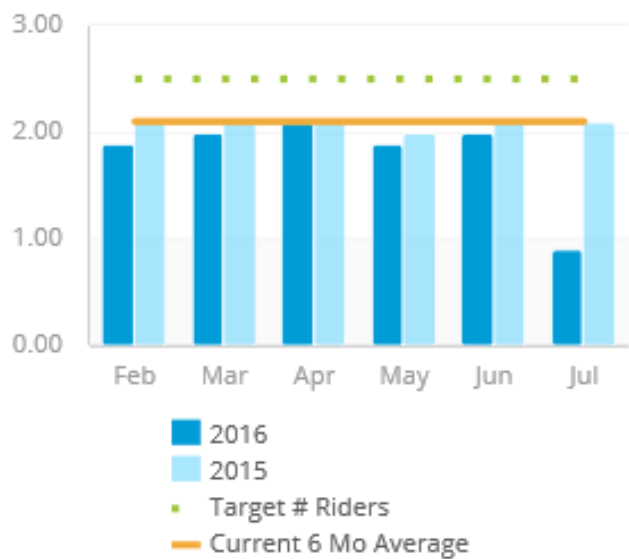
July 2016



Goal of 2.5 riders/hr

### Riders per Hour (Para/Demand)

Six Months vs. One Year Ago and Target

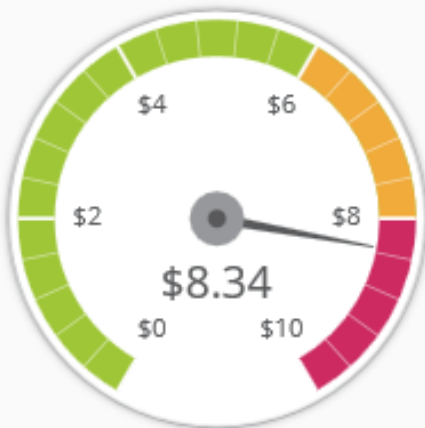




## FINANCIAL PERFORMANCE

### Cost per Passenger

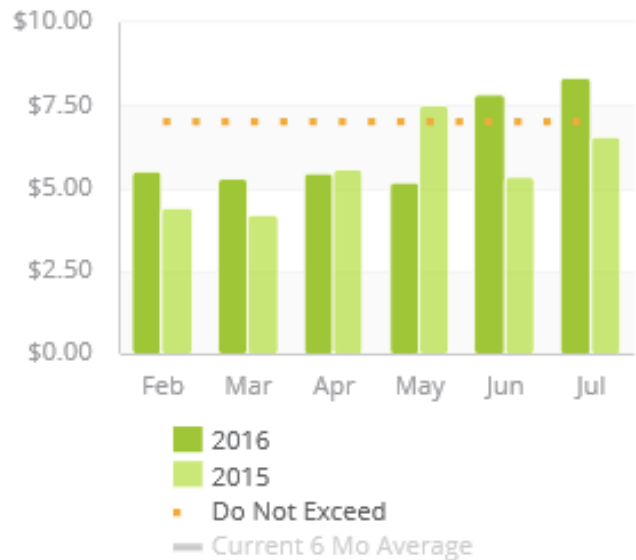
July 2016



Goal of less than \$8/passenger

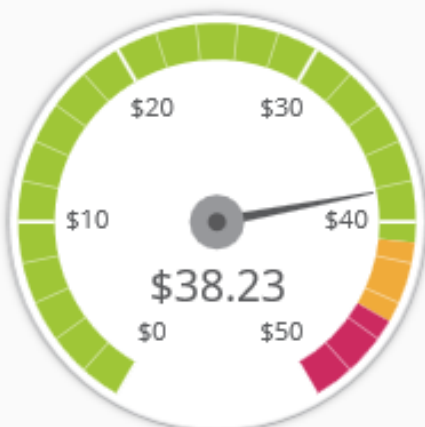
### Cost per Passenger

Six Months vs. One Year Ago and Target



### Cost per Hour of Revenue Service

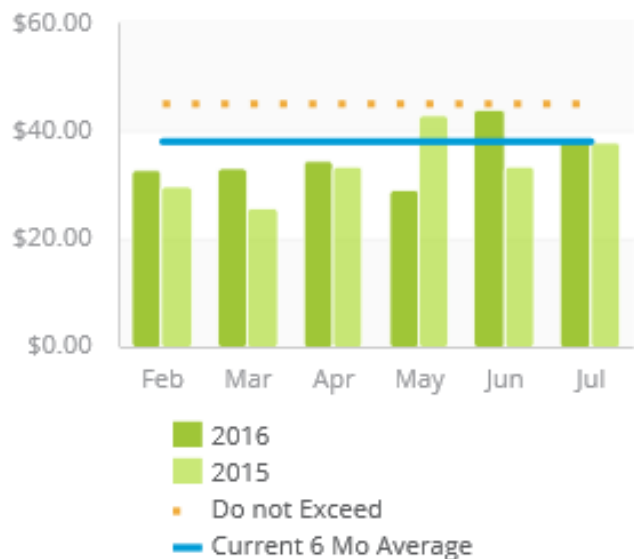
July 2016



Goal of less than \$45/Hour

### Cost per Hour of Revenue Service

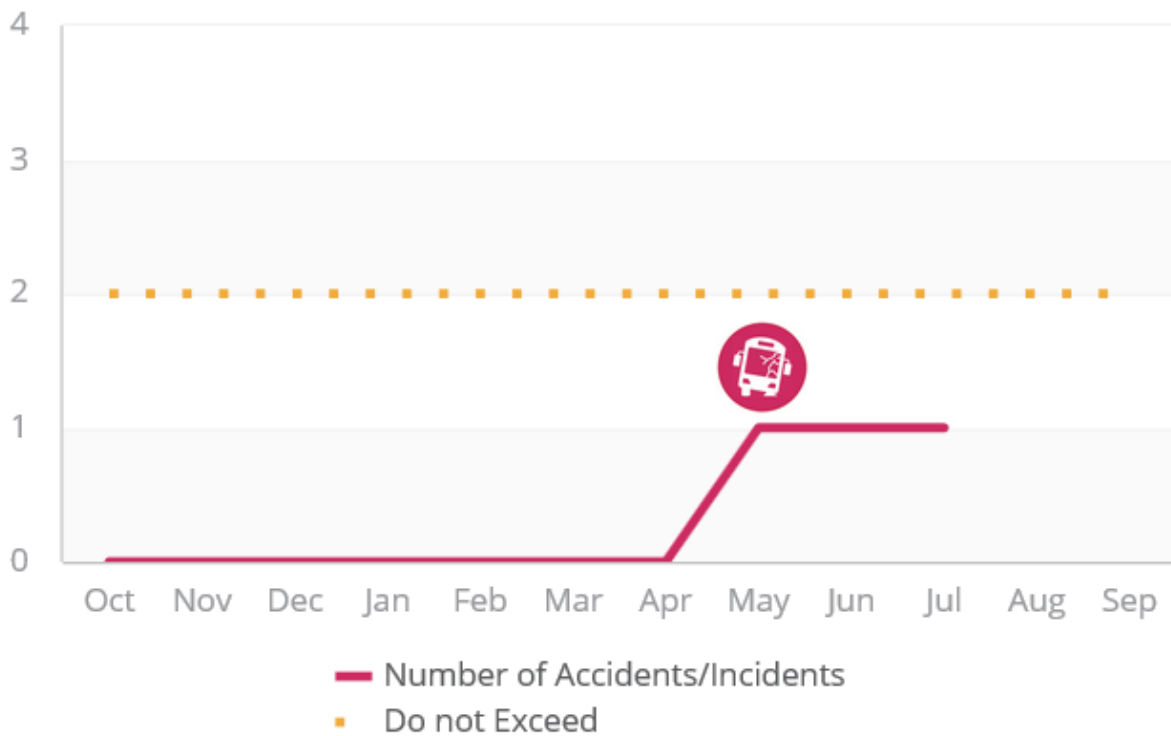
Six Months vs. One Year Ago and Target





## SAFETY PERFORMANCE

Accidents and Incidents per Fiscal Year



Goal of less than 2/Year

See

SPOT

  
*BUILD*

Capital Improvement Plan







# See SPOT Build

## OVERVIEW

Capital planning is critical to the success of any public transportation provider. The SPOT Capital Improvement Plan (CIP) will be a valuable planning tool used to assess, predict, and develop capital needs of the organization over a specific time frame. This CIP uses a five-year time horizon as its basis, planning out capital projects for fiscal years 2017-2021 (FY2017 starts 10/1/16 and ends 9/30/17).

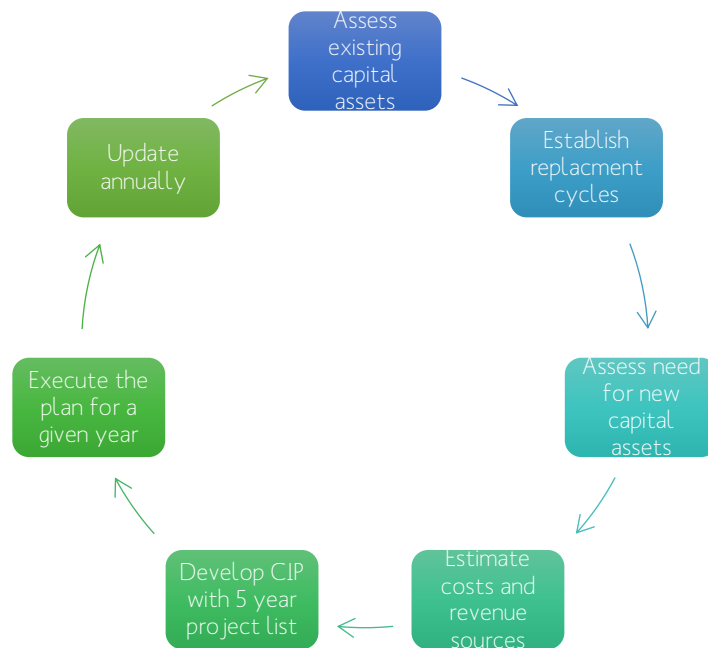
SPOT is at a point in its evolution where there are numerous capital needs to maintain and grow the vehicle fleet, improve bus stops, and look to a future SPOT-owned facility. Having a CIP in place ensures that the SPOT board and staff will be proactive in planning for capital needs and investing in SPOT's continued success.

A CIP ensures that assets are always in a state of good repair, providing safe and reliable service to the community.

## CAPITAL IMPROVEMENT PLANNING PROCESS

Each year SPOT staff, board, and community stakeholders should work together to update this CIP, moving the plan forward one year so that the plan always looks forward to the next five years of capital projects. Capital needs and funding opportunities are always in flux. This plan must be adjusted to match capital needs with capital resources, according to the process below.

## SPOT Capital Project Planning Process



In order to provide predictions about future capital needs, a CIP is formulaic. It assumes that capital assets - especially vehicles – depreciate incrementally and need to be replaced at a certain mileage or after a certain number of years, in accordance with industry standards and guidance. However, actual experience will be different and will have to be accounted for in the annual update.

It is common for a bus expected to go 250,000 miles to need replacement much sooner than expected (the “lemon” effect) and for some buses to go much longer than expected. Staff and board must assess which vehicles, and other assets, are running ahead of or behind the originally planned life cycle and plan accordingly.

By keeping the CIP current and adapting to opportunities and challenges, SPOT can be nimble and responsive in maintaining, replacing, and growing its assets.

## TYPES OF CAPITAL PROJECTS

SPOT’s CIP projects fall into five basic categories:

- bus replacements
- bus expansion (for new service)
- on-street assets like bus shelters
- facilities
- technology

Vanpool vehicles are not included in this CIP, because the leasing model SPOT is using for vanpool should work well going forward. By leasing vehicles and including this in the cost to riders, SPOT doesn't need to include vanpool vans as owned assets in the CIP.

## Bus Replacements

Currently SPOT operates light duty and medium duty buses that have a minimum useful life of 5 years/150,000 miles or 7 years/200,000 miles, as established by the Federal Transit Administration (FTA).

These minimum useful life estimates help a transit agency understand what to expect for minimum life cycle performance of the bus. Many larger transit agencies view these minimums as the point at which a bus should be replaced, but smaller transit agencies like SPOT have to plan to use buses longer than these minimum life estimates.



## Minimum Service-Life Categories for Buses and Vans

Category	Typical Characteristics				Minimum Life	
	Length	Approx. GVW	Seats	Average Cost	Whichever comes First	
					Years	Miles
Heavy-Duty Large Bus	35-48 ft; 60 ft artic.	33,000 to 40,000	27-40	\$325,000 to >\$600,000	12	500,000
Heavy-Duty Small Bus	30 ft	26,000 to 33,000	26-35	\$200,000 to \$325,000	10	350,000
Medium-Duty and Purpose-Built Bus	30 ft	16,000 to 26,000	22-30	\$75,000 to \$175,000	7	200,000
Light-Duty Mid-Sized Bus	25-35 ft	10,000 to 16,000	16-25	\$50,000 to \$65,000	5	150,000
Light-Duty Small Bus, Cutaways, and Modified Van	16-28 ft	6,000 to 14,000	10-22	\$30,000 to \$40,000	4	100,000

*Source: FTA Useful Life of Transit Buses and Vans Final Report, April 2007*

To date, the light and medium-duty buses have served SPOT well, and this vehicle type should continue to do so in the future. The light and medium-duty buses do have limitations – SPOT should be aware of the limitations and how to plan around them.

The current fixed route buses in the SPOT fleet are built on the Ford E450 chassis and can accommodate a maximum of 16-18 passengers without the wheelchair positions occupied. Base price for these buses is approximately \$75,000, for current model year.

The current demand response, paratransit buses are also built on the Ford E450 chassis and can accommodate a maximum of 8 passengers without the wheelchair positions occupied. Base price for these demand response vehicles is approximately \$60,000. All buses have a wheelchair lift and standard safety equipment.

PROS of current buses	CONS of current buses
Cost to purchase and maintain is lower than most other bus options	Expected serviceable life is 250,000 miles or less (engines and transmissions may need to be replaced at 150,000-200,000 miles)
Ford chassis means local dealer can provide maintenance and warranty support	Passenger capacity of 16-18 passengers means system growth could be limited by bus capacity
Gas engine has less issues than modern diesel engine in stop and go operations	Buses have wheelchairs lifts, which require more time and training to operate safely, as opposed to a wheelchair ramp
Sized right for the existing routes, services, and ridership	Buses don't have proper options to serve Schweitzer
Flexible and interchangeable among existing routes and services	Buses have steps which are challenging for some riders

As SPOT continues to evaluate bus needs for fixed route and demand response service, it should consider optional add-ons to the current vehicle chassis that improve carrying capacity and passenger accessibility:

Improvements to current fixed route bus configuration package with stop requests, destination signage, rear bike racks, and rear cameras

Adds \$10,000  
to cost

Increasing carrying capacity of fixed route bus by adding 5-8 passenger capacity

Adds \$30,000  
to cost

Eliminate entry steps and wheelchair lift and replace with a low-floor option (no entry steps and flip-out wheelchair ramp instead of wheelchair lift)

Adds \$40,000  
to cost



*Low floor bus with ramp  
(Credit: Champion Bus)*

If SPOT wanted to purchase heavier duty buses with longer serviceable life, the cost goes up dramatically – as a point of reference, a 28-32 passenger heavy-duty (12 year rated) diesel bus with a low floor (wheelchair ramp) is \$350,000-\$400,000. A 10 year-rated bus with a capacity of 25-30 passengers is \$200,000-\$300,000.

### Bus Expansion for New Service

In evaluating service expansion, SPOT should carefully consider how to grow the fleet. For a small transit system, it's very helpful to have one vehicle platform that is easily interchangeable among different routes and service. Having vehicles that only work on one route is too limiting for a small transit provider like SPOT. By planning around the current Ford vehicle chassis with small adjustments to seating capacity, add-on packages, and potential low-floor option, SPOT will be able to keep a cost-effective fleet that can be used year-round on all routes and services.

With fleet consistency in mind, the biggest challenge in the next 1-2 years will be what type of bus to get for a potential Schweitzer service. If SPOT moves forward with this service, it is recommended that SPOT consider purchasing a bus that has additional passenger capacity but built on a similar Ford chassis as the current SPOT buses. Using the same basic

bus chassis will allow for interchangeability with the current fleet, current routes, and current needs of the service. Especially if the existing Blue Route is lengthened to connect to Schweitzer, SPOT must have a bus that can maneuver easily in town and not be oversized to the year-round usage of the route. This approach will require that Schweitzer retain some of its current buses in order to deal with peak skier demands from the Red Barn parking lot up to the resort.

The buses for Schweitzer are recommended to be built on a Ford E-450 or F-550, or equivalent, chassis and have capacity for 22-26 passengers. They will need to be wheelchair accessible. Additional add-on packages for this bus must include:

- Heavier duty transmission and braking package with retarder system (used to help slow the bus)
- Auto-chains for winter conditions
- Exterior ski racks
- Higher gross vehicle weight to accommodate the additional passenger load

**Estimated per bus cost with these options: \$130,000-\$140,000**



*Auto chain system and driveline retarder system (Credit: left: ONSPOT; right: Telma)*

In addition to the fleet expansion for the Schweitzer service, SPOT will also need to plan for expansion of the bus fleet for potential new services like a scheduled route between the Sandpoint area and Bonner's Ferry to serve commuters or casino goers and a regional intercity connection from the Sandpoint area to Coeur D'Alene. Both of these connections require an additional bus in the fleet and are included in the 5 year CIP. These buses are recommended to be built around a similar specification as the SPOT fixed route buses for Blue and Green Routes.



## On-Street Infrastructure (Stops, Shelters, Park-and-Ride)



*SPOT bus shelter concept  
(Credit: Steve Holt, Eureka Institute)*

SPOT has developed a well-functioning fixed route bus system with over 40 established bus stops served by the Green and Blue Routes within the communities of Dover, Sandpoint, Ponderay, and Kootenai. Most of these stops have limited passenger amenities for safe and comfortable accessibility. SPOT is aware of this need and has already started the capital funding process by applying for and receiving a grant of \$125,000 from the Federal Transit Authority (FTA) for improving bus stops that will become active in the fall of 2016. With matching funds included, this project will result in over \$150,000 in bus stop improvements.

This project will likely not start until 2017 and includes:

- New bus shelters at 10 different higher volume bus stops
  - 4 in Sandpoint
  - 4 in Ponderay
  - 1 in Dover
  - 1 in Kootenai
- Bus stop benches at an additional 9 stops throughout the system.
- Better bus stop signage that shows departure times.

SPOT has built community partnerships for this project including a creative partnership with the Eureka Institute. The Eureka Institute has developed a modern, attractive bus shelter design that fits the community aesthetic. This design will be built by youth, as part of Eureka's Construction Basics Initiative. The partnership leverages the FTA funding that SPOT has secured with the community support for this youth construction program. SPOT has correctly recognized that this effort is only the beginning and needs to be continued in future years, beyond this federal grant. As a result, SPOT and Eureka have started the conversation on ways to keep this project self-funded by looking at bus shelter sponsorship opportunities. This could result in sustained funding for building more shelters and adding more benches.



## Potential Park and Ride Lot in Dover

Another project included in this CIP is the development of a park-and-ride lot in Dover. This lot would become the terminal point for the Green Route in Dover. The City of Dover is a willing partner for acquiring and entitling the land for the park-and-ride, and SPOT would seek grant funding for improvements including paving the lot and building a bus shelter. The project in the [CIP Appendix A](#) includes the cost of these improvements, but excludes the cost of acquiring the land.

SPOT must also work in partnership with the cities in which it operates to help support development of continuously improving bicycle and pedestrian infrastructure. SPOT most likely won't manage the development of better bike lanes, pathways, crosswalks and sidewalks, but SPOT should support and encourage these efforts within the communities that it operates. Every bus trip begins and ends with a walk or bike trip; safe and complete pedestrian and bicycle infrastructure compliments and promotes transit services. Across the nation, ridership numbers are higher in communities that have provided this type of infrastructure.



## Facilities

SPOT currently rents a facility located in Sandpoint. This is its only facility. It is used for office space and bus storage with outdoor parking. This space is meeting the current needs of the organization, but SPOT should be planning for long-term growth. As SPOT expands operations and levels of service, it will need more office space, better bus storage (preferably indoors), and space to perform bus maintenance in-house. Investing in a facility will eliminate rent payments, improve longevity of vehicle fleet, and provide more capacity to grow services.

The CIP includes a facility project that begins with one year of design and planning, followed by a 1-2 year construction process. SPOT may be able to acquire land through one of its partner cities or by working with Schweitzer. The value of this land could be used as match toward the project. Alternatively, SPOT may find that it is able to acquire an existing building that meets the needs of a maintenance and administration facility. Acquiring an existing building would be a quicker process and less costly, avoiding the challenges of having to construct a new facility.

It may seem premature to start planning for a facility, but these projects take years to plan and fund. It is likely that this project will extend beyond the term of this CIP, but SPOT will have a head start if planning and funding development starts now.

## Technology

SPOT currently operates a real-time customer information phone app called DoubleMap. This system utilizes tablets onboard the buses to track bus location and send that information to an app that customers can use to see the bus location. It is unclear how much this system is being used and how much it will cost to maintain the system going forward. The CIP includes funding to keep this program going into 2017, but SPOT should evaluate whether this tool is sustainable. It could be very useful for SPOT customers, but it requires staff time to keep it operating properly.

Other technology projects include:

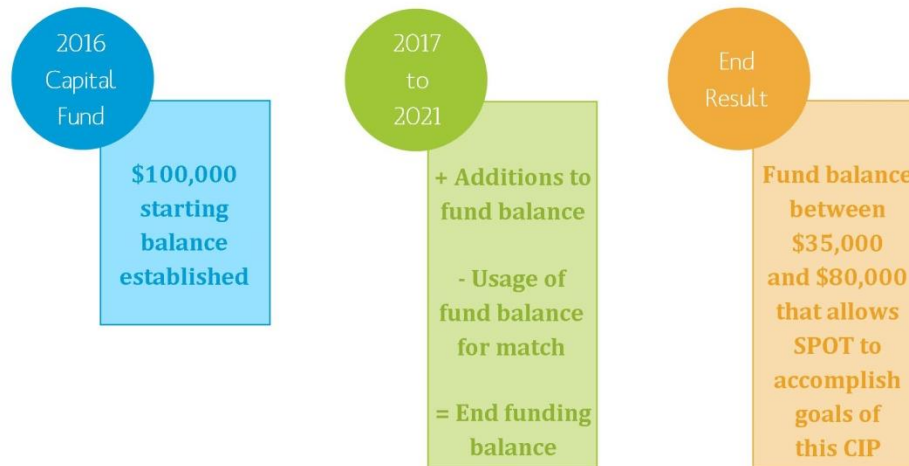
- Ridership tracking system – this would allow drivers to put ridership directly into a tablet instead of doing this by hand. The data would be readily available to management staff and would eliminate time spent entering this data by hand into a spreadsheet
- Scheduling software – as demand response and paratransit ridership increases, SPOT could benefit from software for entering and scheduling these rides.
- Asset management/maintenance software – as the fleet grows, SPOT will need more sophistication in how it manages and tracks maintenance of its buses.



## BASE FUNDING FOR THIS PLAN

Capital planning requires steady capital funding. Currently, SPOT doesn't have a separate budget and account for capital funding. It is recommended that SPOT use its existing "excess funding" that is unallocated in order to establish a capital fund balance. Based on discussions with SPOT staff regarding available fund balances, SHIFT recommends that this starting fund balance be established at \$100,000 for FY2017, beginning October 1<sup>st</sup>, 2016.

## Capital Fund Establishment



For each year going forward, it is recommended that SPOT allocate 10% of local contributions to the newly created capital fund for the purpose of creating a balance of matching funds. Currently SPOT receives approximately \$166,000 of local funding each year. Starting in 2017, SPOT should allocate \$16,000 of this local funding to the capital fund. This allocation creates stability to the capital fund with a growing fund balance that can be leveraged to get new federal funding. Almost all capital projects that SPOT would consider qualify for 80% federal funding from the FTA. Having 20% local funding available and “in the bank” means that SPOT can move forward with capital projects quickly and when needed.

This could be established by creating a separate bank account and establishing a separate capital budget each year, based up the priorities in this plan. This capital budget should be adopted in conjunction with the adoption of the annual operating budget. SPOT’s total adopted budget should include operating and capital funds with estimated revenue and estimated expenses. This new process may require SPOT to ask for more funding from local funding partners to build these capital matching funds in excess of \$166,000 a year.

By establishing this standard of always allocating 10% of every local dollar received, SPOT will be able to show funding partners that there won’t be any surprises when it comes to capital needs. Having to make one-time funding request, outside of the annual budget request, of cities and counties for capital projects creates challenges for the city and county budgeting processes. If funding partners know that SPOT is proactively planning for both operations and capital, then there will be a higher degree of trust in SPOT’s ability to manage its finances.

## FUNDING SOURCES

CIP projects are expensive and require a variety of funding sources to complete. Fortunately, SPOT has been very adept, finding creative ways to make projects happen. SPOT has been successful in competing for federal capital project grants and is using many of the sources listed below to build more capacity for funding future projects.

### Funding from Municipalities and Counties

As previously described, SPOT needs to establish a capital fund and start allocating a percentage of every local dollar received to building and maintaining a fund balance for the capital account. This fund balance can be used as match to federal funding or to complete a capital project in its entirety. SPOT should build this fund in anticipation of large capital projects. The more funding available from local funding sources, the better SPOT can compete for grants that often require or recommend local participation in project funding.

### 5339 Program of the Federal Transit Administration (FTA)

The FTA states that the Grants for Buses and Bus Facilities program (49 U.S.C. 5339) makes federal resources available to states and direct recipients to replace, rehabilitate and purchase buses and related equipment and to construct bus-related facilities including technological changes or innovations to modify low or no emission vehicles or facilities. Funding is provided through formula allocations and competitive grants. For most 5339 projects, the funding from the FTA provides 80% of the cost with a 20% local match requirement.

This 5339 program will fund most major SPOT capital projects, with the assumption that 80% of the cost of a given project for bus replacement/acquisition or new bus facilities, including bus stop improvements, will be paid out of this program. The 5339 program is managed by the Idaho Transportation Department (ITD). ITD has an application cycle of every two years, but periodically ITD has released one-time funding.

### Other Federal Funding

Opportunities for bus and bus facility projects outside of the 5339 program are limited for rural providers like SPOT, but there are still programs that SPOT should look at when considering larger capital projects, especially a new facility. SPOT may be able to access one-time programs like TIGER, 5311(f), and 5310. The SPOT Strategic Plan from 2015 has a list of potential federal sources in Appendix A. SPOT should continue to look for federal funding opportunities for capital projects.

### Creative Community Funding

As a service uniquely positioned in the community, SPOT has the opportunity to continue to grow funding support from a variety of non-profit and business partnerships in order to fund capital projects:

- Eureka Institute and other community minded organizations interested in construction
- Other non-profits like the food bank, the senior center, North Idaho College
- Sponsorship of assets like benches and bus shelters that can be used to continue programs
- Business partnerships

These funding sources can bolster the capital fund balances, be used as matching funds for federal grants, or they could be used entirely to fund a smaller capital project, like bus stop amenities, benches or customer accessibility projects.

### Schweitzer Mountain Resort

SPOT has already received commitment from Schweitzer Mountain Resort to provide the matching funds up to \$170,000 for 4 additional buses to be used to connect Sandpoint and Ponderay with Schweitzer. These matching funds are critical to expanding SPOT's service to Schweitzer. The CIP summary of projects includes two buses for winter 2017-2018 and two buses for winter 2018-2019, based on Schweitzer matching funds.

### Other Grant Opportunities

In the SPOT strategic plan from 2015, many ideas for funding are provided and should be evaluated as opportunities present themselves. Smaller capital projects for bus stop improvements and passenger amenities can often be funded through smaller grant opportunities, as shown in the SPOT strategic plan.

## ANALYSIS OF CURRENT FLEET

SHIFT analyzed the current bus fleet in order to determine necessary vehicle replacement needs to maintain the service. SPOT currently runs a fleet of gas powered light to mid-duty buses in fixed route and demand response service.

Some stats to note:

- Fixed route buses operate a total of 145,000 miles per year.
- Demand response and paratransit buses operate a total of 30,000 miles per year.
- Fleet mileage total of 175,000 miles per year.

This results in the need to replace one bus every other year or sooner, based on current usage.

## Bus Fleet Today

SPOT ID #	Model	Model Year	# of Passengers	Service Mode	Current Mileage 6/30/16	Typical Useful Life for Bus Type (Miles)	Estimated Replacement Cost
<b>106</b>	FORD E450 cutaway	2005	16	Fixed Route Spare	298,301	200,000	\$75,000
<b>107</b>	FORD E450 cutaway	2007	9	Demand Response	195,270	250,000	\$80,000
<b>110</b>	FORD E450 cutaway	2010	16	Demand Response	158,535	250,000	\$78,000
<b>111</b>	FORD E450 cutaway	2011	16	Fixed Route Spare	270,844	250,000	\$75,000
<b>114</b>	FORD E450 cutaway	2014	16	Fixed Route Blue	119,520	250,000	\$82,000
<b>115</b>	FORD E450 cutaway	2015	16	Fixed Route Green	79,919	250,000	\$84,000
<b>BFB#1</b>	FORD E450 cutaway	2011	8	Demand Response Boundary Co.	36,031	200,000	\$80,000

The next step in understanding the fleet is to use mileage data to calculate when a particular bus will be at the end of its useable life, based on how many miles each bus is predicted to accumulate.



Mileage Analysis with Predicted Replacement Year  
Highlight indicates point of replacement

SPOT ID#	Avg miles per year	Estimated Mileage End 2016	Estimated Mileage End 2017	Estimated Mileage End 2018	Estimated Mileage End 2019	Estimated Mileage End 2020	Estimated Mileage End 2021	Notes
106	10,000	303,301	313,301	10,000	20,000	30,000	40,000	replace now no AC, original engine & transmission
107	12,000	201,270	213,270	225,270	237,270	12,000	24,000	replace sooner due to age in 2019
110	12,000	164,535	176,535	12,000	24,000	36,000	48,000	replace sooner due to age and rough condition
111	10,000	275,844	285,844	295,844	10,000	20,000	30,000	run longer due to new engine in 2016
114	60,000	149,520	209,520	239,520	269,520	60,000	90,000	replace when >250k
115	60,000	109,919	169,919	229,919	259,919	289,919	60,000	replace when >250k
BFB#1	12,000	42,031	54,031	66,031	78,031	90,031	102,031	replace due to age

This analysis is the best guess as to how buses will age and how services will grow. Most likely, the SPOT fleet replacement schedule will need to be adjusted to account for numerous unknown factors. The annual CIP update should include adjustments to fleet replacements opportunities.



## CONCLUSION

A CIP is a valuable tool that will allow SPOT to project local and federal funding requirements for achieving capital goals. Capital planning ensures that SPOT can maintain its capital assets in an ongoing state of good repair. Federal funding requires it, local funding partners will appreciate it, and customers will benefit from it.

The CIP addresses acquisition and construction costs of capital projects, but maintaining assets over their lifetime is just as important to the capital asset process. Maintenance costs are not included in the CIP, as they should be included in SPOT's annual operating budget as an ongoing expense.

Given the 5-year timeframe and the many assumptions that have built into this plan, it is necessary that SPOT view the CIP as a living document that should always be as current as possible.

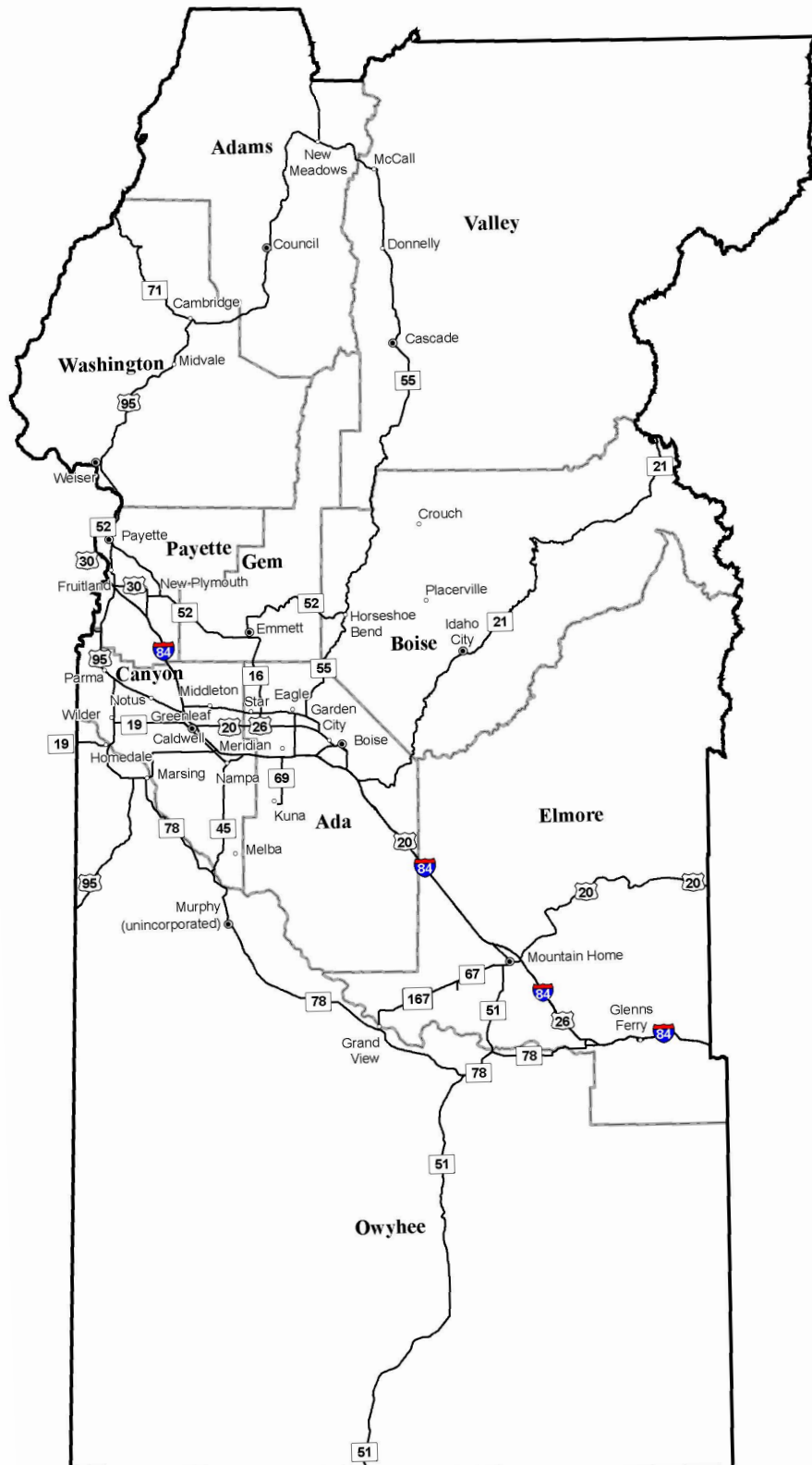
## APPENDIX A - CIP SUMMARY AND SCHEDULE OF PROJECTS 2017-2021

TYPE of PROJECTS	COST OF REPLACEMENT or ACQUISITION by YEAR				
	2017	2018	2019	2020	2021
<b>Existing Fleet-replacement</b>					
Fixed route buses (incl. spares)	\$ 75,000	\$ 78,000	\$ 81,000	\$ 84,000	
Demand/paratransit buses (incl. spares)	\$ 60,000		\$ 64,000		\$ 68,000
<b>Fleet expansion</b>					
Schweitzer buses	\$ 270,000	\$ 270,000			
Regional buses			\$ 78,000	\$ 78,000	
<b>On-street assets</b>					
Park and ride lots			\$ 35,000		
Bus stop signage + bike racks	\$ 20,000				
Bus shelters	\$ 130,000	\$ 18,000	\$ 18,000		
<b>Facilities</b>					
Planning/design			\$ 20,000		
Building/construction of facility				\$ 100,000	\$ 150,000
<b>Technology</b>					
DoubleMap App (or other customer tech)	\$ 5,000				
Scheduling software			\$ 15,000		
System for tracking ridership		\$ 10,000			
Asset management/maintenance				\$ 5,000	
<b>TOTAL CAPITAL SPEND BY YEAR</b>	<b>\$ 560,000</b>	<b>\$ 376,000</b>	<b>\$ 311,000</b>	<b>\$ 267,000</b>	<b>\$ 218,000</b>
LESS Federal Funding (80%)	\$ 448,000	\$ 300,800	\$ 248,800	\$ 213,600	\$ 174,400
<b>BALANCE to fund locally (20%)</b>	<b>\$ 112,000</b>	<b>\$ 75,200</b>	<b>\$ 62,200</b>	<b>\$ 53,400</b>	<b>\$ 43,600</b>
<b>ANALYSIS of CAPITAL FUND</b>					
<b>INCOME Sources</b>					
Capital fund balance (Start with \$100k)	\$ 100,000	\$ 75,000	\$ 77,800	\$ 56,600	\$ 40,200
Capital fund additions-10% of local funds	\$ 16,000	\$ 17,000	\$ 18,000	\$ 19,000	\$ 20,000
Misc local funding (private, grants, etc)	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000
Schweitzer	\$ 54,000	\$ 54,000	\$ -	\$ -	\$ -
Tribe or other local business partners	\$ -	\$ -	\$ 16,000	\$ 16,000	\$ -
Community partners for stop improvements	\$ 15,000	\$ 5,000	\$ 5,000	\$ -	\$ -
<b>TOTAL LOCAL FUNDING AVAILABLE</b>	<b>\$ 187,000</b>	<b>\$ 153,000</b>	<b>\$ 118,800</b>	<b>\$ 93,600</b>	<b>\$ 62,200</b>
LESS BALANCE to fund locally for GIVEN YEAR (annual local expense)	\$ 112,000	\$ 75,200	\$ 62,200	\$ 53,400	\$ 43,600
<b>CARRYOVER CAPITAL FUND BALANCE</b>	<b>\$ 75,000</b>	<b>\$ 77,800</b>	<b>\$ 56,600</b>	<b>\$ 40,200</b>	<b>\$ 18,600</b>

### NOTES

1. As of 10/1/16 start of this plan, only funding secure through federal award is \$125,000 of federal funding for bus stop improvements
2. All other projects are contingent upon future federal awards
3. Capital fund balance starts with \$100k, as described in the CIP, and has 10% of local municipal/county funding added to it each year

# District 3: Southwest Idaho





# Treasure Valley Transit

December 18, 2023

ITD-Public Transportation Office  
ATTN: Sam Carroll  
P.O Box 7129  
Boise, Idaho 83707

**RE: CARES Act One-Time Application for October 1, 2024 – September 30, 2026**

Dear Sam,

It is our pleasure to submit the attached CARES Act One-Time Application for the Public Transportation Services that Treasure Valley Transit, Inc., (TVT) currently provides in the Idaho Transportation Department's District 3. TVT is the rural transportation provider serving the 10-county area and has been since 1996. We have the staff in place with the talent, experience and dedication to continue to serve the general public, seniors, youth and persons with disabilities.

The estimated 5311 Rural Grant increase of 8% in funding for FY25-26 does not cover the funding needed to maintain existing services. The CARES Act application funding applied for would enable TVT to maintain existing services, keep up with the cost of inflation, and maintain the level of service we currently provide.

In addition, we would be able to manage the unexpected costs that arise without cutting needed services. We have demonstrated the innovation, leadership and capacity to achieve the goals, objectives and performance metrics outlined in this application.

I welcome the opportunity to maintain the 5311 rural programs through this CARES grant application.

Sincerely,

Terri Lindenberg  
Executive Director  
Treasure Valley Transit, Inc.  
[terri@treasurevalleytransit.com](mailto:terri@treasurevalleytransit.com)



**Application Information Form**

Applicant: Treasure Valley Transit, Inc.

Authorized Representative: Terri Lindenberg

Address: 1136 W. Finch Drive Nampa, ID 83651

Phone: 208-463-9111

Email Address: terri@treasurevalleytransit.com

DUNS #: 88-497-2332

Architect/Engineer/Planner if applicable: (Contact Name): N/A

Phone: \_\_\_\_\_

Address: \_\_\_\_\_

**Project Description:**

The estimated 5311 Rural Grant increase of 8% in funding for FY25-26 does not cover the funding needed to maintain existing services. The CARES Act Funding applied for would enable TVT to maintain existing services, keep up with the cost of inflation, and maintain a competitive wage and benefit package for our employees. In addition, we would be able to manage the unexpected costs that arise without cutting needed services.

TOTAL PROJECT COST: \$1,704,985

FEDERAL SHARE: \$1,704,985 LOCAL MATCH: N/A

## **Section 1: Project Description**

### **A.) FTA 5311 Program Eligibility:**

5311 funds must be used to support rural transportation serving the general public. The Formula Grants for Rural Areas program provides capital, planning, and operating assistance to states to support public transportation in rural areas with populations of less than 50,000, where many residents often rely on public transit to reach their destinations. Eligible recipients include states and federally recognized Indian Tribes. Subrecipients include nonprofit organizations.

TVT is an experienced public transportation provider operating under the 5311 rural grant program since 1995. TVT is required to complete an annual audit according to Government Auditing Standards and has maintained a low risk auditee classification. TVT underwent a successful DOT Drug and Alcohol Audit. In addition, TVT underwent an ITD site review in 2022 maintaining its low risk auditee classification. This demonstrates TVT's commitment to education, training, and diligence in following the federal rules and regulations of this program.

### **B.) ITD Call for Project Priorities:**

Treasure Valley Transit, Inc. (TVT) is seeking to **maintain existing service** in the four areas we operate in throughout District 3. The residents, elected officials and the business community brand these services to facilitate local ownership. Mountain Community Transit serves Valley County and the residents of Cascade, Donnelly and McCall. There is a monthly Saturday route from McCall to Ontario, Oregon. The Bluebird Express serves both Adams County and Valley County as a winter route from McCall to the Brundage Mountain ski resort and summer service along the main corridor through the City of McCall. In June of 2023, the City of New Meadows implemented the Gold Line from New Meadows to McCall. Mountain Home Community Transit serves Elmore County, the City of Mountain Home and the Air Force Base. In April of 2022, the Mountain Home School District implemented a route for after school programs. Snake River Transit serves Payette County and the residents of Fruitland and Payette with a transfer to the Ontario, Oregon fixed route service and operates one Saturday a month. TVT provides demand response service in the rural areas of Canyon and Owyhee Counties.

### **C.) Scope of Work: Maintain Existing 5311 Services**

#### **Demand Response:**

The Demand Response service serves Canyon and Owyhee Counties and the residents of rural Caldwell, Greenleaf, Homedale, Kuna, Marsing, Melba, rural Middleton and Nampa, Notus, Parma, Wilder and the unincorporated areas within each county. In addition, it provides affordable transportation options, expanded transportation, mobility coverage and accessibility for all groups including, but not limited to: older adults, persons with disabilities, youth, low income, non-drivers, minority groups, veterans, and refugee populations. This service provides valuable matching dollars through Medicaid reimbursement for rides that meet this eligibility.

Revenue Service Hours: 10,893 and Actual Service Hours: 16,906 (more deadhead in DR).

### **Deviated Fixed Routes:**

Mountain Community Transit (MCT) - The Red Line operates in the City of McCall serving the public, which includes adults, seniors, youth, and persons with disabilities. It operates seven days a week, from 7:00am until 7:00pm, with the exception of designated holidays. The route enables access to work, medical facilities, social, and recreational activities and connections to the Green, Blue and Gold Lines. Additional hours accommodate the Winter Carnival and special events, which increase headways and hours of operation.

Revenue Service Hours: 4,471

Mountain Home Community Transit (MHCT) -The Mountain Home City Route serves the public, which includes adults, seniors, youth and persons with disabilities. It operates Monday through Friday, from 9:00am until 3:00pm, with the exception of designated holidays. The route enables access to grocery stores, medical facilities, social, and recreational activities. The Air Force Base Route serves those with access to the Base, which includes the military personnel, private contractors, family members, etc. It operates Monday through Friday, from 7:00am until 9:00am and 3:00pm until 5:00pm, with the exception of designated holidays and base closures. The after school route operates Monday through Thursday, from 5:00pm until 7:00pm, during the school year. The Mountain Home School District sponsors this route that enables students to attend after school activities.

Revenue Service Hours: 2,985

Snake River Transit (SRT) - serves the cities of Fruitland and Payette serving the public, which includes adults, seniors, youth, and persons with disabilities. It operates Monday through Friday, from 6:00am until 6:00pm, with the exception of designated holidays. The route enables access to work, medical facilities, social, and recreational activities and a transfer to Snake River Transit- Oregon. This route operates one Saturday per month from 9:00am until 3:00pm to accommodate seniors and low-income passengers who need access to the grocery store.

Revenue Service Hours: 3,120

### **Fixed Routes:**

Mountain Community Transit (MCT) - The Green Line is a commuter route serving the cities of Cascade, Donnelly, and McCall. The populations served are the public, which includes adults, seniors, youth and persons with disabilities. It operates Monday through Friday, from 5:55am until 7:30pm, with the exception of designated holidays. The route enables access to work, medical facilities, social and recreational activities with connections to the Red, Blue and Gold Lines.

The Red Line has a fixed route that operates one Saturday per month from 8:00am until 5:30pm. It travels from McCall to Ontario, Oregon stopping at senior centers along route such as New



Meadows, Council and Cambridge to accommodate seniors and passengers who need access to Walmart, Winco, and Home Depot.

Revenue Service Hours: 4,896

Mountain Community Transit (MCT) – The Blue Line is a seasonal service that operates a summer and winter service.

The summer service operates from Memorial Day weekend through Labor Day weekend. It is a Friday and Saturday route with the exception of 4-day holiday weekends. It operates from 11:00am until 9:00pm with 20 minutes headways. The route was established to accommodate the tourists moving along the main corridor of Lake Avenue and 3<sup>rd</sup> Street in McCall. The McCall Local Option Lodging Tax is the primary funder for this route and the local hotels are strong supporters of the service.

The winter service is a partnership with the Brundage Mountain Resort (BMR) to provide an employee shuttle to the resort. The employees work different shifts, which enables seating for the public to ride. This service operates seven days a week, from mid-December through mid-April, from 6:30am until 9:30pm and 3:00pm until 6:00pm.

Revenue Service Hours: 790

Mountain Community Transit (MCT) –The Gold Line fixed route serves the City of New Meadows to McCall. In June of 2023, it began as a three-month pilot project. The route operated on Mondays and Wednesday, from 5:45am until 5:45pm, with eight hourly runs. It served 348 passengers in the 23 days of summer service. The success of the pilot project brought in four partners to enable the service to go from two days a week to five days a week as of June of 2024. The partners are the City of New Meadows, St. Luke's Health Foundation, Perpetua Resources and the Blue Cross Foundation.

Revenue Service Hours: 268

The ridership chart for FY21-FY23 shows a 34% increase in deviated/fixed route services.

*Attachment B: 3 Year Ridership Comparison Chart from FY21-FY23*

## **Section 2: Project Planning**

In this section for project planning the methodology for project development and implementing TVT services will be identified.

### **A.) Tie Project to the specific goals in ITD's Statewide Public Transportation Plan:**

#### **1.) Ensure the Safety and Security of Public Transportation**

TVT's first priority is the safety and security of our employees and the passengers they serve. This is demonstrated through our policies and procedures that cover all aspects of operations from maintenance standards for the vehicles, training of employees, drug and alcohol testing program, etc. This information is available in our Personnel Manual, Driver Handbook, Title VI Plan, Safety and Security & Emergency Preparedness Plan.

#### **2.) Encourage Public Transportation as an Important Element of an Effective Multi-Modal Transportation System in Idaho**

TVT works closely with our elected officials and other agencies to advocate for a truly Multi-Modal system in the areas we serve. This includes bus, demand response, vanpool, bike and pedestrian modes.

#### **3.) Preserve the Existing Public Transportation Network**

TVT is seeking continued grant funding in order to preserve the existing services we provide and expand services based on available funding.

#### **4.) Provide Transportation System that Drives Economic Opportunity**

TVT works closely with the chambers of commerce, local businesses in order to promote public transportation and provide access to jobs, which in turns spurs economic growth.

**B.) Describe Project Development Process:** TVT's emphasis on proper planning and realistic expectations has resulted in the successful services we provide.

1. TVT Board of Directors have a strategic planning retreat every three years. They have identified four strategy pillars, strategic challenges and opportunities, five strategic initiatives followed by operational plans and timelines to meet them in three years.
2. TVT staff actively participate in the planning processes at the state and local levels along with the Metropolitan Planning Association (COMPASS).
3. Community involvement from the City and County, Chambers of Commerce, local business, Health and Human Service agencies and the potential passengers (i.e. advisory group, public hearings, social media, surveys, etc.)

4. Selection of the appropriate mode of transportation – fixed route, deviated fixed route or demand response service; van pool, ride share or voucher program
5. Funding mechanism:
  - 5311 Grant Program
  - City and County Funding
  - Medicaid Revenue
  - Employer Benefit for transit passes
  - School District
  - Private Partners
  - Advertising
  - Seek State of Idaho funding
6. Assure sustainability through stable funding
7. Monitoring and Evaluation of the services in an on-going manner
8. Route restructure as appropriate through input of all parties
9. Participate in the City and County development of master plans

To implement and maintain a successful service with stable funding it is imperative that the planning process involve the community as a whole.

### **Mountain Community Transit:**

#### *City of New Meadows Master Transportation Plan 2022*

In March of 2022, Erin Peterson contacted TVT to participate in the City of New Meadows Master Transportation Plan and provide information on the implementation of a new service. There was a significant problem with access to medical appointments and services in McCall, not available in New Meadows. In May, the Transportation Advisory Council (TAC) formed by inviting community leaders to participate. The partners included TVT, City of New Meadows, St. Luke's Hospital, Perpetua Resources, Brundage Resort Company, City of McCall, Idaho Power and Albertsons. Monthly meetings determined the funding sources for a two-day pilot project during the summer of 2023. Based on the success of the pilot project the goal was to continue the two-day service until additional funding became available for a Monday through Friday service. The Blue Cross Foundation funded \$30,000 to start the five-day service in June of 2024. From the phone call in March of 2022 to the funding and implementation of a new service in June of 2023, this is a great example of a successful planning process.

#### *McCall Civic Campus Plan in 2019*

This plan identified the location for the City Hall, Community Center, Library, Parks and Recreation and parking. The Transit Center was a key element and the ability to turn our buses around for ease of access in and out of the Campus.

*McCall Downtown Master Plan:*

TVT staff participate in the City planning process, as transportation is an integral part of overall city planning pertaining to roads, the downtown core and revitalization.

*West Central Mountains – Economic Development Strategy: November 2015*

- Promote daily bus routes that connect the region (including Boise and Spokane)
- Support funding, such as local option tax, for transportation and infrastructure
- Support the completion of the Multi-modal Transit Center as proposed through the regional location analysis
- Expand hours, service areas and locations for bus kiosks
- Explore rideshare opportunities, including park and ride centers
- Expand transit system between medical centers, churches, grocery stores for veterans

**Snake River Transit:**

*Malheur County Coordinated Transportation Plan 2022*

Snake River Transit - Idaho and Snake River Transit –Malheur Express

- Existing System Analysis and Survey
- Needs and strategies
- Coordination strategies to improve SRT

*Malheur/Payette Transit Plan: September 2007*

This plan was developed over an eight-month period in a planning process to identify current services, oversaw the development and distribution of two surveys, identified transportation service gaps and developed and prioritized recommendations for improved service. A total of 660 individuals and 31 agencies responded to the surveys, prepared in both English and Spanish. This plan established the fixed route service for the cities of Fruitland and Payette with a connection to Ontario, Oregon.

**Mountain Home Community Transit:**

In April 2022, TVT initiated a route restructure for service in the City of Mountain Home and the Air Force Base (AFB) to include the Mountain Home School District. Analysis of the service concluded a reduction of three AFB runs, add an additional City run and include two after school runs for the Mountain Home School District.

In August and December of 2023, TVT had planning meetings with the AFB military personnel to determine the viability of a vanpool vs. fixed route for cost effectiveness and efficiency.

TVT is working with the Western Idaho Community Health Collaborative (WICHHC) to discuss future transit opportunities within Elmore County. This is to research and support a 3-year health action plan for Elmore County. The plan and potentially subsequent resulting action items within it, has been funded by the first Get Healthy Idaho grant from the Idaho Department of Health & Welfare to address health challenges in Elmore County.

**TVT Demand Response Service serving Canyon and Owyhee Counties:**

The Idaho Department of Health and Welfare set up a Transportation Advisory Committee to address important concerns with the Medicaid broker, currently MTM. TVT Executive Director, Terri Lindenberg was nominated to this committee in October 2023.

TVT has seen an increase of 6.5% in ridership from FY22 to FY23 at 34,269 annual trips. Since 2020 there has been a statewide drop in Medicaid trips for various reasons including telehealth, persons with cognitive disabilities not returning to developmental centers and a reduction in eligibility for Medicaid services. The statewide Medicaid broker operates under a contractual amount based on number of Medicaid clients and not trip volume. The incentive for the broker is low cost transportation and a lower trip volume is actually a benefit. The goal of the TAC is to hold the statewide broker accountable for unfair practices and maintain our level of trip volume.

### **Minority and Low Income in Compliance with Title VI**

Treasure Valley Transit (TVT) created a Title VI Plan and submits the plan to Idaho Transportation Department as is required. There are eight elements contained in our Title VI Program, these are:

- Notice of rights under Title VI
- How to file a complaint, and a copy of the complaint form
- List of Title VI Investigations, complaints, or law suits
- Public Participation Plan
- LEP Plan
- Racial Breakdowns of Non-elected advisory councils
- Narrative describing sub-recipient monitoring
- Board of Directors Resolution or meeting minutes

TVT has published a link on TVT's website for the USDOT disability law. In addition, you can find the Title VI plan, Public Notice Process, the Riders Guide, and the Complaint and Appeals Process.

TVT prominently and publicly displays Title VI information posters in all TVT facilities and on the revenue vehicles. During the new hire orientation, new employees are informed of the provisions of Title VI and TVT's expectations to perform their duties accordingly. Annually employees are provided Title VI information via an Open Enrollment Meeting.

TVT provides quality language assistance services to individuals with limited English proficiency to ensure meaningful access to transportation programs, services, and activities.

TVT holds public and stakeholder meetings to introduce possible pilot projects, routes or schedule changes when needed.

TVT Board of Directors meets the last Tuesday of every month, 9:00AM, and the public is invited to attend.

TVT regularly attends Health and Human Services meetings in the cities it provides services.

TVT also participates in community resource fairs and public marketing and outreach activities.

TVT does not have any past or current investigations, complaints or lawsuits alleging discrimination on basis of race, color, or national origin with respect to service or other transit benefits provided files with the agency in the past three years. ITD conducted a civil rights compliance review within the past 5 years and TVT passed.

**TVT's Plan to include Disadvantaged Business Enterprises (DBE's) in this project:**

TVT has a DBE Plan and Goal. ITD publishes the current DBE Directory, which lists the companies by category of service they provide. This could be for landscaping, concrete work or architecture and design, etc. The language in all TVT Invitations to Bid or Requests for Proposals is as follows:

**Disadvantaged Business Participation.** Bidders must ensure that in regard to any Contract entered into pursuant to this advertisement; disadvantaged businesses will be afforded full opportunity to submit Bid in response to this invitation and will not be discriminated against on the grounds of race, color, sex, national origin or as otherwise required by law in consideration for an award.

**Identify Local Labor Unions as identified by the Department of Labor:**

TVT is not affiliated with labor unions in the rural areas that we serve. Local 378 represents the Valley Regional Transit Authority.

**Please list the public participation efforts of this application:**

In June 2023, we had an information booth at the KYMfest put on by the For You Network, Inc. at Lakeview Park. This event highlighted the various community resources that are available but not necessarily known by the community at large. Several thousand people attended and our booth saw many visitors. Our TVT vehicle was on display along with police and fire vehicles.

In August 2023, TVT participated in an open house at Nampa City Hall. The panel included the Mayor of Nampa, Elaine Clegg of the Valley Regional Transit Authority and Terri Lindenberg, Executive Director of Treasure Valley Transit, Inc. It was an opportunity to answer questions about TVT's transportation services in Canyon County.

In October 2023, McCall Business and Resource Expo sponsored by the McCall Chamber was an opportunity to highlight MCT, hand out schedules and information on the regional service.

In November, the Nampa Economic Luncheon is another opportunity for TVT to hand out information about our Canyon County Services.

Attachment B: Milestone Reporting N/A and Attachment C: NEPA Worksheet N/A

## **Section 3: Project Benefits/Evaluation**

### **Project Benefits:**

The primary benefit is providing access for individuals both ambulatory and non-ambulatory to employment, health and human services, social and recreational opportunities, etc. Public transit adds to the quality of life of our passengers. This is demonstrated in the stories we hear from our passengers: the disabled veteran, the dialysis patient, the family, the student, the employee getting to and from work and many others.

### **TVT's Goal:**

Maintain existing services in an effective and efficient manner within the funding parameters

- Objective One: Fiscal Responsibility
- Objective Two: Safety and Training
- Objective Three: Be an Employer that attracts High Quality Employees

### **Improve efficiency or increase ridership:**

TVT strives for efficiency in all of its service areas and monitors each service on an on-going basis.

Our strategies to increase ridership are as follows:

- Monitor ridership data
- Seek input from drivers
- Seek input from the passengers
- Seek input from the community at large
- Meet with mayors and city councils
- Meet with the chambers of commerce about new business coming into the community
- Low income housing developments present an opportunity for new riders

### **Improve Safety:**

Safety and security are issues that affect every aspect of public transportation. Identifying and addressing potential threats and hazards can save lives, reduce injuries, and reduce costs. Safety is a top priority for TVT.

TVT has developed a Safety, Security and Emergency Preparedness Plan (SSEPP). This SSEPP outlines the processes used to make informed decisions that are appropriate for our operations, passengers, employees and communities.

The SSEPP provides a capability that will:

1. Ensure that safety, security and emergency preparedness are addressed during all phases of system operation, including the hiring and training of agency personnel, the procurement and maintenance of agency equipment, the development of agency policies,



rules and procedures; and coordination with local public safety and community emergency planning agencies.

2. Promote analysis tools and methodologies to encourage safe system operations through the identification, evaluation and resolution of threat and vulnerabilities and the ongoing assessment of agency capabilities and readiness.
3. Create a culture that supports safety and security and safe system operations.

The SSEPP has five primary pillars:

1. Achieve or exceed a level of performance for similarly sized agencies around the nation
2. Strengthen community involvement
3. Establish a course of action
4. Expand our training program
5. Enhance coordination with others agencies

Treasure Valley Transit ongoing safety activities include the following:

- Mandatory Quarterly Safety Meetings for all employees
- Management participation with local emergency preparedness planning agencies
- Internal Disaster Drills for all employees
- All drivers are required to be certified in the following trainings: First Aid/CPR, Passenger Safety and Sensitivity (PASS), Defensive Driving and Drug and Alcohol
- Annual driver evaluations and random ride along inspections
- One Certified Safety and Security Officer and one PASS Trainer is on staff.

### **Improve Mobility**

In the world of public transportation, mobility is not limited to just one mode of transportation. It is promoting ride share, vanpool services and/or establishing a Purchase of Service program or a Taxi Voucher system. Mobility involves different options and being able to determine the one or more choices that works best for the individual's travel plans. TVT has developed relationships with other agencies such as ACHD Commuteride, Living Independent Network Corp., Elderly Opportunity Agency, Metro Community Services and the Idaho Department of Labor's Veterans Representatives to address gaps and solutions. TVT is currently working with Dana Gover, Northwest ADA Center-Idaho and a small group of agencies looking for solutions to mobility problems in both the small urban and rural areas of Southwest Idaho.

### **Economic Development:**

TVT works closely with local businesses to educate them about the economic advantages of public transit. The tax benefits that they can receive and the benefit of stable transportation for their employees. Large businesses look at the transit options when deciding on what community they may want to locate. The local Chambers of Commerce and the Department of Labor look to public transportation to offer these benefits to the business community. Because of the pandemic, there is a greater need to promote public transportation and the benefits in bringing passengers to the small businesses striving to stay solvent.

## **Project Evaluation:**

### **Describe the methodology that will be used to measure and evaluate the project and determine the projects value to the community:**

The value to the community is access to employment, medical appointments, the grocery store, social and recreational events as demonstrated by the ridership. The value to the City and County served is demonstrated by the level of funding awarded and in-kind support for the service. TVT competes with city departments and other non-profit agencies for limited dollars. During the budget presentations it is our goal to demonstrate the value to the community.

#### **A. TVT intends to continually evaluate and measure success of the project as follows:**

The year-to-year ridership comparisons per route take into account variables that would affect service (service reductions based on funding, inclement weather, etc.). TVT maintains a data tracking system that includes ridership/funding for the 5311 program, which establishes where we were historically, where we are today and will accurately reflect statistics as we move forward. This data is broken down into specific categories such as administrative and operational costs by line item and route performance. The information is prepared for the TVT Board of Directors and strategic planning purposes.

On June 5, 2023, TVT implemented the Gold Line service from New Meadows to McCall. Statistics are the primary measuring tool, but I want to add another valuable measure that is not as obvious. The City of New Meadows, St. Luke's, Perpetua Resource's financial support. The Chamber of Commerce and local newspaper promoting the service through their social media and articles. Responses on social media platforms such as Facebook and Instagram also measure the success from an individual perspective. A multiple-choice print survey produced for the passengers and local community with a QR code to make submission easy as well.

#### **B. Description of data that will be collected and discuss specific measures.**

TVT tracks data daily that includes, but is not limited to; service hours and mileage broken into revenue, deadhead and allowance along with ridership split into appropriate categories per mode (adult, youth, senior and disabled). These operational and financial statistics are reported to the National Transit Data Base according to federal and state requirements. ITD-PT processes the information into District report cards that is a valuable document for the Public Transportation Advisory Council and others in understanding the benefit of public transit in Idaho. TVT is in the process of implementing TripsSpark technology, which will add new reports to the statistical and reporting processes currently in place. This determines annual ridership increases, cost per mile, cost per hour, cost per passenger and the viability of the service.

#### **C. How often will data be collected, used and evaluated?**

The data is collected daily, compiled into monthly reports, submitted quarterly to the National Transit Data Base. TVT evaluates this data on an annual basis with a multi-year comparison and is under a three-year strategic planning process.

**TVT will sustain/maintain the project after the end of the grant period:**

TVT knew that the 5311 grant funding available for FY25-26, at an 8% increase, would not meet the increases in labor, fuel, and services since FY21 and anticipated increases for FY25-26. This would create the need to reduce service to the level of funding available. This CARES Act grant enables TVT to be fully funded through FY26 and allows time for the 5311 funding to increase to a higher level for the next grant cycle.

TVT is proactive in looking to our future through our strategic planning process. Funding to maintain our existing services is imperative as challenges will rise and the economy can be uncertain. TVT understands the critical need for transit service and works closely with the communities we serve. The cities and counties have historically increased their local match contributions to meet the 5311 rural grant funding level.

During the FY21 and FY22 grant cycle, there were significant challenges that occurred to challenge the sustainability of existing services. Inflation rose at over 9% for goods and services. Fuel increased to 40% before leveling off at 27% to date. A labor shortage occurred nationwide that led to a significant increase in wages to remain competitive with the local school district. For example, that starting wage for a school bus driver in McCall is \$23.00 per hour with a \$5,000 sign on bonus. TVT was strategic in the use of CARES Act funding to meet the challenges faced from FY21 through the current FY24 fiscal year.

In January of 2023, TVT requested a substantial increase in our Medicaid reimbursement rate through the Idaho broker MTM and received it in May of 2023. The last increase was in 2019, prior to the release of the RFP for the Medicaid brokerage in 2020 that was awarded in January of 2023. This was critical in meeting our local match requirements for FY24-26. There is the potential to increase Medicaid revenue by working with MTM on additional capacity.

In addition, we will seek funding through foundations and grant opportunities on a regional and national level. In the past, TVT was successful in receiving \$40,000 from the Blue Cross Foundation to match four vans and a \$160,000 VW settlement grant that matched four medium duty buses. In October of 2023, the Blue Cross foundation awarded \$30,000 for the new Gold Line route to go from two days to five days service.

TVT has a three-year advertising contract with the Farmers Mutual Telephone Company for \$45,000. TVT will explore larger scale advertising on our bus fleet to include full bus/van wraps.

State funding for public transportation operations is critical for future growth and the expansion of services. TVT will continue to advocate for state funding through the legislative process by working closely with the Community Transportation Association of Idaho and key legislators, agencies and other supporters of public transportation.

**TVT demonstrates sufficient levels of capacity to carry out the project, manage the grant funding, and adhere to both FTA and State of Idaho rules.**

TVT has an exceptional management team to carry out the projects and manage the grants and funding that has been awarded:

**Executive Director:** Terri Lindenberg has been with TVT since January 1992 when the Office of Rural Health Policy awarded a three year grant to develop a Coordinated Transportation System in Canyon County and secure sustainable funding. TVT now serves a 10-county area, has thirty-five employees and collaborates with multiple agencies. Terri's strength is in building partnerships and advocating for rural transportation on both the local and national stage.

**Certifications:** Certified Community Transit Manager CCTM and Certified Safety and Security Officer through the Community Transportation Association of America

**Assistant Director:** Debbie Maxwell has worked over 11 years in public transportation management and has been with TVT since May 2016. She oversees all aspects of TVT operations including but not limited to, procurement, fleet management, driver training and supervision of operational staff. In addition to these responsibilities, she works closely with the Executive Director in the administration of TVT in the finance and grants departments.

**Certifications:** Certified Safety and Security Officer through the Community Transportation Association of America, Passenger Assistance Safety and Sensitivity Certified

**Mobility Manager:** Miranda Murray has been with TVT since January 2013 and brings extensive experience in dispatch, scheduling, and coordinating services with various agencies in the 10-county area. Miranda's role as Mobility Manager oversees the dispatch and scheduling component and monitors for efficiencies. She works closely with the statewide Medicaid broker and the Department of Health and Welfare Medicaid Division. In addition, her skills in marketing, print material and knowledge of technology (dispatch software and hardware) have been instrumental.

**Certifications:** Certified Community Transit Supervisor; Certified Professional Dispatcher through the Community Transportation Association of America

**Finance and Human Resource Manager:** Rebecca Soto has been with TVT since September 2019 and has worked in both the private and non-profit sector since 2009. She began her career as a Staff accountant, Senior Audit Associate and Accounting Supervisor. Rebecca's expertise is in grants management including the reimbursement process, accounting and human resources. She currently processes TVT's 5309, 5310, 5311 and 5339 grants with attention to detail and accuracy.

**Education:** Bachelor of Business Administration (BBA) in Accountancy 2013 and member of the national Society of Human Resource Managers (SHRM) and the Local Chapter

**Day / Willis, CPA's:** Tabbatha Willis prepares TVT's monthly financial statements for the TVT Board of Directors and provides direct oversight of the grant reimbursement process. TVT is proud to note a clean opinion without findings since we have been required to have a "Government Auditing Standards" Annual Audit done by an independent Accounting Firm.

Attachment A includes the Organizational Chart, FY23 Audit Summary and Letter of Support and Local Match Commitment.

## Section 4: Project Budget

### Budget Narrative:

#### Funding History for 5311 Grant FY19-FY24:

Funding Year	Time frame funded	5311	Local Match	Total Budget
FY19-20	Oct. 2018 - Sept. 2020	\$2,832,602	\$1,098,698	\$3,930,300
FY21-22	Oct. 2020 - Sept. 2022	\$3,065,588	\$1,191,179	\$4,257,385
FY23-24	Oct. 2022 - Sept. 2024	\$3,568,744	\$1,372,332	\$4,941,076

**Note: TVT will have expended all CARES Act and ARPA funding in FY24**

The FY25-26 budget process considers several factors. The primary factor is the 5311 funding available, estimated to be only an 8% increase overall. The second is the local match needed in order to draw down the federal funds. The third factor is taking the most recent fiscal year and the impact of significant increases in labor and benefits, fuel and services and analyzing the income and expenses to determine the estimated budget for the two-year grant cycle.

Treasure Valley Transit is a Non-Emergency Medical Transportation (NEMT) provider receiving Medicaid income through the statewide broker MTM. This income is allowable as match and is critical to funding the rural programs overall.

TVT management works diligently to monitor all aspects of the budget and make any necessary adjustments. TVT has always met our local match requirements. See attached letter of support for the grant applications and local match commitments.

FY24 budget for operational expenses for both fixed route and demand response is \$3,946,060. Subtract the \$2,504,830 in 5311/ARPA/CARES grant funding and the remaining \$1,441,230 is through city, county, Medicaid, advertising and other grant revenue. TVT as a non-profit organization does not have the cost savings of other transit systems operated under a city, county, college or governmental structure. TVT is not eligible to participate in ICRIMP insurance, self-funded medical plans and PERSI retirement for employees.

The estimated increase of 8% in funding for FY25-26 does not cover the funding needed to maintain or expand services. The CARES Act funding applied for would enable TVT to maintain existing services, keep up with the cost of inflation, and maintain a competitive wage and benefit package for our employees. In addition, we would be able to manage the unexpected costs that arise without cutting needed services.

TVT runs a very efficient program and it would be a significant advantage to be able to do more in planning, marketing and mobility management if the funding was available. We are limited in that capacity as all funding goes to the direct operations of our programs.

TVT has demonstrated the financial capability to operate on a cost reimbursement basis over the thirty years we have been in operation. ITD's fiscal year end is June 30<sup>th</sup> and reimbursements are delayed 8-10 weeks so TVT has a line of credit established to cover this delay. In addition, TVT has met or exceeded all of our local match requirements. The FY23 Audit Summary details the income and expenses, giving a three-year comparison and is included with Attachment A.

## ATTACHMENT A

Project Budget Request Form for Maintaining Existing Services

FY25-26 Budget for Maintaining Existing Services

Organizational Chart

FY23 Audit Summary

Letters of support and Local Match Commitment



## Project Budget Request

Subrecipient	Treasure Valley Transit, Inc.
Agreement Term	October 1, 2024 - September 30, 2025
Contact Name	Terri Lindenberg
Address	1136 W Finch Dr
Phone Number	208-463-9111

FTA Grant	100/0		
	Total	Federal	Match
5311 CARES	\$ 1,704,985.00	\$ 1,704,985.00	\$ -

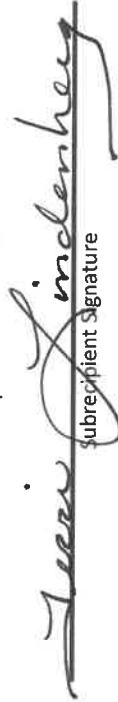
Total Project Cost	Total Federal Request	Total Match Needed
\$ 1,704,985.00	\$ 1,704,985.00	\$ -

### Scope of Work

The estimated 5311 Rural Grant increase of 8% in funding for FY25-26 does not cover the funding needed to maintain existing services. The CARES Act funding applied for would enable TVT to maintain existing services, keep up with the cost of inflation, and maintain a competitive wage and benefit package for our employees. In addition, we would be able to manage the unexpected costs that arise without cutting needed services.

Terri Lindenberg

Subrecipient Printed Name



Subrecipient Signature

12/18/2023

Date

Local Match Source(s) for Project:

Not Applicable

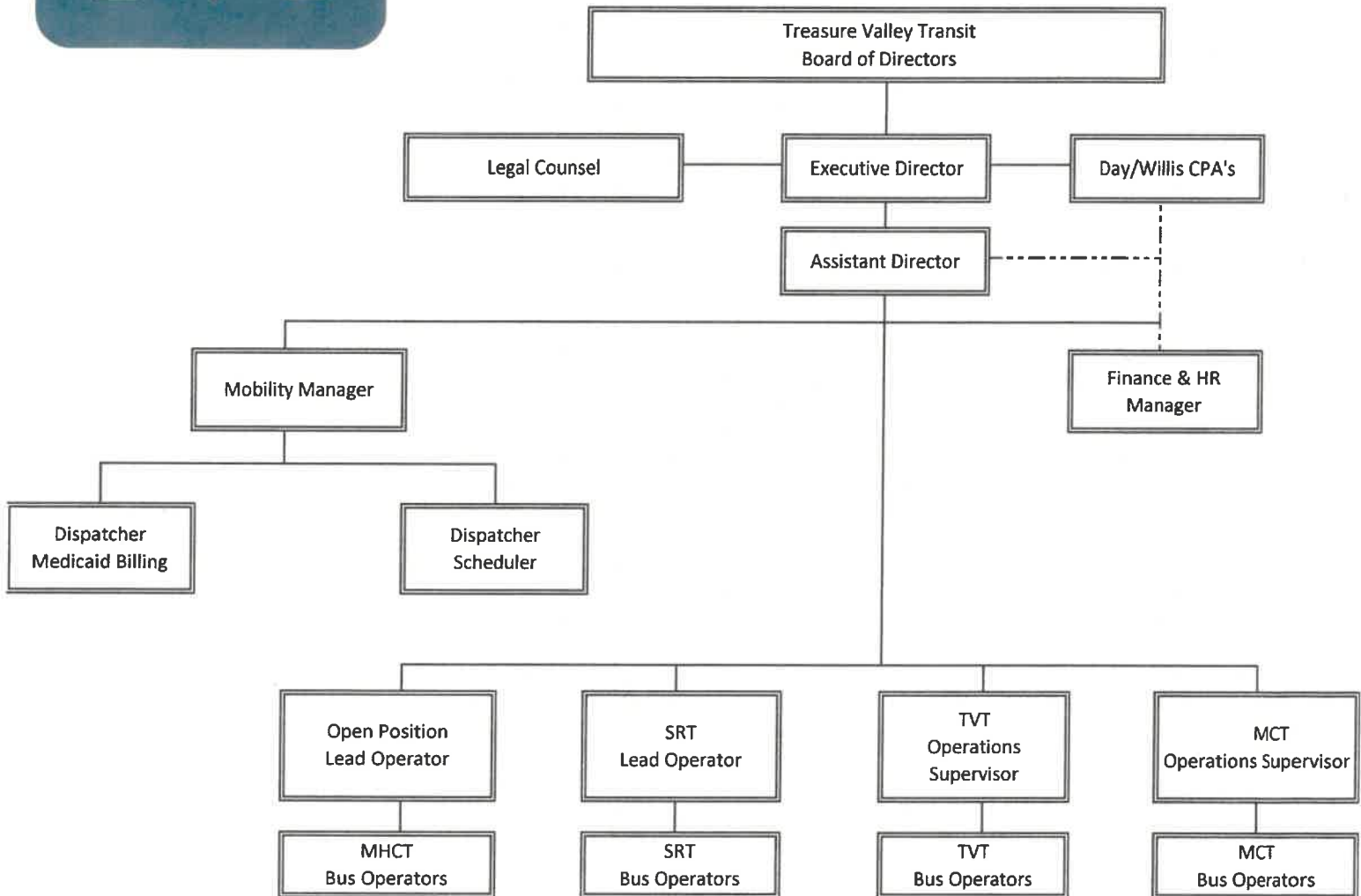
### FY25 & FY26 Draft Budget

Income:	FY25	FY26	
5311	\$ 1,929,297	\$ 1,929,298	
<b>CARES Act Grant Need</b>	<b>\$ 735,408</b>	<b>\$ 969,577</b>	\$ 1,704,985
5307 Small Urban	\$ 350,000	\$ 385,000	
RTAP	\$ 44,000	\$ 48,400	
Cities/LOT	\$ 400,000	\$ 425,000	
Counties	\$ 75,000	\$ 80,000	
Medicaid	\$ 600,000	\$ 660,000	
Contracts: Brundage/MHSD/ <del>GOLD LINE</del>	\$ 309,795	\$ 340,775	
Advertising	\$ 25,000	\$ 27,500	
Fares: Not to be calculated as match	\$ 20,000	\$ 22,000	
	<b>\$ 4,488,500</b>	<b>\$ 4,887,550</b>	
Expenses			
5001 · Pers-Administrative Wages	\$ 650,000	\$ 683,000	
5006 · Pers-Drivers/LD's/SV-MCT	\$ 1,650,000	\$ 1,775,000	
5500 · Pers-Employer Tax/Benefits	\$ 650,000	\$ 725,000	
5504 · P/R Workers Comp	\$ 40,000	\$ 44,000	
5520 · Physical Exams	\$ 2,000	\$ 2,200	
6020 · Administrative Expense/Misc.	\$ 35,000	\$ 38,500	
6220 · Dues (CTAA & CTAI)	\$ 3,000	\$ 3,300	
6410 · Insurance, Liability	\$ 310,000	\$ 355,000	
6540 · Office Supplies/Equip/Mntx	\$ 25,000	\$ 27,500	
6551 · Per Diem Rural	\$ 30,000	\$ 33,000	
6570 · Professional Services	\$ 38,500	\$ 42,350	
6580 · Planning/Marketing	\$ 100,000	\$ 110,000	
6590- IT Services	\$ 20,000	\$ 22,000	
6610 · Postage/Printing	\$ 12,000	\$ 13,200	
6630 · Accounting Services	\$ 19,000	\$ 21,000	
6690 · Facility/Utilities	\$ 65,000	\$ 71,500	
6760 · Uniforms	\$ 5,000	\$ 6,000	
6780 · Telephone	\$ 30,000	\$ 33,000	
6780 · TripSpark O&M	\$ 24,000	\$24,000	
6785 · Training	\$ 44,000	\$ 48,400	
6790 · Travel, Staff Mileage	\$ 14,000	\$ 15,400	
6810 · Vehicle Fuel	\$ 335,000	\$ 368,500	
6840 · Vehicle Maintenance	\$ 352,000	\$ 387,200	
6849 · Vehicle Supplies & Washes	\$ 35,000	\$ 38,500	
	<b>4,488,500</b>	<b>4,887,550</b>	



# TREASURE VALLEY TRANSIT

## Organizational Chart



Date: September 21, 2023

**TREASURE VALLEY TRANSIT, INC.**

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**Financial Statements  
and  
Supplementary Information**

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**For the Year Ended September 30, 2023**



**ZWYGART JOHN**  
CERTIFIED PUBLIC ACCOUNTANTS

Zwygart John & Associates CPAs, PLLC

16130 North Merchant Way, Suite 120 ♦ Nampa, Idaho 83687

Phone: 208-459-4649 ♦ FAX: 208-229-0404

## **Independent Auditor's Report**

Board of Directors  
Treasure Valley Transit, Inc.  
Nampa, Idaho

### **Report on the Audit of the Financial Statements**

#### ***Opinion***

We have audited the financial statements of Treasure Valley Transit, Inc. (a nonprofit organization), which comprise the statement of financial position as of September 30, 2023, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of Treasure Valley Transit, Inc., as of September 30, 2023 and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

#### ***Basis for Opinion***

We conducted our audit in accordance with auditing standards generally accepted in the United States of America (GAAS) and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of Treasure Valley Transit, Inc. and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

#### ***Responsibilities of Management for the Financial Statements***

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about Treasure Valley Transit, Inc.'s ability to continue as a going concern for one year after the date that the financial statements are issued.

## ***Auditor's Responsibilities for the Audit of the Financial Statements***

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements

In performing an audit in accordance with generally accepted auditing standards and *Government Auditing Standards*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of Treasure Valley Transit, Inc.'s internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about Treasure Valley Transit, Inc.'s ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

### **Other Matters**

Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The accompanying Schedule of Expenditures of Federal Awards is presented for the purpose of additional analysis as required by audit requirements of Title 2 U.S. Code of federal Regulations (CFR) Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards and is not a required part of the financial statements.

Management has also elected to include the accompanying Comparative Statements of Program Income and Program Expenses which are not required parts of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America.

In our opinion, the Schedule of Expenditures of Federal Awards and the Comparative Statements of Program Income and Program Expenses are fairly stated, in all material respects in relation to the financial statements as a whole.

**Other Reporting Required by *Government Auditing Standards***

In accordance with *Government Auditing Standards*, we have also issued our report dated December 4, 2023 on our consideration of Treasure Valley Transit, Inc.'s internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Treasure Valley Transit, Inc.'s internal control over financial reporting and compliance.

*Zwygart John & Associates, CPAs, PLLC*

Nampa, Idaho  
December 4, 2023



**Treasure Valley Transit, Inc.**  
**Statement of Financial Position**  
**September 30, 2023**

**Assets**

**Current Assets:**

Cash and Cash Equivalents	\$ 263,495
Grants Receivable	577,219
Contracts Receivable	28,939
Prepaid Expenses	9,184
<b>Total Current Assets</b>	<b>878,837</b>

**Long-Term Assets:**

Property and Equipment	6,975,182
Accumulated Depreciation	(2,134,373)
<b>Total Long-Term Assets</b>	<b>4,840,809</b>

**Total Assets**

**\$ 5,719,646**

**Liabilities and Net Assets**

**Liabilities**

**Current Liabilities:**

Accounts Payable	\$ 81,682
Accrued Wages and Payroll Liabilities	91,485
Credit Cards Payable	8,084
Refundable Advance	20,070
Current Portion of Compensated Absences	32,398
<b>Total Current Liabilities</b>	<b>233,719</b>

**Long-Term Liabilities:**

Compensated Absences	43,035
<b>Total Long-Term Liabilities</b>	<b>43,035</b>

**Total Liabilities**

**276,754**

**Net Assets**

Net Assets Without Donor Restrictions	5,442,892
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**Total Net Assets**

**5,442,892**

**Total Liabilities and Net Assets**

**\$ 5,719,646**

The accompanying notes are an integral  
part of the financial statements.

**Treasure Valley Transit, Inc.**  
**Statement of Activities**  
For the Year Ended September 30, 2023

	<u>Without Donor Restrictions</u>
<b>Support and Revenues</b>	
Program Fees	\$ 4,736,964
Gain (Loss) on the Sale of Assets	1,429
Advertising	16,210
Other Income	930
Interest Income	578
<b>Total Support and Revenues</b>	<u>4,756,111</u>
<b>Expenses</b>	
Program Services	2,653,355
Support Services	
Management and General	<u>1,278,642</u>
<b>Total Expenses</b>	<u>3,931,997</u>
<b>Increase in Net Assets</b>	824,114
<b>Beginning Net Assets</b>	<u>4,618,778</u>
<b>Ending Net Assets</b>	<u>\$ 5,442,892</u>

The accompanying notes are an integral  
part of the financial statements.

**Treasure Valley Transit, Inc.**  
**Statement of Functional Expenses**  
**For the Year Ended September 30, 2023**

		Support Services Management and General	
	Program	General	Total
<b>Expenses</b>			
Wages	\$ 1,247,479	\$ 463,006	\$ 1,710,485
Payroll Taxes	95,984	38,828	134,812
Employee Benefits	88,461	267,296	355,757
Unemployment Insurance	4,681	1,746	6,427
Workers Compensation	-	31,466	31,466
Dues and Subscriptions	-	2,672	2,672
Interest Expense	-	570	570
Liability Insurance	-	239,700	239,700
Miscellaneous	24,278	15,887	40,165
Per Diem - Rural	9,034	23,403	32,437
Professional Services	403	59,911	60,314
Acquisition Services	147,611	-	147,611
Postage	75	4,958	5,033
Telephone and Radio	-	21,620	21,620
Rent and Utilities	8,335	57,682	66,017
Snow removal	-	10,547	10,547
Supplies	-	18,503	18,503
Training	28,934	7,997	36,931
Travel	1,000	12,585	13,585
Fuel	278,408	-	278,408
Vehicle Maintenance	347,592	41	347,633
Uniforms	1,507	224	1,731
Depreciation Expense	369,573	-	369,573
<b>Total Expenses</b>	<b>\$ 2,653,355</b>	<b>\$ 1,278,642</b>	<b>\$ 3,931,997</b>

**Treasure Valley Transit, Inc.**  
**Notes to Financial Statements**  
For the Year Ended September 30, 2023

**6. PROPERTY AND EQUIPMENT**

The following is a summary of changes in property and equipment:

	Balance 9/30/2022	Additions	Disposals	Balance 9/30/2023
<b>Nondepreciable Capital Assets</b>				
Land	\$ 403,157	\$ 255,037	\$ -	\$ 658,194
Construction in Progress	283,712	118,047	-	401,759
<b>Total Nondepreciable Assets</b>	<u>686,869</u>	<u>373,084</u>	<u>-</u>	<u>1,059,953</u>
<b>Depreciable Capital Assets</b>				
Historical Cost				
Buildings and Improvements	1,755,747	1,004,617	-	2,760,364
Equipment	110,206	-	-	110,206
Vehicles	3,240,090		(195,431)	3,044,659
<b>Total Historical Cost</b>	<u>5,106,043</u>	<u>1,004,617</u>	<u>(195,431)</u>	<u>5,915,229</u>
Less: Accumulated Depreciation				
Buildings and Improvements	65,723	7,861	-	73,584
Equipment	191,848	63,021	-	254,869
Vehicles	1,729,364	298,691	(222,135)	1,805,920
<b>Total Accumulated Depreciation</b>	<u>1,986,935</u>	<u>369,573</u>	<u>(222,135)</u>	<u>2,134,373</u>
<b>Total Net Depreciable Capital Assets</b>	<u>3,119,108</u>	<u>635,044</u>	<u>26,704</u>	<u>3,780,856</u>
<b>Total Net Capital Assets</b>	<u>\$3,805,977</u>	<u>\$1,008,128</u>	<u>\$ 26,704</u>	<u>\$4,840,809</u>

Depreciation expense for the year is \$369,573.

**7. COMPENSATED ABSENCES**

The Organization provides compensated absences for vacation and sick leave, the balance of which is paid out when the employment period ends. Therefore, all accumulated personal leave represents a liability to the Organization. Personal leave accumulates based on accumulated years of service and actual hours worked. For the year ended September 30, 2023, changes in compensated absences consisted of the following:

Balance 9/30/2022	Earned	Used	Balance 9/30/2023
<u>\$ 90,032</u>	<u>\$ 114,380</u>	<u>\$ (128,979)</u>	<u>\$ 75,433</u>

**Treasure Valley Transit, Inc.**  
**Comparative Statement of Program Income**  
**For the Years Ended September 30, 2023 and 2022 and 2021**

	2023	2022	2021
<b>Support and Revenues</b>			
Cost Reimbursement	\$ 2,683,981	\$ 2,744,913	\$ 2,248,610
Cities-LOT and Counties	401,951	317,000	363,497
Capital Reimbursement	1,091,561	1,055,165	1,437,379
Small Contracts	47,378	22,816	30,274
Medicaid Contract	497,720	464,380	453,020
Fare Box	14,373	7,124	6,937
Advertising	16,210	15,000	15,000
Insurance	-	19,712	23,508
Other Income	930	2,710	5,907
Interest	578	85	68
Gain (Loss) on Sale of Assets	1,429	859	(1,807)
<b>Total Support and Revenues</b>	<b>\$ 4,756,111</b>	<b>\$ 4,649,764</b>	<b>\$ 4,582,393</b>

## **FEDERAL REPORTS**

**Treasure Valley Transit, Inc.**  
**Schedule of Expenditures of Federal Awards**  
**For the Year Ended September 30, 2023**

<u>Program Title</u>	<u>Federal Assistance Listing Number</u>	<u>Grant No.</u>	<u>Expenditures</u>
<u>U.S. Department of Transportation</u>			
Federal Transit Cluster			
Passed through the Idaho Transportation Department:			
Bus & Bus Facilities Formula Program	20.526	0620	\$ 1,019,401
Passed through Valley Regional Transit:			
Federal Transit Formula Grant	20.507		268,861
Total Federal Transit Cluster			<u>1,288,262</u>
Transit Service Programs Cluster			
Passed through the Idaho Transportation Department:			
Enhanced Mobility of Seniors and Individuals with Disabilities	20.513	0620	<u>144,855</u>
Total Transit Service Programs Cluster			<u>144,855</u>
Passed through the Idaho Transportation Department:			
Formula Grants for Rural Areas	20.509	0620	1,670,688
Formula Grants for Rural Areas - COVID	20.509	COVID	<u>671,737</u>
Total AL 25.509	20.509		<u>2,342,425</u>
Total U.S. Department of Transportation			<u>3,775,542</u>
Total Federal Financial Assistance			<u>\$ 3,775,542</u>



Treasure Valley Transit, Inc.  
Notes to the Schedule of Expenditures of Federal Awards  
For the Year Ended September 30, 2023

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1. BASIS OF PRESENTATION

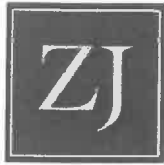
The accompanying schedule of expenditures of federal awards (the Schedule) includes the federal grant activity of Treasure Valley Transit, Inc. under programs of the Federal Government for the year ended September 30, 2023. The information in the Schedule is presented in accordance with the requirements of *Title 2 U.S. Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Because the Schedule presents only a selected portion of the operations of Treasure Valley Transit, Inc. it is not intended to and does not present the financial position or changes in Net Position of Treasure Valley Transit, Inc.

2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Expenditures reported on the Schedule are reported using the accrual basis of accounting. Such expenditures are recognized following the cost principles contained in the Uniform Guidance, where certain types of expenditures are not allowable or are limited as to reimbursement. Negative amounts shown on the Schedule represent adjustments or credits made in the normal course of business to amounts reported as expenditures in prior years.

3. INDIRECT COST RATE

Treasure Valley Transit, Inc. has not elected to use the 10-percent de minimis indirect cost rate.



**ZWYGART JOHN**  
CERTIFIED PUBLIC ACCOUNTANTS

Zwygart John & Associates CPAs, PLLC

16130 North Merchant Way, Suite 120 ♦ Nampa, Idaho 83687

Phone: 208-459-4649 ♦ FAX: 208-229-0404

**Independent Auditor's Report on Internal Control Over Financial Reporting and on Compliance  
and Other Matters Based on an Audit of Financial Statements Performed in Accordance with  
*Government Auditing Standards***

Board of Directors  
Treasure Valley Transit, Inc.  
Nampa, Idaho

We have audited in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, the financial statements of Treasure Valley Transit, Inc. (a nonprofit organization), which comprise the statement of financial position as of September 30, 2023, and the related statements of activities and cash flows for the year then ended, and the related notes to the financial statements and have issued our report thereon dated December 4, 2023.

**Internal Control Over Financial Reporting**

In planning and performing our audit of the financial statements, we considered Treasure Valley Transit, Inc.'s internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of Treasure Valley Transit, Inc.'s internal control. Accordingly, we do not express an opinion on the effectiveness of Treasure Valley Transit, Inc.'s internal control.

*A deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

## **Compliance and Other Matters**

As part of obtaining reasonable assurance about whether Treasure Valley Transit, Inc.'s financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

## **Purpose of this Report**

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the organization's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the organization's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

*Zwygart John & Associates, CPAs, PLLC*

Nampa, Idaho  
December 4, 2023



**ZWYGART JOHN**  
CERTIFIED PUBLIC ACCOUNTANTS

Zwygart John & Associates CPAs, PLLC

16130 North Merchant Way, Suite 120 ♦ Nampa, Idaho 83687

Phone: 208-459-4649 ♦ FAX: 208-229-0404

**Independent Auditor's Report on Compliance for Each Major Program and on Internal Control  
Over Compliance Required by Uniform Guidance**

Board of Directors  
Treasure Valley Transit, Inc.  
Nampa, Idaho

**Report on Compliance for Each Major Federal Program**

***Opinion on Each Major Federal Program***

We have audited Treasure Valley Transit, Inc.'s compliance with the types of compliance requirements identified as subject to audit in the OMB *Compliance Supplement* that could have a direct and material effect on each of Treasure Valley Transit, Inc.'s major federal programs for the year ended September 30, 2023. Treasure Valley Transit, Inc.'s major federal programs are identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

In our opinion, Treasure Valley Transit, Inc. complied, in all material respects, with the compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended September 30, 2023.

***Basis for Opinion on Each Major Federal Program***

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America (GAAS); the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States (*Government Auditing Standards*); and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Our responsibilities under those standards and the Uniform Guidance are further described in the Auditor's Responsibilities for the Audit of Compliance section of our report.

We are required to be independent of Treasure Valley Transit, Inc. and to meet our other ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion on compliance for each major federal program. Our audit does not provide a legal determination of Treasure Valley Transit, Inc.'s compliance with the compliance requirements referred to above.

***Responsibilities of Management for Compliance***

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules and provisions of contracts or grant agreements applicable to Treasure Valley Transit, Inc.'s federal programs.

## ***Auditor's Responsibilities for the Audit of Compliance***

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on Treasure Valley Transit, Inc.'s compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material, if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about Treasure Valley Transit, Inc.'s compliance with the requirements of each major federal program as a whole.

In performing an audit in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding Treasure Valley Transit, Inc.'s compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.
- Obtain an understanding of Treasure Valley Transit, Inc.'s internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of Treasurer Valley Transit, Inc.'s internal control over compliance. Accordingly, no such opinion is expressed.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.

### **Report on Internal Control Over Compliance**

*A deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. *A material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. *A significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the Auditor's Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance. Given these limitations, during our audit we did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that were not identified.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

*Zwygart John & Associates, CPAs, PLLC*

Nampa, Idaho

December 4, 2023

**Treasure Valley Transit, Inc.**  
**Schedule of Findings and Questioned Costs**  
**For the Year Ended September 30, 2023**

**Section I - Summary of Auditor's Results**

*Financial Statements*

Type of auditor's report issued: Unmodified

Internal control over financial reporting:

Significant deficiencies disclosed? ☐ yes ☒ none reported

Material weakness(es) disclosed ☐ yes ☒ No

Noncompliance material to financial statements noted? ☐ yes ☒ no

*Federal Awards*

Internal control over major programs:

Significant deficiencies identified ? ☐ yes ☒ none reported

Material weakness(es) identified ? ☐ yes ☒ none reported

Type of auditor's report issued on compliance for major programs: Unmodified

Any audit findings disclosed that are required to be reported in accordance with 2CFR SECTION 200.516(A)? ☐ yes ☒ no

Identification of major programs:

Federal Assistance Listing Number(s)	Name of Federal Program
20.526, 20.207	Federal Transit Cluster



Dollar threshold used to distinguish between  
Type A and Type B programs:

\$750,000

Auditee qualified as low risk auditee? ☒ yes ☐ no

**Section II - Financial Statement Findings**

None

**Section III - Findings and Questioned Costs for Federal Awards**

None

**DEBBIE KLING**  
**MAYOR**



**CITY HALL**  
**411 3RD STREET SOUTH**  
**NAMPA, ID 83651**  
**(208) 468-5401**

**OFFICE OF THE MAYOR**

January 2, 2024

Ms. Terri Lindenberg  
Executive Director  
Treasure Valley Transit, Inc.  
1136 W. Finch Drive  
Nampa, Idaho 83651

Re: Letter of Support for Treasure Valley Transit Grant Applications

Dear Ms. Lindenberg:

The City of Nampa would like to provide you with our Letter of Support to Treasure Valley Transit, Inc. We understand you are submitting a FY25-26 5311 Congressional Application, CARES Act One-Time Application and a 5339 Capital grant application to the Idaho Transportation Department-Public Transit.

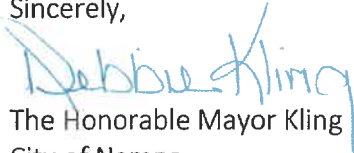
These grants provide funding to maintain existing rural transportation systems, replace vehicles and other capital needs (i.e. technology or facility upgrades) throughout the State of Idaho.

The Idaho Public Transportation Plan 2018 identified needs, priorities, opportunities, and potential solutions for transportation within all of District 3. Maintaining the existing service was the number one priority.

Treasure Valley Transit provides a valuable service to the communities they operate within District 3, which includes Non-Emergency Medical transportation within Canyon County. This has been demonstrated by the ridership and continued community support for the transit service.

The City of Nampa strongly supports Treasure Valley Transit's FY25-26 5311 Congressional Application for operational funds, CARES Act One-Time Application and 5339 Capital grant application for replacement vehicles and administrative facility upgrades to 3101 S. Powerline Rd., Nampa.

Sincerely,

  
The Honorable Mayor Kling  
City of Nampa



WEST CENTRAL MOUNTAINS  
ECONOMIC DEVELOPMENT COUNCIL  
Shelburne County • Canada • Donnelly • McCall • Treasure Valley

December 21, 2023

Ms. Terri Lindenberg  
Executive Director  
Treasure Valley Transit, Inc.  
1136 W. Finch Drive  
Nampa, Idaho 83651

**Letter of Support for FY25 & FY26 Grant Applications**

Dear Ms. Lindenberg,

The West Central Mountains Economic Development Council supports the regional transit service that Mountain Community Transit provides within Adams and Valley Counties. The cities of New Meadows, McCall, Donnelly, and Cascade have access to multi modal transportation options.

TVT is applying for the 5311 rural grant to maintain this regional service. In addition, TVT is applying for a 5310 purchase of service grant that will restore transportation to the New Meadows Community Center serving seniors and persons with disabilities. TVT is applying for CARES Act funding through a one-time grant application. This grant is critical, as the cost of labor, fuel and services has increased beyond the level of rural grant dollars currently available.

The Idaho Public Transportation Plan 2018 identified needs, priorities, opportunities and potential solutions for public transportation within District 3, which includes Adams County. Maintaining existing service was the number one priority.

Mountain Community Transit provides a valuable service to the region and the need for transit will continue to grow. The ridership, community support, and local funding for the red, green, blue and gold line routes demonstrates this fact.

The West Central Mountains Economic Development Council strongly supports Treasure Valley Transit's FY25-26 5311 and 5310 rural grant applications and the CARES Act one-time grant application.

Sincerely,

**Dylan Martin**  
President  
West Central Mountain Economic Development Council

Date: 12/21/2023

WCMEDC P.O. Box 2365 McCall, ID 83638

[admin@wcmedc.org](mailto:admin@wcmedc.org)  
[www.wcmedc.org](http://www.wcmedc.org)



December 11, 2023

Ms. Terri Lindenberg  
Executive Director  
Treasure Valley Transit, Inc.  
1136 W. Finch Drive  
Nampa, Idaho 83651

To Whom It May Concern,

St. Luke's McCall is writing today to provide our support for Treasure Valley Transit's 5311 rural grant and CARES Act grant applications to provide support for transit services within the city of New Meadows with a connection to McCall. This route also includes connection to the McCall Transit Center's Red, Green and Blue line routes that serve Valley County.

This service has provided critical access to health care provided by St. Luke's McCall medical center and clinics, and other medical services like pharmacies, dental and eyecare services not available in New Meadows. These transit services also connect individuals to their place of employment and services like grocery stores and other retail services.

Funding support for this grant is critical, as the cost of labor, fuel, and services have increased beyond the level of rural grant dollars currently available.

Lack of transportation has been identified as a community health need for our region. Those facing the biggest transportation challenges are often those who are economically and/or socially marginalized, including lower income families, children and older adults. Ensuring access to transportation also improves access to healthier food options, medical care and employment.

Maintaining and expanding Treasure Valley Transit service lines plays a critical role to those living in the West Central Mountain region. It provides a valuable service to the residents of New Meadows. The ridership, community support, and local funding for the gold line route demonstrates this fact.

St. Luke's McCall strongly supports Treasure Valley Transit's FY25-26 5311 rural grant application and the CARES Act one-time grant application.

Sincerely,

A handwritten signature in dark ink that reads "Amber Green". The signature is written in a cursive, flowing style.

Amber Green, RN, BSN, MSN  
St. Luke's McCall Chief Operating and Nursing Officer



## City of Donnelly

169 Halferty Street  
P.O. Box 725  
Donnelly, ID 83615  
Telephone (208) 325-8859

November 20, 2023

Ms. Terri Lindenberg  
Executive Director  
Treasure Valley Transit, Inc.  
1136 W. Finch Drive  
Nampa, Idaho 83651

### **Letter of Support for FY25 & FY26 Grant Applications**

Dear Ms. Lindenberg,

The City of Donnelly has provided \$5,000 for FY24 from the Local Option Tax to go towards the local match contribution for the operation of Mountain Community Transit (MCT) that provides a commuter route connecting McCall, Donnelly and Cascade.

The 5311 rural grant will provide funding to maintain our current green line route that has served 16,560 passenger trips in FY23. TVT is applying for a 5339 capital grant that will replace a green line bus that has met its useful life. TVT is applying for CARES Act funding through a one-time grant application. This is critical, as the cost of labor, fuel, and services has increased beyond the level of rural grant dollars available.

The Idaho Public Transportation Plan 2018 identified needs, priorities, opportunities, and potential solutions for public transportation within District 3 that includes the City of Donnelly within Valley County. Maintaining existing service was the number one priority of the plan.

Mountain Community Transit provides a valuable service to the residents of Donnelly to access employment, medical needs, county services, school, and recreation. The 30% ridership increase in FY23 demonstrates community support for the transit service.

The City of Donnelly strongly supports Treasure Valley Transit's FY25-26 5311, 5339, and CARES Act grant applications.

Sincerely,

Susan Dorris, Mayor



November 15, 2023

Ms. Terri Lindenberg  
Executive Director  
Treasure Valley Transit, Inc.  
1136 W. Finch Drive  
Nampa, Idaho 83651

**Letter of Support for FY25 & FY26 Grant Applications**

Dear Ms. Lindenberg,

The City of Cascade has provided \$3,000 in local match for the FY24 to Mountain Community Transit (MCT). MCT provides transit service to the City of Cascade with a commuter route connecting to McCall, Donnelly, and Cascade.

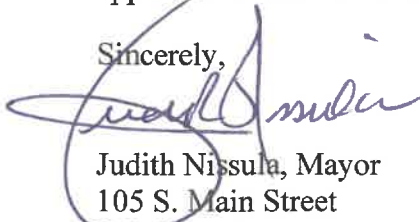
The 5311 rural grant will provide funding to maintain our current green line route that has served 16,560 passenger trips in FY23. TVT is applying for a 5339 capital grant that will replace a green line bus that has met its useful life. TVT is also applying for CARES Act funding through a one-time grant application. This grant is critical, as the cost of labor, fuel, and services has increased beyond the level of rural grant dollars currently available.

The Idaho Public Transportation Plan 2018 identified needs, priorities, opportunities, and potential solutions for public transportation within District 3, which includes Valley County. Maintaining existing service was the number one priority.

Mountain Community Transit provides a valuable service to the residents of Cascade to access employment, medical needs, county services, school, and recreation. The 30% ridership increase in FY23 demonstrates community support for the transit service.

The City of Cascade strongly supports Treasure Valley Transit's FY25-26 5311 and 5339 rural grant applications and the CARES Act one-time grant application.

Sincerely,



Judith Nissula, Mayor  
105 S. Main Street  
P.O. Box 649  
Cascade, Idaho 83611

# Elmore County Board of Commissioners

Phone (208) 587-2129 Ext. 270

ELMORE COUNTY COURTHOUSE  
150 South 4th East Suite #3  
Mountain Home, Idaho 83647

Fax (208) 587-2159

**Albert Hofer**  
(208) 599-1620

**Crystal Rodgers**  
(208) 999-2206

**Franklin L. Corbus**  
(208) 599-1294

December 1, 2023

Ms. Terri Lindenberg  
Executive Director  
Treasure Valley Transit, Inc.  
1136 W. Finch Drive  
Nampa, Idaho 83651

## Letter of Support for FY25 & FY26 Grant Applications

Dear Ms. Lindenberg,

Elmore County provided \$5,075 in local match for FY24 for Mountain Home Community Transit (MHCT). MHCT provides city and county transit service within Elmore County, the Air Force Base, and an after-school program for the Mountain Home School District.

The 5311 rural grant application will provide funding to maintain our current transportation program. TVT is applying for a 5339 capital grant that will replace a 2010 Chevrolet bus that has met its useful life. TVT is also applying for CARES Act funding through a one-time grant application. This grant is critical, as the cost of labor, fuel, and services has increased beyond the level of rural grant dollars currently available.

The Idaho Public Transportation Plan 2018 identified needs, priorities, opportunities, and potential solutions for public transportation within District 3 that includes the City of Mountain Home within Elmore County. Maintaining existing service was the number one priority.

Mountain Home Community Transit provides a valuable service to the residents within Elmore County. The 5% increase in ridership in FY23 and strong community support demonstrates this fact.



Elmore County strongly supports Treasure Valley Transit's FY25-26 5311 and 5339 rural grant applications and the CARES Act one-time grant application.

Sincerely,

  
\_\_\_\_\_  
Albert Hofer, Chairperson

  
\_\_\_\_\_  
Franklin L. Corbus, Commissioner

  
\_\_\_\_\_  
Crystal Rodgers, Commissioner



# City of Fruitland

Area Code 208  
Phone 452-4421  
FAX 452-6146  
[www.fruitland.org](http://www.fruitland.org)

200 S. Whitley

P.O. Box 324  
FRUITLAND, IDAHO 83619

January 3, 2024

Ms. Terri Lindenberg  
Executive Director  
Treasure Valley Transit, Inc.  
1136 W. Finch Drive  
Nampa, Idaho 83651

## Letter of Support for FY25 & FY26 Grant Applications

Dear Ms. Lindenberg,

The City of Fruitland has provided \$25,000 in local match for FY24 to Snake River Transit (SRT). SRT provides a public transit route serving the City of Fruitland and Payette within Payette County.

The 5311 rural grant will provide funding to maintain our current route that has been in operation since 2008 and has served 17,960 riders year to date. There is also a need for additional Saturday service if funding is available. TVT is applying for a 5339 capital grant that will replace a 2018 Ford bus that will have met its useful life in FY25. TVT is also applying for CARES Act funding through a one-time grant application. This grant is critical, as the cost of labor, fuel, and services has increased beyond the level of rural grant dollars currently available.

The 2018 Idaho Public Transportation Plan identified needs, priorities, opportunities, and potential solutions for transportation within District 3 within Payette County. Maintaining existing service was the number one priority of this plan.

Snake River Transit provides a valuable service to the residents of the City of Fruitland. The 18% increase in ridership in FY22 and 7% in FY23, and strong community support for the transit service demonstrates this fact.

The City of Fruitland strongly supports Treasure Valley Transit's FY25-26 5311 and 5339 rural grant applications and the CARES Act grant application.

Sincerely,

Stuart Grimes, Fruitland City Administrator  
City of Fruitland  
200 S. Whitley  
Fruitland, Idaho 83619



November 15, 2023

Ms. Terri Lindenberg

Executive Director

Treasure Valley Transit, Inc.

1136 W. Finch Drive

Nampa, Idaho 83651

**Letter of Support for FY25 & FY26 Grant Applications**

Dear Ms. Lindenberg,

The City of Mountain Home provided \$30,000 in local match for FY24 for Mountain Home Community Transit (MHCT). MHCT provides a deviated fixed route service within the City of Mountain Home, the Air Force Base, and an after-school program for the Mountain Home School District.

The 5311 rural grant application will provide funding to maintain our current transportation program. TVT is applying for a 5339 capital grant that will replace a 2010 Chevrolet bus that has met its useful life. TVT is also applying for CARES Act funding through a one-time grant application. This grant is critical, as the cost of labor, fuel, and services has increased beyond the level of rural grant dollars currently available.

The Idaho Public Transportation Plan 2018 identified needs, priorities, opportunities, and potential solutions for public transportation within District 3 that includes the City of Mountain Home within Elmore County. Maintaining existing service was the number one priority.

Mountain Home Community Transit provides a valuable service to the residents of the City of Mountain Home. The 5% increase in ridership in FY23 and strong community support demonstrates this fact.

The City of Mountain Home strongly supports Treasure Valley Transit's FY25-26 5311 and 5339 rural grant applications and the CARES Act one-time grant application.

Sincerely,

The Honorable Mayor Sykes

City of Mountain Home

160 South 3rd East

Mountain Home, Idaho 83647

December 15, 2023

Ms. Terri Lindenberg  
Executive Director  
Treasure Valley Transit, Inc.  
1136 W. Finch Drive  
Nampa, Idaho 83651



**Letter of Support for FY25 & FY26 Grant Applications**

Dear Ms. Lindenberg,

The Mountain Home Air Force Base (AFB) is not able to meet the local match required in FY25 for Mountain Home Community Transit's (MHCT) fixed route service going out to the AFB. AFB military personnel and TVT met in FY23 and FY24 to determine an option that would maintain the service at a lower cost to TVT and still meet the needs of the Air Force Base.

The 5311 rural grant application will provide funding to support a van operated by military personnel similar to a standard vanpool program. In addition, TVT is applying for a 5339 capital grant to purchase a 9-passenger accessible van. TVT is also applying for CARES Act funding through a one-time grant application for this van if funding is available.

The Idaho Public Transportation Plan 2018 identified needs, priorities, opportunities and potential solutions for public transportation within District 3 that includes the City of Mountain Home within Elmore County. Maintaining existing service was the number one priority.

Mountain Home Community Transit provides a valuable service to the military personnel in need of transportation to the Air Force Base from the City of Mountain Home.

The Mountain Home Air Force Base strongly supports Treasure Valley Transit's FY25-26 5311 and 5339 rural grant applications and the CARES Act one-time grant application.

Sincerely,

*Darius R. Outlaw*  
*Andrew Rivero*

Mountain Home Air Force Base  
366 Gunfighter Avenue  
Mountain Home AFB, Idaho 83648



*This institution is an equal opportunity provider/employer*  
City of New Meadows \* P.O. Box 324 \* New Meadows, Idaho, 83654  
Phone (208) 347-2171 \* Fax (208) 347-2384

November 22, 2023

Ms. Terri Lindenberg  
Executive Director  
Treasure Valley Transit, Inc.  
1136 W. Finch Drive  
Nampa, Idaho 83651

**Letter of Support for FY25 & FY26 Grant Applications**

Dear Ms. Lindenberg,

The City of New Meadows has provided \$10,791 in local match for the FY24 fiscal year to Mountain Community Transit (MCT). MCT provides transit service within the City of New Meadows to McCall with a connection to the McCall Transit Center and the red, green, and blue line routes.

The 5311 rural grant provides funding to maintain the gold line route. This service has provided critical access to healthcare, groceries, and other services not available in New Meadows. TVT is applying for a 5310 purchase of service grant that will restore transportation to the New Meadows Community Center serving seniors and persons with disabilities. TVT is also applying for CARES Act funding through a one-time grant application. This grant is critical, as the cost of labor, fuel, and services has increased beyond the level of rural grant dollars currently available.

The Idaho Public Transportation Plan 2018 identified needs, priorities, opportunities, and potential solutions for public transportation within District 3, which includes Adams County. Maintaining existing service was the number one priority.

Mountain Community Transit provides a valuable service to the residents of New Meadows. The ridership, community support, and local funding for the gold line route demonstrates this fact.

The City of New Meadows strongly supports Treasure Valley Transit's FY25-26 5311 and 5310 rural grant applications and the CARES Act one-time grant application.

Sincerely,

A handwritten signature in dark ink, appearing to read "Julie Good". The signature is fluid and cursive, with the first name "Julie" written in a larger, more prominent script than the last name "Good".

The Honorable Mayor Good  
City of New Meadows  
401 Virginia Street  
New Meadows, Idaho 83654

## OFFICE OF ADMINISTRATION

November 15, 2023

Ms. Terri Lindenberg  
Executive Director  
Treasure Valley Transit, Inc.  
1136 W. Finch Drive  
Nampa, Idaho 83651

### Letter of Support for FY25 & FY26 Grant Applications

Dear Ms. Lindenberg,

The City of Payette has provided \$25,000 in local match for FY24 to Snake River Transit (SRT). SRT provides a public transit service for the City of Payette and Fruitland within Payette County.

The 5311 rural grant funding will maintain our city route that has served 17,987 passenger trips in FY23. There is a need for additional Saturday service if funding is available. TVT is applying for a 5339 capital grant that will replace a 2018 Ford bus that will have met its useful life in FY25. TVT is applying for CARES Act funding through a one-time grant application. This grant is critical, as the cost of labor, fuel, and services has increased beyond the level of rural grant dollars currently available.

The 2018 Idaho Public Transportation Plan identified needs, priorities, opportunities, and potential solutions for transportation within District 3, which includes Payette County. Maintaining existing service was the number one priority of this plan.

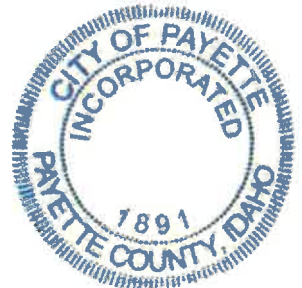
Snake River Transit provides a valuable service to the residents of the City of Payette. The 18% increase in ridership in FY22 and 7% increase in FY23, and strong community support for the transit service demonstrates this fact.

The City of Payette strongly supports Treasure Valley Transit's FY25-26 5311 and 5339 rural grant applications and the CARES Act one-time grant application.

Sincerely,



The Honorable Clay Jensen  
City of Payette  
700 Center Avenue  
Payette, Idaho 83661





OFFICE OF  
**The Board of Payette County Commissioners**

**DISTRICT 1 ANNE-MARIE KELSO, CHAIR**  
**DISTRICT 2 JENNIFER F. RIEBE**  
**DISTRICT 3 KEN BISHOP**



**1130 3<sup>RD</sup> AVENUE N., RM 104**  
**PAYETTE, IDAHO 83661-2473**  
**PHONE (208) 642-6000**

November 20, 2023

Ms. Terri Lindenberg  
Executive Director  
Treasure Valley Transit, Inc.  
1136 W. Finch Drive  
Nampa, Idaho 83651

**Letter of Support for FY25 & FY26 Grant Applications**

Dear Ms. Lindenberg,

Payette County has provided \$25,000 for FY24 for Snake River Transit (SRT). SRT provides a public transit service within Payette County connecting the City of Fruitland and the City of Payette.

The 5311 rural grant will provide funding to maintain our current route that has been in operation since 2008 and has served 17,987 riders year to date. There is also a need for additional Saturday service if funding is available. TVT is applying for a 5339 capital grant that will replace a 2018 Ford bus that will have met its useful life in FY25. TVT is also applying for CARES Act funding through a one-time grant application. This grant is critical, as the cost of labor, fuel, and services has increased beyond the level of rural grant dollars currently available.

The Idaho Public Transportation Plan 2018 identified needs, priorities, opportunities, and potential solutions for public transportation within District 3 that includes Payette County. Maintaining existing service was the number one priority.

Snake River Transit provides a valuable service to the residents of the City of Payette. The 18% increase in ridership in FY22 and 7% increase in FY23, and strong community support for the transit service demonstrates this fact.

Payette County strongly supports Treasure Valley Transit's FY25-26 5311 and 5339 rural grant applications and the CARES Act one-time grant application.

Sincerely,

The Board of Payette County Commissioners

A handwritten signature in cursive script, appearing to read "AmKelso".

Anne-Marie Kelso, Chair

A handwritten signature in cursive script, appearing to read "Jennifer Riebe".

Jennifer Riebe, Commissioner

A handwritten signature in cursive script, appearing to read "Ken Bishop".

Ken Bishop, Commissioner

December 13, 2023

Ms. Terri Lindenberg  
Executive Director  
Treasure Valley Transit, Inc.  
1136 W. Finch Drive  
Nampa, Idaho 83651

**Letter of Support for FY25 & FY26 Grant Applications**

Dear Ms. Lindenberg,

Perpetua Resources has provided \$10,791 in local match for the FY24 fiscal year to Mountain Community Transit (MCT). MCT provides transit service within the City of New Meadows to McCall with a connection to the McCall Transit Center and the red, green, and blue line routes.

The 5311 rural grant provides funding to maintain the gold line route. This service has provided critical access to St. Luke's Hospital in McCall, groceries, and other services not available in New Meadows. TVT is also applying for CARES Act funding through a one-time grant application. This grant is critical, as the cost of labor, fuel, and services has increased beyond the level of rural grant dollars currently available.

The Idaho Public Transportation Plan 2018 identified needs, priorities, opportunities, and potential solutions for public transportation within District 3, which includes Adams County. Maintaining the existing service was the number one priority.

Mountain Community Transit provides a valuable service to the residents of New Meadows. The ridership, community support, and local funding for the gold line route demonstrate this fact.

Perpetua Resources strongly supports Treasure Valley Transit's FY25-26 5311 rural grant application and the CARES Act one-time grant application.

Sincerely,



Belinda Provancher  
Perpetua Resources  
13181 Highway 55  
Donnelly, Idaho 83615

# Valley County Board of Commissioners

P.O. Box 1350 • 219 N. Main Street  
Cascade, Idaho 83611-1350

Phone (208) 382-7100  
Fax (208) 382-7107



**ELTING G. HASBROUCK**  
*Chairman of the Board*  
[ehasbrouck@co.valley.id.us](mailto:ehasbrouck@co.valley.id.us)

**NEAL THOMPSON**  
*Commissioner*  
[nthompson@co.valley.id.us](mailto:nthompson@co.valley.id.us)

**SHERRY MAUPIN**  
*Commissioner*  
[smaupin@co.valley.id.us](mailto:smaupin@co.valley.id.us)

**DOUGLAS A. MILLER**  
*Clerk*  
[dmiller@co.valley.id.us](mailto:dmiller@co.valley.id.us)

November 15, 2023

Ms. Terri Lindenberg  
Executive Director  
Treasure Valley Transit, Inc.  
1136 W. Finch Drive  
Nampa, Idaho 83651

## Letter of Support for FY25 & FY26 Grant Applications

Dear Ms. Lindenberg,

Valley County has provided \$40,000 for FY24 to Mountain Community Transit (MCT). Treasure Valley Transit operates Mountain Community Transit (MCT) that provides the commuter route connecting McCall, Donnelly, and Cascade.

The 5311 rural grant will provide funding to maintain our current route that has been in operation since 2008 and has served 16,560 riders year to date. TVT is applying for a 5339 capital grant that will replace a green line bus that will have met its useful life. TVT is also applying for CARES Act funding through a one-time grant application. This grant is critical, as the cost of labor, fuel, and services has increased beyond the level of rural grant dollars currently available.

The Idaho Public Transportation Plan 2018 identified needs, priorities, opportunities, and potential solutions for public transportation within District 3 that includes Valley County. Maintaining existing service was the number one priority.

Mountain Community Transit provides a valuable service to the residents of Valley County. The 30% ridership increase in FY23 and continued community support for the transit service demonstrates this fact.

Valley County strongly supports Treasure Valley Transit's FY25-26 5311 and 5339 rural grant applications and the CARES Act grant application.

Sincerely,

Handwritten signature of Elting G. Hasbrouck.

Valley County Commissioners  
P.O. Box 1350  
Cascade, Idaho 83611



**City of McCall**

CITY CLERK

[www.mccall.id.us](http://www.mccall.id.us)

423 - 4 2023

216 East Park Street  
McCall, Idaho 83638

**Phone 208-634-7142**

Fax 208-634-3038

8/01/2023

Dear Treasure Valley Transit, Inc.:

Your organization has been chosen to receive Local Option Tax (LOT) funds for Fiscal Year 2024.

The LOT Commission and City Council have allotted \$108,630 specifically for LOT Application #24-01 for Rural Grant Funding Match, as outlined in the submitted application. Provided the City receives the estimated LOT funds, your allocation of \$108,630 should be awarded on or around June 2024. Please understand that funding of your project is based entirely on funds being received from the Lodging Local Option Tax. Should funds not be available, your project will not be funded.

Enclosed is a copy of the approved funding summary for FY2024. This summary shows the priority order of funding for FY24 Lodging LOT funds. There will be no reductions in project funding amounts. Funding will be provided in the order shown on the spreadsheet. As Lodging LOT funds are received, the next project on the list will be funded. If your project is at the bottom of the list, especially in the Contingency section, it is possible that funding will not be available.

Future correspondence from the City of McCall will be sent only to the email address currently on file [terri@treasurevalleytransit.com](mailto:terri@treasurevalleytransit.com). If you prefer notification by another means, please let us know. Otherwise, be sure to keep us advised if your email address changes.

You will be notified via email when your funds are available.

The City of McCall and the Local Option Tax Commission congratulate you on being chosen as a recipient for Local Option Tax funds and look forward to a successful year.

Best regards,

Amanda Payne | Local Option Tax Administrator  
208-634-8929 | [apayne@mccall.id.us](mailto:apayne@mccall.id.us)

**FY24 Local Option Tax  
Funding Amounts**

Priority #	Project Number	Requestor	Project	Amount requested	Amount funded
1		LOT Administrative Costs	LOT Administrative Costs	\$14,500	\$14,500
2		City of McCall Parks & Recreation Dept	Parks & Recreation Move	\$200,000	\$200,000
3	24-34	City of McCall	Deed Restricted Housing Incentives	\$300,000	\$100,000
4	24-33	City of McCall	Housing Authority	\$250,000	\$125,023
5	24-05	Valley County Pathways	Nordic Trail Grooming	\$12,000	\$12,000
6	24-01	Treasure Valley Transit, Inc.	Rural Grant Funding Match	\$108,630	\$108,630
7	24-35	City of McCall - Parks & Recreation	Downtown Sidewalk Maintenance	\$216,150	\$216,150
8	24-43	Payette Lakes Ski Club	Nordic Trails Grooming	\$10,000	\$10,000
9	24-04	Valley County	Snow Plowing Winter Parking Lots	\$17,000	\$17,000
10	24-10	McCall Ultra Sled Dog Challenge, LLC	Shuttle Buses	\$3,764	\$3,764
11	24-37	City of McCall - Parks & Recreation	Community Activities	\$31,250	\$31,250
12	24-45	Friends of Payette Avalanche Center	Website and Beacon training	\$8,000	\$8,000
13	24-41	Chamber of Commerce and Visitors Bureau	Winter Carnival Logistics	\$29,000	\$29,000
14	24-03	McCall Arts and Humanities Council	Idaho Talks Speakers	\$2,565	\$2,565
15	24-27	City of McCall Golf Club	Path Resurfacing	\$40,000	\$40,000
16	24-36	City of McCall - Parks & Recreation	Equipment Lease	\$9,592	\$9,592
17	24-18	McCall Folklore Society	Summer Music Festival	\$10,000	\$10,000
18	24-23	Payette Lakes Community Association, Inc	After School and Summer Programs	\$10,000	\$10,000
19	24-42	Chamber of Commerce and Visitors Bureau	IDSOS Grant Match	\$50,523	\$50,523
20	24-17	McCall Nordic & Biathlon Ski Club	AED and Cargo Sled	\$5,044	\$5,044
21	24-38	City of McCall - Parks & Recreation	Noxious Weed Program	\$5,995	\$5,995
22	24-39	City of McCall - Parks & Recreation	Trash and Benches	\$20,362	\$20,362
23	24-44	Payette Lakes Ski Club	Rope-Tow Lift	\$35,000	\$35,000
24	24-07	Roots Forest School	Trek to the North Pole	\$1,783	\$1,783
25	24-11	McCall Ultra Sled Dog Challenge, LLC	Checkpoint Equipment	\$3,162	\$3,162
26	24-22	McCall Winter Sports Club	Ski Event Costs	\$3,610	\$3,610
27	24-25	Valley County Search and Rescue	Winter Response Equipment	\$12,700	\$12,700
28	24-09	McCall Ultra Sled Dog Challenge, LLC	Equipment Storage Unit	\$1,200	\$1,200
29	24-16	Payette Land Trust, Inc	Payette River Basin Initiative	\$15,000	\$7,500
30	24-29	City of McCall Golf Club	Clubhouse Outdoor Lighting	\$2,000	\$2,000
31	24-46	WCM Economic Development Council	Regional Housing Needs Assessment	\$20,000	\$20,000
32	24-08	Roots Forest School	Park Use Fee	\$3,800	\$3,800
33	24-28	City of McCall Golf Club	Clubhouse Roof and Insulation	\$50,000	\$50,000
34	24-12	McCall Ultra Sled Dog Challenge, LLC	Communication Equipment	\$2,188	\$2,188
35	24-02	McCall Fire and EMS	Vehicle for Safety Inspections	\$44,909	\$44,909
36	24-19	Manchester Ice and Event Center	Learn to Skate	\$15,000	\$15,000
37	24-06	McCall Youth Hockey Association	Ice Time	\$8,500	\$8,500
38	24-40	City of McCall - Parks & Recreation	Purchase four cameras	\$10,500	\$10,500
39	24-24	Valley County Search and Rescue	Swiftwater Response Equipment	\$32,500	\$16,250
40	24-30	McCall Figure Skating Club	Ice Time	\$10,000	\$10,000
41	24-26	City of McCall Golf Club	Permenant Meeting Structure	\$15,000	\$15,000
42	24-20	McCall Ski Heritage Foundation	Ski Mural	\$7,500	\$7,500
<b>Total:</b>				<b>\$1,648,727</b>	<b>\$1,277,500</b>
<b>Contingency Funding</b>					
43	24-32	McCall Public Library	New Library Project	\$100,000	\$100,000
44	24-13	Central Idaho Mountain Bike Association	Bike Park	\$50,000	\$50,000
<b>Total:</b>				<b>\$150,000</b>	<b>\$150,000</b>
<b>Not Recommended for Funding</b>					
	24-15	WCM Housing Trust	Property purchase	\$50,000	\$0
	24-14	Valley County Pickleball Club	Rec Facility	\$75,000	\$0
	24-21	City of McCall - CED	Vehicle Charging Stations	\$120,000	\$0
	24-31	Manchester Ice and Event Center	Exterior Refinishing	\$15,000	\$0
<b>Total:</b>				<b>\$260,000</b>	<b>\$0</b>

## ATTACHMENT B

Milestone Report (Not Applicable)

3-Year Ridership Comparison

NTD Service Data for FY23



# October 2022 - September 2023

	October	Nov.	Dec.	Jan.	Feb.	March	April	May	June	July	August	Sept.	Total FY23
MCT -Green Line	1272	1241	1289	1285	1230	1563	1578	1815	1610	1039	1179	1459	16,560
MCT- Red Line	1732	1608	1960	2763	2184	2132	1705	1667	2630	2927	2182	1538	25,028
MCT - Blue Line	0	0	644	677	366	145	0	38	220	358	193	48	2,689
MCT - Gold Line									87	119	100	42	348
SRT-Idaho	1404	1379	1234	1264	1443	1717	1534	1522	1701	1492	1710	1560	17,960
MHCT-City	457	261	209	235	220	241	257	335	255	202	270	307	3,249
MHCT- AFB	78	133	141	132	141	163	171	195	164	139	186	146	1,789
Demand Response	2977	2692	2671	2879	2761	3206	2763	3012	2954	2623	2996	2735	34,269
Purchase of Service-EOA	679	763	702	811	609	798	621	679	526	636	785	752	8,361
Purchase of Service-PSC	341	277	306	522	384	266	248	233	294	255	291	214	3,631
	8,940	8,354	9,156	10,568	9,338	10,231	8,877	9,496	10,441	9,790	9,892	8,801	113,884

101,892

11,992

113,884

# October 2021 - September 2022

	October	Nov.	Dec.	Jan.	Feb.	March	April	May	June	July	August	Sept.	Total FY22
MCT -Green Line	622	759	840	725	693	879	1037	1121	1237	1323	1263	1158	11,657
MCT- Red Line	1089	851	1088	2177	1729	1429	1361	1738	2606	2773	2105	1470	20,416
MCT - Blue Line			225	185	117	26		47	112	165	114	35	1,026
SRT-Idaho	953	1229	1201	1288	1267	1587	1394	1267	1690	1553	1673	1624	16,726
MHCT-City	178	194	221	226	176	265	224	249	249	246	379	451	3,058
MHCT- AFB	152	145	135	94	130	158	136	123	181	132	173	150	1,709
Demand Response	2734	2726	2592	2349	2789	3509	3264	3248	3079	2675	3330	3020	35,315
Purchase of Service-EOA	583	661	724	693	783	657	698	406	781	459	625	622	7,692
Purchase of Service-PSC	312	330	245	300	693	321	300	248	274	254	325	269	3,871
	6,623	6,895	7,271	8,037	8,377	8,831	8,414	8,447	10,209	9,580	9,987	8,799	101,470

89,907

11,563

101,470

# October 2020 - September 2021

	October	Nov.	Dec.	Jan.	Feb.	March	April	May	June	July	August	Sept.	Total FY21
MCT -Green Line	856	764	719	784	741	860	814	753	767	859	786	750	9,453
MCT- Red Line	1072	836	1275	1052	1037	1092	1121	1201	1655	2024	1647	1031	15,043
MCT - Blue Line								65	92	159	108	92	516
SRT-Idaho	1221	1172	1201	1125	1147	1384	1299	1072	1282	1204	1379	1285	14,771
MHCT-City	188	183	263	173	153	214	217	218	215	206	238	245	2,513
MHCT- AFB	198	199	221	208	189	246	228	169	190	154	193	178	2,373
Demand Response	2631	2196	2358	2286	2738	3371	3009	2689	2872	2754	2972	2624	32,500
Purchase of Service-EOA	576	520	480	474	554	674	643	882	859	745	751	643	7,801
Purchase of Service-PSC	457	214	24	27	30	500	571	447	483	405	304	332	3,794
	7,199	6,084	6,541	6,129	6,589	8,341	7,902	7,496	8,415	8,510	8,378	7,180	88,764

77,169

11,595

88,764



Service Data		Service Measure											
Service Mode	Bus	Vehicle Revenue Miles											
		2022	2022	2022	2023	2023	2023	2023	2023	2023	2023	2023	2023
		Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Vehicle Revenue Hours		27,432	26,241	29,194	29,600	28,303	30,822	26,072	27,406	30,051	28,338	30,954	27,108
Number of Days with Service		1,287	1,221	1,386	1,440	1,360	1,466	1,235	1,363	1,481	1,430	1,532	1,329
Passenger Miles					31	28	31	30	31	30	31	31	30
Passenger Trips--Elderly (Not Wheelchair)		917	759	742	761	774	932	837	919	994	989	1,268	1,168
Passenger Trips--Disabled (Not Wheelchair)		733	604	501	595	519	513	387	480	430	452	550	495
Passenger Trips--Elderly (Wheelchair)													
Passenger Trips--Disabled (Wheelchair)		35	40	18	23	22	38	88	73	65	56	13	21
Passenger Trips--Youth/Students		975	745	810	825	821	915	1,050	988	1,407	1,501	1,021	914
Passenger Trips--All Other/General Public		2,283	2,474	3,406	4,152	3,448	3,563	2,883	3,112	3,771	3,278	2,968	2,502
Total Ridership		4,943	4,622	5,477	6,356	5,584	5,961	5,245	5,572	6,667	6,276	5,820	5,100
Vehicle Revenue Miles		17,161	16,316	17,191	17,753	17,607	20,244	16,368	17,932	17,482	15,151	17,746	16,237
Vehicle Revenue Hours		894	961	933	1,019	879	1,036	763	908	899	790	963	848
Number of Days with Service		21	20	21	20	20	23	20	22	22	20	23	20
Passenger Miles		17,161	16,316	17,191	17,753	17,607	20,244	16,368	17,932	17,482	15,151	17,746	16,237
Total Unduplicated Passenger Trips		2,977	2,692	2,671	2,879	2,761	3,206	2,763	3,012	2,954	2,623	2,996	2,735
Passenger Trips													
Passenger Trips													
Passenger Trips--Elderly (Not Wheelchair)													
Passenger Trips--Elderly (Wheelchair)													
Passenger Trips--Disabled (Not Wheelchair)		2,253	2,082	2,110	2,308	2,165	2,508	2,151	2,324	2,281	2,036	2,349	2,094
Passenger Trips--Disabled (Wheelchair)		656	544	537	521	543	639	553	639	655	547	611	567
Passenger Trips--Youth/Students		36	56	11	33	33	31	47	39	4	24	13	32
Passenger Trips--All Other/General Public		32	10	13	17	20	28	12	10	14	16	23	42
Total Ridership Combined		7,920	7,314	8,148	9,235	8,345	9,167	8,008	8,584	9,621	8,899	8,816	7,835
													101,892

Total	Passenger Trips--Elderly (Not Wheelchair)	917	759	742	761	774	932	837	919	994	989	1,268	1,168
Total	Passenger Trips--Elderly (Wheelchair)	733	604	501	595	519	513	387	480	430	452	550	495
Total	Passenger Trips--Disabled (Not Wheelchair)	2,253	2,082	2,110	2,308	2,165	2,508	2,151	2,324	2,281	2,036	2,349	2,094
Total	Passenger Trips--Disabled (Wheelchair)	691	584	555	544	565	677	641	712	720	603	624	588
Total	Passenger Trips--Youth/Students	1,011	801	821	858	854	946	1,097	1,027	1,411	1,525	1,034	946
Total	Passenger Trips--All Other/General Public	2,315	2,484	3,419	4,169	3,468	3,591	2,895	3,122	3,785	3,294	2,991	2,544
													101,892

## ATTACHMENT C & D

NEPA Worksheet (Not Applicable)

Demonstration of Need Form

## Congressional Application Attachment D: Demonstration of Need

### 1. Type of Service (Check all that apply):

- ☒ Fixed Route
- ☒ Deviated Fixed Route
- ☒ Demand/ Response

### 2. Service Area (Check one)

- ☐ City
- ☐ County
- ☒ Multi-County
- ☐ Other (Please Specify):

### 3. Connectivity:

Do you connect with other modes of transportation? Check all that apply.

- ☐ Urban Public Systems
- ☐ Intercity Carriers
- ☐ Airports/ Trains
- ☒ Other transit operators in your region (please list below):

Elderly Opportunity Agency, Inc., Metro Community Services, Inc., and the Valley Regional Transit Authority serving Canyon County.

### 4. Ridership:

Estimate the average number of rides: Per Day 425 Per Year 101,982

Briefly describe your ridership over the last two years: -  
Ridership increased 16.5% from FY21 to FY22 combined for all systems.

Ridership increased 13.4% from FY22 to FY23 combined for all systems.

### 5. Days/ Hours of Service:

List days of the week and hours transit provider is in service

Mon - Fri 6 am - 6 pm for MHCT, SRT, and TVT. MCT Red Line Mon - Sun 7 am - 7 pm, Green Line Mon - Fri

5:55 am to 7:25 pm, and Blue Line Winter 7 am - 6 pm, Summer 11 am - 9 pm, Gold Line Mon - Fri 5:45 am - 5:45 pm.

## **TVT Supplemental for CARES Application**

### **Meeting ADA requirements:**

All TVT revenue vehicles and facilities provide access for persons with disabilities including those confined to a wheelchair, required height and width for steps and ramps, accessible bathrooms, halls and doorways. TVT has passed all inspections for ADA compliance in our current Nampa facility, McCall Transit Center and new Nampa Facility. We follow federal guidelines for service animals on board our vehicles. The drivers call out all stops for the visually impaired, and we have pull cords for those with hearing impairments or speech impediments as they are approaching their stop.

### **Marketing and/or Advertising**

TVT utilizes all forms of social media including website, Facebook, X (formerly Twitter) and Instagram. We provide our schedules on the website, distribute route schedules to various locations (hotels, library, chambers of commerce, local businesses, City Hall, schools, etc.), attend community events such as local festivals, farmer's markets and hold events promoting our services that include the Mayor, City Council and local business leaders with tours of our buses/vans.

Utilizing a committee of stakeholders, hiring a graphic designer for our print media has provided inclusivity and multiple individuals offering input and editing for errors. The general public appreciate swag such as squeeze buses, note pads and pen, magnets with our website and phone number. The hotels and Airbnbs pass out the route schedules. Local newspapers run special event stories and we have paid advertising space to promote our seasonal services. Here are some examples of what we have done in FY23:

- Terri Lindenberg and Miranda Murray attended the APTA Planning and Marketing Conference in February 2023. This was a very in-depth course offering valuable information and ideas on promoting our transit services that were implemented.
- In April 2023, Micael McKenzie Creative was selected to rebrand MCT, promote services and highlight the new Gold Line. This included paid advertising on Facebook by zip code to promote the new Gold Line and MCT route information. A video and photos produced brought positive feedback from comments. Part of the rebrand was a new logo, schedules and rack cards. A direct mail card sent to all the residents of Donnelly, Cascade, McCall, and New Meadows. This card was from MCT with photo of our bus and noting that we were hiring for driver positions.
- Mayor Good of New Meadows had doorknockers placed at all the residences. The Community Center and Library had displays of MCT routes and schedules. Albertsons distributed the Gold Line schedule in their grocery bags. The community events LED sign promoted the Gold Line. The ribbon cutting for the new Gold Line in June was well attended by elected officials from both counties, newspapers, St. Luke's, Brundage Resort, Perpetua Resources and many others.

- KymFest June 2023 – Sponsored by the For You Network held at Lakeview Park in Nampa annually. The event is to highlight community resources during a free family oriented festival and several thousand attend. It has been an excellent opportunity to give out TVT information to individuals and network with other local non-profits in attendance. TVT has vehicles on hand for public viewing.
- In August, TVT attended an open house and was a panelist for transportation services in Canyon County along with Nampa Mayor Debbie Kling and Elaine Clegg of VRT.
- The Nampa Civic Centers hosts the Senior Fair annually in October and TVT will reserve a booth to talk about the Canyon County demand responses we provide.
- In October 2023, McCall Business and Resource Expo sponsored by the McCall Chamber was an opportunity to highlight MCT and had out schedules and information on the regional service available.
- In November, the Nampa Economic Luncheon is another opportunity for TVT to hand out information about our Canyon County Services.
- Mountain Home Community Transit - the Mountain Home School District places information about the after school transportation in the school orientation packet. A part time driver has hours allocated to visit with veteran services, medical facilities, senior services, and the information center to distribute schedules and answer any questions.
- Snake River Transit - The Fruitland Chamber of Commerce hosts a monthly luncheon where local businesses have their information available and can network. Local elected officials attend these luncheons and it is great opportunity to discuss transit successes.



**Application Information Form**

Applicant: Treasure Valley Transit, Inc.

Authorized Representative: Debbie Maxwell

Address: 1136 W. Finch Drive, Nampa ID 83651

Phone: 208-463-9111

Email Address: [debbie@treasurevalleytransit.com](mailto:debbie@treasurevalleytransit.com)

DUNS #: 884972332

Architect/Engineer/Planner if applicable: (Contact Name): **Not Applicable**

Phone: \_\_\_\_\_

Address: \_\_\_\_\_

**PROJECT Description:**

Purchase replacement CNG cylinder tanks for 3 medium duty ADA buses currently used in the demand response system.

TOTAL PROJECT COST: \$37,500

FEDERAL SHARE: \$37,500 LOCAL MATCH: N/A



### **Section 1: Project Description**

- a) FTA Program Eligibility: Discuss how project meets the FTA funding source program purpose.
- b) Treasure Valley Transit is an eligible recipient as a private nonprofit 501(c)3 operator of public transportation that currently receives 5311 funding. This project meets this FTA funding source program purpose by purchasing replacement CNG cylinder tanks for 3 buses currently used on the demand response system.
- c) ITD Call for Project Priorities: Discuss how the project meets the ITD-PT call for project priorities

By funding this project ITD will ensure safety and security by funding Preventative Maintenance for existing buses utilized for existing service to maintain vehicles in a State of Good Repair and also preserve the existing public transportation network.

- d) Application Scope of Work: Describe in detail the scope of work for the project you are proposing:

The 3 Compressed Natural Gas (CNG) buses we have in our fleet are used daily in our demand response system. Performing a regular safety inspection of the CNG storage tanks is a critical maintenance requirement for CNG fuel systems. Damage from road debris can threaten the integrity of CNG tanks. Exposure to certain chemicals may cause corrosion and cracking as well.

Upon the recent inspection of the CNG tanks, one of the tanks failed the inspection and needed to be removed from the vehicle. This tank needs to be replaced immediately. We can safely keep the vehicle in service with one less tank. However, it does require the driver to fill the transit vehicle with compressed natural gas more frequently. This is not efficient and not cost-effective for operations.

CNG fuel tanks have a useful life of 15 to 20 years, depending on their construction and how they were certified by the original manufacturer. Because there is no way to safely “requalify” tanks for extended use, once a tank has reached its useful life it must be replaced. A CNG tank must be replaced by a qualified service facility with properly trained personnel and equipment.

Once funding is received, we will work with Valley Regional Transit Authority, who has a CNG certified mechanic on staff, to perform the defueling, decommissioning, and disposal of the failed tank and replace it with a new tank. The estimated cost of \$2,500 for the labor to install a new CNG tank is based on the costs we recently paid for the inspection and removal of the failed tank.





a) Ridership History

Service	FY21	FY22	FY23	+/-
Demand Response	32,500	35,313	34,269	(3%)
<b>Total Ridership</b>	<b>32,500</b>	<b>35,313</b>	<b>34,269</b>	<b>(3%)</b>

Marketing/Advertising/Public participation efforts

TVT is quick to take advantage of opportunities to publicly participate in local events. We take these opportunities to introduce our services and provide information to the public. For example, on June 10, 2023, we had an information booth at the KYMfest put on by the For You Network, Inc. at Lakeview Park in Nampa. This even highlighted the various community resources that are available but not necessarily known by the community at large. Several thousand were in attendance and our booth saw many visitors.

TVT uses electronic media resources to inform the public of our services and instructs people how to use them in each of our service areas. We have a website, [treasurevalleytransit.com](https://treasurevalleytransit.com), a Facebook page and an X account, these are listed on all our brochures, schedules, and vehicles. Our services are marketed to each of our service areas in different ways. Each service is branded to facilitate local ownership by the residents, elected officials, and the business community. Advertisements for local services and/or events are placed in the local newspaper and local community magazines. TVT also belongs to the local chamber of commerce in Nampa.



## **Section 2: Project Planning**

### **a) Tie project to specific goals in ITD Statewide Public Transportation Plan:**

#### **1. Ensure the Safety and Security of Public Transportation**

TVT's priority is the safety and security of our employees and the passengers they serve. This is demonstrated through our policies and procedures that cover all aspects of operations from maintenance standards for the vehicles, training of employees, drug and alcohol testing program, etc. This information is available in our Personnel Manual, Driver Handbook, Title VI Plan, Safety and Security & Emergency Preparedness Plan.

#### **2. Encourage Public Transportation as an Important Element of an Effective Multi-Modal Transportation System in Idaho**

TVT works closely with our elected officials and other agencies to advocate for a truly Multi-Modal system in the areas we serve. This includes bus, demand response, vanpool, bike, and pedestrian modes.

#### **3. Preserve the Existing Public Transportation Network**

TVT is seeking continued grant funding to preserve the existing services we provide.

#### **4. Provide Transportation System that Drives Economic Opportunity**

TVT works closely with the chambers of commerce, and other local businesses in order to promote public transportation and provide access to jobs which in turn spurs economic growth.

### **b. Describe the Project Development Process**

1. Community involvement from the city and county, chambers of commerce, local businesses, health and human service agencies and the potential passengers (i.e. advisory group, public hearings, social media, surveys etc.)
2. Selection of the appropriate mode of transportation-fixed route, deviated fixed route or demand response service; van pool, ride share or voucher program
3. Funding mechanism:
  - 5339 Grant Program
  - City and county funding



- Medicaid revenue
  - Employer benefit for transit passes
  - School district
  - Advertising
  - Seek State of Idaho funding
  - Private grants and foundations
4. Assure sustainability through stable funding
  5. Monitoring and Evaluation of the service in an on-going manner
  6. Route restructure as appropriate through input of all
  7. Participate in the City and County development of master plans

For a successful service to be implemented and maintained by stable funding it is imperative that the planning process involves ongoing input from affected parties. Meaningful engagement ensures accountability, effective communications, and consistencies.

- Describe efforts undertaken to coordinate with Minority and Low-Income Population

Treasure Valley Transit (TVT) operates using our Title VI Plan to outline TVT processes and procedures to comply with all Title VI laws and regulations. All employees receive training on Title VI laws and regulations. They all receive a copy of TVT Title VI Plan and commit to ensuring that no person is excluded from participation in. or denied the benefits of transit services on the basis of race, sex, LEP, disability, gender identity sexual orientation, age, color, or national origin, as protected by Title VI Civil Rights Act of 1964, Civil Rights Restoration Act of 1987 and subsequent related acts and FTA Circular 4702.1.

Community Outreach is a requirement of Title VI. Recipients and sub recipients shall seek out and consider the viewpoints of minority and low-income populations while conducting public outreach. Recipients have wide latitude to determine what specific measures are most appropriate and should make this determination based on the composition of the affected population, the public involvement process, and the resources of the recipient.

As an agency receiving federal financial assistance, we have made the following community outreach efforts:

*Public Meetings: TVT holds public and stakeholder meetings to introduce possible pilot projects, routes or schedules change when needed.*



TVT will conduct a four-factor analysis:

- a. Determine the eligible Limited English Proficient (LEP) populations (Example: the data on percent of LEP's within the service area, i.e. 25% are Spanish LEP'S, etc.). This will be done through the use of EJScreen or information requested through COMPASS the metropolitan planning association for Southwest Idaho.
- b. Determine the frequency with which the LEP individuals come in contact with the program through the use of surveys, website, postings at local venues (i.e. churches, grocery stores, library, etc.) and public meetings (i.e. outside the Walmart, public Library, etc.)
- c. Identify the nature and importance of the program, activity or service provided to the LEP populations (i.e. scheduling information, riders guide, complaint forms, route changes due to construction, policies and procedures, etc.). TVT will take this information and conduct a survey of the LEP populations to determine what the communities identified think is most important.
- d. Cost does not prohibit TVT from providing language services through GOOGLE translate, in-house staff for Spanish speaking passenger's or interpretive call center for other languages and posting vital documents in Spanish on the TVT website.

*Board Meetings: Treasure Valley Transit's Board of Directors meets the last Tuesday of every month, 9:00am, and the public is invited to attend.*

*TVT regularly attends Health and Human Services meetings in the cities, in which, it serves. In the past, TVT has used public hearings and public comment sessions for programs such as Transit Improvement Plan (TIP).*

*TVT also participates in community resource fairs and public marketing and outreach activities.*

TVT submits to the Idaho Transportation Department an application for funding during the scheduled application periods. The application requests funding for both capital and operating assistance and a part of the application process requires public notice, which includes a 30-day public comment period.

- What is your plan to include Disadvantage Business Enterprises (DBE)

TVT will make a good faith effort to include Disadvantage Business Enterprises (DBE's) in this project. The first thing we will do is to search the Idaho Transportation Department Directory for DBE's.

<https://itd.dbesystem.com/FrontEnd/SearchCertifiedDirectory.asp?XID=9178&TN=itd>,



- Identify any local Labor Unions

TVT is not affiliated with any labor unions in the rural areas that we serve. The Valley Regional Transit Authority contracts out their large and small urban services. They are represented by Local 378.

- c. Provide Attachment B: Milestone Reporting

### **Section 3: Project Benefits/Evaluation**

**a. Improve safety.**

The new CNG replacement tanks will ensure the existing public transportation services operating within District 3 continue to operate in a safe, dependable, and easily accessible manner.

Increased safety for drivers and vehicles, driver safety in our vehicles is of major importance. A well scheduled and executed preventative maintenance plan reduces vehicle downtime by up to 60% and helps achieve adequate performance. The most important benefit is extending the mechanical useful life of the current fleet which will be a necessity to maintaining current levels of transit service.

**b. Improve mobility.**

Mobility is an essential human need, no more or less vital to our existence than clean and safe air, water and food, as well as public safety and security. As such, mobility is a quality-of-life issue, and for those unable to provide their own mobility due to health, age, economic or other conditions, public transit can bridge the gap. Likewise, to ensure the well-being and future of our society, we have chosen to provide space for social programs to assist our community citizens in need. Often, those requiring human services rely on public transit to get them there.

The primary benefit of this project is the general population will receive the continuance of our current level of transit service without interruption. Ensuring them quality opportunity for mobility.

**c. Support local economic development and expand economic opportunity.**

TVT works closely with local businesses to educate them about the economic advantages of public transit. The tax benefits that they can receive and the benefit of stable transportation for their employees. Large businesses look at the transit options when deciding on what community they may want to locate to. The local chambers of commerce and the Department of Labor look to public transportation to offer these benefits to the business community.



**a. TVT intends to continually evaluate success of the project as follows:**

Treasure Valley Transit will continue to track and monitor the condition of vehicle assets by regularly conducting inspections as outlined in our Vehicle Preventative Maintenance Plan. This allows us to plan and budget to maintain and add continued value and life to our assets. Our inspections are conducted prior to going into any service. Any noted distresses will allow for proper planning, budgeting, and maintenance.

**b. TVT collects the following data and reports to ITD quarterly and to the National Transit Data Base annually:**

- Ridership
- Fares
- Mileage
- Services Miles and Hours
- Dead Head Miles and Hours
- Accidents (at fault or not at fault)
- Injuries
- Fatalities
- Complaints
- Other Incidents

Treasure Valley Transit will continue to track fleet performance by obtaining and analyzing the following Performance Metrics:

- Inspect for tire problems, low air, tread depth
- Inspect for wheel and rim problems, missing or loose lug nuts,
- Any leakage around outside of vehicle, underneath vehicle, and in the engine compartment
- All lights, blinkers, brakes, headlights etc.... are working
- No cracks in windshield or mirrors
- Vehicle Body in good condition, nothing loose or flapping or dented
- Any exhaust system defects
- Any steering defects
- Any braking defects
- All emergency equipment on board
- Start engine and check all gauges
- Operate wheelchair lift to ensure working properly



- Complete the TVT Pre Trip and Post Trip Inspection form and report to supervisor any defects noted

**a. TVT will sustain/maintain the project after the end of the grant period:**

The Operations Supervisor keeps a file for each vehicle that includes a record of all repairs and vehicle inspections as well as their associated costs. All daily inspection forms are also kept in a file. This helps to keep all maintenance records organized and allows the Operation Supervisor to collect data on a regular basis, identify any reoccurring problems or concerns as well as ongoing costs. The Operations Supervisor tracks and schedules all upcoming preventative maintenance, and annual DOT inspections as well as the CNG cylinder tank inspections. This allows for a minimization of maintenance related downtimes in the service schedule.

**TVT has the capacity to carry out the project as proposed:**

**Executive Director:** Terri Lindenberg has been with TVT since January 1992 when the Office of Rural Health Policy awarded a three-year grant to develop a Coordinated Transportation System in Canyon County and secure sustainable funding. TVT now serves a 10-county area, has thirty-five employees, and collaborates with multiple agencies. Terri's strength is in building partnerships and advocating for rural transportation on both the local and national stage.

**Certifications:** Certified Community Transit Manager CCTM and Certified Safety and Security Officer through the Community Transportation Association of America

**Assistant Director:** Debbie Maxwell has worked over 11 years in public transportation management and has been with TVT since May 2016. She oversees all aspects of TVT operations including but not limited to, procurement, fleet management, driver training and supervision of operational staff. In addition to these responsibilities she works closely with the Executive Director in the administration of TVT in the finance and grants departments.

**Certifications:** Certified Safety and Security Officer through the Community Transportation Association of America, Passenger Assistance Safety and Sensitivity Certified

**Operations Supervisor:** Fred Maxwell has been with TVT since January 2023 and brings extensive CDL transportation management experience as well as public transportation driving experience. Fred is directly responsible for supervising, evaluating, and training drivers. He is also responsible to ensure TVT Vehicle Maintenance Plan, TVT Facility Maintenance Plan, and the TVT Safety Security and Emergency Preparedness Plan are adhered to.

**Certifications:** Designated Employer Representative through Wienhoff Drug Testing, First Aid/CPR through the American Heart Association, Passenger Assistance Safety & Sensitivity Training certificate through the Community Transportation Association of America, Vehicle Maintenance Management and Compliance certified through Community Transportation Association of America.





***Mobility Manager:*** Miranda Murray has been with TVT since January 2013 and brings extensive experience in dispatch, scheduling and coordinating services with various agencies in the 10-county area. Miranda's role as Mobility Manager oversees the dispatch and scheduling component and monitors for efficiencies. She works closely with the statewide Medicaid broker and the Department of Health and Welfare Medicaid Division. In addition, her skills in marketing, print material and knowledge of technology (dispatch software and hardware) have been instrumental.

***Certifications:*** Certified Community Transit Supervisor; Certified Professional Dispatcher through the Community Transportation Association of America

***Finance and Human Resource Manager:*** Rebecca Soto has been with TVT since September 2019 and has worked in both the private and non-profit sector since 2009. She began her career as a Staff accountant, Senior Audit Associate and Accounting Supervisor. She currently processes TVT's 5309, 5310, 5311 and 5339 grants with attention to detail and accuracy.

***Education:*** Bachelor of Business Administration (BBA) in Accountancy 2013 and member of the national Society of Human Resource Managers (SHRM) and the Local Chapter

***Day / Willis, CPA's:*** Tabbatha Willis prepares TVT's monthly Financial Statements for the TVT Board of Directors and provides direct oversight of the grant reimbursement process. TVT is proud to note a clean opinion without findings since we have been required to have an A-133 Annual Audit done by an independent Accounting Firm.



**Section 4: Project Budget**

**Budget Narrative:**

It is estimated the CNG tank replacement to include parts, taxes, shipping and labor for installation is \$12,500. We will order three tanks and keep two on hand as back up in case of another inspection failure.

Description	Quantity	Price	Total
CNG Cylinder	3	\$10,000	\$30,000
Labor for Installation	3	\$ 2,500	\$ 7,500
Total			\$37,500

- a. Itemized estimated project budget included in documentation.**
- b. Attachment A: Project Budget Request Form included in documentation**



## **ATTACHMENTS**

- **Project Budget**
- **Estimated quote**
- **Milestone Reporting**
- **NEPA (Not Applicable)**
- **Sole Source Aquifer (Not Applicable)**
- **Rolling Stock Worksheet**
- **Demonstration of Need**
- **TVT Organizational Chart**
- **TVT FY23 Audit**
- **Letters of Support**
- **CNG cylinder tank inspection report and invoice**



**Application Information Form**

Applicant: Treasure Valley Transit, Inc.

Authorized Representative: Debbie Maxwell

Address: 1136 W. Finch Drive, Nampa ID 83651

Phone: 208-463-9111

Email Address: [debbie@treasurevalleytransit.com](mailto:debbie@treasurevalleytransit.com)

DUNS #: 884972332

Architect/Engineer/Planner if applicable: (Contact Name): Schlager Zimmerman Architects, Dion Zimmerman, Principle

Phone: 208-866-3457

Address: 1179 Pleasant View Drive, Weiser, Idaho 83672

**PROJECT Description:**

This project is for Phase 2 for site development improvements for the Bus Parking area to include asphalt paving and a covered, enclosed bus parking structure. In addition, the City of Nampa has included street improvements and a walking path for Treasure Valley Transit Administrative Facility located at 3101 S. Powerline, Nampa, Idaho 83686. This project will house administrative staff and vehicles of Treasure Valley Transit (TVT), a private non-profit public transportation company operating in rural southwestern Idaho since 1992.

TOTAL PROJECT COST: \$2,980,550

FEDERAL SHARE: \$2,980,550 LOCAL MATCH: N/A



### **Section 1: Project Description**

- a) **FTA Program Eligibility:** Discuss how project meets the FTA funding source program purpose.

This project is for Phase 2 of site development improvements for the bus parking area to include asphalt paving and a covered, enclosed bus parking structure. In addition, the City of Nampa has included street improvements and a walking path for Treasure Valley Transit Administrative Facility located at 3101 S. Powerline, Nampa, Idaho 83686, as a condition in the Conditional Use Permit. This project will house all local vehicles of Treasure Valley Transit (TVT), a private non-profit public transportation company operating in rural southwestern Idaho since 1992.

Treasure Valley Transit is an eligible recipient as a private nonprofit 501(c)3 operator of public transportation that currently receives 5311 funding. This project meets this FTA funding source program by making resources available to States and designated recipients to replace, rehabilitate, and purchase bus related facilities.

- b) **ITD Call for Project Priorities:** Discuss how the project meets the ITD-PT call for project priorities.

This project meets the number one priority of Idaho Transportation Department-Public Transportation, the need to maintain/expand existing capital assets. This funding will allow continuation of existing services.

The bus parking area is an unpaved gravel surface with a storage building located near the York Ave. roadway. Treasure Valley Transit would like to improve the parking area by paving the site and building a covered, enclosed bus parking structure. A site aerial map is included as additional documentation, on the site map the storage building is labeled building 3. In Phase 2, we will procure a qualified asphalt and excavation company to mobilize, grade, and pave the asphalt paving according to the engineering recommendations. In a separate procurement, we will seek a qualified architect and engineering firm to develop a stormwater drainage report and design a new enclosed bus parking structure. This will be a major improvement to the infrastructure of the property.

- c) **Application Scope of Work:** Describe in detail the scope of work for the project you are proposing:

The scope of work for Phase 2 of the project consists of site development improvements for the bus parking area to include asphalt paving and a covered, enclosed bus parking structure. In addition, the City of Nampa has included a walking path to be constructed as a condition of the approved Conditional Use Permit. Preliminary design concepts and estimated costs have been completed by Phase I Architect & Engineering Firm.



The Bus Storage Facility Building is expected to be constructed using a pre-manufactured steel building component with steel exterior siding and roofing. The building will incorporate concrete foundations and reinforced building slabs. The building's square footage is currently designed at 9000 square ft. and has been positioned to allow maximum flexibility within the allowable site. A total of (24) 12'x12' overhead doors will be added to each bus storage bay and (4) man doors are expected to be positioned around the building footprint. The structure is expected to be insulated and heated with gas fired unit heaters throughout the building. Interior lighting and emergency egress lighting will be included. Preliminary design concept is attached as additional documentation.

We have separated the project into three separate scopes of work for prioritizing and budgeting purposes. The priority is the building and concrete. We could do the asphalt first, however, upon building the structure later we would have to remove a considerable amount of the already finished asphalt for the installation of the footings for the new structure. If we do the concrete and footings at the same time as the asphalt, it will create a safety issue with rebar and footings sticking out of the concrete and asphalt until the building can be built. The building and concrete should be done first. The site development and drainage should be completed second, and lastly the improvements to the street and walking path as agreed upon in the Conditional Use Permit. The budget outlines the estimated costs of each of the three scopes.

**Also included as additional back up documentation is a Preliminary Design Drawing.**

TVT acquired the property on April 10, 2023. The work for Phase 1 which included renovations on the interior and exterior directly around the administrative building will be completed in July 2024. The driveway and parking area improvements are not included in this phase. It is critically important to make these infrastructure improvements for TVT operations. The Nampa site will house up to 25 ADA medium duty buses and ADA transit vans. These vehicles provide demand response services within the Canyon County rural and small urban areas and back-up vehicles during regular scheduled service maintenance for the Snake River Transit and Mountain Home Community Transit vehicles.

TVT operates this service Monday through Friday, and the vehicles will be coming and going on the gravel site multiple times a day. This will put a lot of travel onto the gravel driveway and parking area. With the weather conditions constantly changing, the weight of the vehicles, and the frequency of driving vehicles that is required on the gravel will create potholes and cause snow plowing issues. This will create maintenance problems in the driveway and parking area which will need to be graded and the potholes filled on a regular basis. By making these improvements, TVT will be able to protect our assets from outdoor weather conditions and protect our employees from adverse weather conditions when they are beginning or ending their scheduled shift. Additionally, reduce



maintenance costs by not having to grade and maintain the driveway and parking area on a regular basis.

Included in the line-item budget “exterior” improvements is the pricing for updated and improved keypad fencing, exterior and interior lighting, and added cameras for security.

Treasure Valley Transit is committed to maintaining its facilities and equipment to protect its investment and to prolong the useful life of its assets. We believe service of the highest quality to our customers cannot be maintained without the most efficient operating and support program we can provide. By investing in the new asphalt paving and bus parking structure it will provide less wear and tear on transit vehicles and provide a cleaner, smoother, and more comfortable riding experience.

The City of Nampa made a condition of the approval of the Conditional Use Permit that a 10’ wide paved pedestrian path be located along the south side of York Ave from S Powerline Rd. to the Bray Lateral Bridge be constructed. This walking path will connect the green belt to the Wilson Ponds walking path and provide the community with a safer pathway. This supports alternative modes of travel which is identified as a priority for the City of Nampa.

This asphalt paving and enclosed bus parking structure is a shovel ready infrastructure project. The preliminary planning, engineering, and design have all been completed. Once the balance of funding needed has been secured, we can finalize the engineering and the design and plans to begin construction immediately. It is critical to obtain enough funding to complete the project as originally envisioned.

### **Marketing/Advertising/Public participation efforts**

TVT is quick to take advantage of opportunities to publicly participate in local events. We take this opportunity to introduce our services and provide information to the public. For example, TVT staff recently sponsored and attended the 2023 Regional Economic Summit on November 6th, which was held in Cascade, Idaho this year. The summit gave TVT staff the opportunity to obtain a bigger picture of current economic challenges we face nationally, regionally, and locally. There were several opportunities available for networking with local government leaders and business owners, and it provided us with an opportunity to introduce our new route, the New Meadows Gold Line. We were able to provide marketing and scheduling material at the registration table. These forums are a great opportunity to address questions in a very positive and transparent manner.

TVT uses electronic media resources to inform the public of our services and instructs people how to use them in each of our service areas. We have a website, [treasurevalleytransit.com](http://treasurevalleytransit.com), a Facebook





page and an X account. These are listed on all our brochures, schedules, and vehicles. Our services are marketed to each of our service areas in different ways. Each service is branded to facilitate local ownership by the residents, elected officials, and the business community. Advertisements for local services and/or events are placed in the local newspaper and local community magazines. TVT also belongs to the local chamber of commerce in each of our service areas and participates whenever possible in local events like the McCall Winter Carnival annual parade.

a) Ridership History

Service	FY21	FY22	FY23	+/-
MCT -Green Line	9,453	11,657	16,560	42%
MCT- Red Line	15,043	20,416	25,028	23%
MCT – Blue Line	516	1026	2689	162%
MCT – Gold Line			348	
SRT-Idaho	14,771	16,726	17,960	7%
MHCT-City/AFB	4,886	4767	5,038	6%
Demand Response	32,500	35,313	34,269	(3%)
<b>Total Ridership</b>	<b>77,169</b>	<b>89,907</b>	<b>101,982</b>	<b>13%</b>



## **Section 2: Project Planning**

### **a) Tie project to specific goals in ITD Statewide Public Transportation Plan:**

#### **1. Ensure the Safety and Security of Public Transportation**

This project meets the goal highlighted in the Idaho Transportation Department Public Transportation plan “Ensure the safety and security of public transportation”. The action item under this goal is for capital investments for bus stops, transit centers, and paths of travel. The next action item under this goal is funding to support state of good repair. All of Treasure Valley Transit assets are included in the ITD Transit Asset Management Plan.

This project also meets another goal highlighted in the Idaho Transportation Department-Public Transportation plan “Provide a Transportation System that Drives Economic Opportunity”. The public transportation system in Nampa is headquarters to all TVT services and operations within District 3 rural southwest Idaho. This project will provide the people within District 3 with connections to medical, educational, cultural, social, and recreational outlets.

### **b. Describe the Project Development Process**

- Describe coordination with local stakeholders on project development and involvement.

TVT recognized the need for a new facility and started to explore the potential in 2015. TVT organized a Transit Oriented Development Committee which consisted of staff from the following agencies: Treasure Valley Transit, Inc, Valley Regional Transit Authority, Community Planning Association of Southwest Idaho, City of Nampa Economic Development Department, Elderly Opportunity Agency, Metro Community Services, and the Nampa Senior Center. Several properties were ranked in consideration for this project, and one property was selected by the committee. TVT was awarded grant funding as of October 2019 to begin the NEPA, appraisal and appraisal review. All was on track to move forward with the property until the COVID-19 pandemic arrived in March 2020. At that point the property became unavailable because the seller took it off the market, and the project could not move forward.

TVT consulted with a local commercial realtor to look for new properties or vacant land to design and build a new facility. This became a race against time as commercial property was being sold as



soon as it came on the market with multiple cash offers above fair market value. TVT held a Strategic Planning Session with its Board of Directors and staff, and the Nampa facility was identified as one of four main initiatives and a top priority. A key component to this initiative was to accommodate future growth and purchase adequate land to meet this requirement looking out on a 5–10-year horizon.

Over the next couple of years several properties were identified and pursued, but TVT was never successful in procuring a suitable property until 2022. On September 29, 2022, the State of Idaho Department of Administration listed a Surplus Property. This property was perfectly suited for TVT's needs. Working with the Idaho Transportation Department Public Transportation and the Federal Transit Administration-Region X we were able to submit a Categorical Exclusion and receive approval to move forward with an Appraisal and Appraisal Review on November 1, 2022.

We were able to close on the property dated April 12, 2023. This occurred after an amendment to the Future Land Use Map was approved by the Nampa City Council on February 6, 2023, and the County approved a Conditional Use Permit on April 7, 2023.

- Describe efforts undertaken to coordinate with Minority and Low-Income Population

TVT has interviewed stakeholders, transit users, and other community groups throughout the planning process to include the Minority and Low-Income Populations.

TVT has published a link on our website where the Title VI plan, Public Notice Process, the Riders Guide, and the Complaint and Appeals Process can be located.

- What is your plan to include Disadvantage Business Enterprises (DBE)

TVT will make a good faith effort to include Disadvantage Business Enterprises (DBE's) in this project. The first thing we will do is to search the Idaho Transportation Department Director for DBE's.

<https://itd.dbesystem.com/FrontEnd/SearchCertifiedDirectory.asp?XID=9178&TN=itd>,

- Identify any local Labor Unions

TVT is not affiliated with any labor unions in the rural areas that we serve. The Valley Regional Transit Authority contracts out their large and small urban services. They are represented by Local 378.



c. Provide Attachment B: Milestone Reporting

Included in Documentation

**Section 3: Project Benefits/Evaluation**

**a. Improve safety.**

By funding this project the bus structure will add safety to TVT vehicle assets by sheltering them while not in operation in an enclosed, locked, well-lit bus parking structure. With the vehicles out of adverse weather conditions, it will reduce the possibility of slip and falls with drivers while pre-tripping vehicles and preparing for their shifts.

**b. Improve mobility.**

By having a safe, dry, warm area to prepare for the beginning or end of a shift our drivers will improve on time performance. By investing in the new asphalt paving, it will provide less wear and tear on transit vehicles, providing a cleaner, smoother, and more comfortable riding experience.

**c. Support local economic development and expand economic opportunity.**

The development of the new transit facility provides an opportunity for coordination among key stakeholders. Stronger transit systems allow access to our passengers to health and educational institutions, cultural, social, and recreational outlets.

The Nampa Facility will help Treasure Valley Transit achieve several different types of goals, such as:

- Create a working environment that is pleasant and comfortable.
- Raise the profile of and support for public transit within the community.
- Allow staff parking on site.
- Provide a secure, covered, enclosed space to store and protect transit vehicles.
- Provide upgraded keypad fencing to deter vandalism and add security and safety for assets and employees
- Provide upgraded lighting for added security and better lighting for employees
- Security cameras for added security and safety

**a. TVT intends to continually evaluate success of the project as follows:**

Once TVT is notified that we have been awarded the necessary funding to complete the project the



following will be our measures of success:

- Issuance of Invitation to bid once we receive the notification of funding awarded
- Conduct the Pre-Bid Meeting with several eligible vendors in attendance
- Receive a minimum of two eligible proposals for the General Contractor award
- Issue the Notice to Proceed to contractor and begin the construction of the project
- Follow the construction schedule as laid out by the Architect and General Contractor
- Have successful inspections and review monthly by the Architect of Record
- Remain within projected budget.
- Process draws in a timely manner
- Have substantial completion of construction by September 2026.
- Close out Grant with ITD by September 2026

**b. Include in the description what kinds of data will be collected and discuss specific measures**

- ADA compliance
- Are exterior lights in working order
- Is the entrance and exits free of obstructions
- Inspection and condition of paved surfaces
- Are doors and windows free from cracks or broken parts
- Condition of roof
- Any signs of vandalism or structure damage
- Are evacuation diagrams posted throughout the building
- Are all exit signs working
- Check pipes and lines for leakage
- Have filters been changed and clean
- Are thermostats in good working order
- Is alarm system in good working order

This list is not all inclusive a more comprehensive facility inspection list is provided as additional documentation.

**c. TVT intends to sustain/maintain the project after the end of the grant period:**

TVT will continue to work closely with the Idaho Transportation Department to secure continued funding to maintain our facility. TVT will continue to advocate for state funding through the legislative process by working closely with key legislators, agencies, and other supporters of public transportation. Until such funding is available, we will continue to meet our match requirements through the cities and



counties we serve. In addition, we will seek funding through foundations advertising and grant opportunities on a regional and national level.

TVT maintains its facilities and equipment to protect its investment in and prolong the useful life of its assets. The facilities and equipment will be maintained at a minimum to the specifications in the operation and maintenance manuals provided upon the completion of the project.

TVT conducts a thorough inspection of facilities and equipment on a quarterly basis. TVT has an inspection list form that is utilized during the inspection and all applicable items are inspected and noted on the form. A copy of the inspection list is included as additional documentation. The following highlights the areas that are inspected:

- Facility interior
- Electrical systems
- Heating system
- Air conditioning
- Private protection (alarms/fire etc...)
- Emergency evacuation
- Facility exterior

Any emergency repairs shall be immediately addressed. A log of needed non-urgent repairs shall be maintained and appropriate staff are notified to incorporate repair costs into budgetary planning. All permanent records are kept at the Nampa Administrative Office.

**Facility Maintenance Plan and inspection form are submitted with this application as supplemental documentation.**

**TVT has the capacity to carry out the project as proposed:**

**Executive Director:** Terri Lindenberg has been with TVT since January 1992 when the Office of Rural Health Policy awarded a three-year grant to develop a Coordinated Transportation System in Canyon County and secure sustainable funding. TVT now serves a 10-county area, has thirty-five employees, and collaborates with multiple agencies. Terri's strength is in building partnerships and advocating for rural transportation on both the local and national stage.

**Certifications:** Certified Community Transit Manager CCTM and Certified Safety and Security Officer through the Community Transportation Association of America

**Assistant Director:** Debbie Maxwell has worked over 11 years in public transportation management and has been with TVT since May 2016. She oversees all aspects of TVT operations including but not limited to, procurement, fleet management, driver training and supervision of operational staff. In addition to these responsibilities she works closely with the Executive Director in the administration of TVT in the finance and grants departments.



*Certifications:* Certified Safety and Security Officer through the Community Transportation Association of America, Passenger Assistance Safety and Sensitivity Certified

**Operations Supervisor:** Fred Maxwell has been with TVT since January 2023 and brings extensive CDL transportation management experience as well as public transportation driving experience. Fred is directly responsible for supervising, evaluating, and training drivers. He is also responsible to ensure TVT Vehicle Maintenance Plan, TVT Facility Maintenance Plan, and the TVT Safety Security and Emergency Preparedness Plan are adhered to.

*Certifications:* Designated Employer Representative through Wienhoff Drug Testing, First Aid/CPR through the American Heart Association, Passenger Assistance Safety & Sensitivity Training certificate through the Community Transportation Association of America, Vehicle Maintenance Management and Compliance certified through Community Transportation Association of America.

**Mobility Manager:** Miranda Murray has been with TVT since January 2013 and brings extensive experience in dispatch, scheduling and coordinating services with various agencies in the 10-county area. Miranda's role as Mobility Manager oversees the dispatch and scheduling component and monitors for efficiencies. She works closely with the statewide Medicaid broker and the Department of Health and Welfare Medicaid Division. In addition, her skills in marketing, print material and knowledge of technology (dispatch software and hardware) have been instrumental.

*Certifications:* Certified Community Transit Supervisor; Certified Professional Dispatcher through the Community Transportation Association of America

**Finance and Human Resource Manager:** Rebecca Soto has been with TVT since September 2019 and has worked in both the private and non-profit sector since 2009. She began her career as a Staff accountant, Senior Audit Associate and Accounting Supervisor. She currently processes TVT's 5309, 5310, 5311 and 5339 grants with attention to detail and accuracy.

*Education:* Bachelor of Business Administration (BBA) in Accountancy 2013 and member of the national Society of Human Resource Managers (SHRM) and the Local Chapter

**Day / Willis, CPA's:** Tabbatha Willis prepares TVT's monthly Financial Statements for the TVT Board of Directors and provides direct oversight of the grant reimbursement process. TVT is proud to note a clean opinion without findings since we have been required to have an A-133 Annual Audit done by an independent Accounting Firm.





#### **Section 4: Project Budget**

##### **Budget Narrative:**

TVT was awarded a 5339 Rural Capital Grant in the amount of \$2,451,920 for property acquisition, closing costs, environmental process, appraisal, appraisal review, and facility updates as approved in the CE attached. The term of the grant is October 1, 2022-September 30, 2024. The acquisition occurred on April 10, 2023, totaling \$1,239,382 including closing costs with 80% federal funds in the amount of \$991,505 and 20% local match in the amount of \$247,876. With the existing balance of funding, TVT can make most of the improvements identified as needed in the CSHQA Capital Needs Assessment report. We called the acquisition and slight renovations and upgrades to the building Phase 1.

In Phase 2 the project is identified as site development improvements for the bus parking area to include asphalt paving and a covered and enclosed bus parking structure. In addition, the City of Nampa has included street improvements and a walking path for Treasure Valley Transit Administrative Facility located at 3101 S. Powerline, Nampa, Idaho 83686.

We have estimated the cost of the project in three separate costs for prioritization and budgeting purposes. Priority 1 is the Building and Concrete, estimated at \$1,805,929 total construction costs, priority 2 is Site Development and Drainage estimated at \$852,373, and priority 3 is Street and Walking Path Improvements is estimated at \$322,248. An itemized detailed list of cost estimate for each priority is included as additional documentation.

- a. Itemized estimated project budget included in documentation.**
- b. Attachment A: Project Budget Request Form included in documentation**



## **ADDITIONAL DOCUMENTATION**

### **Exhibit A- BUDGET**

- Preliminary Design Drawing
- Preliminary Cost Estimate for Building and Concrete
- Preliminary Cost Estimate Site Development and Drainage
- Preliminary Cost Estimate Street and Walking Path Improvements

### **Exhibit B- MILESTONE**

### **Exhibit C- NEPA**

### **Exhibit C RR - NOT APPLICABLE**

### **Exhibit D- NEED**

- TVT Organizational Chart
- TVT FY23 Audit Summary
- County Approval Letter for Conditional Use Permit
- City Approval letter for change to Future Land Use Map with condition for walking path
- County Conditional Use Permit Staff Report with exhibits includes multiple letters of support.
- Letters of Support/Commitment
- TVT Facility Maintenance Program Policy
- FTA Approved Categorical Exclusion for Phase 1



**Application Information Form**

Applicant: Treasure Valley Transit, Inc.

Authorized Representative: Debbie Maxwell

Address: 1136 W. Finch Drive, Nampa ID 83651

Phone: 208-463-9111

Email Address: [debbie@treasurevalleytransit.com](mailto:debbie@treasurevalleytransit.com)

DUNS #: 884972332

Architect/Engineer/Planner if applicable: (Contact Name): **Not Applicable**

Phone: \_\_\_\_\_

Address: \_\_\_\_\_

**PROJECT Description:**

This project is to purchase six Ranger 4 (internal Verizon Modem, GPS, WiFi) tablets used for our fixed route systems. We recently purchased the Trip Spark ITS system through the CTAA statewide procurement. We need to have some back-up tablets on hand in case a breakdown or technical problem arises with one of the tablets. I estimate two back up tablets per system area will be sufficient.

TOTAL PROJECT COST: \$26,870

FEDERAL SHARE: \$26,870 LOCAL MATCH: N/A



### **Section 1: Project Description**

- a) FTA Program Eligibility: Discuss how project meets the FTA funding source program purpose.

Treasure Valley Transit is an eligible recipient as a private nonprofit 501(c)3 operator of public transportation that currently receives 5311 funding. This project meets this FTA funding source program purpose by purchasing 6 electronic computer tablets to use as a backup to replace any broken or nonworking tablets currently used on the fixed route system for data collection.

- b) ITD Call for Project Priorities: Discuss how the project meets the ITD-PT call for project priorities

This project meets the number one priority of Idaho Transportation Department-Public Transportation, the need to maintain/expand existing capital assets. This funding will allow continuation of existing services.

- c) Application Scope of Work: Describe in detail the scope of work for the project you are proposing:

This project is to purchase six Ranger 4 (internal Verizon Modem, GPS, WiFi) tablets used for our fixed route systems. We recently purchased the Trip Spark ITS system through the CTAA statewide procurement. We need to have some back-up tablets on hand in case a breakdown or technical problem arises with one of the tablets. I estimate two back up tablets per system area will be sufficient.

The tablets are used daily throughout a driver's shift to collect data. The tablets are used to collect the following data:

- Automatic Vehicle Location
- AVL Data Collection to feed traveler information
- Computer Assisted Passenger Counter
- Display of Stop List
- Automated Updates of Stop List upon completion
- Two-Way messaging
- Emergency alarm
- Onboard Schedule Adherence
- Integrated Rules Based Engine Alerts and Messaging
- Screen blocker
- Fares
- Vehicle mileage
- Service hours and mileage
- Dead head miles and hours



The Idaho State Public Transportation Plan has four goals. One of the four goals identified is to preserve the existing public transportation network. These tablets are necessary to maintain and preserve existing services. If one of the current tablets goes down, we do not have a backup tablet to replace it. If this occurs TVT will be forced to track all of the data manually as has been done in the past. This opens the potential for human error to occur and puts an additional burden on the drivers and staff.

**Qualitative:**

1. Increased productivity for TVT staff
2. Integration with our current data base
3. 24/7 access to data and remote access in case of an emergency
4. User friendly driver tablets with GPS and Automatic Vehicle Location
5. Accurate Data tracking for the National Transit Data Base reports

**Quantitative:**

1. Significant time/cost savings for TVT staff
2. Significant time/cost savings for TVT management
3. Improved reporting for Management and Board of Director oversight

a) Ridership History

Service	FY21	FY22	FY23	+/-
MCT -Green Line	9,453	11,657	16,560	42%
MCT- Red Line	15,043	20,416	25,028	23%
MCT – Blue Line	516	1026	2689	162%
MCT – Gold Line			348	
SRT-Idaho	14,771	16,726	17,960	7%
MHCT-City/AFB	4,886	4767	5,038	6%
Demand Response	32,500	35,313	34,269	(3%)
<b>Total Ridership</b>	<b>77,169</b>	<b>89,907</b>	<b>101,982</b>	<b>13%</b>



### Marketing/Advertising/Public participation efforts

TVT's marketing and advertising efforts include opportunities to publicly participate in local events. We take these opportunities to introduce our services and provide information to the public. For example, TVT staff recently attended the 2023 Regional Economic Summit, November 6th, 2023, which was held in Cascade, Idaho this year. The summit gave TVT staff the opportunity to obtain a bigger picture context of current economic challenges we face nationally, regionally, and locally. There was much opportunity available for networking with local government leaders and business owners and provide us with an opportunity to introduce our new route, New Meadows Gold Line. We were able to provide marketing and scheduling material at the registration table. These forums also provide us with a great opportunity to address questions in a very positive and transparent manner.

In addition, TVT uses electronic media resources to inform the public of our services and instructs people how to use them in each of our service areas. We have a website, [treasurevalleytransit.com](http://treasurevalleytransit.com), a Facebook page and a twitter account, these are listed on all our brochures, schedules, and vehicles. Our services are marketed to each of our service areas in different ways. Each service is branded to facilitate local ownership by the residents, elected officials, and the business community. Advertisements for local services and/or events are placed in the local newspaper and local community magazines. TVT also belongs to the local Chamber of Commerce in each of our service areas and participates whenever possible in local events like the McCall Winter Carnival annual parade.



## **Section 2: Project Planning**

### a) Tie project to specific goals in ITD Statewide Public Transportation Plan:

#### 1. Ensure the Safety and Security of Public Transportation

TVT's priority is the safety and security of our employees and the passengers they serve. This is demonstrated through our policies and procedures that cover all aspects of operations from maintenance standards for the vehicles, training of employees, drug and alcohol testing program, etc. This information is available in our Personnel Manual, Driver Handbook, Title VI Plan, Safety and Security & Emergency Preparedness Plan.

#### 2. Encourage Public Transportation as an Important Element of an Effective Multi-Modal Transportation System in Idaho

TVT works closely with our elected officials and other agencies to advocate for a truly Multi-Modal system in the areas we serve. This includes bus, demand response, vanpool, bike and pedestrian modes.

#### 3. Preserve the Existing Public Transportation Network

TVT is seeking continued grant funding to preserve the existing services we provide.

#### 4. Provide Transportation System that Drives Economic Opportunity

TVT works closely with the chambers of commerce, and other local businesses in order to promote public transportation and provide access to jobs which in turn spurs economic growth.

### b) Describe the Project Development Process

1. Community involvement from the city and county, chambers of commerce, local businesses, health and human service agencies and the potential passengers (i.e. advisory group, public hearings, social media, surveys etc.)
2. Selection of the appropriate mode of transportation-fixed route, deviated fixed route or demand response service; van pool, ride share or voucher program
3. Funding mechanism:
  - 5339 Grant program





- City and county funding
  - Medicaid revenue
  - Employer benefit for transit passes
  - School district
  - Advertising
  - Seek State of Idaho funding
  - Private grants and foundations
4. Assure sustainability through stable funding
  5. Monitoring and Evaluation of the service in an on-going manner
  6. Route restructure as appropriate through input of all
  7. Participate in the City and County development of master plans

For a successful service to be implemented and maintained by stable funding it is imperative that the planning process involves ongoing input from affected parties. Meaningful engagement ensures accountability, effective communications, and consistencies.

- Describe efforts undertaken to coordinate with Minority and Low-Income Population

TVT has interviewed stakeholders, transit users, and other community groups throughout the planning process to include the Minority and Low-Income Populations.

- What is your plan to include Disadvantage Business Enterprises (DBE)

TVT will make a good faith effort to include Disadvantage Business Enterprises (DBE's) in this project. The first thing we will do is to search the Idaho Transportation Department Director for DBE's.

[https://itd.dbesystem.com/FrontEnd/SearchCertifiedDirectory.asp?XID=9178&TN=itd,](https://itd.dbesystem.com/FrontEnd/SearchCertifiedDirectory.asp?XID=9178&TN=itd)

- Identify any local Labor Unions

TVT is not affiliated with any labor unions in the rural areas that we serve. The Valley Regional Transit Authority contracts out their large and small urban services. They are represented by Local 378.



- c) Provide Attachment B: Milestone Reporting

### **Section 3: Project Benefits/Evaluation**

**a. Improve safety.**

The new computer tablets will ensure the existing public transportation services operating within District 3 continue to operate in a safe, dependable, and easily accessible manner.

This project will significantly increase efficiency within our dispatch and fixed route operations. The new system will allow efficiency and improve productivity by increasing trip capacity. The new system will reduce errors made in the data collection and improve the method of producing the various reports needed for Management and Board of Director oversight. The required reporting for the National Transit Data Base, which is currently done manually, will be collected more efficiently. Accurate data is imperative, and this has been a weakness.

**b. Improve mobility.**

The tablets allow the dispatchers and drivers to communicate much more efficiently and safely with each other using real time information. The tablet provides two-way text messaging improving service reliability, effectively manage incident alerts, and simplify the reporting process using a user-friendly dashboard system.

**c. Support local economic development and expand economic opportunity.**

TVT works closely with local businesses to educate them about the economic advantages of public transit. The tax benefits that they can receive and the benefit of stable transportation for their employees. Large businesses look at the transit options when deciding on what community they may want to locate to. The local chambers of commerce and the Department of Labor look to public transportation to offer these benefits to the business community.

### **TVT intends to continually evaluate success of the project as follows:**

We are proactively seeking funding to purchase the necessary equipment to avoid any gaps in data collection if this were to occur. TVT conducts daily pre-trip inspections on all vehicles. As a part of the inspection the tablets will be evaluated to ensure they are working properly. It is estimated the tablets should last for up to five years on average before they will need to be replaced.



**a. TVT collects the following data and reports to ITD quarterly and to the National Transit Data Base annually:**

- Ridership
- Fares
- Mileage
- Services Miles and Hours
- Dead Head Miles and Hours
- Accidents (at fault or not at fault)
- Injuries
- Fatalities
- Complaints
- Other Incidents

**b. TVT will sustain/maintain the project after the end of the grant period.**

TVT will continue to work closely with the Idaho Transportation Department to secure continued funding to maintain our facilities and vehicles. TVT will continue to advocate for state funding through the legislative process by working closely with key legislators, agencies, and other supporters of public transportation. Until such funding is available we will continue to meet our match requirements through the cities and counties we serve. In addition, we will seek funding through foundations advertising and grant opportunities on a regional and national level.

Treasure Valley Transit will continue to track fleet performance annually by obtaining and analyzing the following Performance Metrics:

- Average operating cost per mile
- Average overall cost per vehicle
- Fleet Inventory and age of fleet
- Average mile per vehicle annually
- Utilization
- Average maintenance cost per vehicle
- Accidents
- Out of Service days
- Percentage of fleet due/overdue for replacement



**TVT has the capacity to carry out the project as proposed:**

**Executive Director:** Terri Lindenberg has been with TVT since January 1992 when the Office of Rural Health Policy awarded a three-year grant to develop a Coordinated Transportation System in Canyon County and secure sustainable funding. TVT now serves a 10-county area, has thirty-five employees, and collaborates with multiple agencies. Terri's strength is in building partnerships and advocating for rural transportation on both the local and national stage.

**Certifications:** Certified Community Transit Manager CCTM and Certified Safety and Security Officer through the Community Transportation Association of America

**Assistant Director:** Debbie Maxwell has worked over 11 years in public transportation management and has been with TVT since May 2016. She oversees all aspects of TVT operations including but not limited to, procurement, fleet management, driver training and supervision of operational staff. In addition to these responsibilities she works closely with the Executive Director in the administration of TVT in the finance and grants departments.

**Certifications:** Certified Safety and Security Officer through the Community Transportation Association of America, Passenger Assistance Safety and Sensitivity Certified

**Operations Supervisor:** Fred Maxwell has been with TVT since January 2023 and brings extensive CDL transportation management experience as well as public transportation driving experience. Fred is directly responsible for supervising, evaluating, and training drivers. He is also responsible to ensure TVT Vehicle Maintenance Plan, TVT Facility Maintenance Plan, and the TVT Safety Security and Emergency Preparedness Plan are adhered to.

**Certifications:** Designated Employer Representative through Wienhoff Drug Testing, First Aid/CPR through the American Heart Association, Passenger Assistance Safety & Sensitivity Training certificate through the Community Transportation Association of America, Vehicle Maintenance Management and Compliance certified through Community Transportation Association of America.

**Mobility Manager:** Miranda Murray has been with TVT since January 2013 and brings extensive experience in dispatch, scheduling and coordinating services with various agencies in the 10-county area. Miranda's role as Mobility Manager oversees the dispatch and scheduling component and monitors for efficiencies. She works closely with the statewide Medicaid broker and the Department of Health and Welfare Medicaid Division. In addition, her skills in marketing, print material and knowledge of technology (dispatch software and hardware) have been instrumental.

**Certifications:** Certified Community Transit Supervisor; Certified Professional Dispatcher through the Community Transportation Association of America

**Finance and Human Resource Manager:** Rebecca Soto has been with TVT since September 2019 and has worked in both the private and non-profit sector since 2009. She began her career as a Staff accountant, Senior Audit Associate and Accounting Supervisor. She currently processes TVT's 5309, 5310, 5311 and 5339 grants with attention to detail and accuracy.



*Education:* Bachelor of Business Administration (BBA) in Accountancy 2013 and member of the national Society of Human Resource Managers (SHRM) and the Local Chapter

**Day / Willis, CPA's:** Tabbatha Willis prepares TVT's monthly Financial Statements for the TVT Board of Directors and provides direct oversight of the grant reimbursement process. TVT is proud to note a clean opinion without findings since we have been required to have an A-133 Annual Audit done by an independent Accounting Firm.



**Section 4: Project Budget**

**Budget Narrative:**

- a. It is estimated each of the tablets will cost \$26,870 total, this amount includes the tablet, mounts, cables, licensing, and installation will need to be considered in the pricing. I have attached a copy of a quote received from Trip Spark itemizing the costs for each \$4,217.

Description	Numbers	Costs	Total
Tablets	6	\$4,217	\$25,302
Freight			\$ 50
Taxes	6% Tax		\$ 1,518
Total Project Cost			\$26,870

- b. Itemized estimated quote for project budget included in documentation.
- c. Attachment A: Project Budget Request Form included in documentation



## **ATTACHMENTS**

- **Project Budget**
- **Quote for cost of hardware equipment**
- **Milestone Reporting**
- **NEPA (Not Applicable)**
- **Sole Source Aquifer (Not Applicable)**
- **Rolling Stock Replacement Report (Not Applicable)**
- **Demonstration of Need**
- **TVT Organizational Chart**
- **TVT FY23 Audit**
- **Letters of Support**





*Treasure Valley Transit*

January 8, 2024

Mr. Sam Carroll  
ITD-Public Transportation  
PO Box 7129  
Boise, Idaho 83707-1129

**RE: CARES One-Time Application**

Dear Sam,

It is our pleasure to submit the attached application for the CARES One-Time funding. The FTA CARES Grant makes resources available to 5311 grant recipients for Capital projects. The project scope is for the transition of a fixed route bus to a van for the Mountain Home Air Force Base.

By funding this grant submission ITD will also ensure the TVT "Mission of providing viable public transportation solutions that deliver the highest levels of quality and satisfaction to our consumers and partners, by offering safe, dependable and easily accessible means to riders of all ages and all physical abilities" is successful.

I look forward to the opportunity to work with ITD staff to ensure that all necessary information has been submitted and address any questions that may offer clarification. Thank you for your time and consideration in this important application.

Sincerely,

Terri Lindenberg  
Executive Director  
Treasure Valley Transit, Inc.  
1136 W. Finch Drive  
Nampa, Idaho 83651  
Office: 208-463-9111



**Application Information Form**

Applicant: Treasure Valley Transit, Inc.

Authorized Representative: Terri Lindenberg

Address: 1136 W. Finch Drive Nampa, ID 83651

Phone: 208-463-9111

Email Address: terri@treasurevalleytransit.com

DUNS #: 88-497-2332

Architect/Engineer/Planner if applicable: (Contact Name): N/A

Phone: \_\_\_\_\_

Address: \_\_\_\_\_

**Project Description:**

In August and December of 2023, TVT had planning meetings with the Air Force Base military personnel to determine the viability of a vanpool vs. fixed route service for cost effectiveness and efficiency. This grant is to shift from a 24-passenger medium duty bus to a 9-passenger van.

TOTAL PROJECT COST: \$155,588

FEDERAL SHARE: \$155,588 LOCAL MATCH: N/A

## **Section 1: Project Description**

### **A.) FTA 5311 CARES Program Eligibility:**

The FTA 5311 CARES Grant makes resources available to States and designated recipients to replace, rehabilitate, and purchase buses/vans and related equipment. This project meets this FTA funding source program purpose by purchasing a new van to maintain existing service to the Mountain Home Air Force Base. Eligible recipients include states and federally recognized Indian Tribes. Subrecipients include nonprofit organizations.

TVT is an experienced public transportation provider operating this service since its establishment in 2005.

### **B.) ITD Call for Project Priorities:**

This project meets the number one priority of Idaho Transportation Department-Public Transportation: the need to maintain/expand existing capital assets. Treasure Valley Transit, Inc. (TVT) is seeking to **maintain existing service** to the Mountain Home Air Force Base.

### **C.) Scope of Work:**

In August and December of 2023, TVT had planning meetings with the Air Force Base military personnel to determine the viability of a vanpool vs. fixed route for cost effectiveness and efficiency. This grant is to shift from a 24-passenger medium duty bus to a 9-passenger van.

The Air Force Base Route serves those with access to the base, which includes the military personnel, private contractors, family members, etc. It operates Monday through Friday, from 7:00am until 9:00am and 3:00pm until 5:00pm, with the exception of designated holidays and base closures.

The Air Force Base (AFB) approached TVT in 2005 with a critical need for access to public transportation. The AFB is a training center for US flight personnel and international troops, such as Israel and other allies, to be stationed at the base for several months. A component for the Mountain Home AFB to be competitive in securing these training wings was access to public transportation. The AFB is 21 miles from the City of Mountain Home. Temporary military personnel do not have access to a personal vehicle, and housing is primarily in the City of Mountain Home as well as access to the local community and amenities. In the past, there was a concern that the base would be designated for closure but this has not happened. It shows the importance of public transit in small rural communities and the economic impact that is a direct result of the Air Force Base.

### **D.) Contractor Information: Will this project use third party contractors? Not Applicable**

## **Section 2: Project Planning**

### **A.) Tie Project to the specific goals in ITD's Statewide Public Transportation Plan:**

#### **1.) Ensure the Safety and Security of Public Transportation**

TVT's first priority is the safety and security of our employees and the passengers they serve. This is demonstrated through our policies and procedures that cover all aspects of operations from maintenance standards for the vehicles, training of employees, drug and alcohol testing program, etc. This information is available in our Personnel Manual, Driver Handbook, Title VI Plan, Safety and Security & Emergency Preparedness Plan.

#### **2.) Encourage Public Transportation as an Important Element of an Effective Multi-Modal Transportation System in Idaho**

TVT works closely with our elected officials and other agencies to advocate for a truly Multi-Modal system in the areas we serve. This includes bus, demand response, vanpool, bike and pedestrian modes.

#### **3.) Preserve the Existing Public Transportation Network**

TVT is seeking continued grant funding in order to preserve the existing services we provide and expand services based on available funding.

#### **4.) Provide Transportation System that Drives Economic Opportunity**

TVT works closely with the chambers of commerce and local businesses in order to promote public transportation and provide access to jobs, which in turns spurs economic growth.

**B.) Describe Project Development Process:** TVT's emphasis on proper planning and realistic expectations has resulted in the successful services we provide.

1. TVT Board of Directors have a strategic planning retreat every three years. They have identified four strategy pillars, strategic challenges and opportunities, five strategic initiatives followed by operational plans and timelines to meet them in three years.
2. TVT staff actively participate in the planning processes at the state and local levels along with the Metropolitan Planning Association (COMPASS).
3. Community involvement from the City and County, Chambers of Commerce, local business, Health and Human Service agencies and the potential passengers (i.e. advisory group, public hearings, social media, surveys, etc.)
4. Selection of the appropriate mode of transportation – fixed route, deviated fixed route or demand response service; van pool, ride share or voucher program

5. Funding mechanism:

- 5311 Grant Program
- City and County Funding
- Medicaid Revenue
- Employer Benefit for transit passes
- School District
- Advertising
- Private Grants and Foundations

6. Assure sustainability through stable funding

7. Monitoring and Evaluation of the services in an on-going manner

8. Route restructure as appropriate through input of all parties

9. Participate in the City and County development of master plans

To implement and maintain a successful service with stable funding it is imperative that the planning process involve the community as a whole.

**Mountain Home Community Transit:**

In April 2022, TVT initiated a route restructure for service in the City of Mountain Home and the Air Force Base (AFB) to include the Mountain Home School District. Analysis of the service concluded a reduction of three hourly AFB runs, add an additional City run and include two after school runs for the Mountain Home School District.

In August and December of 2023, TVT had planning meetings with the AFB military personnel to determine the viability of a vanpool vs. fixed route for cost effectiveness and efficiency.

**Minority and Low Income in Compliance with Title VI**

Treasure Valley Transit (TVT) created a Title VI Plan and submits the plan to Idaho Transportation Department as is required.

TVT has interviewed stakeholders, transit users, and other community groups throughout the planning process to include the Minority and Low-Income Populations.

TVT has published a link where the Title VI plan, Public Notice Process, the Riders Guide, and the Complaint and Appeals Process can be located.

TVT provides quality language assistance services to individuals with limited English proficiency to ensure meaningful access to transportation programs, services, and activities.

TVT holds public and stakeholder meetings to introduce possible pilot projects, routes or schedule changes when needed.

**TVT's Plan to include Disadvantaged Business Enterprises (DBE's) in this project:**

TVT has a DBE Plan and Goal. ITD publishes the current DBE Directory, which lists the companies by category of service they provide. This could be for landscaping, concrete work or architecture and design, etc. The language in all TVT Invitations to Bid or Requests for Proposals is as follows:

**Disadvantaged Business Participation.**

Bidders must ensure that in regard to any Contract entered into pursuant to this advertisement; disadvantaged businesses will be afforded full opportunity to submit Bid in response to this invitation and will not be discriminated against on the grounds of race, color, sex, national origin or as otherwise required by law in consideration for an award.

**Identify Local Labor Unions as identified by the Department of Labor:**

TVT is not affiliated with labor unions in the rural areas that we serve. Local 378 represents the Valley Regional Transit Authority.

**Please list the public participation efforts of this application:**

TVT staff are available at open houses to talk about the projects and answer questions about the public transportation services we provide. These forums are a great opportunity to address questions in a very positive and transparent manner. In addition, we participate in local community events and display our information.

In addition, TVT uses electronic media resources to inform the public of our services and instructs people how to use them in each of our service areas. We have a website, treasurevalleytransit.com, a Facebook page, and X account, these are listed on all our brochures, schedules, and vehicles. Our services are marketed to each of our service areas in different ways. Each service is branded to facilitate local ownership by the residents, elected officials, and the business community. Advertisements for local services and/or events are placed in the local newspaper and local community magazines. TVT also belongs to the local Chamber of Commerce in each of our service areas and participates whenever possible in local events.

**Attachment B: Milestone Reporting**

**Attachment C:**

NEPA Worksheet (*Not Applicable*)

Sole Source Aquifer (SSA) (*Not Applicable*)

Rolling Stock Replacement Report (*See attached documentation*)

## **Section 3: Project Benefits/Evaluation**

### **Project Benefits:**

This new van for the Mountain Home AFB will ensure the continuation of this service, operating since 2005, will operate in a safe, dependable, and easily accessible manner.

We believe our mission as a company is parallel with the Idaho Transportation Departments mission: your safety, your mobility, and your economic development.

### **TVT's Goal:**

Maintain existing services in an effective and efficient manner within the funding parameters

- Objective One: Fiscal Responsibility
- Objective Two: Safety and Training
- Objective Three: Be an Employer that attracts High Quality Employees

### **Improve efficiency or increase ridership:**

TVT strives for efficiency in all of its service areas and monitors each service on an on-going basis.

Our strategies to increase ridership are as follows:

- Monitor ridership data
- Seek input from drivers
- Seek input from the passengers
- Seek input from the community at large
- Meet with mayors and city councils
- Meet with the chambers of commerce about new business coming into the community
- Low income housing developments present an opportunity for new riders

### **Improve Safety:**

The benefits to having a new vehicle will be fewer mechanical breakdowns, and offering a safe, dependable, rider experience.

TVT has developed a Safety, Security and Emergency Preparedness Plan (SSEPP). This SSEPP outlines the processes used to make informed decisions that are appropriate for our operations, passengers, employees and communities.

The SSEPP provides a capability that will:

1. Ensure that safety, security and emergency preparedness are addressed during all phases of system operation, including the hiring and training of agency personnel, the procurement and maintenance of agency equipment, the development of agency policies, rules and procedures; and coordination with local public safety and community emergency planning agencies.



2. Promote analysis tools and methodologies to encourage safe system operations through the identification, evaluation and resolution of threat and vulnerabilities and the ongoing assessment of agency capabilities and readiness.
3. Create a culture that supports safety and security and safe system operations.

Treasure Valley Transit ongoing safety activities include the following:

- Mandatory Quarterly Safety Meetings for all employees
- Management participation with local emergency preparedness planning agencies
- Internal Disaster Drills for all employees
- All drivers are required to be certified in the following trainings: First Aid/CPR, Passenger Safety and Sensitivity (PASS), Defensive Driving and Drug and Alcohol
- Annual driver evaluations and random ride along inspections
- One Certified Safety and Security Officer and one PASS Trainer is on staff.

#### **Improve Mobility:**

This new approach to “vanpool” is different from the standard ACHD van that is available from Ada or Canyon County to the base. Those vans are not accessible and prohibits veterans needing wheelchair access from riding. In addition, if you are a passenger who is visually impaired and need room for a seeing eye dog it would require the utilization of more space. The AFB route currently has a passenger who needs this accommodation. In utilizing the AFB driver there is room for flexibility for base half-days, and for picking up passengers that were outside the  $\frac{3}{4}$  of a mile fixed route boundary.

#### **Economic Development:**

The Mountain Home Air Force Base is the key economic driver of the City itself. This new innovative approach to start a vanpool instead of using a fixed route bus has the potential for growth and expansion while being cost effective and efficient. This will be critical to the AFB in the application process for new training opportunities to highlight this form of public transit available.

## **Project Evaluation:**

**Describe the methodology that will be used to measure and evaluate the project and determine the projects value to the community:**

### **A. TVT intends to continually evaluate and measure success of the project as follows:**

The year-to-year ridership comparisons per route take into account variables that would affect service (service reductions based on funding, inclement weather, etc.). TVT maintains a data tracking system that includes ridership/funding for the 5311 program, which establishes where we were historically, where we are today and will accurately reflect statistics as we move forward. This data is broken down into specific categories such as administrative and operational costs by line item and route performance. The information is prepared for the TVT Board of Directors and strategic planning purposes.

### **B. Description of data that will be collected and discuss specific measures.**

TVT tracks data daily that includes, but is not limited to; service hours and mileage broken into revenue, deadhead and allowance along with ridership split into appropriate categories per mode (adult, youth, senior and disabled). These operational and financial statistics are reported to the National Transit Data Base according to federal and state requirements. ITD-PT processes the information into District report cards that is a valuable document for the Public Transportation Advisory Council and others in understanding the benefit of public transit in Idaho. TVT is in the process of implementing TripsSpark technology, which will add new reports to the statistical and reporting processes currently in place. This determines annual ridership increases, cost per mile, cost per hour, cost per passenger and the viability of the service.

Treasure Valley Transit will continue to track fleet performance annually by obtaining and analyzing the following Performance Metrics:

- Average operating cost per mile
- Average overall cost per vehicle
- Fleet Inventory and age of Fleet
- Average mile per vehicle annually
- Utilization
- Average maintenance cost per vehicle
- Accidents
- Out of Service Days
- Percentage of Fleet due/overdue for replacement

**Attachment B: TVT Vehicle Maintenance Plan and Pre –Trip Inspection Form**

### **C. How often will data be collected, used and evaluated?**

The data is collected daily, compiled into monthly reports, submitted annually to the National Transit Data Base. TVT evaluates this data on an annual basis with a multi-year comparison and is under a three-year strategic planning process.

#### **TVT will sustain/maintain the project after the end of the grant period:**

This new innovative (accessible) vanpool approach will allow the service to continue through the Department of Defense passes which will be approximately \$180 per month per passenger. With maximum capacity at nine would create a revenue stream of \$19,440 annually. The primary cost savings is not paying labor and benefits for the driver. TVT would still pay all other associated insurances and operating costs such as fuel and maintaining the vehicle.

TVT will continue to work closely with the Idaho Transportation Department to secure continued funding to maintain our facilities and vehicles. TVT will continue to advocate for state funding through the legislative process by working closely with key legislators, agencies, and other supporters of public transportation. Until such funding is available we will continue to meet our match requirements through the cities and counties we serve. In addition, we will seek funding through foundations advertising and grant opportunities on a regional and national level.

#### **TVT demonstrates sufficient levels of capacity to carry out the project, manage the grant funding, and adhere to both FTA and State of Idaho rules.**

TVT has an exceptional management team to carry out the projects and manage the grants and funding that has been awarded:

**Executive Director:** Terri Lindenberg has been with TVT since January 1992 when the Office of Rural Health Policy awarded a three year grant to develop a Coordinated Transportation System in Canyon County and secure sustainable funding. TVT now serves a 10-county area, has thirty-five employees and collaborates with multiple agencies. Terri's strength is in building partnerships and advocating for rural transportation on both the local and national stage.

**Certifications:** Certified Community Transit Manager CCTM and Certified Safety and Security Officer through the Community Transportation Association of America

**Assistant Director:** Debbie Maxwell has worked over 11 years in public transportation management and has been with TVT since May 2016. She oversees all aspects of TVT operations including but not limited to, procurement, fleet management, driver training and supervision of operational staff. In addition to these responsibilities, she works closely with the Executive Director in the administration of TVT in the finance and grants departments.

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**Mobility Manager:** Miranda Murray has been with TVT since January 2013 and brings extensive experience in dispatch, scheduling, and coordinating services with various agencies in

the 10-county area. Miranda's role as Mobility Manager oversees the dispatch and scheduling component and monitors for efficiencies. She works closely with the statewide Medicaid broker and the Department of Health and Welfare Medicaid Division. In addition, her skills in marketing, print material and knowledge of technology (dispatch software and hardware) have been instrumental.

*Certifications:* Certified Community Transit Supervisor; Certified Professional Dispatcher through the Community Transportation Association of America

***Finance and Human Resource Manager:*** Rebecca Soto has been with TVT since September 2019 and has worked in both the private and non-profit sector since 2009. She began her career as a Staff accountant, Senior Audit Associate and Accounting Supervisor. Rebecca's expertise is in grants management including the reimbursement process, accounting and human resources. She currently processes TVT's 5309, 5310, 5311, and 5339 grants with attention to detail and accuracy.

*Education:* Bachelor of Business Administration (BBA) in Accountancy 2013 and member of the national Society of Human Resource Managers (SHRM) and the Local Chapter

**Day / Willis, CPA's:** Tabbatha Willis prepares TVT's monthly financial statements for the TVT Board of Directors and provides direct oversight of the grant reimbursement process. TVT is proud to note a clean opinion without findings since we have been required to have a "Government Auditing Standards" Annual Audit done by an independent Accounting Firm.

In 2022, ITD staff performed a site review, and TVT continues to remain a low risk auditee.

TVT has an annual review by National Interstate Insurance Co. who provides our fleet insurance. This is an in-depth review of our vehicles, maintenance files, and operator training records. TVT has had no findings throughout this process.

TVT has a contract with the Idaho Department of Health and Welfare (IDHW) Non-Emergency Medical Transportation (NEMT) Broker and there are requirements from IDHW within this contract for background checks, training, vehicle inspections, audits, and monitoring. There have been no findings throughout this process.

**Attachment A:** Includes the Organizational Chart, FY23 Audit Summary, and Letters of Support

## Section 4: Project Budget

TVT received independent cost estimates from three vendors.

- 1.) Creative Bus Sales price \$151,152
- 2.) Schetky Bus and Van Sales price \$114,122
- 3.) ABC Companies Georgia Contract \$113,844.60

The AFB requested the USB blocks that are \$200 a unit  $4 = \$800$

Striping: \$4,000

License and Registration = \$250

Taxes at 6% = 8,838

The Creative Bus Sales price of \$151,152 was significantly higher than Schetky and the ABC Company Georgia Contract by \$37,000 for the same vehicle specifications. TVT was only able to procure 3 vehicles instead of the 5 that were awarded in the FY23-24 5339 Congressional Application due to significant cost increases. In the event that a significant level of cost increase occur again TVT is requesting a 25% increase from the low range of \$114,000 at \$28,500 for a total of \$142,500 plus, USB block, striping, tax, license and registration is \$155,588.

This estimate is based on quotes TVT has received from qualified vendors and recent purchases made for similar products. This is a non-construction project, so Davis Bacon Wages are not applicable.

TVT will issue an Advance Payment Request Letter with the understanding that once the request has been funded TVT will have three days to disperse the funds.

### **Attachment A: Independent Cost Estimates**

ATTACHMENT A

Project Budget Request Form

Independent Cost Estimates

Organizational Chart

FY23 Audit Summary

Letters of Support

## Project Budget Request


<b>Subrecipient</b>	<b>Treasure Valley Transit, Inc.</b>
<b>Agreement Term</b>	<b>October 1, 2024-September 30, 2026</b>
<b>Contact Name</b>	<b>Terri Lindenberg</b>
<b>Address</b>	<b>1136 W Finch Drive, Nampa Idaho</b>
<b>Phone Number</b>	<b>208-463-9111</b>

FTA Grant	100/0		
5311	Total	Federal	Match
CARES	\$ 155,588.00	\$ 155,588.00	\$ -

Total Project Cost	Total Federal Request	Total Match Needed
\$ 155,588.00	\$ 155,588.00	\$ -

### Scope of Work

In August and December of 2023, TVT had planning meetings with the Air Force Base military personnel to determine the viability of a vanpool vs. fixed route for cost effectiveness and efficiency. This grant is to shift from a 24-passenger medium duty bus to a 9-passenger van.

\_\_\_\_\_  
 Terri Lindenberg  
 Subrecipient Printed Name  
  
  
 Subrecipient Signature  
  
 1/8/2024  
 Date

Local Match Source(s) for Project:

Not Applicable





Creative Bus Sales

## ADOA

**Solicitation #: BPM003324 / Contract #: CTR054848**  
**FY 2023**

Preparer: Paul Watson

### Base Model

Ram ProMaster 3500, 3.6L V-6, GVWR 9,350 lbs.



Base Model Price: \$ 151,152.00

Base Model Options: \$ -

Options: \$ -

CBS Published Options: \$ -

CBS Unpublished Options: \$ -

County Delivery Cost: N/A \$ 250.00

Vehicle Length	Lift Position	WC Positions	Total # Passengers	CDL Required
21'	Side Ramp	2	9	No

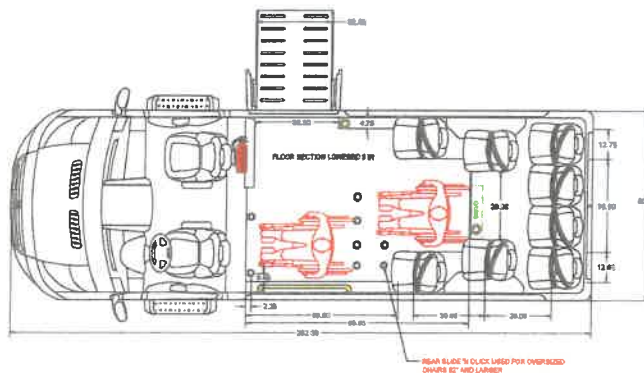
QTY Vehicles: 1 Total Contract Price: \$ 151,402.00

Per Vehicle Price: \$ 151,402.00

### Customer Info

<b>Customer:</b>	Treasure Valley Transit
<b>Address:</b>	1136 W. Finch Drive, Nampa, ID 83651
<b>Contact:</b>	Debbie Maxwell
<b>Office Phone:</b>	208-463-9111
<b>Mobile Phone:</b>	
<b>E-Mail:</b>	<a href="mailto:debbie@treasurevalleytransit.com">debbie@treasurevalleytransit.com</a>

### Floorplan



6/14/2023

Qty	Part #	Description	FY 2023 List Price	QTY Total
1		Manual Swing Away Ramp 32" WIDE	STD - Included	STD - Included
1		Gerflor Flooring	STD - Included	STD - Included
1		Panels for Walls: ABS Interior wall, ABS ceiling Insulation for walls	STD - Included	STD - Included
1		Q'Straint with SLIDE N CLICK	STD - Included	STD - Included
1		QUBE retractable system for 2nd position on back	STD - Included	STD - Included
1		Rear A/C & Rear Heat	STD - Included	STD - Included
1		New Exhaust System	STD - Included	STD - Included
1		2 - Passenger Freedman Seats, 3pt (on back-level 4 vinyl) curbside	STD - Included	STD - Included
1		2 - Passenger Freedman Seats, 3 pt (on back-level 4 vinyl) streetside	STD - Included	STD - Included
1		2 per van /1 Passenger rigid seats (level 4 vinyl) curbside	STD - Included	STD - Included
1		2 per van / 1 Passenger rigid seat (level 4 vinyl) streetside	STD - Included	STD - Included
1		Safety Kit (first aid kit, fire extinguisher, triangles)	STD - Included	STD - Included
1		Back up alarm	STD - Included	STD - Included
1		LED strip lighting	STD - Included	STD - Included
1		Emergency window	STD - Included	STD - Included
1		Storage bags (2) per Van	STD - Included	STD - Included
1		Driver and Passenger sidesteps	STD - Included	STD - Included
1		Handrails-& Decals	STD - Included	STD - Included
1		Amber LED light	STD - Included	STD - Included
1		Trans/Air 50K BTU AC Upgrade	Included Buy America Content	Included Buy America Content
1		Q'Straint InQline Assist	Included Buy America Content	Included Buy America Content
1		(2) Q'Straint One Tie Down System	Included Buy America Content	Included Buy America Content
1		Q'Straint Omni Floor	Included Buy America Content	Included Buy America Content
				\$ -
		<b>Subtotal Base Model Options:</b>		<b>\$ -</b>

**ADOA**
**Solicitation #: BPM003324 / Contract #: CTR054848**

# ProMaster 3500

## Standard Features

FTA Buy America compliant  
ADA-Compliant Low Floor Conversion  
Unibody Construction  
Front-Wheel Drive Powertrain  
Engine: 3.6 Liter Pentaster V-6 Gas, 280 HP  
6-Speed Automatic Transmission  
GVWR: 9,350 lbs.  
Wheelbase: 159"  
Overall Height: 101" Overall Width: 80"  
Turning Radius: 46.8'  
Oil Change Intervals: 8-10K miles  
Floor Drop: 9" Ground-to-First-Step Height: 12.5"  
Ramp Width: 32" Ramp Load Rating: 1,000 lbs.  
Manual Swing-Away Aluminum Ramp  
Offers 1 or 2 ADA-Compliant Wheelchair Positions  
ABS Interior Panels on Walls and Ceiling  
Closed Cell Foam Insulation in Walls and Ceiling  
Bus Style Entrance Door, 32" Clear Opening  
A&M Systems Door Header  
3-Point Lap/Shoulder Belts on All Seats  
LED Interior lighting  
No Modifications to OEM Drive Train or Suspension  
Powertrain Warranty: 5-Year / 60,000 Miles  
Body Conversion Warranty: 3-Year / 36,000 Miles

DATE: 1/16/2023

STATE OF ARIZONA PRICE AGREEMENT, ADOT NO. CTR054849, CONTRACT

PURCHASING AGENCY: **TREASURE VALLEY TRANSIT**

WE ARE PLEASED TO SUBMIT A PRICE QUOTE FOR OUR **SUNSET FORD TRANSIT**, WHICH INCLUDES THE FOLLOWING FEATURES AND BENEFITS FOR YOUR CONSIDERATION:



**SCHETKY BUS AND VAN SALES: THE LEADER IN TRANSPORTATION SINCE 1942**

- THE NORTHWEST'S LARGEST BUS AND VAN DEALER
- THE NORTHWEST'S ORIGINAL BUS DEALER, FOUNDED IN 1942
- FAMILY OWNED AND OPERATED, FOURTH GENERATION BUSINESS
- ONE OF THE NATION'S LARGEST AND LONGEST ESTABLISHED BUS DEALERS
- THE PREFERRED TRANSIT, SCHOOL BUS, AND RETAIL BUS DEALER, SERVING ALL TRANSPORTATION MARKETS

**SCHETKY SERVICE / WARRANTY / PARTS / SUPPORT**

- FOUR LOCATIONS, STRATEGICALLY LOCATED TO PROVIDE BEST SERVICE COVERAGE
- LARGEST ON-HAND AND DROP-SHIP PARTS AVAILABILITY IN THE NORTHWEST
- MOBILE FIELD SERVICE, WITH CAPABILITY TO WORK ON YOUR VEHICLES AT YOUR LOCATION
- LONGEST TENURED, MOST EXPERIENCED PARTS, SERVICE, AND SUPPORT PERSONNEL

## CONTRACT BASE VEHICLE CONFIGURATION

QTY	OPTION	DESCRIPTION	LIST	EXT
1		SUNSET VANS 130" WB FORD TRANSIT ADA VAN, 2 PASSENGER, 2 WHEELCHAIR POSITIONS BASE BUILD	\$ 83,774.34	\$ 83,774.34

## BASE VEHICLE FEATURES

QTY	OPTION	DESCRIPTION	LIST	EXT
1	BASE	E1C: 2023 Ford 150 130"wb MR 3.5L	STANDARD	INCLUDED
1	BASE	Wheelchair Lift - fully automatic ADA lift 403/404 complaint	STANDARD	INCLUDED
1	BASE	Overhead storage compartment above driver and passenger area	STANDARD	INCLUDED
1	BASE	Rows of bolted "L" track (holds 2 wheelchairs)	STANDARD	INCLUDED
1	BASE	Tie down straps for 2 wheelchairs 30/20 Tested DOT approved	STANDARD	INCLUDED
1	BASE	Interior dome lights (On/Off switch)	STANDARD	INCLUDED
1	BASE	Wheelchair lift light	STANDARD	INCLUDED
1	BASE	3/4 in sub floor with heavy duty Altro Flooring	STANDARD	INCLUDED
1	BASE	ABS interior kit (medium grey walls and roof liner both with insulation)	STANDARD	INCLUDED
1	BASE	Rear A/C and heat with in dash fan speed control in roof (OEM)	STANDARD	INCLUDED
1	BASE	Interlock for lift, brake, transmission, lift door	STANDARD	INCLUDED
1	BASE	Vehicle Backup Alarm	STANDARD	INCLUDED
1	BASE	Seat reinforcement kit	STANDARD	INCLUDED
1	BASE	Sign kit (Interior, Watch your step, No smoking, Emergency exit, All passengers must shall seat belts)	STANDARD	INCLUDED
1	BASE	Shoulder belt reinforcement kit	STANDARD	INCLUDED
1	BASE	Standard Length Van package (2023): Rear Lift	STANDARD	INCLUDED
1	BASE	Foldaway Seat - Single passenger folding seat forward facing Freedman	STANDARD	INCLUDED
1	BASE	Running Board - Driver-short and Passenger-long heavy duty running boards (grey powder coat)	STANDARD	INCLUDED
1	BASE	Grab handle - "B" pillar	STANDARD	INCLUDED
1	BASE	Safety kit - Web cutter, First Aid Kit 10 person, Fire Extinguisher 2.5lb	STANDARD	INCLUDED
1	BASE	Upgrade from standard securement in packages to Titan self tensioning	STANDARD	INCLUDED
1	BASE	Lighting Upgrade - LED interior dome light kit (Round replacement lights)	STANDARD	INCLUDED
1	BASE	3 Year Braun lift warranty	STANDARD	INCLUDED
1	BASE	5 year / 60,000 Ford Powertrain warranty (see Ford specifications) - remaining Ford Warranty	STANDARD	INCLUDED
1	BASE	High Strength Laminate in Clear or Tint	STANDARD	INCLUDED

## CONTRACT OPTIONAL EQUIPMENT

QTY	OPTION	DESCRIPTION	LIST	
<b>CHASSIS COST</b>				
1	148ELDRW2023	F4X: 2023 Ford Transit T350 EL HR DRW	\$ 8,817.00	\$ 8,817.00
<b>CONVERSION BASE SHELL - NO SEATS - ADD OPTIONS BELOW</b>				
1	HCT148EL	Extra Long HR Conversion Package 148 EL	\$2,162.00	\$ 2,162.00
<b>ABILITRAX FLOORING SYSTEM</b>				
<b>TRANSORT OPTIONS</b>				
1	HCSSE	Driver-Short/ Passenger-Long Heavy Duty Running Boards (Grey Powder Coat)	\$ 612.00	\$ 612.00



SEATING OPTIONS				
2	HCSF	Single Folding Seat Forward Facing Freedman	\$ 766.00	\$ 1,532.00
3	HCDSF	Double Passenger Folding Seat Forward Facing Freeman	\$ 1,609.00	\$ 4,827.00
SECUREMENT OPTIONS				
2	HCUQM	Upgrade From Standard Securement in Packages To Q-Straint Max Retractable	\$ 429.00	\$ 858.00
1	HCWT	Wide Tracks	\$ 121.00	\$ 121.00
2		Adjustable Height Shoulder Belts	\$ 29.00	\$ 58.00
2		Tie Down Storage Bag (please specify location) Rear walls	\$ 66.00	\$ 132.00
GURNEY OPTIONS				
ADDITIONAL OPTIONS				
1	H CRAH	Rear AC/Heat combo installed (Evaporator) Tie in 32k btu	\$ 1,962.00	\$ 1,962.00
1	H CLED	Upgrade To Interior Led Lighting Kit- Round Replacement Lights	\$ 198.00	\$ 198.00
1		Bus door area light (shines outside of door when open) 3ft	\$ 254.00	\$ 254.00
1		Mid Bus Door, 148"WB HR EL with Steps A&M door	\$ 7,500.00	\$ 7,500.00
DOT PACKAGES				
1	HCNCL1000FIB34 54-2	Upgrade - Braun Century-2 NHTSA Compliant Lift - Usable Platform 34x54 1000lb	\$ 475.00	\$ 475.00
WARRANTIES AVAILABLE				
ORIGINAL CONTRACT PRICE				\$ 113,282.34

### ADDITIONAL CUSTOMER OPTIONS

QTY	OPTION	DESCRIPTION	LIST	EXT
SUBTOTAL, FOB SCHETKY NORTHWEST WASHINGTON OFFICE				\$ -

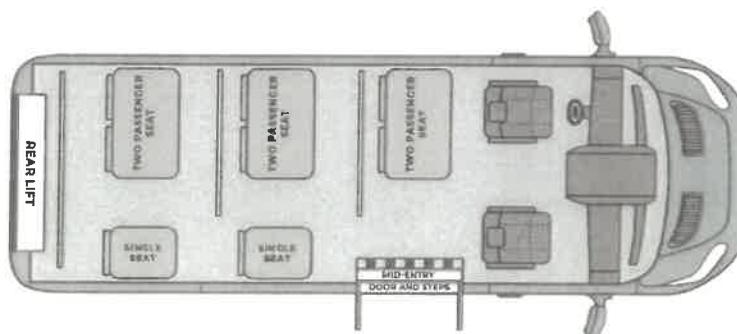
### VEHICLE DELIVERY

MILES	DESCRIPTION	LIST	EXT
280	DELIVERY TO CUSTOMER (PER MILE, WSDOT AGREEMENT)	\$ 3.00	\$ 840.00

### TOTAL SELL PRICE

VEHICLE TOTAL, FOB CUSTOMER (TAX NOT INCLUDED)	\$ 114,122.34
--	---------------

### FLOOR PLAN:





**TCI Mobility – Ford Transit 350HD**  
**Treasure Valley Transit**  
**Georgia DOAS Contract #99999-SPD-SPD0000212-0010**

**Chassis Specifications:**

Ford Transit Wagon – Body Code: U4X  
Extended length  
High roof  
Dual rear wheels  
10,360lb GVWR  
148" wheelbase  
195/75R 16 BSW tires  
Ford privacy glass  
Cruise Control  
AM/FM w/ Sync 4" screen  
Cruise control  
(4) sets of keys

**Body Conversion:**

Ford OEM walls/headliner  
Ford OEM side curtain airbags  
Ford OEM front/rear A/C & heat  
TCI Mobility rain gutters  
TCI Mobility LED lighting at ambulatory entrance  
Dual leaf glass bus style door, electric

**Flooring:**

14ga steel reinforced subfloor  
Laminated plywood subfloor  
Black diamond one-piece commercial non-skid TPO flooring

**Passenger Seating:**

Freedman GO-ES seating per floorplan  
Level #1 seating, TBD by TVT  
Grab handle on top of each seat

**Safety:**

Dual high visibility yellow grab rails to left and right of entrance door  
5lb fire extinguisher  
Rear backup alarm  
Seat belt cutter



First aid kit  
Road triangle kit

**ADA Equipment:**

Braun Century II, 1,000lb, 37" x 54" platform  
Q-Straint Q-8200-AT-L restraints (2)  
Q-Straint storage bags (2)

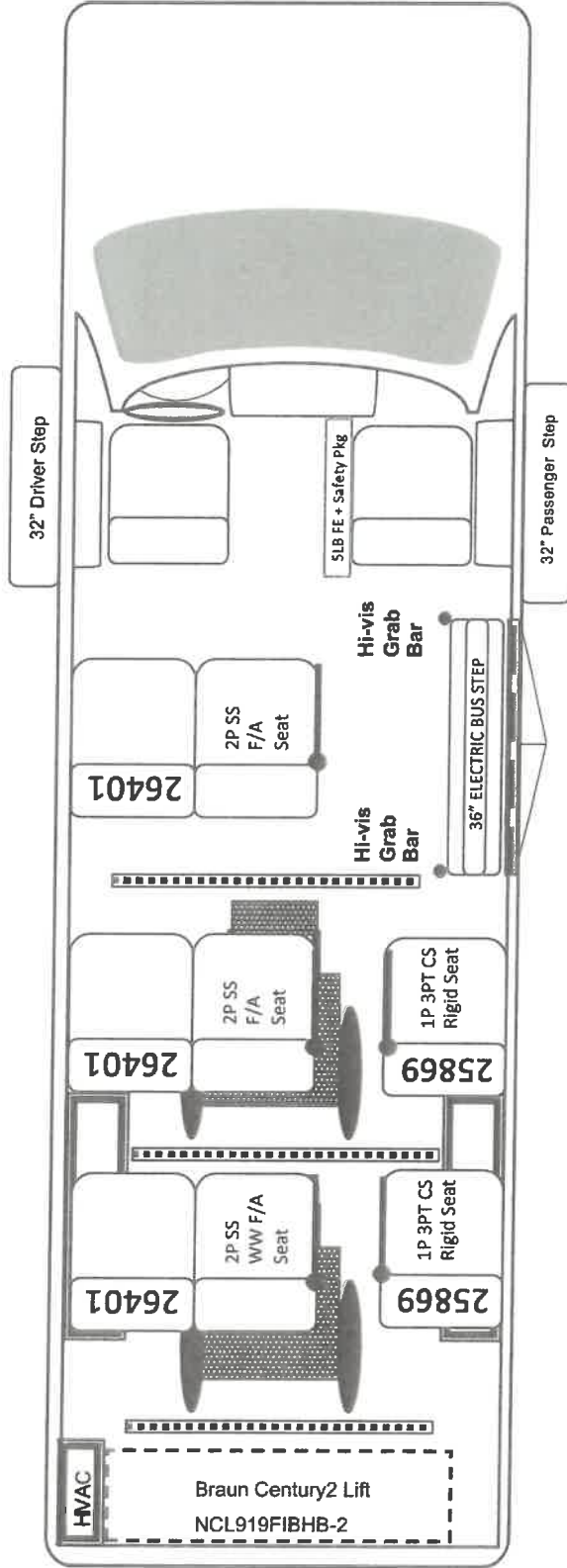
**Warranty:**

TCI Mobility Conversion: 4yrs/50,000 miles  
Ford Basic Vehicle: 3yrs/36,000 miles  
Ford Powertrain: 5yrs/100,000 miles





2023 Ford Transit T350-148" EL High Roof DRW



Drawn Exclusively For:  
**ABC COMPANIES**

APPROVED BY \_\_\_\_\_ DATE \_\_\_\_\_

DRAWN BY: **STEVE HOFFMAN**



**TCIMobility™**

TCI MOBILITY, LLC  
230 BOSSARDSVILLE RD.  
SCIOTA, PA 18354  
PA LIC# VD031392  
877-TCI-VANS

NOTE: Drawing is for reference only and may not accurately reflect a true representation of seating capacity or scale

rev5/23



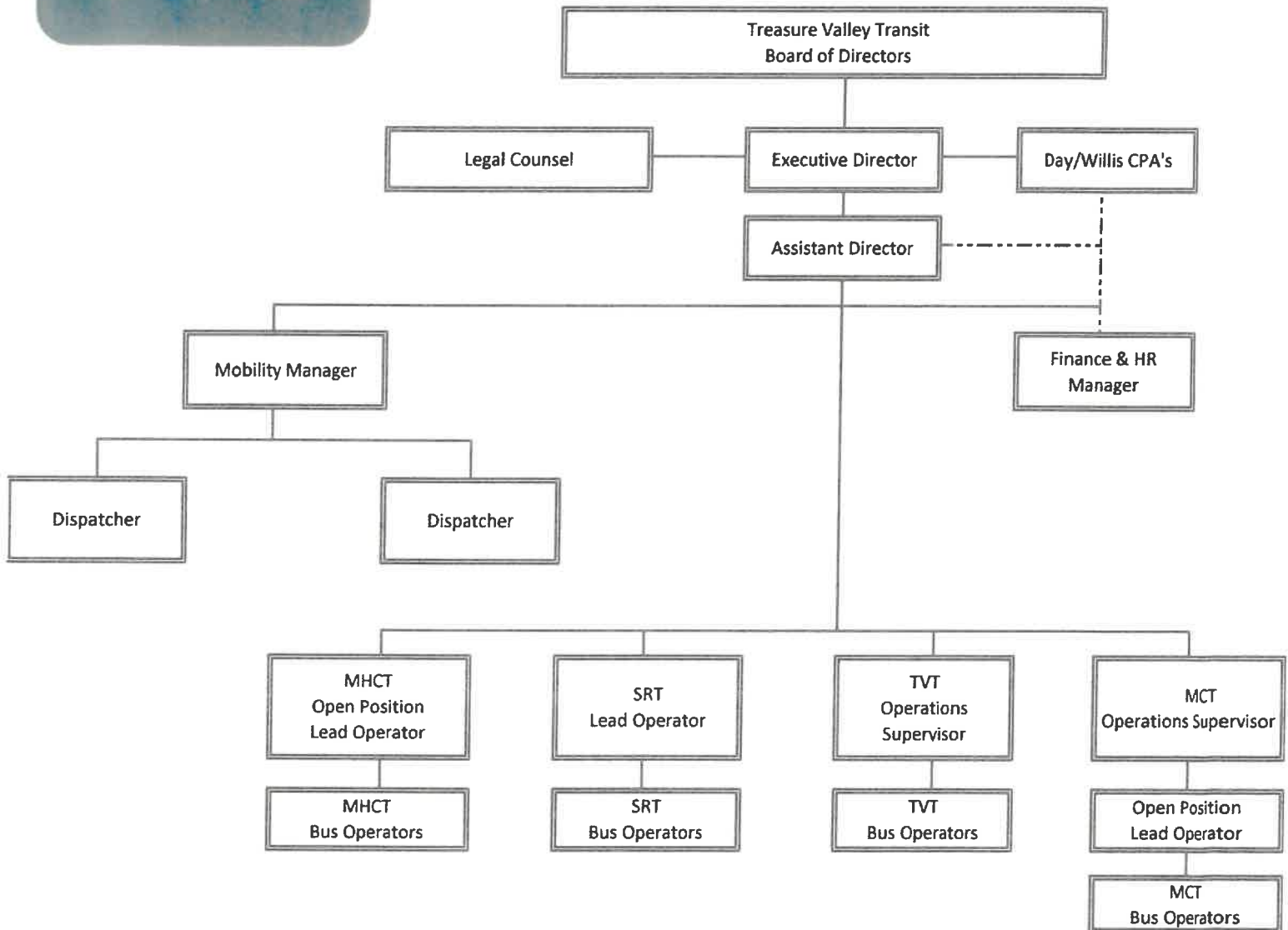
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# TREASURE VALLEY TRANSIT

## Organizational Chart



Date: December 22, 2023



**ZWYGART JOHN**

**CERTIFIED PUBLIC ACCOUNTANTS**

**Zwygart John & Associates CPAs, PLLC**

16130 North Merchant Way, Suite 120 ♦ Nampa, Idaho 83687

Phone: 208-459-4649 ♦ FAX: 208-229-0404

**Independent Auditor's Report on Internal Control Over Financial Reporting and on Compliance  
and Other Matters Based on an Audit of Financial Statements Performed in Accordance with  
*Government Auditing Standards***

**Board of Directors  
Treasure Valley Transit, Inc.  
Nampa, Idaho**

We have audited in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, the financial statements of Treasure Valley Transit, Inc. (a nonprofit organization), which comprise the statement of financial position as of September 30, 2023, and the related statements of activities and cash flows for the year then ended, and the related notes to the financial statements and have issued our report thereon dated December 4, 2023.

**Internal Control Over Financial Reporting**

In planning and performing our audit of the financial statements, we considered Treasure Valley Transit, Inc.'s internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of Treasure Valley Transit, Inc.'s internal control. Accordingly, we do not express an opinion on the effectiveness of Treasure Valley Transit, Inc.'s internal control.

*A deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

## **Compliance and Other Matters**

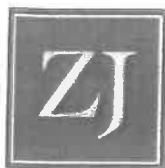
As part of obtaining reasonable assurance about whether Treasure Valley Transit, Inc.'s financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

## **Purpose of this Report**

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the organization's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the organization's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

*Zwygart John & Associates, CPAs, PLLC*

Nampa, Idaho  
December 4, 2023



**ZWYGART JOHN**

**CERTIFIED PUBLIC ACCOUNTANTS**

**Zwygart John & Associates CPAs, PLLC**

16130 North Merchant Way, Suite 120 ♦ Nampa, Idaho 83687

Phone: 208-459-4649 ♦ FAX: 208-229-0404

**Independent Auditor's Report on Compliance for Each Major Program and on Internal Control  
Over Compliance Required by Uniform Guidance**

Board of Directors  
Treasure Valley Transit, Inc.  
Nampa, Idaho

**Report on Compliance for Each Major Federal Program**

***Opinion on Each Major Federal Program***

We have audited Treasure Valley Transit, Inc.'s compliance with the types of compliance requirements identified as subject to audit in the OMB *Compliance Supplement* that could have a direct and material effect on each of Treasure Valley Transit, Inc.'s major federal programs for the year ended September 30, 2023. Treasure Valley Transit, Inc.'s major federal programs are identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

In our opinion, Treasure Valley Transit, Inc. complied, in all material respects, with the compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended September 30, 2023.

***Basis for Opinion on Each Major Federal Program***

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America (GAAS); the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States (*Government Auditing Standards*); and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Our responsibilities under those standards and the Uniform Guidance are further described in the Auditor's Responsibilities for the Audit of Compliance section of our report.

We are required to be independent of Treasure Valley Transit, Inc. and to meet our other ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion on compliance for each major federal program. Our audit does not provide a legal determination of Treasure Valley Transit, Inc.'s compliance with the compliance requirements referred to above.

***Responsibilities of Management for Compliance***

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules and provisions of contracts or grant agreements applicable to Treasure Valley Transit, Inc.'s federal programs.

## ***Auditor's Responsibilities for the Audit of Compliance***

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on Treasure Valley Transit, Inc.'s compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material, if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about Treasure Valley Transit, Inc.'s compliance with the requirements of each major federal program as a whole.

In performing an audit in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding Treasure Valley Transit, Inc.'s compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.
- Obtain an understanding of Treasure Valley Transit, Inc.'s internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of Treasurer Valley Transit, Inc.'s internal control over compliance. Accordingly, no such opinion is expressed.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.

### **Report on Internal Control Over Compliance**

*A deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. *A material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. *A significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the Auditor's Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance. Given these limitations, during our audit we did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that were not identified.



Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

*Zwygart John & Associates, CPAs, PLLC*

Nampa, Idaho  
December 4, 2023

**Treasure Valley Transit, Inc.**  
**Schedule of Findings and Questioned Costs**  
**For the Year Ended September 30, 2023**

**Section I - Summary of Auditor's Results**

*Financial Statements*

Type of auditor's report issued: Unmodified

Internal control over financial reporting:

Significant deficiencies disclosed? ☐ yes ☒ none reported

Material weakness(es) disclosed ☐ yes ☒ No

Noncompliance material to financial statements noted? ☐ yes ☒ no

*Federal Awards*

Internal control over major programs:

Significant deficiencies identified ? ☐ yes ☒ none reported

Material weakness(es) identified ? ☐ yes ☒ none reported

Type of auditor's report issued on compliance for major programs: Unmodified

Any audit findings disclosed that are required to be reported in accordance with 2CFR SECTION 200.516(A)? ☐ yes ☒ no

Identification of major programs:

Federal Assistance Listing Number(s)	Name of Federal Program
20.526, 20.207	Federal Transit Cluster

Dollar threshold used to distinguish between  
Type A and Type B programs: \$750,000

Auditee qualified as low risk auditee? ☒ yes ☐ no

**Section II - Financial Statement Findings**

None

**Section III - Findings and Questioned Costs for Federal Awards**

None

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December 15, 2023

Ms. Terri Lindenberg  
Executive Director  
Treasure Valley Transit, Inc.  
1136 W. Finch Drive  
Nampa, Idaho 83651



**Letter of Support for FY25 & FY26 Grant Applications**

Dear Ms. Lindenberg,

The Mountain Home Air Force Base (AFB) is not able to meet the local match required in FY25 for Mountain Home Community Transit's (MHCT) fixed route service going out to the AFB. AFB military personnel and TVT met in FY23 and FY24 to determine an option that would maintain the service at a lower cost to TVT and still meet the needs of the Air Force Base.

The 5311 rural grant application will provide funding to support a van operated by military personnel similar to a standard vanpool program. In addition, TVT is applying for a 5339 capital grant to purchase a 9-passenger accessible van. TVT is also applying for CARES Act funding through a one-time grant application for this van if funding is available.

The Idaho Public Transportation Plan 2018 identified needs, priorities, opportunities and potential solutions for public transportation within District 3 that includes the City of Mountain Home within Elmore County. Maintaining existing service was the number one priority.

Mountain Home Community Transit provides a valuable service to the military personnel in need of transportation to the Air Force Base from the City of Mountain Home.

The Mountain Home Air Force Base strongly supports Treasure Valley Transit's FY25-26 5311 and 5339 rural grant applications and the CARES Act one-time grant application.

Sincerely,

*Darius R. Outlaw*  
*Andrew Rivero*

Mountain Home Air Force Base  
366 Gunfighter Avenue  
Mountain Home AFB, Idaho 83648



November 15, 2023

Ms. Terri Lindenberg

Executive Director

Treasure Valley Transit, Inc.

1136 W. Finch Drive

Nampa, Idaho 83651

**Letter of Support for FY25 & FY26 Grant Applications**

Dear Ms. Lindenberg,

The City of Mountain Home provided \$30,000 in local match for FY24 for Mountain Home Community Transit (MHCT). MHCT provides a deviated fixed route service within the City of Mountain Home, the Air Force Base, and an after-school program for the Mountain Home School District.

The 5311 rural grant application will provide funding to maintain our current transportation program. TVT is applying for a 5339 capital grant that will replace a 2010 Chevrolet bus that has met its useful life. TVT is also applying for CARES Act funding through a one-time grant application. This grant is critical, as the cost of labor, fuel, and services has increased beyond the level of rural grant dollars currently available.

The Idaho Public Transportation Plan 2018 identified needs, priorities, opportunities, and potential solutions for public transportation within District 3 that includes the City of Mountain Home within Elmore County. Maintaining existing service was the number one priority.

Mountain Home Community Transit provides a valuable service to the residents of the City of Mountain Home. The 5% increase in ridership in FY23 and strong community support demonstrates this fact.

The City of Mountain Home strongly supports Treasure Valley Transit's FY25-26 5311 and 5339 rural grant applications and the CARES Act one-time grant application.

Sincerely,

The Honorable Mayor Sykes

City of Mountain Home

160 South 3rd East

Mountain Home, Idaho 83647

# Elmore County Board of Commissioners

Phone (208) 587-2129 Ext. 270

ELMORE COUNTY COURTHOUSE  
150 South 4th East Suite #3  
Mountain Home, Idaho 83647

Fax (208) 587-2159

**Albert Hofer**  
(208) 599-1620

**Crystal Rodgers**  
(208) 999-2206

**Franklin L. Corbus**  
(208) 599-1294

December 1, 2023

Ms. Terri Lindenberg  
Executive Director  
Treasure Valley Transit, Inc.  
1136 W. Finch Drive  
Nampa, Idaho 83651

## Letter of Support for FY25 & FY26 Grant Applications

Dear Ms. Lindenberg,

Elmore County provided \$5,075 in local match for FY24 for Mountain Home Community Transit (MHCT). MHCT provides city and county transit service within Elmore County, the Air Force Base, and an after-school program for the Mountain Home School District.

The 5311 rural grant application will provide funding to maintain our current transportation program. TVT is applying for a 5339 capital grant that will replace a 2010 Chevrolet bus that has met its useful life. TVT is also applying for CARES Act funding through a one-time grant application. This grant is critical, as the cost of labor, fuel, and services has increased beyond the level of rural grant dollars currently available.

The Idaho Public Transportation Plan 2018 identified needs, priorities, opportunities, and potential solutions for public transportation within District 3 that includes the City of Mountain Home within Elmore County. Maintaining existing service was the number one priority.

Mountain Home Community Transit provides a valuable service to the residents within Elmore County. The 5% increase in ridership in FY23 and strong community support demonstrates this fact.

Elmore County strongly supports Treasure Valley Transit's FY25-26 5311 and 5339 rural grant applications and the CARES Act one-time grant application.

Sincerely,

  
\_\_\_\_\_  
Albert Hofer, Chairperson

  
\_\_\_\_\_  
Franklin L. Corbus, Commissioner

  
\_\_\_\_\_  
Crystal Rodgers, Commissioner

January 9, 2024

Ms. Terri Lindenberg  
Executive Director  
Treasure Valley Transit, Inc.  
1136 W. Finch Drive  
Nampa, Idaho 83651

**Letter of Support for FY25 & FY26 Grant Applications**

Dear Ms. Lindenberg,

The Mountain Home Air Force Base (AFB) is the largest military base in Idaho and the only DoD installation in the entire state. The Mountain Home AFB is not able to meet the local match required in FY25 for Mountain Home Community Transit's (MHCT) fixed route service which transports military personnel to the AFB. The AFB military personnel and TVT met in FY23 and FY24 to determine an option that would maintain the service at a lower cost to TVT and still meet the needs of the Air Force Base.

The 5311 rural grant application will provide funding to support a van operated by military personnel similar to a standard vanpool program. In addition, TVT is applying for a 5339 capital grant to purchase a 9-passenger accessible van. TVT is also applying for CARES Act funding through a one-time grant application for this van if funding is available.

The Idaho Public Transportation Plan 2018 identified needs, priorities, opportunities, and potential solutions for public transportation within District 3 that includes the City of Mountain Home within Elmore County. Maintaining existing service was the number one priority.

Mountain Home Community Transit provides a valuable service to the military personnel who reside in the City of Mountain Home and who need transportation to the AFB.

I, Susie Hicks, strongly supports Treasure Valley Transit's FY25-26 5311 and 5339 rural grant applications and the CARES Act one-time grant application.

Sincerely,

A handwritten signature in cursive script that reads "Susie Hicks".

Treasure Valley Transit Board President  
Representing Mountain Home



## ATTACHMENT B

Milestone Report

TVT Maintenance Plan

Pre-Trip Inspection Form

## CARES One-Time Application Attachment B: Milestone Reporting

Agency Name	Treasure Valley Transit, Inc.		
Agency Contact	Terri Lindenberg		
Phone #	208-463-9111	Email	terri@treasurevalleytransit.com
Grant Program	5339	Rural	One Time
Federal Award Amount	\$155,588		
<p>Scope of Work: In August and December of 2023, TVT had planning meetings with the Air Force Base military personnel to determine the viability of a vanpool vs. fixed route for cost effectiveness and efficiency. This grant is to shift from a 24-passenger medium duty bus to a 9-passenger van.</p>			
<p><b>Milestone Progress Report:</b> Target of major tasks to be achieved by specific dates.</p> <p>The Creative Bus Sales price of \$151,152 was significantly higher than Schetky and the ABC Company Georgia Contract by \$37,000 for the same vehicle specifications. TVT was only able to procure 3 vehicles instead of the 5 that were awarded in the FY23-24 5339 Congressional Application due to significant cost increases. In the event that a significant level of cost increase occur again TVT is requesting a 25% increase from the low range of \$114,000 at \$28,500 for a total of \$142,500 plus, USB block, striping, tax, license and registration is \$155,588.</p> <p>Add additional milestones to the table below as needed.</p>			

Name	Estimated Completion Date	Description
RFP/RFQ Issue Date	12/31/2024	Issue RFP or purchase through a State Cooperative Agreement
Award Date	10/1/2024	Award Contract
Start Date or Order Date for Rolling Stock, Equipment, and Technology Purchases	1/31/2025	Issue Purchase Order
Construction Completion Date or Delivery Date for Rolling Stock, Equipment, or Technology Purchases	7/31/25	Delivery of van
Contract Completion Date	9/30/25	Close out grant

## **TVT VEHICLE MAINTENANCE PLAN**

The Treasure Valley Transit vehicle maintenance program involves policies and procedures in which all company employees play a role, in addition to our maintenance provider.

Proper vehicle maintenance begins with our drivers, who are trained and required to perform a complete pre-trip inspection of their assigned vehicle before beginning their route. This includes, but is not limited to, an approximately 42-point check consisting of:

- The general condition and appearance of the vehicle.
- The engine compartment including fluid levels, leaks, belt wear, batteries, etc.
- The interior including operation of controls, gauges, lights, safety equipment, passenger hazards, etc.
- The exterior including tires and rims, headlights, tail lights, brake lights, flashers, etc.

Our primary maintenance provider Blue Wrench, Meridian Idaho and Gold Fork Automotive, McCall Idaho are licensed, qualified and experienced in all aspects of fleet maintenance from regular services and preventative maintenance inspections to major mechanical repairs, rebuilds, retrofits, etc. Maintenance records are maintained in a computerized format with hard copy back-up records.

The preventative maintenance schedule for all Treasure Valley Transit vehicles is as follows:

- **Complete Service (Performed every 3,000 or 5,000 Miles Depending on Bus or Van type):** Includes a complete vehicle service and inspection. This service includes an oil change, oil and fuel filter changes, chassis lube, and checking and filling all fluids. The inspection includes a 43-point inspection on items such as electrical components, fuel, braking, cooling, heating, drive train, exhaust, tires, visual and mechanical components, etc.
- **DOT Inspection (Performed Annually):** Includes a complete Federal DOT inspection. This DOT inspection is in full compliance with all federal, state and local regulations.
- **TVT meets or exceeds all recommended manufacturers scheduled maintenance plan, as stated in the owners manual.**

Treasure Valley Transit managers and supervisors are experienced, trained and dedicated to ensuring all our vehicles are always maintained in good safe working order. Ongoing training, reviewing driver's vehicle inspection forms and providing a timely response to noted deficiencies, performing unannounced "spot inspections" of vehicles, maintaining meticulous records and excellent communication with the vehicle maintenance service provider all contribute to the efficiency and success of the Treasure Valley Transit maintenance policy.

Treasure Valley Transit is in full compliance with all federal, state and local regulations regarding the safe and legal operation and maintenance of all company vehicles.

# BUS DRIVER'S VEHICLE INSPECTION REPORT

COMPANY: \_\_\_\_\_

ODOMETER READING: \_\_\_\_\_ BUS NO.: \_\_\_\_\_

END MILEAGE: \_\_\_\_\_ DATE: \_\_\_\_\_

START MILEAGE: \_\_\_\_\_ TIME: \_\_\_\_\_ ☐ AM ☐ PM

TOTAL MILEAGE: \_\_\_\_\_ LOCATION: \_\_\_\_\_

## INSPECT ITEMS LISTED - IF DEFECTIVE, NUMBER AND DESCRIBE IN "REMARKS"

- |   |  |
|---|--|
| <input type="checkbox"/> FLUID LEAKS UNDER BUS              | <input type="checkbox"/> EMERGENCY DOOR & BUZZER               |
| <input type="checkbox"/> LOOSE WIRES, HOSE CONNECTIONS OR   | <input type="checkbox"/> HEADLIGHTS, FLASHERS & 4-WAY FLASHERS |
| <input type="checkbox"/> BELTS IN ENGINE COMPARTMENT        | <input type="checkbox"/> RIGHT FRONT TIRE & WHEEL              |
| <input type="checkbox"/> OIL LEVEL                          | <input type="checkbox"/> FRONT OF BUS - WINDSHIELD             |
| <input type="checkbox"/> RADIATOR COOLANT LEVEL             | <input type="checkbox"/> LEFT FRONT TIRE & WHEEL               |
| <input type="checkbox"/> BATTERY                            | <input type="checkbox"/> STOP ARM (SCHOOL BUS)                 |
| <input type="checkbox"/> TRANSMISSION                       | <input type="checkbox"/> EXHAUST SYSTEM                        |
| <input type="checkbox"/> UNUSUAL ENGINE NOISE               | <input type="checkbox"/> LEFT SIDE OF BUS - WINDOWS & LIGHTS   |
| <input type="checkbox"/> GAUGES & WARNING LIGHTS            | <input type="checkbox"/> LEFT REAR TIRES & WHEELS              |
| <input type="checkbox"/> SWITCHES                           | <input type="checkbox"/> REAR OF BUS - WINDOWS & LIGHTS        |
| <input type="checkbox"/> HORN                               | <input type="checkbox"/> TAIL PIPE                             |
| <input type="checkbox"/> FANS & DEFROSTERS                  | <input type="checkbox"/> RIGHT REAR TIRES & WHEELS             |
| <input type="checkbox"/> WIPERS & WASHERS                   | <input type="checkbox"/> RIGHT SIDE OF BUS - WINDOWS & LIGHTS  |
| <input type="checkbox"/> STOP ARM CONTROL (WARNING CONTROL) | <input type="checkbox"/> DRIVER'S SEAT & BELT                  |
| <input type="checkbox"/> INSIDE & OUTSIDE MIRRORS           | <input type="checkbox"/> DIRECTIONAL LIGHTS                    |
| <input type="checkbox"/> BRAKE PEDAL & WARNING LIGHT        | <input type="checkbox"/> PARKING BRAKE OR SERVICE BRAKE        |
| <input type="checkbox"/> OPERATION OF SERVICE DOOR          | <input type="checkbox"/> CLUTCH                                |
| <input type="checkbox"/> EMERGENCY EQUIPMENT                | <input type="checkbox"/> STEERING                              |
| <input type="checkbox"/> FIRST AID KIT                      | <input type="checkbox"/> WHEELCHAIR LIFT                       |
| <input type="checkbox"/> ENTRANCE STEPS                     | _____  |
| <input type="checkbox"/> CLEANLINESS OF INTERIOR            | _____  |
| <input type="checkbox"/> CONDITION OF FLOOR                 | _____  |

REMARKS: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

CONDITION OF ABOVE VEHICLE IS: ☐ SATISFACTORY ☐ UNSATISFACTORY

DRIVER'S SIGNATURE: \_\_\_\_\_

- ☐ ABOVE DEFECTS CORRECTED  
☐ ABOVE DEFECTS NEED NOT BE CORRECTED FOR SAFE OPERATION OF VEHICLE

MECHANIC'S SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

DRIVER REVIEWING REPAIRS: SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

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ORIGINAL

1928 (Rev. 6/13)

## ATTACHMENT C & D

Rolling Stock Replacement Form

NEPA Worksheet (Not Applicable)

Demonstration of Need Form

Subrecipient	Vehicle #	Year	Make/Model/Description	In Service	Out of Service	Current Mileage	Award ID	Fed Share
Example	1FTNS2EL0DDB02363	2022	E250 Van	11/04/22	05/01/23	5,600	C2376XX	\$ 42,238.00
TVT	1GBG5U1978F414796	2010	Chevy C5500	09/28/10	N/A	309,200	ARRA	\$106,731

## Congressional Application Attachment D: Demonstration of Need

### 1. Type of Service (Check all that apply):

- ☒ Fixed Route
- ☒ Deviated Fixed Route
- ☒ Demand/ Response

### 2. Service Area (Check one)

- ☐ City
- ☐ County
- ☒ Multi-County
- ☐ Other (Please Specify):

### 3. Connectivity:

Do you connect with other modes of transportation? Check all that apply.

- ☐ Urban Public Systems
- ☐ Intercity Carriers
- ☐ Airports/ Trains

☒ Other transit operators in your region (please list below):

Elderly Opportunity Agency, Inc., Metro Community Services, Inc., and the Valley Regional Transit Authority serving Canyon County.

### 4. Ridership:

Estimate the average number of rides: Per Day 425 Per Year 101,982

Briefly describe your ridership over the last two years: -

Ridership increased 16.5% from FY21 to FY22 combined for all systems.

Ridership increased 13.4% from FY22 to FY23 combined for all systems.

### 5. Days/ Hours of Service:

List days of the week and hours transit provider is in service

Mon - Fri 6 am - 6 pm for MHCT, SRT, and TVT. MCT Red Line Mon - Sun 7 am - 7 pm, Green Line Mon - Fri

5:55 am to 7:25 pm, and Blue Line Winter 7 am - 6 pm, Summer 11 am - 9 pm, Gold Line Mon - Fri 5:45 am - 5:45 pm.



**Application Information Form**

Applicant: Treasure Valley Transit, Inc.

Authorized Representative: Debbie Maxwell

Address: 1136 W. Finch Drive, Nampa ID 83651

Phone: 208-463-9111

Email Address: [debbie@treasurevalleytransit.com](mailto:debbie@treasurevalleytransit.com)

DUNS #: 884972332

Architect/Engineer/Planner if applicable: (Contact Name): **Not Applicable**

Phone: \_\_\_\_\_

Address: \_\_\_\_\_

PROJECT Description:

Replace four ADA conversion vans that operate in the demand response routes TVT operates within District 3.

TOTAL PROJECT COST: \$663,444

FEDERAL SHARE: \$663,444 LOCAL MATCH: N/A





### **Section 1: Project Description**

- a) **FTA Program Eligibility:** Discuss how project meets the FTA funding source program purpose.

Treasure Valley Transit is an eligible recipient as a private nonprofit 501(c)3 operator of public transportation that currently receives 5311 funding. This project meets this FTA funding source program purpose by purchasing new ADA conversion transit vans to replace older ADA conversion transit vans to maintain existing services.

- b) **ITD Call for Project Priorities:** Discuss how the project meets the ITD-PT call for project priorities

This project meets the number one priority of Idaho Transportation Department-Public Transportation, the need to maintain/expand existing capital assets. This funding will allow continuation of existing services.

- c) **Application Scope of Work:** Describe in detail the scope of work for the project you are proposing:

This project is to purchase four brand new ADA conversion transit vans to replace four currently in service ADA conversion transit vans. All four are used in the Demand Response Service. These vehicles will have exceeded their useful life expectancy, five years or 150,000 miles, over the next three years. The original transit vans were purchased with ITD as the recipient of FTA capital grant funds and TVT as the sub-recipient.

The vans that need to be replaced operate daily in a demand response service on an average of five days a week, and an average of 1,600 to 2,000 miles per month for each vehicle. All vehicles are ADA accessible and meet ADA requirements. In accordance with the TVT vehicle replacement plan and the Idaho State Transportation Departments Transit Asset Management Plan, these vehicles are on the schedule for replacement.

All these vehicles have a Federal Transit Administration (FTA) condition rating of Poor. The FTA definition of Poor is a vehicle condition of “Seriously damaged components in need of immediate repair” and is the lowest rating on the conditions scale. The vans will be close to or over 150,000 miles and will have reached their useful life by the time this grant is funded. Our maintenance staff is anticipating future expensive maintenance such as exhaust systems, brake systems, and engine repairs. When a Transit Agency replaces a transit van it pays the purchase costs, but then will incur lower rehabilitation, energy, maintenance and out of service costs. In addition, the agency may experience additional benefits such as reductions in emissions, improved technology, and other factors. Once a vehicle exceeds the original cost savings, the Transit Agency spends more money to keep the vehicle in service than it would to replace the vehicle.



The condition of TVT's rolling stock used for our services is critical to the safety and performance of our public transit agency. TVT maintains a strict maintenance regime for every vehicle in our fleet. All vehicles are repaired and maintained under a preventative maintenance protocol established by manufacturer's recommendations. Blue Wrench Services performs all our service and repair work using certified technicians. Treasure Valley Transit is fiscally sound and budgets a substantial amount of annual funds directly to maintenance and repairs. TVT takes pride in its ability to operate vehicles far in excess of their useful life in a safe reliable fashion. However, with the aging and increasing mileage of these vehicles, TVT anticipates having significant increased costs for preventative maintenance.

a) Ridership History

Service	FY21	FY22	FY23	+/-
Demand Response	32,500	35,313	34,269	(3%)
<b>Total Ridership</b>	<b>32,500</b>	<b>35,313</b>	<b>34,269</b>	<b>(3%)</b>

Marketing/Advertising/Public participation efforts

TVT is quick to take advantage of opportunities to publicly participate in local events. We take these opportunities to introduce our services and provide information to the public. For example, on June 10, 2023, we had an information booth at the KYMfest put on by the For You Network, Inc. at Lakeview Park in Nampa. This even highlighted the various community resources that are available but not necessarily known by the community at large. Several thousand were in attendance and our booth saw many visitors.

TVT uses electronic media resources to inform the public of our services and instructs people how to use them in each of our service areas. We have a website, [treasurevalleytransit.com](https://treasurevalleytransit.com), a Facebook page and a twitter account, these are listed on all our brochures, schedules, and vehicles. Our services are marketed to each of our service areas in different ways. Each service is branded to facilitate local ownership by the residents, elected officials, and the business community. Advertisements for local services and/or events are placed in the local newspaper and local community magazines. TVT also belongs to the local Chamber of Commerce in Nampa.



## **Section 2: Project Planning**

### **a) Tie project to specific goals in ITD Statewide Public Transportation Plan:**

#### **1. Ensure the Safety and Security of Public Transportation**

TVT's priority is the safety and security of our employees and the passengers they serve. This is demonstrated through our policies and procedures that cover all aspects of operations from maintenance standards for the vehicles, training of employees, drug and alcohol testing program, etc. This information is available in our Personnel Manual, Driver Handbook, Title VI Plan, Safety and Security & Emergency Preparedness Plan.

#### **2. Encourage Public Transportation as an Important Element of an Effective Multi-Modal Transportation System in Idaho**

TVT works closely with our elected officials and other agencies to advocate for a truly Multi-Modal system in the areas we serve. This includes bus, demand response, vanpool, bike and pedestrian modes.

#### **3. Preserve the Existing Public Transportation Network**

TVT is seeking continued grant funding to preserve the existing services we provide.

#### **4. Provide Transportation System that Drives Economic Opportunity**

TVT works closely with the chambers of commerce, and other local businesses in order to promote public transportation and provide access to jobs which in turn spurs economic growth.

### **b. Describe the Project Development Process**

1. Community involvement from the City and County, Chambers of Commerce, local business, Health and Human Service agencies and the potential passengers (i.e. advisory group, public hearings, social media, surveys etc.)
2. Selection of the appropriate mode of transportation-fixed route, deviated fixed route or demand response service; van pool, ride share or voucher program
3. Funding mechanism:
  - 5339 Grant Program
  - City and County Funding



- Medicaid Revenue
  - Employer Benefit for transit passes
  - School District
  - Advertising
  - Seek State of Idaho Funding
  - Private Grants and Foundations
4. Assure sustainability through stable funding
  5. Monitoring and Evaluation of the service in an on-going manner
  6. Route restructure as appropriate through input of all
  7. Participate in the City and County development of master plans

For a successful service to be implemented and maintained by stable funding it is imperative that the planning process involves ongoing input from affected parties. Meaningful engagement ensures accountability, effective communications, and consistencies.

- Describe efforts undertaken to coordinate with Minority and Low-Income Population

TVT has interviewed stakeholders, transit users, and other community groups throughout the planning process to include the Minority and Low-Income Populations.

- What is your plan to include Disadvantage Business Enterprises (DBE)

TVT will make a good faith effort to include Disadvantage Business Enterprises (DBE's) in this project. The first thing we will do is to search the Idaho Transportation Department Directory for DBE's.

<https://itd.dbesystem.com/FrontEnd/SearchCertifiedDirectory.asp?XID=9178&TN=itd>,

- Identify any local Labor Unions

TVT is not affiliated with any labor unions in the rural areas that we serve. The Valley Regional Transit Authority contracts out their large and small urban services. They are represented by Local 378.

c. Provide Attachment B: Milestone Reporting



### **Section 3: Project Benefits/Evaluation**

**a. Improve safety.**

The new vehicles will ensure the existing public transportation services operating within District 3 continue to operate in a safe, dependable, and easily accessible manner.

The replacement of these vehicles will also ensure the Treasure Valley Transit “Mission of providing viable public transportation solutions that deliver the highest levels of quality and satisfaction to our consumers and partners, by offering safe, dependable and easily accessible means to riders of all ages and all physical abilities” is successful. We believe our mission as a company is parallel with the Idaho Transportation Departments mission: your safety, your mobility, and your economic development.

**b. Improve mobility.**

Additional benefits to having new vehicles will be fewer mechanical breakdowns, this will improve on time performance if the breakdown occurs while the vehicle is in service. It also helps in the efficiency and productivity of the staff time not having to suddenly cover routes, schedule tows, and and/or schedule maintenance. In addition, there will be a reduction in maintenance expenses and an improvement to air quality. Ultimately, all of this benefits the passengers overall experience and reduces safety risks to the passengers, the Transit Driver, and other Drivers on the roads.

**c. Support local economic development and expand economic opportunity.**

TVT works closely with local businesses to educate them about the economic advantages of public transit. The tax benefits that they can receive and the benefit of stable transportation for their employees. Large businesses look at the transit options when deciding on what community they may want to locate to. The local Chambers of Commerce and the Department of Labor look to public transportation to offer these benefits to the business community.

**TVT intends to continually evaluate success of the project as follows:**

Treasure Valley Transit has a backlog of replacement vehicles primarily due to the lack of available funding and the price increases we have seen since COVID began. These new vehicles will reduce the backlog of replacement vehicles significantly. The replacement of these vehicles will also serve to assist the ITD, Public Transportation Office in achieving their Statewide Transit Asset Management goals.



**a. TVT collects the following data and reports to ITD quarterly and to the National Transit Data Base annually:**

- Ridership
- Fares
- Mileage
- Services Miles and Hours
- Dead Head Miles and Hours
- Accidents (at fault or not at fault)
- Injuries
- Fatalities
- Complaints
- Other Incidents

**b. TVT will sustain/maintain the project after the end of the grant period:**

TVT will continue to work closely with the Idaho Transportation Department to secure continued funding to maintain our facilities and vehicles. TVT will continue to advocate for state funding through the legislative process by working closely with key legislators, agencies, and other supporters of public transportation. Until such funding is available we will continue to meet our match requirements through the cities and counties we serve. In addition, we will seek funding through foundations advertising and grant opportunities on a regional and national level.

Treasure Valley Transit will continue to track fleet performance annually by obtaining and analyzing the following Performance Metrics:

- Average operating cost per mile
- Average overall cost per vehicle
- Fleet Inventory and age of Fleet
- Average mile per vehicle annually
- Utilization
- Average maintenance cost per vehicle
- Accidents
- Out of Service Days
- Percentage of Fleet due/overdue for replacement

**TVT Maintenance Plan and inspection form are submitted with this application as supplemental documentation.**



**TVT has the capacity to carry out the project as proposed:**

**Executive Director:** Terri Lindenberg has been with TVT since January 1992 when the Office of Rural Health Policy awarded a three-year grant to develop a Coordinated Transportation System in Canyon County and secure sustainable funding. TVT now serves a 10-county area, has thirty-five employees, and collaborates with multiple agencies. Terri's strength is in building partnerships and advocating for rural transportation on both the local and national stage.

**Certifications:** Certified Community Transit Manager CCTM and Certified Safety and Security Officer through the Community Transportation Association of America

**Assistant Director:** Debbie Maxwell has worked over 11 years in public transportation management and has been with TVT since May 2016. She oversees all aspects of TVT operations including but not limited to, procurement, fleet management, driver training and supervision of operational staff. In addition to these responsibilities she works closely with the Executive Director in the administration of TVT in the finance and grants departments.

**Certifications:** Certified Safety and Security Officer through the Community Transportation Association of America, Passenger Assistance Safety and Sensitivity Certified

**Operations Supervisor:** Fred Maxwell has been with TVT since January 2023 and brings extensive CDL transportation management experience as well as public transportation driving experience. Fred is directly responsible for supervising, evaluating, and training drivers. He is also responsible to ensure TVT Vehicle Maintenance Plan, TVT Facility Maintenance Plan, and the TVT Safety Security and Emergency Preparedness Plan are adhered to.

**Certifications:** Designated Employer Representative through Wienhoff Drug Testing, First Aid/CPR through the American Heart Association, Passenger Assistance Safety & Sensitivity Training certificate through the Community Transportation Association of America, Vehicle Maintenance Management and Compliance certified through Community Transportation Association of America.

**Mobility Manager:** Miranda Murray has been with TVT since January 2013 and brings extensive experience in dispatch, scheduling and coordinating services with various agencies in the 10-county area. Miranda's role as Mobility Manager oversees the dispatch and scheduling component and monitors for efficiencies. She works closely with the statewide Medicaid broker and the Department of Health and Welfare Medicaid Division. In addition, her skills in marketing, print material and knowledge of technology (dispatch software and hardware) have been instrumental.

**Certifications:** Certified Community Transit Supervisor; Certified Professional Dispatcher through the Community Transportation Association of America

**Finance and Human Resource Manager:** Rebecca Soto has been with TVT since September 2019 and has worked in both the private and non-profit sector since 2009. She began her career as a Staff accountant, Senior Audit Associate and Accounting Supervisor. She currently processes TVT's 5309, 5310, 5311 and 5339 grants with attention to detail and accuracy.



*Education:* Bachelor of Business Administration (BBA) in Accountancy 2013 and member of the national Society of Human Resource Managers (SHRM) and the Local Chapter

**Day / Willis, CPA's:** Tabbatha Willis prepares TVT's monthly Financial Statements for the TVT Board of Directors and provides direct oversight of the grant reimbursement process. TVT is proud to note a clean opinion without findings since we have been required to have an A-133 Annual Audit done by an independent Accounting Firm.





#### **Section 4: Project Budget**

##### **Budget Narrative:**

It is estimated the new ADA transit vans will be approximately \$165,861 to include taxes, registration, stripping and ITS hardware for the vehicle. See itemized budget attached. The Federal portion will pay for 80% of the vehicle and the Local Match will be raised through Local City and County contributions along with Medicaid Revenue, Advertising, and any Foundational Grant Funds we are able to acquire. This estimate is based on estimated quotes TVT has received from qualified vendors and recent purchases made for similar products. This is a non-construction project, so Davis Bacon Wages are not applicable.

TVT will issue an Advance Payment Request Letter with the understanding that once the request has been funded TVT will have three days to disperse the funds.

- a. Itemized estimated project budget included in documentation.**
- b. Attachment A: Project Budget Request Form included in documentation**



## **ATTACHMENTS**

- **Project Budget**
- **Independent Cost Estimate Summary & Backup**
- **Milestone Reporting**
- **NEPA (Not Applicable)**
- **Sole Source Aquifer (Not Applicable)**
- **Rolling Stock Worksheet**
- **Demonstration of Need**
- **TVT Organizational Chart**
- **TVT FY23 Audit**
- **Letters of Support**
- **TVT Fleet Maintenance Plan**



**Application Information Form**

Applicant: Treasure Valley Transit, Inc.

Authorized Representative: Debbie Maxwell

Address: 1136 W. Finch Drive, Nampa ID 83651

Phone: 208-463-9111

Email Address: [debbie@treasurevalleytransit.com](mailto:debbie@treasurevalleytransit.com)

DUNS #: 884972332

Architect/Engineer/Planner if applicable: (Contact Name): **Not Applicable**

Phone: \_\_\_\_\_

Address: \_\_\_\_\_

**PROJECT Description:**

Replace nine energy efficient medium duty ADA cutaway buses that operate in both the fixed route and demand response routes TVT operates within District 3

TOTAL PROJECT COST: \$2,766,461

FEDERAL SHARE: \$2,766,461 LOCAL MATCH: N/A



## **Section 1: Project Description**

- a) FTA Program Eligibility: Discuss how project meets the FTA funding source program purpose.

Treasure Valley Transit is an eligible recipient as a private nonprofit 501(c)3 operator of public transportation that currently receives 5311 funding. This project meets this FTA funding source program purpose by purchasing new buses to replace older buses to maintain existing services.

- b) ITD Call for Project Priorities: Discuss how the project meets the ITD-PT call for project priorities

This project meets the number one priority of Idaho Transportation Department-Public Transportation, the need to maintain/expand existing capital assets. This funding will allow continuation of existing services.

- c) Application Scope of Work: Describe in detail the scope of work for the project you are proposing:

This project is to purchase nine brand new ADA Medium Duty Cutaway Buses to replace nine currently in service buses. Four are used in the Demand Response Service and five are used in the Fixed Route service. These vehicles will have exceeded their useful life expectancy, seven years or 200,000 miles, over the next three years. The original buses were purchased with ITD as the recipient of FTA capital grant funds and TVT as the sub-recipient.

The buses that need to be replaced operate daily in a demand response service or a fixed route service on an average of five days a week, and an average of 1,600 to 2,000 miles per month for each vehicle. All vehicles are ADA accessible and meet ADA requirements. In accordance with the TVT vehicle replacement plan and the Idaho State Transportation Departments Transit Asset Management Plan, these vehicles are on the schedule for replacement within the next three years.

A grant was written to replace five of the replacement vehicles in the 2023-2024 grant cycle. There were only enough federal funds to replace three of the five buses that were requested. Two of those originally requested vehicles I am now adding to our asset replacement list for this funding cycle.

All these vehicles have a Federal Transit Administration (FTA) condition rating of Poor. The FTA definition of Poor is a vehicle condition of “Seriously damaged components in need of immediate repair” and is the lowest rating on the conditions scale. The buses are close to or over 200,000 miles and will have reached their useful life by the time this grant is funded. The CNG bus mileage is the lowest, however, these vehicles have had the highest maintenance costs. We have had continuous serious maintenance issues with all CNG vehicles. All the CNG engines have been replaced multiple times. The reason is because they run so hot, it’s causing warping that destroys many of the metal parts that cannot withstand the heat. In addition to engine damage the high heat has affected the air conditioning units, and maintaining cool air during the summer months has been a difficult and



costly challenge. Now one of the CNG tanks failed inspection and had to be completely removed and needs a replacement tank installed. These are all very expensive maintenance costs. Our maintenance staff is anticipating future expensive maintenance such as exhaust systems, brake systems, and engine repairs.

Our maintenance staff is anticipating future expensive maintenance such as exhaust systems, brake systems, and engine repairs. When a transit agency replaces a bus, it pays the purchase costs, but then will incur lower rehabilitation, energy, maintenance, and out of service costs. In addition, the agency may experience additional benefits such as reductions in emissions, improved technology, and other factors. Once a vehicle exceeds the original cost savings, the Transit Agency spends more money to keep the vehicle in service than it would to replace the vehicle.

The condition of TVT's rolling stock used for our services is critical to the safety and performance of our public transit agency. TVT maintains a strict maintenance regime for every vehicle in our fleet. All vehicles are repaired and maintained under a preventative maintenance protocol established by manufacturer's recommendations. Blue Wrench Services and Gold Fork Automotive perform all our service and repair work using certified technicians. Treasure Valley Transit is fiscally sound and budgets a substantial amount of annual funds directly to maintenance and repairs. TVT takes pride in its ability to operate vehicles far in excess of their useful life in a safe reliable fashion. However, with the aging and increasing mileage of these vehicles, TVT anticipates future high maintenance expenses.

a) Ridership History

Service	FY21	FY22	FY23	+/-
MCT -Green Line	9,453	11,657	16,560	42%
MCT- Red Line	15,043	20,416	25,028	23%
MCT – Blue Line	516	1026	2689	162%
MCT – Gold Line			348	
SRT-Idaho	14,771	16,726	17,960	7%
MHCT-City/AFB	4,886	4767	5,038	6%
Demand Response	32,500	35,313	34,269	(3%)
<b>Total Ridership</b>	<b>77,169</b>	<b>89,907</b>	<b>101,982</b>	<b>13%</b>



**Condition Matrix for buses scheduled to replace in Demand Response:**

Year	Make	Model	Mileage	Current Condition	TVT Bus Number
2015	Ford	CNG Bus	178,621	Poor	62-DR
2015	Ford	CNG Bus	129,048	Poor	63-DR
2015	Ford	CNG Bus	119,274	Poor	64-DR
2007	Ford	Bus	246,304	Poor	34-DR

**Condition Matrix for buses scheduled to replace in Fixed Route:**

Year	Make	Model	Mileage	Current Condition	TVT Bus Number
2018	Ford	Bus	211,806	Poor	69-SRT
2018	Ford	Bus	321,734	Poor	71-MCT
2010	Chevy	Bus	309,200	Poor	61-MHCT
2010	Chevy	Bus	317,684	Poor	56-MCT
2008	Chevy	Bus	223,323	Poor	80-MCT

**Marketing/Advertising/Public participation efforts**

TVT is quick to take advantage of opportunities to publicly participate in local events. We take this opportunity to introduce our services and provide information to the public. For example, TVT staff recently sponsored and attended the 2023 Regional Economic Summit on November 6th, which was held in Cascade, Idaho this year. The summit gave TVT staff the opportunity to obtain a bigger picture of current economic challenges we face nationally, regionally, and locally. There were several opportunities available for networking with local government leaders and business owners, and it provided us with an opportunity to introduce our new route, the New Meadows Gold Line. We were able to provide marketing and scheduling material at the registration table. These forums are a great opportunity to address questions in a very positive and transparent manner.

TVT uses electronic media resources to inform the public of our services and instructs people how to use them in each of our service areas. We have a website, [treasurevalleytransit.com](http://treasurevalleytransit.com), a Facebook page and an X account. These are listed on all our brochures, schedules, and vehicles. Our services are marketed to each of our service areas in different ways. Each service is branded to facilitate local



ownership by the residents, elected officials, and the business community. Advertisements for local services and/or events are placed in the local newspaper and local community magazines. TVT also belongs to the local chamber of commerce in each of our service areas and participates whenever possible in local events like the McCall Winter Carnival annual parade.

## **Section 2: Project Planning**

### **a) Tie project to specific goals in ITD Statewide Public Transportation Plan:**

#### **1. Ensure the Safety and Security of Public Transportation**

TVT's priority is the safety and security of our employees and the passengers they serve. This is demonstrated through our policies and procedures that cover all aspects of operations from maintenance standards for the vehicles, training of employees, drug and alcohol testing program, etc. This information is available in our Personnel Manual, Driver Handbook, Title VI Plan, Safety and Security & Emergency Preparedness Plan.

#### **2. Encourage Public Transportation as an Important Element of an Effective Multi-Modal Transportation System in Idaho**

TVT works closely with our elected officials and other agencies to advocate for a truly Multi-Modal system in the areas we serve. This includes bus, demand response, vanpool, bike and pedestrian modes.

#### **3. Preserve the Existing Public Transportation Network**

TVT is seeking continued grant funding to preserve the existing services we provide.

#### **4. Provide Transportation System that Drives Economic Opportunity**

TVT works closely with the chambers of commerce, and other local businesses in order to promote public transportation and provide access to jobs which in turn spurs economic growth.

### **b. Describe the Project Development Process**

#### **1. Community involvement from the cities and counties, chambers of commerce, local businesses, health and human service agencies and the potential passengers (i.e. advisory group, public hearings, social media, surveys etc.)**



2. Selection of the appropriate mode of transportation: fixed route, deviated fixed route or demand response service; van pool, ride share or voucher program
3. Funding mechanism:
  - 5339 grant program
  - City and county Funding
  - Medicaid revenue
  - Employer Benefit for transit passes
  - School District
  - Advertising
  - Seek State of Idaho funding
  - Private grants and foundations
4. Assure sustainability through stable funding
5. Monitoring and Evaluation of the service in an on-going manner
6. Route restructure as appropriate through input of all
7. Participate in the City and County development of master plans

For a successful service to be implemented and maintained by stable funding it is imperative that the planning process involves ongoing input from affected parties. Meaningful engagement ensures accountability, effective communications, and consistencies.

- Describe efforts undertaken to coordinate with Minority and Low-Income Population

TVT has interviewed stakeholders, transit users, and other community groups throughout the planning process to include the Minority and Low-Income Populations.

TVT has published a link on our website where the Title VI plan, Public Notice Process, the Riders Guide, and the Complaint and Appeals Process can be located.

- What is your plan to include Disadvantage Business Enterprises (DBE)

TVT will make a good faith effort to include Disadvantage Business Enterprises (DBE's) in this project. The first thing we will do is search the Idaho Transportation Department





Directory for DBE's.

<https://itd.dbesystem.com/FrontEnd/SearchCertifiedDirectory.asp?XID=9178&TN=itd>,

- Identify any local Labor Unions

TVT is not affiliated with any labor unions in the rural areas that we serve. The Valley Regional Transit Authority contracts out their large and small urban services. They are represented by Local 378.

- c) Provide Attachment B: Milestone Reporting

### **Section 3: Project Benefits/Evaluation**

**a. Improve safety.**

The new vehicles will ensure the existing public transportation services operating within District 3 continue to operate in a safe, dependable, and easily accessible manner.

The replacement of these vehicles will also ensure the Treasure Valley Transit “Mission of providing viable public transportation solutions that deliver the highest levels of quality and satisfaction to our consumers and partners, by offering safe, dependable and easily accessible means to riders of all ages and all physical abilities” is successful. We believe our mission as a company is parallel with the Idaho Transportation Departments mission: your safety, your mobility, and your economic development.

**b. Improve mobility.**

Additional benefits to having new vehicles will be fewer mechanical breakdowns. This will improve on time performance if the breakdown doesn't occur while the vehicle is in service. It also helps in the efficiency and productivity of the staff time when they don't have to suddenly cover a route, schedule a tow, and/or schedule maintenance. In addition, there will be a reduction in maintenance expenses and an improvement in air quality. Ultimately, all of this benefits the passengers overall experience and reduces safety risks to the passengers, the transit driver, and other drivers on the roads.

**c. Support local economic development and expand economic opportunity.**

TVT works closely with local businesses to educate them about the economic advantages of public transit. The tax benefits that they can receive and the benefit of stable transportation for their employees. Large businesses look at the transit options when deciding on what community they may



want to locate to. The local chambers of commerce and the Department of Labor look to public transportation to offer these benefits to the business community.

**TVT intends to continually evaluate success of the project as follows:**

Treasure Valley Transit has a backlog of replacement vehicles primarily due to the lack of available funding and the price increases we have seen since the pandemic began. These new vehicles will reduce the backlog of replacement vehicles significantly. The replacement of these vehicles will also serve to assist the ITD Public Transportation Office in achieving their Statewide Transit Asset Management goals.

**a. TVT collects the following data and reports to ITD quarterly and to the National Transit Data Base annually.**

- Ridership
- Fares
- Mileage
- Services Miles and Hours
- Dead Head Miles and Hours
- Accidents (at fault or not at fault)
- Injuries
- Fatalities
- Complaints
- Other Incidents

**b. TVT will sustain/maintain the project after the end of the grant period:**

TVT will continue to work closely with the Idaho Transportation Department to secure continued funding to maintain our facilities and vehicles. TVT will continue to advocate for state funding through the legislative process by working closely with key legislators, agencies, and other supporters of public transportation. Until such funding is available we will continue to meet our match requirements through the cities and counties we serve. In addition, we will seek funding through foundations advertising and grant opportunities on a regional and national level.

Treasure Valley Transit will continue to track fleet performance annually by obtaining and analyzing the following Performance Metrics:

- Average operating cost per mile
- Average overall cost per vehicle
- Fleet Inventory and age of Fleet



- Average mile per vehicle annually
- Utilization
- Average maintenance cost per vehicle
- Accidents
- Out of Service Days
- Percentage of Fleet due/overdue for replacement

**TVT Maintenance Plan and inspection form are submitted with this application as supplemental documentation.**

**TVT has the capacity to carry out the project as proposed:**

**Executive Director:** Terri Lindenberg has been with TVT since January 1992 when the Office of Rural Health Policy awarded a three-year grant to develop a Coordinated Transportation System in Canyon County and secure sustainable funding. TVT now serves a 10-county area, has thirty-five employees, and collaborates with multiple agencies. Terri's strength is in building partnerships and advocating for rural transportation on both the local and national stage.

**Certifications:** Certified Community Transit Manager CCTM and Certified Safety and Security Officer through the Community Transportation Association of America

**Assistant Director:** Debbie Maxwell has worked over 11 years in public transportation management and has been with TVT since May 2016. She oversees all aspects of TVT operations including but not limited to, procurement, fleet management, driver training and supervision of operational staff. In addition to these responsibilities she works closely with the Executive Director in the administration of TVT in the finance and grants departments.

**Certifications:** Certified Safety and Security Officer through the Community Transportation Association of America, Passenger Assistance Safety and Sensitivity Certified

**Operations Supervisor:** Fred Maxwell has been with TVT since January 2023 and brings extensive CDL transportation management experience as well as public transportation driving experience. Fred is directly responsible for supervising, evaluating, and training drivers. He is also responsible to ensure TVT Vehicle Maintenance Plan, TVT Facility Maintenance Plan, and the TVT Safety Security and Emergency Preparedness Plan are adhered to.

**Certifications:** Designated Employer Representative through Wienhoff Drug Testing, First Aid/CPR through the American Heart Association, Passenger Assistance Safety & Sensitivity Training certificate through the Community Transportation Association of America, Vehicle Maintenance Management and Compliance certified through Community Transportation Association of America.

**Mobility Manager:** Miranda Murray has been with TVT since January 2013 and brings extensive experience in dispatch, scheduling and coordinating services with various agencies in the 10-county area. Miranda's role as Mobility Manager oversees the dispatch and scheduling component and



monitors for efficiencies. She works closely with the statewide Medicaid broker and the Department of Health and Welfare Medicaid Division. In addition, her skills in marketing, print material and knowledge of technology (dispatch software and hardware) have been instrumental.

*Certifications:* Certified Community Transit Supervisor; Certified Professional Dispatcher through the Community Transportation Association of America

***Finance and Human Resource Manager:*** Rebecca Soto has been with TVT since September 2019 and has worked in both the private and non-profit sector since 2009. She began her career as a Staff accountant, Senior Audit Associate and Accounting Supervisor. She currently processes TVT's 5309, 5310, 5311 and 5339 grants with attention to detail and accuracy.

*Education:* Bachelor of Business Administration (BBA) in Accountancy 2013 and member of the national Society of Human Resource Managers (SHRM) and the Local Chapter

**Day / Willis, CPA's:** Tabbatha Willis prepares TVT's monthly Financial Statements for the TVT Board of Directors and provides direct oversight of the grant reimbursement process. TVT is proud to note a clean opinion without findings since we have been required to have an A-133 Annual Audit done by an independent Accounting Firm.



#### **Section 4: Project Budget**

##### **Budget Narrative:**

It is estimated that each Medium Duty Cutaway Bus will cost approximately \$307,385 includes taxes, registration, striping, and ITS hardware, licensing, and installation to the vehicle, plus a 10% inflation estimate. The Federal portion will pay for 80% of the vehicle and the Local Match will be raised through local city and county contributions along with Medicaid revenue, advertising, and any foundational grant funds we are able to acquire. This estimate is based on quotes TVT has received from qualified vendors and recent purchases made for similar products. This is a non-construction project, so Davis Bacon Wages are not applicable.

TVT will issue an Advance Payment Request Letter with the understanding that once the request has been funded TVT will have three days to disperse the funds.

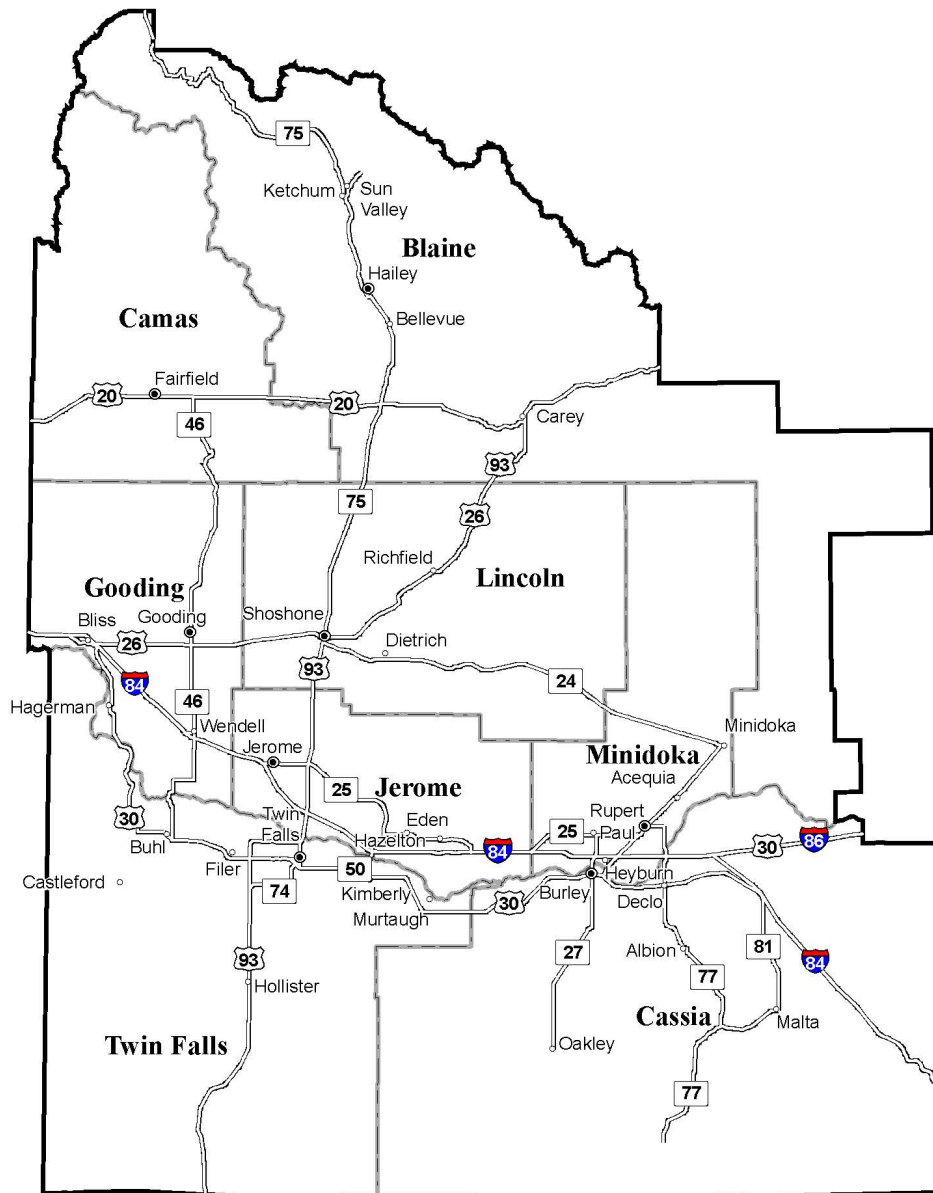
- a. Itemized estimated project budget included in documentation.**
- b. Attachment A: Project Budget Request Form included in documentation**



## **ATTACHMENTS**

- **Project Budget**
- **Independent Cost Estimate Summary & Backup**
- **Milestone Reporting**
- **NEPA (Not Applicable)**
- **Sole Source Aquifer (Not Applicable)**
- **Rolling Stock Replacement Report**
- **Demonstration of Need**
- **TVT Organizational Chart**
- **TVT FY23 Audit**
- **Letters of Support**
- **TVT Fleet Maintenance Plan**
- **Drivers Daily Pretrip Inspection form**

# District 4: South-Central Idaho



# Mountain Rides Transportation Authority



## CARES Act One-time Grant Application

Funding for Oct 1, 2024 - Sep 30, 2026

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IDAHO TRANSPORTATION DEPARTMENT  
PUBLIC TRANSPORTATION OFFICE

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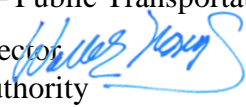
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Mountain Rides Transportation Authority  
P.O. Box 3091  
800 1<sup>st</sup> Avenue North  
Ketchum, Idaho 83340

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**To:** Grants Evaluation Team  
Idaho Transportation Department – Public Transportation  
**From:** Wallace E. Morgus, Executive Director   
Mountain Rides Transportation Authority  
**Date:** January 5, 2024  
**Re:** CARES Act One-time Grant Application – Mountain Rides Transportation Authority

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Enclosed please find the CARES Act One-time Grant Application for the grant cycle from October 1, 2024, through September 30, 2026, for Mountain Rides Transportation Authority (“Mountain Rides” or “MRTA”). The enclosed package includes a response to the questions laid out in each section of the application, a completed Attachment A (Budget) to the application, a completed Attachment D (Demonstration of Need) to the application, and four appendices containing support materials recommended as part of the application.

For the two-year grant cycle – October 1, 2024, to September 30, 2026 – Mountain Rides is seeking \$350,000 in Federal support, which requires no local funding match.

The total funding – \$350,000 – will underwrite Mountain Rides’ existing and continuing operation of NEMT Service connecting riders in the Wood River Valley, in rural Blaine County, Idaho, with medical/health care services providers in greater Twin Falls, Idaho.

If you have any comments or questions, please feel free to reach out.

Thank you and ITD’s Public Transportation Office for your consideration and for looking favorably upon our application.



**Application Information Form**

Applicant: Mountain Rides Transportation Authority

Authorized Representative: Wallace E. Morgus, Executive Director

Address: PO Box 3091, Ketchum, ID 83340

Phone: 208.788.7433 x.101

Email Address: wally@mountainrides.org

DUNS #: 0205108600000

Architect/Engineer/Planner if applicable: (Contact Name): NA

Phone: NA

Address: NA

**Project Description:**

Existing and ongoing Non-emergency Medical Transportation ("NEMT") Service – demand-response service transporting passengers between the Wood River Valley, Idaho, and Twin Falls, Idaho, for non-emergency medical treatments, consultations, and other appointments – that provides public transportation service supplementing Mountain Rides' 5311 Services in rural (<50,000 pop.) Blaine County, Idaho, and its surrounding communities, where residents and visitors rely on public transportation to reach their destinations.

TOTAL PROJECT COST: \$ 350,000

FEDERAL SHARE: \$ 350,000 LOCAL MATCH: \$ 0

# 1. Project Description: Mountain Rides NEMT Service

## Project Priorities and Program Eligibility

Mountain Rides Transportation Authority (“Mountain Rides” or “MRTA”) hereby requests funding to underwrite operation of its existing and ongoing Non-emergency Medical Transportation (“NEMT”) Service – demand-response service transporting passengers between the Wood River Valley, Idaho, and Twin Falls, Idaho, for non-emergency medical treatments, consultations, and other appointments – that provides public transportation service supplementing Mountain Rides’ 5311 Services in rural (<50,000 pop.) Blaine County, Idaho, and its surrounding communities, where residents and visitors rely on public transportation to reach their destinations.

**The Project meets the FTA’s purpose for CARES Act funding** as it supports and enhances public transportation in a rural area (<50,000 pop.), where residents count on public transportation to get them safely to their destinations.

**The Project meets the ITD-PT’s call for project priorities** – promoting the success of all public transportation options throughout Idaho – as it ensures that public transportation options and innovations of all kinds – in this case, longer distance NEMT service that supplements 5311 Services – are available in Idaho.

## Scope of Work

### *Demand-Response NEMT Service*

Mountain Rides’ demand-response NEMT Service operates from its base in Blaine County, Idaho, serving residents of the cities of Bellevue, Hailey, Ketchum and Sun Valley, and unincorporated Blaine County, and connecting them to non-emergency medical appointments, treatments, and consultations in and around Twin Falls, Idaho, some 75+ miles distant.

Route	Service Area	Seasonal or Year-round?
<b>Demand-Response NEMT</b>	<b>Connects Sun Valley, Ketchum, Hailey, Bellevue, and unincorporated Blaine Co. with Twin Falls.</b>	<b>Year-round (Mon-Fri, on-demand)</b>

Mountain Rides delivers significant service, as measured in NEMT service hours: ~2,200 hours/year. The Service deploys ADA Paratransit vans and other light-duty vehicles, as it operates each week of the year, typically Monday through Friday, with one round trip between the Wood River Valley and Twin Falls, Idaho, daily.

Since the inception of the NEMT Service, as initially underwritten by a grant from the National Aging and Disability Transportation Center (“NADTC”) and additional grants from local community foundations, in Spring 2021, as well as CARES Act funding via the ITD-PT to sustain the Service, the NEMT Service hours have been productive, yielding a growing ridership of transit-dependent passengers destined for essential non-emergency medical appointments, consultations, and treatments in and around Twin Falls, Idaho. Over the past six (6) months, ridership has averaged ~4 one-way trips (riders) per day.

## Scope of Services and Objectives

Mountain Rides provides and supports a range of transportation options, including NEMT Service, for Blaine County, its communities, and nearby jurisdictions, that are safe, user-focused, environmentally friendly, sustainable, and supportive of a strong local economy. The funding requested herein (Federal share: \$ 350,000) will underwrite Mountain Rides’ NEMT Service and support its objectives:

- Providing and advocating for a sustainable public transportation system that reduces single occupancy vehicle trips and meets the needs of our communities and their citizens.
- Conveying information and knowledge, thereby increasing awareness of the social, financial, environmental, and community benefits of public transportation.
- Facilitating regional cooperation regarding transportation issues.
- Providing convenient, accessible, sustainable mobility for all persons, with a focus on meeting vital needs, including commuting to jobs, shuttling to medical services, and traveling to grocery stores and other shopping outlets.
- Prioritizing service for the transit-dependent, including essential workers, underserved communities, and those needing access to non-emergency medical services, who have limited options for mobility.
- Reducing traffic congestion and greenhouse gas emissions, thereby enhancing the quality of life in the Mountain Rides' service area.

### **Scope of Services and Objectives re: the Idaho Public Transportation Plan**

The Idaho Public Transportation Plan (c. April 2018) calls out four overarching goals for public transportation in Idaho, namely:

- Ensure the Safety and Security of Public Transportation Users;
- Encourage Public Transportation as an Important Element of an Effective Multi-Modal Transportation System in Idaho;
- Preserve the Existing Public Transportation Network;
- Provide a Transportation System that Drives Economic Opportunity.

Mountain Rides, in general, and this Project support and contribute to the achievement of these goals by:

- Facilitating mobility for the citizens and visitors of Idaho, including underserved, disadvantaged, and overburdened communities within our service area;
- Providing an array of transportation choices to all segments, including underserved, disadvantaged, and overburdened communities, of the state's population residing within our service area;
- Enhancing access to and connectivity among transportation modes, including public transit and active transportation;
- Reducing traffic crowding and congestion on our streets and highways;
- Promoting – and walking the talk on – environmental stewardship, including reducing emissions of harmful greenhouse gases attributable to public transportation; and
- When possible, collaborating with other service providers to deliver safe, efficient, and effective public transportation options that improve access and connectivity for our constituents.

### **Marketing Communications: Driving Demand that Validates Service Need**

MRTA executes a comprehensive, targeted, efficient marketing and advertising program (the “Program”) aimed at increasing awareness of MRTA as a viable transportation choice; highlighting the safety, accessibility, convenience, and overall value of MRTA's services; and, ultimately, stimulating demand – that translates to ridership – for MRTA's services. Spearheaded by MRTA's Director of Community Transportation Services, the Program conveys MRTA's message via digital media (website, social media, online PR), conventional media

and outlets (newspaper, printed bus schedules, rack cards), and person-to-person interactions (presentations to and interactions with the community-at-large, centers-of-influence in the community, stakeholders, funding partners, employers, and others). For a summary of MRTA's *Marketing & Communications Action Plan*, please see Appendix E.

## **Conclusion**

The funding requested herein – \$ 350,000 – is essential to MRTA's maintaining, enhancing the quality of, and keeping up with demand for NEMT Service between the Wood River Valley and Twin Falls, Idaho. It will underwrite Mountain Rides' continuing NEMT Service, as a supplement to MRTA's regular and ongoing 5311 Rural Transportation Services, and will benefit a broad, diverse community of riders, many of whom depend on public transportation to move about Blaine County and the reaches of the ITD's District 4 in south central Idaho.

## 2. Project Planning: Mountain Rides NEMT Service

Mountain Rides provides comprehensive rural public transportation services in Blaine County, Idaho, and surrounding communities. The planning for this Project – Mountain Rides NEMT Service – derives from MRTA’s general planning process, as described in the following paragraphs.

In addition, the foundational document for MRTA’s planning process is the *Idaho Public Transportation Plan* (c. April 2018), authored by the Idaho Transportation Department’s Public Transportation Office. The *Plan* is structured on three (3) main pillars: i) Safety; ii) Mobility; and iii) Economic Opportunity. It further enumerates goals and recommended actions for achieving those goals. The tenets set forth in the *Plan* underpin MRTA’s planning process and serve as a yardstick for measuring MRTA’s performance.

### The Idaho Public Transportation Plan: Underpinning MRTA’s Planning Process

The Idaho Public Transportation Plan (c. April 2018) calls out four overarching goals for public transportation in Idaho, namely:

- Ensure the Safety and Security of Public Transportation Users;
- Encourage Public Transportation as an Important Element of an Effective Multi-Modal Transportation System in Idaho;
- Preserve the Existing Public Transportation Network; and
- Provide a Transportation System that Drives Economic Opportunity.

Mountain Rides, generally, and this Project, specifically, support the achievement of these goals by:

- Facilitating mobility for the citizens and visitors of Idaho, including underserved, disadvantaged, and overburdened communities, within our service area;
- Providing an array of transportation choices to all segments, including underserved, disadvantaged, and overburdened communities, of the state’s population, specifically that population residing within our service area;
- Enhancing access to and connectivity among transportation modes, including public transit and active transportation;
- Reducing traffic crowding and congestion on our streets and highways;
- Promoting – and walking the talk on – environmental stewardship, including reducing emissions of harmful greenhouse gases attributable to public transportation vehicles; and
- When possible, collaborating with other service providers to deliver safe, efficient, and effective public transportation options that improve access and connectivity for our constituents.

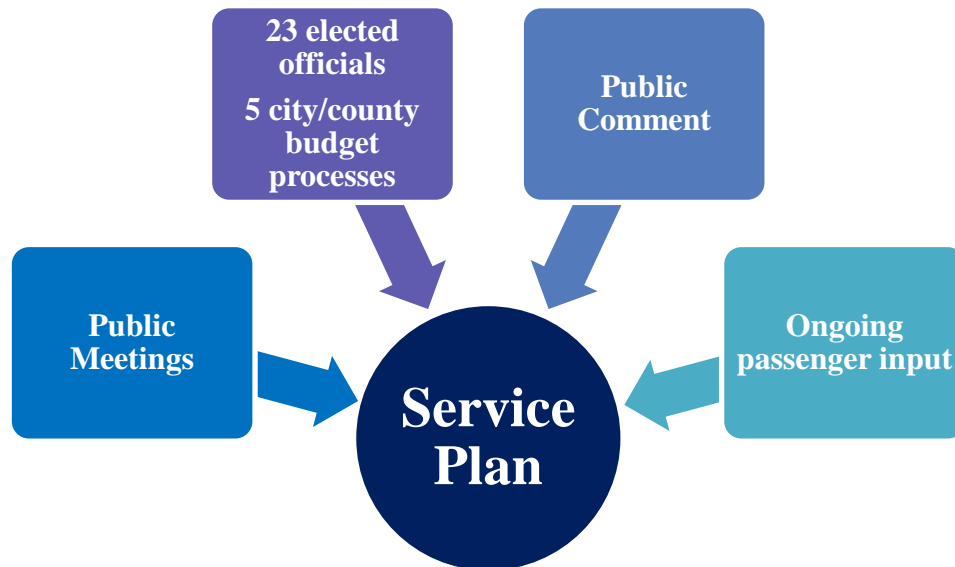
### MRTA’s Planning Process

Mountain Rides provides comprehensive rural public transportation services in Blaine County, Idaho, and surrounding communities. Over the years, MRTA has instigated, refined, and implemented a disciplined planning process geared to developing an executable service plan that derives opportunities from the needs expressed by the community. The planning process includes:

- Strategic planning sessions and annual budget development.
- Annual transportation service plan development.
- Surveys of riders and non-riders.

- Public meetings and workshops.
- Meetings and workshops with the cities, the county, and other community partners.

MRTA recently adopted its FY2024 Service Plan, including NEMT Service, that was defined by diverse inputs:



The upshot of the MRTA planning process – the Service Plan and its ideas, goals, and objectives – reflects and has as its foundation input from riders; those who do not ride but would like to; funding partners; and community stakeholders. The process seeks and encourages input from the public and marries that input with recommendations and expertise from MRTA’s staff and its Board of Directors to coalesce the plan. The planning process begets a strong plan that balances what is needed with what is possible and clarifies opportunities and constraints driven by funding levels, regulations, restrictions, and accumulated knowledge born of the trial-and-error of past efforts.

With respect to MRTA’s NEMT Service, in addition to its being part of the planning process for the Service Plan (above), the specific planning process for the NEMT Service entailed:

- Developing a project plan and financial pro forma for the NEMT Service, including a plan and pro forma for a pilot of the NEMT Service (in 2021).
- Gathering input from St. Luke’s Wood River and Magic Valley Medical Centers’ doctors, nurses, support staff, and administrators, as well as from other medical/health care services providers in Twin Falls, regarding structuring the NEMT Service, including routing, frequency, on-demand parameters, and other components of the Service.
- Collaborating with public transportation providers in Twin Falls to coordinate schedules and afford transfers, when needed, between MRTA’s NEMT Service and the Twin Falls transportation providers.
- Raising funds, including a grant (\$30,000) from the National Aging and Disability Transportation Center (“NADTC”) and grants from local community-based NGOs, to initiate and underwrite: i) a pilot of the NEMT Service and ii) continuing operations, in a limited capacity, of the service after the pilot.
- Executing the pilot of the NEMT Service (April 2021 – January 2023).
- Based on data gleaned from the pilot, fine-tuning the NEMT Service and arriving at the current configuration of the NEMT Service.



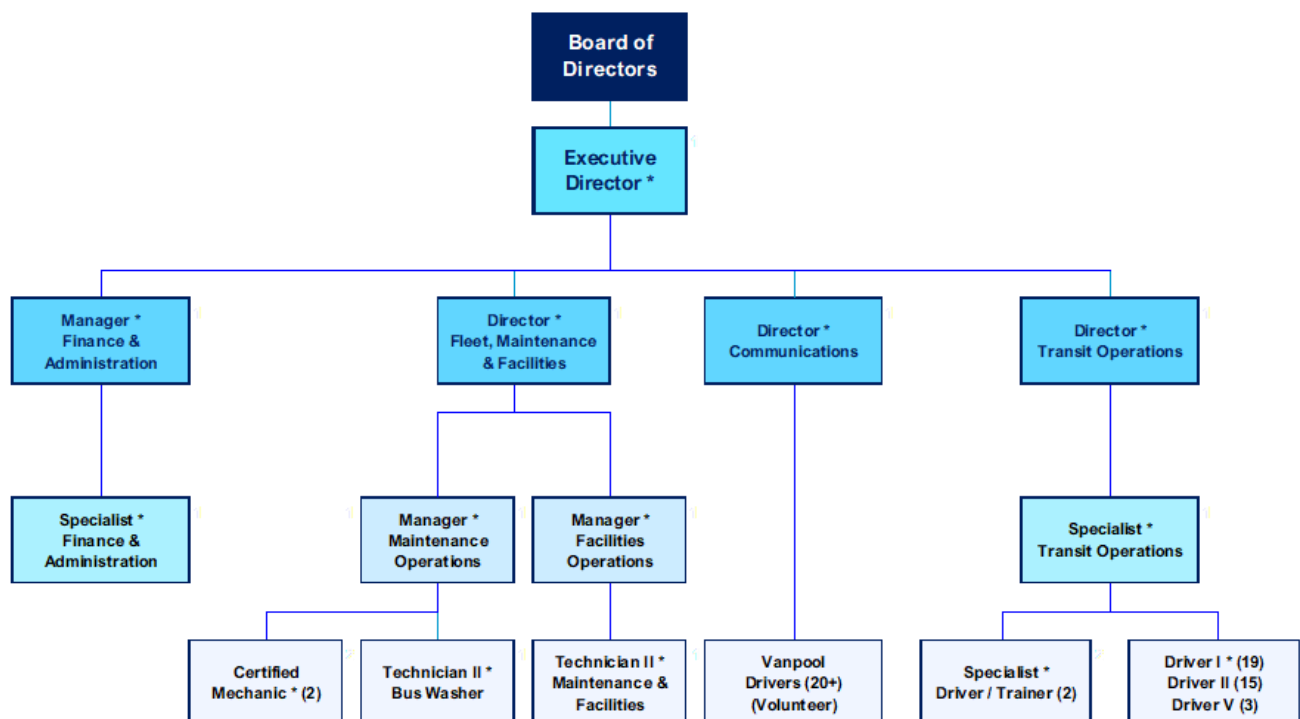
MRTA communicates with its riders, drivers, stakeholders, partners, and the public at-large, seeking means for continual improvement. Recently, MRTA surveyed (in English and Spanish) 200+ members of the community regarding service improvement and expansion. An overwhelming majority – 82% of respondents – affirmed that Mountain Rides is doing the right things with respect to maintaining and improving services. Less than 4% of respondents indicated that MRTA was not on the right track with respect to service development. MRTA uses the data gleaned from this survey, and others like them, in its planning process for routes and services.

MRTA collaborates with local human-services organizations and businesses to solve transportation problems and design, tailor, and enhance services. MRTA partners with Blaine County Hunger Coalition, Wood River YMCA, Blaine County Recreation District, Higher Ground Adaptive Sports, The Senior Connection, and The Advocates Against Domestic Abuse to craft services that reach lower income, disabled, and minority populations (Title VI).

Mountain Rides’ allies in the business community include Sun Valley Company, Webb Landscape, Atkinsons Markets, Rocky Mountain Hardware, Sun Valley Bronze, local auto repair shops, hotels, and property management companies. MRTA’s discipline includes soliciting bids from and doing business with Disadvantaged Business Enterprises (DBEs), whenever possible.

For its NEMT Service, Mountain Rides maintains a crucial and collaborative relationship with St. Luke’s Wood River Medical Center (Ketchum, ID) and St. Luke’s Magic Valley Medical Center (Twin Falls, ID), as well as with other medical and health services providers in the greater Twin Falls area.

MRTA’s management and staff have a strong record of managing grants and delivering transportation services and other projects underwritten by those grants. MRTA is a government agency, formed according to the terms of a Joint Powers Agreement (JPA) by and between the cities of Ketchum, Sun Valley, Hailey, and Bellevue, and Blaine County, Idaho. The JPA renews every four (4) years, with the most recent renewal occurring in October 2023. An eight-member Board of Directors, appointed by the signatories to the JPA, oversees and serves as fiduciary for Mountain Rides, setting strategic direction and objectives, approving budgets, ratifying policies, and managing the Executive Director. The Executive Director and staff implement annual and longer-term plans under the Board’s direction. The MRTA organization:



MRTA has no labor unions.

This project (operations) does not require NEPA.

Please see Appendix A for letters of support from our joint powers and community partners.

### 3. Project Benefits/Evaluation: Mountain Rides NEMT Service

#### Benefits

As a source of public transportation services for the region, MRTA is valued and valuable, providing clear benefits to the community:

## Mountain Rides Teamwork...Integrity...Commitment to Excellence

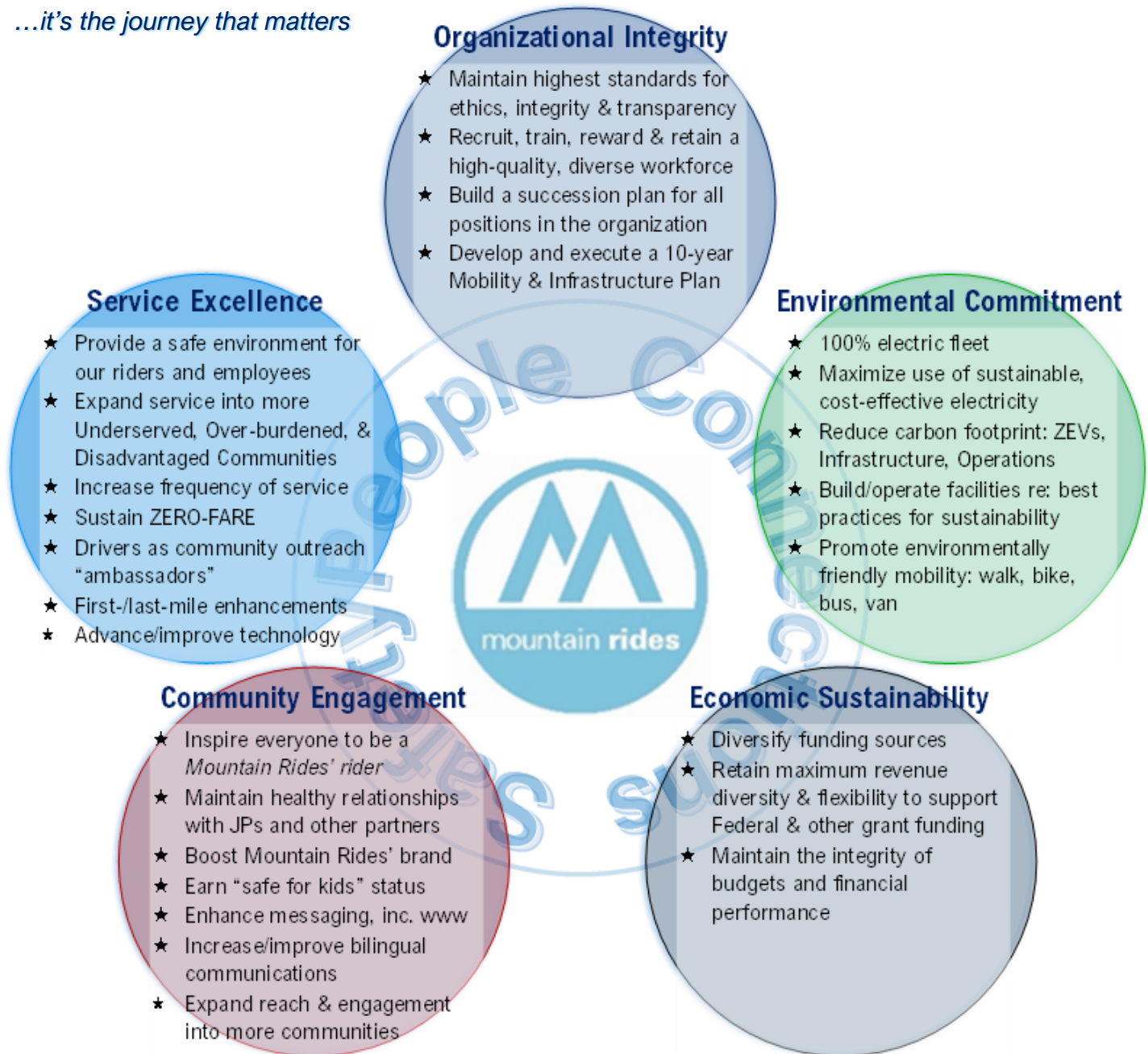


*...because it's the journey that matters*

...as guided by our Strategic Framework:

## Mountain Rides Transportation Authority Strategic Framework: Pentad of Focus 2023 – 2027

*...it's the journey that matters*



## Efficiency and Ridership

MRTA operates efficiently. System-wide ridership (productivity) averages seventeen (17) passengers per service hour and has been growing steadily. At ~\$79.00 per service hour and ~\$3.65 per service mile, operating costs for the NEMT Service are reasonable and generally compare favorably across the spectrum of 5311 rural service providers and very favorably across the industry as a whole. As ridership has grown, MRTA's operating costs have remained very stable; we anticipate continuation of these trends.

With the funding sought in this application, MRTA will persevere with efficient, productive operation of its NEMT Service, driving growth in ridership by simplifying mobility and improving access to critical medical and health care services for Blaine County residents dependent on public transportation for that mobility and access.

## Safety

Safety is MRTA's top priority. We relentlessly measure our performance against benchmarks, evaluate our measurements, and apply what we learn to improve our safety performance. MRTA employs a disciplined driver safety training program, integrating internal and external training resources (in-house supervisors and programs; drivers' handbook; ITD; RTAP; CTAA; FTA). Via a monthly performance dashboard that is distributed to staff, management, and the Board, and made available to the public, MRTA communicates its safety performance as a means for reinforcing the importance, criticality, and priority we assign to safety. A recent dashboard:



MRTA currently enjoys a streak of over sixteen hundred (1,600) days without a lost-time accident in our Maintenance Department and shows a miniscule number of on-street at-fault smaller incidents. This attests to the "safety culture" that is firmly rooted at Mountain Rides and is especially outstanding against the backdrop of ever-increasing service levels and year-in-and-year-out extremely challenging winter operating conditions.

## ***Mobility***

MRTA serves diverse demographics – youth, seniors, workers/commuters, persons with disabilities, riders-by-choice, transit-dependent riders, minorities, all income levels. According to mobility data compiled by *AllTransit* (<http://alltransit.cnt.org>), eighty five percent (85%) of commuters in the cities in Mountain Rides’ service area live within ½-mile of transit. This is a very high percentage and reflects the efficient build out of Mountain Rides’ infrastructure, routes, and service, as well as confirms a manifestation of Mountain Rides’ commitment to “mobility for all.” (Opportunity and room for growth are also implicit in *AllTransit*’s numbers, which show less than four percent (<4.0%) of commuters living within ½-mile of transit in Mountain Rides’ service area using public transportation for their commutes.)

## ***Economy***

MRTA contributes directly to the local economy:

- MRTA is a de facto federally funded jobs-creation program that sustains approximately fifty (50) seasonal and year-round full-time jobs and pumps approximately two million dollars (\$2.0 million) in wages and benefits into the local economy.
- MRTA “buys local” for a variety of goods and services it purchases and thereby pumps an additional approximately one million dollars (\$1.0 million) into the local economy.

MRTA’s public transportation services benefit the economy by supporting residents and workers:

- Commuters save money and time by using public transportation.
- Parents save money and time when their children take public transportation to activities and school events.
- Employers attract and retain employees who have reliable transportation options.
- Community organizations’ customers/clients get where they need to go safely and reliably.
- Local cities offer an enhanced quality of life, especially for residents who enjoy walking, biking, and riding the bus.

MRTA’s public transportation services benefit the economy by supporting visitors, who make the largest contribution (spending) to our resort-destination market. MRTA’s services enable visitors’ moving around the community easily and efficiently without a car, which enhances the overall visitor experience.

## **Evaluation**

### ***Measurement***

MRTA, via its NEMT Service (the “project”), provides valued and valuable transportation services to the communities it serves. MRTA will measure its success in fulfilling this commitment on an ongoing basis across three (3) key measures: i) safety performance, ii) financial performance, and iii) service/ridership performance. MRTA will monitor these measures on an ongoing basis throughout the life of the project.

MRTA will collate service/ridership and safety performance measurements into monthly performance dashboard reports for distribution to management, staff, the board, community stakeholders, and the public at-large, thereby assuring and reinforcing transparency and accountability. The safety performance dashboard (for a sample dashboard, see the ***Safety*** section, above) will capture at-fault accidents, incidents, road calls, age of fleet, and other metrics. The service/ridership performance dashboard will comprise measurements of total ridership, service hours, ridership/service hour, and other metrics.

MRTA will measure financial performance, evaluating it against the budget and prior periods' performance, by way of management's diligently producing monthly financial statements and reviewing those statements with MRTA's Board of Directors.

MRTA will continually evaluate its financial performance against the industry's financial benchmarks for high-frequency, fixed-route service, as well as for on-demand NEMT Service, and maintain the flexibility to adjust service from time-to-time to conform with those benchmarks.

For a recent Monthly Dashboard of performance metrics, please see Appendix D.

### ***Accountability***

MRTA will be held accountable for its performance by, among others, its Joint Powers partners. Accountability will manifest in a regular array of reports and presentations, in public session, by MRTA to the Joint Powers partners, specifically to city councils and the county board of commissioners. These interactions will include: i) semi-annual presentations updating the councils/commission/public on topics including operations, service levels and performance, ridership, customer service, marketing, customer feedback, safety performance, financial performance, etc.; ii) annual presentations to councils/commission supporting MRTA's annual and community funding request (For recent funding requests and presentations, please see Appendix a.); and iii) ad hoc presentations, upon request from the councils/commission or at the suggestion of MRTA, from time-to-time, on a variety of issues at the intersection of the Joint Powers, the public, riders, and MRTA. The checks-and-balances to assure prudent and proper management, execution, and engagement with the community by MRTA are solidly in place. As attestation of MRTA's accountability – letters of support from our Joint Powers and community partners – please see Appendix A.

### ***ITD Metrics and Accountability***

As a subrecipient of federal grant funding, MRTA is accountable to the Idaho Transportation Department (ITD) Public Transportation Office (PT). This accountability manifests through quarterly and ad hoc reporting by MRTA to the ITD-PT. One of the upshots of that reporting is the ITD-PT's compilation and dissemination of its ***Annual Public Transportation Performance Report***, a state-of-the-state report regarding public transportation that details, for all to see, the performance, on a variety of metrics, of individual agencies and across the state at-large. Accountability!

### ***Executing the Project***

MRTA has the capacity and wherewithal to carry out the project – operating NEMT Service as a component of 5311 rural public transportation services. MRTA has been successfully carrying out this project, with underwriting from several sources, for just over two years.

MRTA has the organization and financial strength in place to support and execute this project. To verify this claim, please see Appendix B for MRTA's organizational chart; the MRTA Joint Powers Agreement, extended and executed through September 2027; an agreement for service and funding with our joint powers partners; and audited financial statements for our most recently completed fiscal year (FY2023).



## 4. Project Budget: Mountain Rides NEMT Service

### Narrative

MRTA's management and staff have a strong track record of managing grant programs and budgets and delivering transportation services and other projects underwritten by those grant programs within budget.

MRTA is a government agency, governed by the terms of a Joint Powers Agreement (JPA). The signatories to the JPA are Mountain Rides' primary providers of local match funds. That funding appears to be stable into the foreseeable future. The Joint Powers appropriate MRTA funding annually via their respective budgeting processes.

MRTA counts on the CARES Act funding contemplated herein to underwrite one hundred percent (100%) of the Project (NEMT Service).

MRTA has generated supplemental revenue – grant awards from local community foundations – to underwrite NEMT Service to date. MRTA anticipates limited-to-no such supplemental revenue going forward.

MRTA develops expense budgets and cost projections using a zero-based technique that considers the projected service plan to be funded, prevailing wage rates, age and state-of-repair of the fleet, and projected costs, including an inflationary adjustment, for all goods and services to be purchased to support the project.

### Project Budget

The Project Budget is a subset of MRTA's projected Operating Budgets for fiscal years 2025 and 2026. To calculate the Project Budget, MRTA considered all of the inputs required to deliver the service in conjunction with the service plan for the NEMT Service. A simplified, straightforward depiction of that process and its outcome – the total cost to deliver the Service – is shown below:

<b>Mountain Rides</b>					
<b>Pro Forma: TWF-NEMT Service</b>					
<b>NEMT Service Parameters</b>					
	52.00	weeks / year			
	5.00	trips / week			
	8.50	service hours / trip			
	176.00	miles / trip			
	20.71	miles / service hour			
	42.50	service hours / week			
	2,210.00	service hours / year			
<b>Cost of Service Per Service Hour</b>					
Driver	\$ 31.63	\$ 23.00 / hr. wage	+37.5% taxes/benefits		
Fuel	7.76	12.00 MPG	\$ 4.50 / gal.		
Maintenance	3.93	\$ 0.19 / mi.	\$ 17.86 / hr.		
Insurance	5.13	\$ 5.13 / service hr.			
Admin/Mgt	5.90	\$ 36.48 / hr. wage	+37.5% taxes/benefits	1.00 hour / trip	
Capital Cost	24.85	\$ 120,000 van cost	100,000 mi. useful life	\$ 1.20 CapCost / mi.	
<b>Total</b>	<b>\$ 79.20</b>				
<b>Per Trip</b>	<b>\$ 673.23</b>				
<b>Per Week</b>	<b>\$ 3,366.15</b>				
<b>Per Year</b>	<b>\$ 175,040.05</b>				



For reference, MRTA’s overall Budget (preliminary) for FY2025 and FY2026 follows:

<b>Mountain Rides Transportation Authority Project Budget</b>	<b>FY25</b>	<b>FY26</b>	<b>FY25 + FY26</b>
<b>51000 • Payroll Expense</b>	<b>\$ 3,288,700</b>	<b>\$ 3,387,900</b>	<b>\$ 6,676,600</b>
<b>52000 • Insurance Expense</b>	204,000	210,100	414,100
<b>53000 • Professional Fees</b>	40,200	40,800	81,000
<b>54000 • Equipment/Tools</b>	13,400	13,500	26,900
<b>55000 • Rent &amp; Utilities</b>	36,200	37,300	73,500
<b>56000 • Supplies</b>	35,000	35,700	70,700
<b>57000 • Repairs &amp; Maintenance</b>	54,100	55,200	109,300
<b>58000 • Communications Expense</b>	46,900	48,300	95,200
<b>59000 • Travel &amp; Training</b>	34,800	35,700	70,500
<b>60000 • Business Expenses</b>	16,500	16,800	33,300
<b>61000 • Advertising</b>	39,800	40,200	80,000
<b>62000 • Marketing &amp; Promotion</b>	22,400	22,800	45,200
<b>63000 • Printing &amp; Reproduction</b>	19,600	20,200	39,800
<b>64000 • Fuel Expense</b>	515,500	531,800	1,047,300
<b>65000 • Vehicle Maintenance</b>	194,100	203,800	397,900
<b>Total Expense</b>	<b>\$ 4,561,200</b>	<b>\$ 4,700,100</b>	<b>\$ 9,261,300</b>

For a summary of MRTA’s FY2024 Operating Budget, please see Appendix C. MRTA’s NEMT Service is included in this budget.

### **Economic Sustainability of the NEMT Service**

MRTA recognizes the risk associated with securing sustainable funding for the NEMT Service beyond the two years during which the proceeds from this grant will fund the Service. This risk, born largely of the nature of funding cycles and funding partners’ willingness to commit funding only for the current cycle and not beyond, is similar to that borne by MRTA relative to funding for all of its services, operations, and capital investments.

In the case of NEMT, MRTA has a strong cadre of supporters who have lent meaningful financial support to the endeavor since its “pilot stage” in 2021. MRTA will look to this cadre for continuing financial support – ~\$175,000+ per year – beyond the two years of funding afforded by this grant. This bloc of underwriters includes: i) MRTA’s Joint Powers’ partners; ii) St. Luke’s Wood River Medical Center; iii) St. Luke’s Magic Valley Medical Center; iv) St. Luke’s Wood River Foundation; v) St. Luke’s Magic Valley Foundation; and vi) other local non-profit foundations and organizations. In addition, during the FY27+FY28 cycle, MRTA will seek incremental 5311 funding for underwriting the NEMT Service.

With the value of the NEMT Service proven and apparent to the community and MRTA’s strong track record of funding from local partners, MRTA is confident that funding to sustain the Service will continue to flow from the community, including the cadre of supporters/partners highlighted above.

## **5. Applicant Experience (ITD/FTA): Mountain Rides**

Mountain Rides has a long, strong history of mutually beneficial relationships with, and successful management and administration of grant funds awarded by the ITD and FTA.

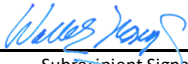
## **6. Application Professionalism: Mountain Rides**

Mountain Rides, to the best of its abilities, has completed this application with the utmost of efficiency, accuracy, veracity, and integrity.

Thank you.

# Attachment A

## Project Budget Request

Project Budget Request																			
		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Subrecipient</td> <td colspan="2">Mountain Rides Transportation Authority</td> </tr> <tr> <td>Agreement Term</td> <td colspan="2">October 1, 2024 - September 30, 2025</td> </tr> <tr> <td>Contact Name</td> <td colspan="2">Wally Morgus, Executive Director</td> </tr> <tr> <td>Address</td> <td colspan="2">PO Box 3091, Ketchum, ID 83340</td> </tr> <tr> <td>Phone Number</td> <td colspan="2">208.788.7433 x. 101</td> </tr> </table>			Subrecipient	Mountain Rides Transportation Authority		Agreement Term	October 1, 2024 - September 30, 2025		Contact Name	Wally Morgus, Executive Director		Address	PO Box 3091, Ketchum, ID 83340		Phone Number	208.788.7433 x. 101	
		Subrecipient	Mountain Rides Transportation Authority																
		Agreement Term	October 1, 2024 - September 30, 2025																
		Contact Name	Wally Morgus, Executive Director																
		Address	PO Box 3091, Ketchum, ID 83340																
Phone Number	208.788.7433 x. 101																		
FTA Grant	100/0																		
5311	Total	Federal	Match																
CARES	\$ 350,000	\$ 350,000	\$ -																
Total Project Cost		Total Federal Request		Total Match Needed															
\$ 350,000		\$ 350,000		\$ -															
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p><u>Wally Morgus, Mountain Rides Transportation Authority</u></p> <p style="text-align: center;">Subrecipient Printed Name</p> <div style="text-align: center;">  </div> <p style="text-align: center;">Subrecipient Signature</p> <div style="text-align: center;"> <p>Dec 21, 2023</p> <p>Date</p> </div> </div> <div style="width: 50%; border: 1px solid black; padding: 5px;"> <p>Scope of Work</p> <p>Existing and ongoing Non-Emergency Medical Transportation ("NEMT") Service: demand-response service that transports passengers between the Wood River Valley and Twin Falls, Idaho, for non-emergency medical treatments, consultations, and other appointments and that provides public transportation service supplementing Mountain Rides' 5311 Services in rural (&lt;50,000 pop.) Blaine County, Idaho, and its surrounding communities, where residents and visitors rely on public transportation for mobility.</p> </div> </div>																			
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"></div> <div style="width: 50%; border: 1px solid black; padding: 5px;"> <p>Local Match Source(s) for Project:</p> <p>NA</p> </div> </div>																			

**Attachment D**  
**Demonstration of Need**

**Congressional Application Attachment D: Demonstration of Need**

**1. Type of Service (Check all that apply):**

- ☒ Fixed Route  
☒ Deviated Fixed Route  
☒ Demand/ Response

**2. Service Area (Check one)**

- ☐ City  
☒ County  
☐ Multi-County  
☐ Other (Please Specify):

**3. Connectivity:**

Do you connect with other modes of transportation? Check all that apply.

- ☐ Urban Public Systems  
☐ Intercity Carriers  
☐ Airports/ Trains  
☒ Other transit operators in your region (please list below):

Ride TFT (Twin Falls Transit)

**4. Ridership:**

Estimate the average number of rides: Per Day 2,055\* Per Year 750,000\* (\*includes bus & vanpool riders)

Briefly describe your ridership over the last two years: -

Over the past two years, MRTA's ridership has been burgeoning, with bus riders progressing from ~500K in FY22 to over 700K in FY23 (+41%+); and vanpool riders growing from ~40K in FY22 to ~45K in FY23 (+12.5%).

**5. Days/ Hours of Service:**

List days of the week and hours transit provider is in service

In service: Sun thru Sat, 6:00am - 12:30am. Annual service hours: 38,000+ for bus transit.

## Appendix A

- Letter of Support



### CITY OF KETCHUM | MAYOR

Neil Bradshaw | Mayor  
direct: 208.721.2162 | office: 208.726.7803  
nbradshaw@ketchumidaho.org  
P.O. Box 2315, 191 5th Street West, Ketchum, ID 83340  
ketchumidaho.org

December 22, 2023

Idaho Transportation Department  
Public Transportation Office  
11331 W. Chinden Boulevard  
Building 8  
Boise, Idaho 83714

#### Re: Mountain Rides' Grant Application for CARES Act Funding

Dear Grant Evaluation Team:

Please accept this letter in support of Mountain Rides' application for FY2025 and FY2026 grant funding to support public transportation – specifically, operation of NEMT service between the Wood River Valley and Twin Falls, Idaho – via the CARES Act One-time Funding Opportunity, as administered by the ITD's Public Transportation Office.

The City of Ketchum supports Mountain Rides' application and encourages you to view it favorably.

The City of Ketchum regards public transportation as a strategic priority. The City makes significant investments in Mountain Rides through annual appropriations of local funding. As a result, public transportation helps energize the economy and enhance our quality of life.

Of particular significance is Mountain Rides' on-demand NEMT service, which, over the past year, has become a highly demanded service, providing access for people in the Wood River Valley to essential, non-emergency medical services in Twin Falls. As demand for those medical services continues to grow, Mountain Rides' NEMT service becomes even more important, especially for those whose condition precludes their driving to Twin Falls in a personal auto.

Mountain Rides, having exhausted local funding opportunities in underwriting the nascent NEMT service to date, must have the CARES funding contemplated herein to carry on with the NEMT service beyond the next few months and into the next couple of years.

Thank you for looking favorably on Mountain Rides' application for funding and for supporting public transportation in Ketchum, Sun Valley, Hailey, Bellevue, Blaine County, and District 4. Funding opportunities like this one are critical to Mountain Rides' success and sustainability.

Sincerely,

Neil Bradshaw  
Mayor  
City of Ketchum

MAYOR Neil Bradshaw | COUNCIL Amanda Breen Michael David Courtney Hamilton Jim Slanetz

**SMALL TOWN. BIG LIFE.**

## Appendix A

- Letter of Support



Mayor  
Peter M. Hendricks

Council  
Jane Gorman, Council President  
Michelle Grunir  
Brad Duhon  
Keith Gales

December 19, 2023

Idaho Transportation Department  
Public Transportation Office  
11331 W. Chinden Boulevard, Building 8  
Boise, Idaho 83714

**Re: Mountain Rides' Grant Application for CARES Act Funding**

Dear Grant Evaluation Team:

Please accept this letter in support of Mountain Rides' application for FY2025 and FY2026 grant funding to support public transportation operations – specifically, operation of NEMT service between the Wood River Valley and Twin Falls, Idaho – via the CARES Act One-time Funding Opportunity, as administered by the ITD's Public Transportation Office.

The City of Sun Valley supports Mountain Rides' application and encourages you to view it favorably.

The City of Sun Valley regards public transportation as a strategic priority. The City makes significant investments in Mountain Rides through annual appropriations of local funding. As a result, public transportation helps energize the economy and enhance our quality of life.

Of particular significance is Mountain Rides' on-demand NEMT service, which, over the past year, has become a highly demanded service, providing access for people in the Wood River Valley to essential, non-emergency medical services in Twin Falls. As demand for those medical services continues to grow, Mountain Rides' NEMT service becomes even more important, especially for those whose condition precludes their driving to Twin Falls in a personal auto.

Mountain Rides, having exhausted local funding opportunities in underwriting the nascent NEMT service to date, must have the CARES funding contemplated herein to carry on with the NEMT service beyond the next few months and into the next couple of years.

Thank you for looking favorably on Mountain Rides' application for funding and for supporting public transportation in Sun Valley, Ketchum, Hailey, Bellevue, Blaine County, and District 4. Funding opportunities like this one are critical to Mountain Rides' success and sustainability.

Sincerely,

Peter M. Hendricks  
Mayor

PO Box 416 • SUN VALLEY, ID 83353 • 208-622-4438 • FAX 208-622-3401  
[www.sunvalleyidaho.gov](http://www.sunvalleyidaho.gov)



## Appendix A

- Letter of Support



### THE BOARD OF BLAINE COUNTY COMMISSIONERS

206 FIRST AVENUE SOUTH, SUITE 300

HAILEY, IDAHO 83333

PHONE: (208) 788-5500 FAX: (208) 788-5569

[www.blainecounty.org](http://www.blainecounty.org) [bec@co.blaine.id.us](mailto:bec@co.blaine.id.us)

Muffy Davis, Chair \* Angenie McCleary, Vice-Chair \* Lindsay Mollineaux, Commissioner

December 19, 2023

Idaho Transportation Department  
Public Transportation Office  
11331 W. Chinden Boulevard  
Building 8  
Boise, Idaho 83714

#### Re: Mountain Rides' Grant Application for CARES Act Funding

Dear Grant Evaluation Team:

Please accept this letter in support of Mountain Rides' application for FY2025 and FY2026 grant funding to support public transportation – specifically, operation of NEMT service between the Wood River Valley and Twin Falls, Idaho – via the CARES Act One-time Funding Opportunity, as administered by the ITD's Public Transportation Office.

Blaine County regards public transportation as a strategic priority. The County makes significant investments in Mountain Rides through annual appropriations of local funding. As a result, public transportation helps energize the economy and enhance our quality of life.

Of particular significance is Mountain Rides' on-demand NEMT service, which, over the past year, has become a highly demanded service, providing access for people in Blaine County to essential, non-emergency medical services in Twin Falls. As demand for those medical services continues to grow, Mountain Rides' NEMT service becomes even more important, especially for those whose condition precludes their driving to Twin Falls in a personal auto.

Mountain Rides, having exhausted local funding opportunities in underwriting the nascent NEMT service to date, must have the CARES funding contemplated herein to carry on with the NEMT service beyond the next few months and into the next couple of years.

Thank you for looking favorably on Mountain Rides' application for funding and for supporting public transportation in Blaine County, Ketchum, Sun Valley, Hailey, Bellevue, and District 4. Funding opportunities like this one are critical to Mountain Rides' success and sustainability.

Respectfully,

Angenie McCleary  
Vice-Chair



## Appendix A

- Letter of Support



December 22, 2023

Idaho Transportation Department  
Public Transportation Office  
11331 W. Chinden Boulevard  
Boise, Idaho 83714

**Re: Mountain Rides' Grant Application for CARES Act Funding**

Dear Grant Evaluation Team:

Please accept this letter in support of Mountain Rides' application for FY2025 and FY2026 grant funding to support public transportation – specifically, operation of NEMT service between the Wood River Valley and Twin Falls, Idaho – via the CARES Act One-time Funding Opportunity, as administered by the ITD's Public Transportation Office.

St. Luke's ardently supports Mountain Rides' application and encourages you to view it favorably.

St. Luke's, on behalf of its patients, doctors, staff, and the community at-large, regards public transportation, specifically Mountain Rides' NEMT service, as a necessity. The Wood River Valley is a rural region with a critical access hospital and limited medical services. In fact, it is considered a mental health provider and dental health provider shortage area according to the latest Community Health Needs Assessment. Critical medical services are provided in Twin Falls that are not found in Blaine County such as certain cancer treatments, renal dialysis, and ophthalmology. Public transportation plays a key role in providing access to healthcare, both here in the Wood River Valley and beyond the Valley into Twin Falls where St. Luke's and other health care organizations maintain a comprehensive array of highly needed and demanded healthcare services.

Mountain Rides' on-demand NEMT service is particularly significant. Over the past year, it has become a highly demanded service, providing access for people in the Wood River Valley to essential, non-emergency medical services in Twin Falls. As demand for those medical services continues to grow, Mountain Rides' NEMT service becomes even more important, especially for those whose condition precludes their driving to Twin Falls in a personal auto and for those that cannot afford the cost of gasoline for frequent trips.

Mountain Rides, having exhausted local funding opportunities, including substantial support from St. Luke's, in underwriting the nascent NEMT service to date, must have the CARES funding contemplated herein to carry on with the NEMT service beyond the next few months and into the next couple of years.



Thank you for looking favorably at Mountain Rides' application for funding and for supporting public transportation. Funding opportunities like this one are critical to Mountain Rides' success and sustainability and to the continuing well-being of our community.

Very truly yours,

Sarah Seppa MS, RD, CDCES  
Director of Community Engagement

## Appendix A

- Letter of Support

 <b>City of Hailey</b> 115 MAIN STREET SOUTH, SUITE H HAILEY, IDAHO 83333	OFFICE OF THE MAYOR  (208) 788-4221 Fax: (208) 788-2924
December 22, 2023	
Idaho Transportation Department Public Transportation Office 11331 W. Chinden Boulevard Building 8 Boise, Idaho 83714	
<b>Re: Mountain Rides' Grant Application for CARES Act Funding</b>	
Dear Grant Evaluation Team:	
Please accept this letter in support of Mountain Rides' application for FY2025 and FY2026 grant funding to support public transportation – specifically, operation of NEMT service between the Wood River Valley and Twin Falls, Idaho – via the CARES Act One-time Funding Opportunity, as administered by the ITD's Public Transportation Office.	
The City of Hailey supports Mountain Rides' application and encourages you to view it favorably.	
The City of Hailey regards public transportation as a strategic priority. The City makes significant investments in Mountain Rides through annual appropriations of local funding. As a result, public transportation helps energize the economy and enhance our quality of life.	
Of particular significance is Mountain Rides' on-demand NEMT service, which, over the past year, has become a highly demanded service, providing access for people in the Wood River Valley to essential, non-emergency medical services in Twin Falls. As demand for those medical services continues to grow, Mountain Rides' NEMT service becomes even more important, especially for those whose condition precludes their driving to Twin Falls in a personal auto.	
Mountain Rides, having exhausted local funding opportunities in underwriting the nascent NEMT service to date, must have the CARES funding contemplated herein to carry on with the NEMT service beyond the next few months and into the next couple of years.	
Thank you for looking favorably on Mountain Rides' application for funding and for supporting public transportation in Hailey, Ketchum, Sun Valley, Bellevue, Blaine County, and District 4. Funding opportunities like this one are critical to Mountain Rides' success and sustainability.	
Respectfully,	
	
Martha Burke Mayor	

## Appendix A


- **Funding Request & Presentation: Sun Valley**

**FY24 Funding Request: City of Sun Valley**  
Respectfully: \$ 450,000 + \$ 360,000 CIP



June 1, 2023

...it's the journey that matters

**Mountain Rides Transportation Authority**  
Crucial Infrastructure; Vital Service; Key Cog in the Economy

➤ **Mountain Rides:**

- ★ Provides mobility and access to employment, community resources, medical care, and recreation
- ★ Benefits those who choose to ride and those who are transit dependent, relying on public transportation for mobility
- ★ Supports community efforts to expand business opportunities, mitigate the impacts of workforce housing shortages, and foster a sense of community – buttressing economic vitality & resilience
- ★ Reduces road congestion & travel times, air pollution, and energy consumption – benefiting riders and the community-at-large
- ★ Stands ready, in times of emergency, as a critical transportation alternative for safe and efficient evacuation

FY24 Funding Request: City of Sun Valley (\$450,000) 2

## Appendix A

### • Funding Request & Presentation: Sun Valley




### Community Impact

Common Mission; Shared Ethos; Essential Service

- **Infrastructure that supports & drives the local economy**
  - ★ Investing \$28.0M+ of Federal/State grant awards, FY24-FY27, in PT infrastructure
- **Good sustainable jobs – Federally-endorsed workforce program**
  - ★ Underwriting 45 local jobs with \$2.1M of FTA funding annually
- **Quality of life**
  - ★ Reducing emissions; mitigating congestion; supporting opportunity
  - ★ Providing safe, accessible, **zero-fare** public transportation
  - ★ Guaranteeing workforce mobility
  - ★ Mitigating the impacts of the workforce housing deficit
- **Integrity**
  - ★ Operating transparently within a balanced budget
  - ★ Supporting & contributing to the valley's economic vitality & growth

FY24 Funding Request: City of Sun Valley (\$450,000)

3



### Community Investment

Vital Operations; Strategic Infrastructure; Community Asset

➤ **FY24 Funding Request**

**\$ 450,000**


- **For Continuing Operations** **\$ 366,000**
  - ★ Operating Budget (prelim) \$ 4.25M
  - ★ Pre-pandemic service levels++
  - ★ Increased frequency during commute-hours
  - ★ TWF NEMT service sustainability
  - ★ ADA Paratransit service growth
- **For Capital Expenditures** **\$ 84,000**
  - ★ Capital Budget (prelim) \$ 1.4M
  - ★ LD BEBs (2) + charging infrastructure
  - ★ Commuter vanpool vans (4)
  - ★ ADA Paratransit / NEMT vans (2)
  - ★ Capital Sources
    - ★ FTA Grants \$ 1.12M
    - ★ JPs FY24 CIP Funding \$ 280K

FY24 Funding Request: City of Sun Valley (\$450,000)

4

## Appendix A

- **Funding Request & Presentation: Sun Valley**


**Community Investment – SPECIAL CAPITAL**  
Strategic Infrastructure; Community Asset; Vital to Operations

➤ **FY24 Special Capital Funding Request** **\$ 360,000**

➤ **For Constructing & Equipping BEB Facility** **\$ 360,000**

- ★ *Project Budget* **\$ 6.05M**
- ★ *5,400SF addition to MRTA's Bellevue campus*
- ★ *Electric bus depot, maintenance, storage, charging*
- ★ *Capital Sources*
- ★ *FTA/ITD Grants* **\$ 4.84M**
- ★ *JPs FY24 Special CIP Funding* **\$ 1.21M**

**FY24 Special Funding Request: City of Sun Valley (\$360,000)** 5

**FY24 Funding Request: City of Sun Valley**  
Comments, Questions & Answers

**Thank You**

mountain rides

June 1, 2022

*...it's the journey that matters*



## Appendix A

- **Funding Request & Presentation: Sun Valley**



**City of Sun Valley**  
**FY24 Funding Request**  
**June 1, 2023**

### Executive Summary

**Agency:** Mountain Rides Transportation Authority ("Mountain Rides" or "MRTA")  
**Program:** Public Transportation  
**Contact:** Wally Morgus  
Executive Director  
wally@mountainrides.org  
208.788.7433 x.101

Mountain Rides requests FY24 funding from the City of Sun Valley ("City") in the amount of \$450,000.

### Community Investment: FY24 Funding Request – \$450,000

Mountain Rides is seeking **community investment – funding – from the City of \$450,000 for FY24** for continuing public transportation services benefiting the City, its residents, businesses, workers, and visitors.

For FY24, Mountain Rides anticipates allocating the City's funding as follows:

- ★ \$ 366,000 for Operations
  - ★ MRTA's total FY24 operating budget (preliminary) = \$4.25M.
- ★ \$ 84,000 for Capital Expenditures
  - ★ MRTA's total FY24 capital budget (preliminary) = \$1.4M.
    - ★ Light-duty battery electric buses (2) & related charging infrastructure.
    - ★ ADA Paratransit / NEMT vans (2).
    - ★ Commuter vanpool vans (4).

### Community Engagement

#### **Essential Service: Vital Thread**

Mountain Rides is a vital thread in the fabric of the community, as it:

- ★ Operates fixed-route bus service moving 550,000+ riders annually into, around, and about the City;
  - ★ Operates regional vanpool services providing safe, reliable, and affordable transportation for workers moving to and from workplaces in and around the City;
  - ★ Operates on-demand NEMT service between Sun Valley and Twin Falls;
  - ★ Engages in transportation planning – e.g., the County's Bike-Ped Master Plan – that benefits the City; and
  - ★ Builds out a zero-emissions, electric bus fleet that is good for the environment, aligns with the ethos of the community, and promotes a healthy, sustainable lifestyle.
-

## Appendix A

### • Funding Request & Presentation: Sun Valley



#### Community Engagement (cont.)

##### **Operations**

In FY24, Mountain Rides will maintain service similar to FY23 levels, which, in addition to our routes and service in the Wood River Valley, will include continuing regular on-demand van service – non-emergency medical transportation (NEMT) – between Sun Valley and Twin Falls.

##### **Capital Expenditures**

On the Capital side in FY24, Mountain Rides will continue its drive towards a 100% zero-emissions fleet by acquiring two (2) light-duty battery electric buses (LD BEBs) and related charging infrastructure. About 85% of the total cost of the BEBs will be underwritten by Federal grant awards. In the winter, these LD BEBs will be deployed on Mountain Rides' Red Route serving the Elkhorn neighborhoods in Sun Valley.

In addition, in FY24 Mountain Rides will add four (4) commuter vanpool vans and two (2) ADA Paratransit/NEMT vans to its fleet.

##### **Challenges & Growth**

Mountain Rides anticipates spending FY24 continuing to grow ridership, which has rebounded to exceed pre-pandemic levels. We also anticipate continued growth in ridership with our ADA Paratransit Service and on our on-demand NEMT Service to Twin Falls.

Also, as opportunity and funding emerge, Mountain Rides will continue to fine-tune and improve services:

- ★ Expanding service hours;
- ★ Improving connectivity, e.g., to-and-from more neighborhoods and pockets of population;
- ★ Extending Red Route service into the Summer season;
- ★ Extending service to underserved populations; and
- ★ Increasing frequency, especially on our vital commuter service, the Valley Route.

##### **Competence & Commitment**

Key staff managing and carrying out activities at Mountain Rides includes:

- ★ 35 part-time and full-time Drivers;
- ★ 5 maintenance and facilities Technicians.
- ★ Jamie Canfield, Director of Transit Operations;
- ★ Kim MacPherson, Director of Communications;
- ★ Jerry Garcia, Manager of Human Resources;
- ★ Carlos Tellez, Maintenance Manager;
- ★ Ben Varner, Director of Assets & Planning;
- ★ Tucker Van Law, Director of Finance & Administration; and
- ★ Wally Morgus, Executive Director.

## Appendix A

- **Funding Request & Presentation: Sun Valley**



### Community Impact


#### Mountain Rides:


- ★ Responds to the needs of the City, as evidenced by its support of and participation in City-sponsored activities, events, and planning.
- ★ Continues to grow ridership, with record-high ridership in 2022 of 597,000 riders. Through the first quarter of 2023, ridership was 291,000, up ~52% from the same quarter in 2022.
- ★ Delivers enhanced mobility options for residents, visitors, businesses, and workers.
- ★ Operates 32,000+ hours of service annually on routes serving the City.
- ★ Delivers quality transportation services and infrastructure that underpin economic growth, vitality, and livability.
- ★ Provides essential transportation services for transit-dependent essential workers.
- ★ Contributes to the health and vitality of the local economy, with 45+ employees earning – and spending – ~\$2.5MM in annual wages and benefits. With its Federal funding, Mountain Rides is, de facto, a Federally underwritten workforce sustainability program.
- ★ Operates within funding constraints as measured by its annual performance of actuals to budget.



## Appendix A


- **Funding Request & Presentation: Ketchum**

**FY24 Funding Request: City of Ketchum**  
Respectfully: \$ 796,000 + \$ 600,000 CIP



June 26, 2023

...it's the journey that matters

**Mountain Rides Transportation Authority**  
Crucial Infrastructure; Vital Service; Key Cog in the Economy


➤ **Mountain Rides:**

- ★ Provides mobility and access to employment, community resources, medical care, and recreation
- ★ Benefits those who choose to ride and those who are transit dependent, relying on public transportation for mobility
- ★ Supports community efforts to expand business opportunities, mitigate the impacts of workforce housing shortages, and foster a sense of community – buttressing economic vitality & resilience
- ★ Reduces road congestion & travel times, air pollution, and energy consumption – benefiting riders and the community-at-large
- ★ Stands ready, in times of emergency, as a critical transportation alternative for safe and efficient evacuation

FY24 Funding Request: City of Ketchum (\$796,000) 2

## Appendix A

### • Funding Request & Presentation: Ketchum




### Community Impact

Common Mission; Shared Ethos; Essential Service

- **Infrastructure that supports & drives the local economy**
  - ★ Investing \$25.0M+ of Federal grant awards, FY23-FY27, in PT infrastructure
- **Good sustainable jobs – Federally-endorsed workforce program**
  - ★ Underwriting 45 local jobs with \$2.1M of FTA funding annually
- **Quality of life**
  - ★ Reducing emissions; mitigating congestion...SOVs ↓; BEBs ↑
  - ★ Providing safe, accessible, **zero-fare** public transportation
  - ★ Guaranteeing workforce mobility
  - ★ Mitigating the impacts of the workforce housing deficit
- **Integrity**
  - ★ Operating transparently within a balanced budget
  - ★ Supporting & contributing to the valley's economic vitality & growth

FY24 Funding Request: City of Ketchum (\$796,000)
3



### Community Investment


Vital Operations; Strategic Infrastructure; Community Asset

- **FY24 Funding Request** **\$ 796,000**
- **For Continuing Operations** **\$ 631,000**
  - ★ Operating Budget (prelim) \$ 4.25M
  - ★ Pre-pandemic service levels++
  - ★ Increased frequency during commute-hours
  - ★ TWF NEMT service sustainability
  - ★ ADA Paratransit service growth
- **For Capital Expenditures** **\$ 165,000**
  - ★ Capital Budget (prelim) \$ 1.4M
  - ★ LD BEBs (2) + charging infrastructure
  - ★ Commuter vanpool vans (4)
  - ★ ADA Paratransit / NEMT vans (2)
  - ★ Capital Sources
    - ★ FTA Grants \$ 1.12M
    - ★ JPs FY24 CIP Funding \$ 280K

FY24 Funding Request: City of Ketchum (\$796,000)
4

## Appendix A

- **Funding Request & Presentation: Ketchum**


**Community Investment – SPECIAL CAPITAL**  
Strategic Infrastructure; Community Asset; Vital to Operations


➤ **FY24 Funding Request** **\$ 600,000**

➤ **For Constructing & Equipping BEB Facility** **\$ 600,000**

- ★ *Project Budget* **\$ 6.05M**
- ★ *5,400SF addition to MRTA's Bellevue campus*
- ★ *Indoor storage, maintenance, and charging for electric buses*
- ★ *TWF NEMT service sustainability*
- ★ *ADA Paratransit service growth*
- ★ *Capital Sources*
- ★ *FTA/ITD Grants* **\$ 4.84M**
- ★ *JPs FY24 Special CIP Funding* **\$ 1.21M**

**FY24 Special Funding Request: City of Ketchum (\$600,000)** **5**

**FY24 Funding Request: City of Ketchum**  
Comments, Questions & Answers



**Thank You**  
mountain rides

**June 26, 2023**

*...it's the journey that matters*

## Appendix A

### • Funding Request & Presentation: Ketchum



City of Ketchum

Mountain Rides Transportation Authority

Agency Name: Mountain Rides Transportation Authority

Project Name: Public Transportation Operations & Capital

Contact Person: Wally Morgus, Executive Director

Address: POB 3091, Ketchum, ID 83340-3091

Email: wally@mountainrides.org

Phone Number: 208.788.7433 x.101

Please provide the information requested below and return via email to [aswindley@ketchumidaho.org](mailto:aswindley@ketchumidaho.org) by end of day, **Friday, April 21, 2023**.

- City Council's Budget Strategic Session will be on Monday, June 26, 2023 from 9:00a – 1:00p
- The public hearing will be on July 17, with the readings as follows:
  - 1<sup>st</sup> – August 7 | 2<sup>nd</sup> – August 21 | 3<sup>rd</sup> – September 5

Feel free to expand the text fields. Supporting documents or any additional information for consideration are welcome as attachments. If any of the below items do not apply to your request, please indicate with N/A.

1. Amount requested for fiscal year 2024: \$ 796,000
2. What percentage of your overall budget does the requested amount represent? 6.8 %  
Please submit a budget sheet for FY2022 and FY2023 – Attachment A – that shows detailed revenue and expenditures.
3. How would your program or project be impacted if it did not receive funding from the City or if funding were reduced? (Expand the box as needed or submit separately.)

To qualify for FTA funding, which underwrites the lion's share of our budget, Mountain Rides must receive local match funds. There is a direct relationship – intensified by the leverage from the Federal match – between funding from our Joint Powers, including Ketchum, and the quality and quantity of public transportation services we deliver. In Operations, with ~\$2.75 of FTA funding per \$1.00 of local funding, each \$100,000 of local funding results in ~\$375,000 of total funding, which translates to ~3,600 hours of bus service. On the Capital side, the match is ~\$4.00 of Federal funding per \$1.00 of local funding.

Mountain Rides deploys resources efficiently to deliver quality services critical to the community. Reduced funding from Ketchum would likely trigger service cuts on our Blue & Valley Routes – serving ~500,000 riders per year (~75% of MRTA ridership) – which, in turn, would exacerbate challenges – traffic congestion; parking shortages; accelerated wear-and-tear on highways/streets; safety and environmental issues due to increased SOV trips – that Mountain Rides, historically, has helped to mitigate.

For FY24, Mountain Rides is requesting \$796,000 (+3.5% over FY23) from Ketchum: i) for Operations/Service – \$631,000 – which is slightly higher than the FY23 funding for Operations and reflects marginal increases in service in FY24 plus inflationary impacts on Mountain Rides' expenses; and ii) for Capital – \$165,000 – which is explicitly allocated as part of the local match for Federal awards earmarked for Capital Improvements, including buses (LD BEBs) (2), vanpool vans (4), Paratransit/NEMT vans (2), and equipment (lifts, hoists, charging infrastructure).

P.O. Box 2315 | 191 5<sup>th</sup> Street West | Ketchum, ID | 208.726.3841

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



## Appendix A

### • Funding Request & Presentation: Ketchum

#### Mountain Rides Transportation Authority

4. If you received funds from the City in fiscal year 2023, please provide specific examples of how those funds were used to benefit the community. (Expand the box as needed or submit separately.)

In FY23, Mountain Rides is using City funds to: i) operate and support our Valley & Blue Routes, including enhanced, more frequent, seven-day service on the Valley Route and continuing late-night service – daily until 12:30am year-round – on the Blue Route; ii) underwrite a portion of the expense for operating ~36,000 hours of service system-wide; iii) manage and operate an ADA Paratransit/NEMT Service; iv) augment grant funding to support, manage, and operate a Safe Routes to School Program; v) engage in regional transportation planning and coordination; and vi) operate and support our regional commuter van pool services bringing workers into the Wood River Valley from points south. Benefits to the community include:

- Workers accessing affordable, reliable, safe transportation getting them to/from jobs.
- Senior citizens and others accessing zero-fare, reliable, safe transportation – ADA Paratransit & NEMT services – getting them to/from health care services, shopping, and activities.
- Cyclists and pedestrians, including children, moving along safe, secure, and scenic routes.
- Visitors – the lifeblood of our economy – connecting from their local lodgings to recreational, cultural, and entertainment venues and activities.
- Less traffic; more balanced transportation options; mitigated parking shortages; higher quality of life.

5. If you receive funds from the City in fiscal year 2024, please provide specific goals set by your organization. (Expand the box as needed or submit separately.)

Mountain Rides goals, set by our Board of Directors, remain consistent and relevant:

- Provide/advocate for well-funded public transportation that meets communities' needs.
- Promote knowledge and awareness of the social, financial, environmental, and community benefits of public transportation.
- Promote regional cooperation on transportation issues.

Specifically, in FY 2024, look for Mountain Rides to:

- Operate 33,000+ hours of annual service on routes serving the City.
- Provide quality transportation services and infrastructure that underpin and promote economic growth, vitality, and livability.
- Provide critical transportation services to transit-dependent essential workers who buttress our local economy.
- Positively impact the local economy, with ~45 employees earning – and spending – ~\$2.6MM in annual wages and benefits.
- Bring two (2) light-duty electric buses (LD BEBs) and related charging infrastructure into our operations (total investment, ~\$800K), which will bring our total BEBs to thirteen (13) in a fleet of twenty-four (24) buses.
- Build, occupy, and put in-service a ~5,400SF state-of-the-art battery electric bus depot and maintenance facility, including charging infrastructure, on Mountain Rides' Bellevue campus.

For a comprehensive look at Mountain Rides' goals, please see Attachment B, "Mountain Rides Transportation Authority Strategic Framework: Pentad of Focus."

## Appendix A

- Funding Request & Presentation: Ketchum

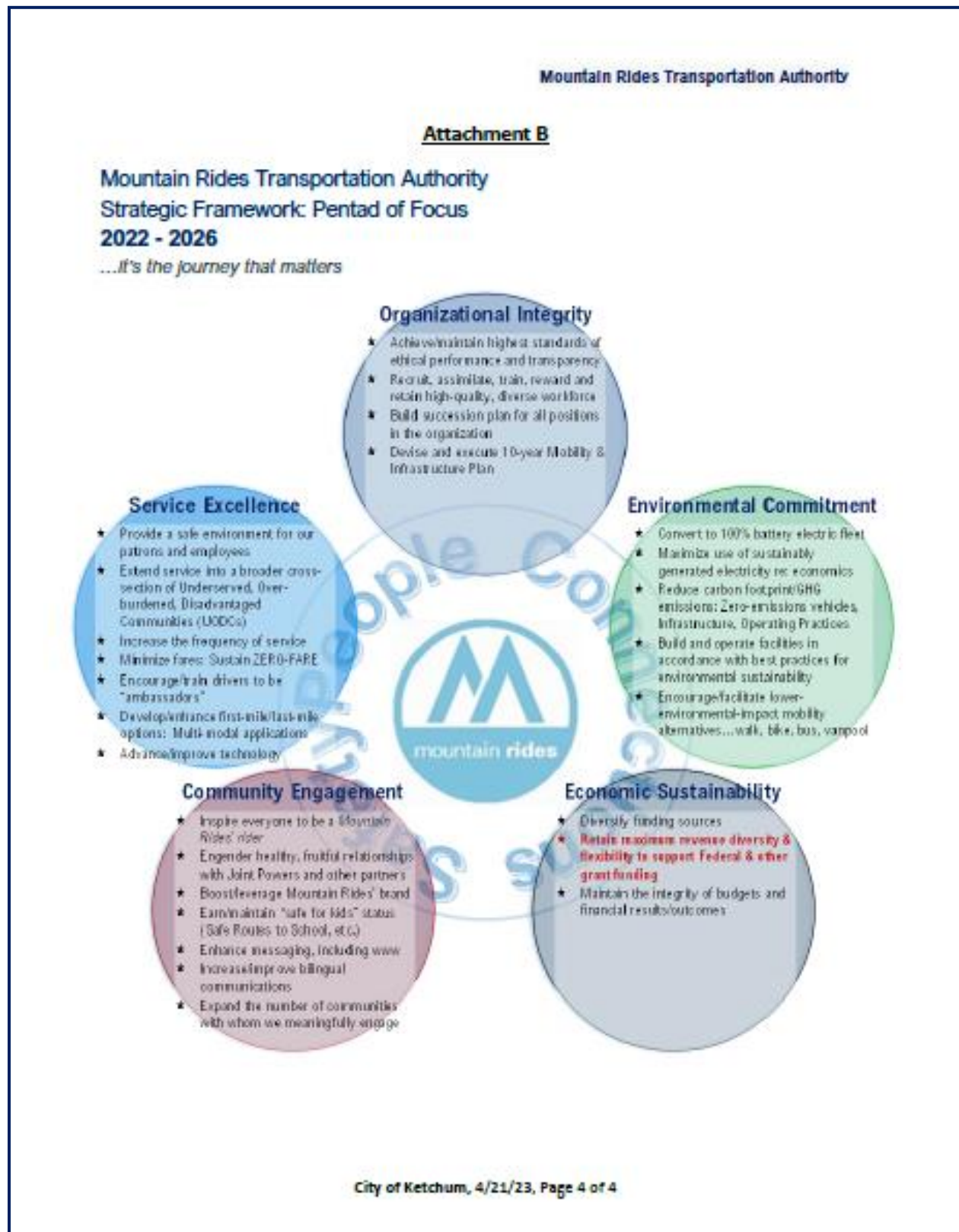
Mountain Rides Transportation Authority

### Attachment A

BUDGET SHEET: MOUNTAIN RIDES		
REVENUE	FY 2022	FY 2023
Operations Fund	\$ 3,636,400	\$ 4,188,300
Cap. Eqpt. Fund	6,744,800	6,780,800
Facilities Fund	1,140,500	3,080,300
WFH Fund	54,200	65,200
Total Revenue	\$ 11,575,900	\$ 14,114,600
EXPENSE	FY 2022	FY 2023
Operations Fund	\$ 3,636,400	\$ 4,188,300
Cap. Eqpt. Fund	6,677,000	6,627,000
Facilities Fund	1,081,400	2,999,500
WFH Fund	33,200	33,200
Total Expense	\$ 11,428,000	\$ 13,848,000
FY CARRYFWD.	\$ 147,900	\$ 266,600

## Appendix A

### • Funding Request & Presentation: Ketchum



## Appendix A


- **Funding Request & Presentation: Hailey**

**FY23 Funding Request: City of Hailey**  
Respectfully: \$ 96,000 + \$ 75,000 CIP



June 2023

...it's the journey that matters

**Mountain Rides Transportation Authority**  
Crucial Infrastructure; Vital Service; Key Cog in the Economy

➤ **Mountain Rides:**

- ★ *Provides mobility and access to employment, community resources, medical care, and recreation*
- ★ *Benefits those who choose to ride and those who are transit dependent, relying on public transportation for mobility*
- ★ *Supports community efforts to expand business opportunities, mitigate the impacts of workforce housing shortages, and foster a sense of community – buttressing economic vitality & resilience*
- ★ *Reduces road congestion & travel times, air pollution, and energy consumption – benefiting riders and the community-at-large*
- ★ *Stands ready, in times of emergency, as a critical transportation alternative for safe and efficient evacuation*

FY24 Funding Request: City of Hailey (\$ 96,000) 2



## Appendix A

### • Funding Request & Presentation: Hailey




#### Community Impact

Common Mission; Shared Ethos; Essential Service

- **Infrastructure that supports & drives the local economy**
  - ★ Investing \$28.0M+ of Federal/State grant awards, FY24-FY27, in PT infrastructure
- **Good sustainable jobs – Federally-endorsed workforce program**
  - ★ Underwriting 45 local jobs with \$2.1M of FTA funding annually
- **Quality of life**
  - ★ Reducing emissions; mitigating congestion; supporting opportunity
  - ★ Providing safe, accessible, **zero-fare** public transportation
  - ★ Guaranteeing workforce mobility
  - ★ Mitigating the impacts of the workforce housing deficit
- **Integrity**
  - ★ Operating transparently within a balanced budget
  - ★ Supporting & contributing to the valley's economic vitality & growth

FY24 Funding Request: City of Hailey (\$ 96,000) 3



#### Community Investment – SPECIAL CAPITAL

Strategic Infrastructure; Community Asset; Vital to Operations

- **FY24 Special Capital Funding Request** **\$ 75,000**
  - **For Constructing & Equipping BEB Facility** **\$ 75,000**
    - ★ Project Budget \$ 6.05M
    - ★ 5,400SF addition to MRTA's Bellevue campus
    - ★ Electric bus depot, maintenance, storage, charging
  - ★ Capital Sources
    - ★ FTA/ITD Grants \$ 4.84M
    - ★ JPs FY24 Special CIP Funding \$ 1.21M

FY24 Special Funding Request: City of Hailey (\$ 75,000) 6

## Appendix A

- **Funding Request & Presentation: Hailey**



**City of Hailey**  
**FY24 Funding Request**  
**June 2023**

**Executive Summary**

**Agency:** Mountain Rides Transportation Authority ("Mountain Rides" or "MRTA")  
**Program:** Public Transportation  
**Contact:** Wally Morgus  
Executive Director  
wally@mountainrides.org  
208.788.7433 x.101

**Mountain Rides requests FY24 funding from the City of Hailey ("City") in the amount of \$ 96,000.**

**Community Investment: FY24 Funding Request – \$ 96,000**

Mountain Rides is seeking **community investment – funding – from the City of \$ 96,000 for FY24** for continuing public transportation services benefiting the City, its residents, businesses, workers, and visitors.

For FY24, Mountain Rides anticipates allocating the City's funding as follows:

- ★ \$ 88,000 for Operations
  - ★ MRTA's total FY24 operating budget (preliminary) = \$4.25M.
- ★ \$ 8,000 for Capital Expenditures
  - ★ MRTA's total FY24 capital budget (preliminary) = \$1.4M.
    - ★ Light-duty battery electric buses (2) & related charging infrastructure.
    - ★ ADA Paratransit / NEMT vans (2).
    - ★ Commuter vanpool vans (4).

**Community Engagement**

**Essential Service; Vital Thread**

Mountain Rides is a vital thread in the fabric of the community, as it:

- ★ Operates fixed-route bus service moving 550,000+ riders annually into, around, and about the City;
  - ★ Operates regional vanpool services providing safe, reliable, and affordable transportation for workers moving to and from workplaces in and around the City;
  - ★ Operates on-demand NEMT service between the Wood River Valley and Twin Falls;
  - ★ Engages in transportation planning – e.g., County Bike-Ped Master Plan; City of Hailey Downtown Master Plan – that benefits the City; and
  - ★ Builds out a zero-emissions, electric bus fleet that is good for the environment, aligns with the ethos of the community, and promotes a healthy, sustainable lifestyle.
-

## Appendix A

### • Funding Request & Presentation: Hailey



#### Community Engagement (cont.)

##### **Operations**

In FY24, Mountain Rides will maintain service similar to FY23 levels, which, in addition to our routes and service in the Wood River Valley, will include continuing regular on-demand van service – non-emergency medical transportation (NEMT) – between the Wood River Valley and Twin Falls.

##### **Capital Expenditures**

On the Capital side in FY24, Mountain Rides will continue its drive towards a 100% zero-emissions fleet by acquiring two (2) light-duty battery electric buses (LD BEBs) and related charging infrastructure. About 85% of the total cost of the BEBs will be underwritten by Federal grant awards. Mountain Rides will deploy BEBs on the Hailey Route, as well as its other routes.

In addition, in FY24 Mountain Rides will add four (4) commuter vanpool vans and two (2) ADA Paratransit/NEMT vans to its fleet.

##### **Challenges & Growth**

Mountain Rides anticipates spending FY24 continuing to grow ridership, which has rebounded to exceed pre-pandemic levels. We also anticipate continued growth in ridership with our ADA Paratransit Service and our on-demand NEMT Service to Twin Falls.

Also, as opportunity and funding emerge, Mountain Rides will continue to fine-tune and improve services:

- ★ Expanding service hours;
- ★ Improving connectivity, e.g., to-and-from more neighborhoods and pockets of population;
- ★ Extending service to underserved populations; and
- ★ Increasing frequency, especially on our vital commuter service, the Valley Route.

##### **Competence & Commitment**

Key staff managing and carrying out activities at Mountain Rides includes:

- ★ 35 part-time and full-time Drivers;
- ★ 5 maintenance and facilities Technicians.
- ★ Jamie Canfield, Director of Transit Operations;
- ★ Kim MacPherson, Director of Communications;
- ★ Jerry Garcia, Manager of Human Resources;
- ★ Carlos Tellez, Maintenance Manager;
- ★ Ben Varner, Director of Assets & Planning;
- ★ Tucker Van Law, Director of Finance & Administration; and
- ★ Wally Morgus, Executive Director.

## Appendix A

- **Funding Request & Presentation: Hailey**




### Community Impact


#### Mountain Rides:

- ★ Responds to the needs of the City, as evidenced by its support of and participation in City-sponsored activities, events, and planning.
- ★ Continues to grow ridership, with record-high ridership in 2022 of 597,000 riders. Through the first quarter of 2023, ridership was 291,000, up ~52% from the same quarter in 2022.
- ★ Delivers enhanced mobility options for residents, visitors, businesses, and workers.
- ★ Operates 18,000+ hours of service annually on routes serving the City.
- ★ Delivers quality transportation services and infrastructure that underpin economic growth, vitality, and livability.
- ★ Provides essential transportation services for transit-dependent essential workers.
- ★ Contributes to the health and vitality of the local economy, with 45+ employees earning – and spending – ~\$2.5MM in annual wages and benefits. With its Federal funding, Mountain Rides is, de facto, a Federally underwritten workforce sustainability program.
- ★ Operates within funding constraints as measured by its annual performance of actuals to budget.

## Appendix A

- **Funding Request & Presentation: Bellevue**


**FY23 Funding Request: City of Bellevue**  
Respectfully: \$ 12,000 + \$ 5,000 CIP



People Connections  
Safety

June 2023

...it's the journey that matters

**Mountain Rides Transportation Authority**  
Crucial Infrastructure; Vital Service; Key Cog in the Economy

➤ **Mountain Rides:**

- ★ *Provides mobility and access to employment, community resources, medical care, and recreation*
- ★ *Benefits those who choose to ride and those who are transit dependent, relying on public transportation for mobility*
- ★ *Supports community efforts to expand business opportunities, mitigate the impacts of workforce housing shortages, and foster a sense of community – buttressing economic vitality & resilience*
- ★ *Reduces road congestion & travel times, air pollution, and energy consumption – benefiting riders and the community-at-large*
- ★ *Stands ready, in times of emergency, as a critical transportation alternative for safe and efficient evacuation*

FY24 Funding Request: City of Bellevue (\$ 12,000) 2

## Appendix A

### • Funding Request & Presentation: Bellevue




### Community Impact

Common Mission; Shared Ethos; Essential Service

- **Infrastructure that supports & drives the local economy**
  - ★ Investing \$28.0M+ of Federal/State grant awards, FY24-FY27, in PT infrastructure
- **Good sustainable jobs – Federally-endorsed workforce program**
  - ★ Underwriting 45 local jobs with \$2.1M of FTA funding annually
- **Quality of life**
  - ★ Reducing emissions; mitigating congestion; supporting opportunity
  - ★ Providing safe, accessible, **zero-fare** public transportation
  - ★ Guaranteeing workforce mobility
  - ★ Mitigating the impacts of the workforce housing deficit
- **Integrity**
  - ★ Operating transparently within a balanced budget
  - ★ Supporting & contributing to the valley's economic vitality & growth

FY24 Funding Request: City of Bellevue (\$ 12,000)

3



### Community Investment

Vital Operations; Strategic Infrastructure; Community Asset


- **FY24 Funding Request** **\$ 12,000**
- **For Continuing Operations** **\$ 10,000**
  - ★ MRTA Budget (prelim) \$ 4.25M
  - ★ Pre-pandemic service levels++
  - ★ Increased frequency during commute-hours
  - ★ TWF NEMT service sustainability
  - ★ ADA Paratransit service growth
- **For Capital Expenditures** **\$ 2,000**
  - ★ MRTA Budget (prelim) \$ 1.4M
  - ★ LD BEBs (2) + charging infrastructure
  - ★ Commuter vanpool vans (4)
  - ★ ADA Paratransit / NEMT Vans (2)
  - ★ Capital Sources
    - ★ FTA Grants \$ 1.12M
    - ★ JPs FY24 CIP Funding \$ 280K

FY24 Funding Request: City of Bellevue (\$ 12,000)

4

## Appendix A

- Funding Request & Presentation: Bellevue

**Community Investment – SPECIAL CAPITAL**  
Strategic Infrastructure; Community Asset; Vital to Operations


➤ **FY24 Special Capital Funding Request** **\$ 5,000**

➤ **For Constructing & Equipping BEB Facility** **\$ 5,000**

- ★ *Project Budget* **\$ 6.05M**
- ★ *5,400SF addition to MRTA's Bellevue campus*
- ★ *Electric bus depot, maintenance, storage, charging*
- ★ *Capital Sources*
- ★ *FTA/ITD Grants* **\$ 4.84M**
- ★ *JPs FY24 Special CIP Funding* **\$ 1.21M**

*FY24 Special Funding Request: City of Bellevue (\$ 5,000)*

5

**FY24 Funding Request: City of Bellevue**  
Comments, Questions & Answers

**Thank You**

mountain rides

June 2023

*...it's the journey that matters*



## Appendix A

- Funding Request & Presentation: Bellevue



**City of Bellevue**  
**FY24 Funding Request**  
**June 2023**

**Executive Summary**

**Agency:** Mountain Rides Transportation Authority ("Mountain Rides" or "MRTA")  
**Program:** Public Transportation  
**Contact:** Wally Morgus  
Executive Director  
wally@mountainrides.org  
208.788.7433 x.101

Mountain Rides requests FY24 funding from the City of Bellevue ("City") in the amount of \$17,000.

**Community Investment: FY24 Funding Request – \$17,000**

Mountain Rides requests **community investment – funding – from the City of \$17,000** for FY24 for ongoing public transportation services benefiting the City, its residents, businesses, workers, and visitors.

For FY24, Mountain Rides anticipates allocating the City's funding as follows:

- ★ **\$ 10,000 for Operations**
  - ★ MRTA's total FY24 operating budget (preliminary) = \$ 4.25M.
- ★ **\$ 2,000 for Capital Expenditures**
  - ★ MRTA's total FY24 capital budget (preliminary) = \$ 1.4M.
    - ★ Light-duty battery electric buses (2) & related charging infrastructure.
    - ★ ADA Paratransit / NEMT vans (2).
    - ★ Commuter vanpool vans (4).
- ★ **\$ 5,000 as a Special One-time Match**
  - ★ Match of federal funding for the constructing and equipping of a \$6.05M state-of-the-art battery electric bus facility on Mountain Rides' Bellevue campus.

**Community Engagement**

**Essential Service: Vital Thread**

Mountain Rides is a vital thread in the fabric of the community, as it:

- ★ Operates fixed-route bus service moving 550,000+ riders annually into, around, and about the City;
- ★ Operates regional vanpool services providing safe, reliable, and affordable transportation for workers moving to and from workplaces in and around the City;
- ★ Operates on-demand NEMT service between the Wood River Valley and Twin Falls;
- ★ Engages in transportation planning – e.g., County Bike-Ped Master Plan; City of Bellevue Transit Infrastructure – that benefits the City; and
- ★ Builds out a zero-emissions, electric bus fleet that is good for the environment, aligns with the ethos of the community, and promotes a healthy, sustainable lifestyle.



## Appendix A

- Funding Request & Presentation: Bellevue



### Community Engagement (cont.)

#### **Operations**

In FY24, Mountain Rides will maintain service similar to FY23 levels, which, in addition to our routes and service in the Wood River Valley, will include continuing regular on-demand van service – non-emergency medical transportation (NEMT) – between the Wood River Valley and Twin Falls.

#### **Capital Expenditures**

On the Capital side in FY24, Mountain Rides will continue its drive towards a 100% zero-emissions fleet by acquiring two (2) light-duty battery electric buses (LD BEBs) and related charging infrastructure. About 85% of the total cost of the BEBs will be underwritten by Federal grant awards. Mountain Rides will continue deploying BEBs on the Valley Route, originating in and serving the City of Bellevue.

In addition, in FY24 Mountain Rides will add four (4) commuter vanpool vans and two (2) ADA Paratransit/NEMT vans to its fleet.

#### **FY24 Capital Project**

In FY24 Mountain Rides will strengthen its presence in the community by erecting critical transit infrastructure – an expanded, state-of-the-art depot on Mountain Rides' Bellevue campus – for storing, maintaining, and charging our growing fleet of electric buses. Approximately 80% of the total cost of the Project – \$6.05M – will be underwritten by Federal grant awards – ~\$4.85M – and the remaining 20% of the total cost – ~\$1.2M – will be funded by Local Match monies from our Joint Powers and other Community Partners. For a comprehensive, detailed description of and context for the Project, please see Attachment A, "Mountain Rides Transportation Authority - FFY 2024 5339 Rural One-Time Capital Application," excerpted from Mountain Rides' Federal Grant Application, submitted through ITD, for the Project.

#### **Challenges & Growth**

Mountain Rides anticipates spending FY24 continuing to grow ridership, which has rebounded to exceed pre-pandemic levels. We also anticipate continued growth in ridership with our ADA Paratransit Service and our on-demand NEMT Service to Twin Falls.

Also, as opportunity and funding emerge, Mountain Rides will continue to fine-tune and improve services:

- ★ Expanding service hours;
- ★ Improving connectivity, e.g., to-and-from more neighborhoods and pockets of population;
- ★ Extending service to underserved populations; and
- ★ Increasing frequency, especially on our vital commuter service, the Valley Route.

## Appendix A

- **Funding Request & Presentation: Bellevue**



### **Competence & Commitment**

Key staff managing and carrying out activities at Mountain Rides includes:

- ★ 35 part-time and full-time Drivers;
- ★ 5 maintenance and facilities Technicians.
- ★ Jamie Canfield, Director of Transit Operations;
- ★ Kim MacPherson, Director of Communications;
- ★ Jerry Garcia, Manager of Human Resources;
- ★ Carlos Tellez, Maintenance Manager;
- ★ Ben Varner, Director of Assets & Planning;
- ★ Tucker Van Law, Director of Finance & Administration; and
- ★ Wally Morgus, Executive Director.

### **Community Impact**

Mountain Rides:

- ★ Responds to the needs of the City, as evidenced by its support of and participation in City-sponsored activities, events, and planning.
- ★ Continues to grow ridership, with record-high ridership in 2022 of 597,000 riders. Through the first quarter of 2023, ridership was 291,000, up ~52% from the same quarter in 2022.
- ★ Delivers enhanced mobility options for residents, visitors, businesses, and workers.
- ★ Operates 16,000+ hours of service annually on routes serving the City.
- ★ Delivers quality transportation services and infrastructure that underpin economic growth, vitality, and livability.
- ★ Provides essential transportation services for transit-dependent essential workers.
- ★ Contributes to the health and vitality of the local economy, with 45+ employees earning – and spending – ~\$2.5MM in annual wages and benefits. With its Federal funding, Mountain Rides is, de facto, a Federally underwritten workforce sustainability program.
- ★ Operates within funding constraints as measured by its annual performance of actuals to budget.

## Appendix A


- **Funding Request & Presentation: Blaine County**

**FY24 Funding Request: Blaine County**  
Respectfully: \$ 208,500 + \$ 160,000 CIP



June 2023

...it's the journey that matters

**Mountain Rides Transportation Authority**  
Crucial Infrastructure; Vital Service; Key Cog in the Economy


➤ **Mountain Rides:**

- ★ Provides mobility and access to employment, community resources, medical care, and recreation
- ★ Benefits those who choose to ride and those who are transit dependent, relying on public transportation for mobility
- ★ Supports community efforts to expand business opportunities, mitigate the impacts of workforce housing shortages, and foster a sense of community – buttressing economic vitality & resilience
- ★ Reduces road congestion & travel times, air pollution, and energy consumption – benefiting riders and the community-at-large
- ★ Stands ready, in times of emergency, as a critical transportation alternative for safe and efficient evacuation

FY24 Funding Request: Blaine County (\$ 208,500) 2

## Appendix A

### • Funding Request & Presentation: Blaine County




### Community Impact

Common Mission; Shared Ethos; Essential Service

- **Infrastructure that supports & drives the local economy**
  - ★ Investing \$28.0M+ of Federal/State grant awards, FY24-FY27, in PT infrastructure
- **Good sustainable jobs – Federally-endorsed workforce program**
  - ★ Underwriting 45 local jobs with \$2.1M of FTA funding annually
- **Quality of life**
  - ★ Reducing emissions; mitigating congestion; supporting opportunity
  - ★ Providing safe, accessible, **zero-fare** public transportation
  - ★ Guaranteeing workforce mobility
  - ★ Mitigating the impacts of the workforce housing deficit
- **Integrity**
  - ★ Operating transparently within a balanced budget
  - ★ Supporting & contributing to the valley's economic vitality & growth

FY24 Funding Request: Blaine County (\$ 208,500)
3



### Community Investment


Vital Operations; Strategic Infrastructure; Community Asset

- **FY24 Funding Request** **\$ 208,500**
- **For Continuing Operations** **\$ 187,500**
  - ★ MRTA Budget (prelim) \$ 4.25M
  - ★ Pre-pandemic service levels++
  - ★ Increased frequency during commute-hours
  - ★ TWF NEMT service sustainability
  - ★ ADA Paratransit service growth
- **For Capital Expenditures** **\$ 21,000**
  - ★ MRTA Budget (prelim) \$ 1.4M
  - ★ LD BEBs (2) + charging infrastructure
  - ★ Commuter vanpool vans (4)
  - ★ ADA Paratransit / NEMT Vans (2)
  - ★ Capital Sources
    - ★ FTA Grants \$ 1.12M
    - ★ JPs FY24 CIP Funding \$ 280K

FY24 Funding Request: Blaine County (\$ 208,500)
4

## Appendix A

- **Funding Request & Presentation: Blaine County**

**Community Investment – SPECIAL CAPITAL**  
Strategic Infrastructure; Community Asset; Vital to Operations


➤ **FY24 Special Capital Funding Request** **\$ 160,000**

➤ **For Constructing & Equipping BEB Facility** **\$ 160,000**

- ★ *Project Budget* **\$ 6.05M**
- ★ *5,400SF addition to MRTA's Bellevue campus*
- ★ *Electric bus depot, maintenance, storage, charging*
- ★ *Capital Sources*
- ★ *FTA/ITD Grants* **\$ 4.84M**
- ★ *JPs FY24 Special CIP Funding* **\$ 1.21M**

*FY24 Special Funding Request: Blaine County (\$ 160,000)*

5

**FY24 Funding Request: Blaine County**  
Comments, Questions & Answers

**Thank You**

mountain rides

June 2023

*...it's the journey that matters*

## Appendix A

- Funding Request & Presentation: Blaine County



### Blaine County Fiscal Year 2024 Funding Request Form

Agency Name:	Mountain Rides Transportation Authority
Project Name:	FY2024 Budget Funding Request
Contact Person:	Wally Morgus, Executive Director
Address:	POB 3091, Ketchum, ID 83340-3091
Email:	wally@mountainrides.org
Phone Number:	208.788.7433 x.101

Please provide the information requested below and return via email to [jlovell@blainecounty.org](mailto:jlovell@blainecounty.org). If you have additional information you would like the County to consider, please feel free to attach.

- Amount requested for fiscal year 2024: \$208,500
- What percentage of your overall budget does the requested amount represent? 3.7%
- Please list your primary funding sources other than the County and the percentage of your budget they represent:

Funding Source	% of Budget the Source Represents
Federal Awards (FTA: 5311 & 5339 grants)	57%
City of Ketchum	14%
City of Sun Valley	8%

- Check this box if you received funding from Blaine County in the past. ☒ If so, please indicate how much funding each year for the past three fiscal years.

FY23: \$201,500; FY22: \$180,000; FY21: \$115,600

- How would your program or project be impacted if it did not receive funding from Blaine County or if funding from Blaine County were reduced?

To qualify for FTA funds, which underwrite the lion's share of our budget, Mountain Rides must receive local match funds. There is a direct relationship – intensified by the leverage of the Federal match – between funding from our JPs, including Blaine County, and the quality and quantity of service we deliver. In Operations: With ~\$2.75 of FTA funding per \$1.00 of local funding, each \$100,000 of local funding results in ~\$375,000 of total funding, yielding ~3,800 hours of service. On the Capital side, the match is ~\$4.00 of Federal funding per \$1.00 of local funding.

Mountain Rides deploys resources efficiently to deliver quality services critical to the community. Reduced funding from Blaine County would trigger service cuts on our Valley Route – serving ~250,000 riders per year (~42% of MRTA ridership) – which, in turn, would exacerbate challenges – traffic congestion; parking shortages; accelerated wear-and-tear on highways/streets; safety and environmental issues due to increased SOV trips – that Mountain Rides has helped to mitigate.



## Appendix A

- Funding Request & Presentation: Blaine County



### Blaine County Fiscal Year 2024 Funding Request Form

6. Please provide a brief description of your operational/business functions.

*Mountain Rides provides and supports a full range of transportation alternatives for Blaine County and adjacent communities that are safe, user oriented, environmentally friendly, economically sustainable, and supportive of a strong local economy.*

Mountain Rides is a public agency, established via a Joint Powers Agreement among the cities of Bellevue, Hailey, Ketchum, and Sun Valley and Blaine County.

Mountain Rides provides public transportation services: i) fixed route commuter bus service – the Valley Route – operating up-and-down the Wood River Valley, serving a majority of Blaine County residents, and relying on Blaine County funding to sustain; ii) fixed bus routes in Ketchum and Sun Valley; iii) fixed bus route in Hailey; iv) on-demand ADA Paratransit service throughout the Wood River Valley; v) on-demand non-emergency medical transportation (NEMT) service between the Wood River Valley and Twin Falls; and vi) commuter vanpools serving residents of Blaine County and commuters to Blaine County from communities in Lincoln, Jerome, and Twin Falls Counties.

In addition to public transportation services, MRTA manages and executes other activities, some in conjunction with other service agencies in the county, that support our mission: i) public education and outreach programs and ii) overall transportation planning services. For more information about our services, please see our website, [www.mountainrides.org](http://www.mountainrides.org).

Depending on the season and level of service operating, Mountain Rides employs full-time and part-time staff numbering from 35 to 50 people. Most are employed in MRTA's operations and maintenance departments (operators/drivers, mechanics/technicians, bus washers).

7. Check this box if your program or project has a strategic plan or business plan in place. ☒ If so, please provide a copy electronically as an attachment to the email submission of this form.

Please see "MRTA Strategic Framework: Pentad of Focus," Attachment A.

8. How long do you anticipate your program or project will need Blaine County funding?

Mountain Rides anticipates funding from Blaine County (and all Joint Powers) for as long as there remains a demand among residents and visitors for essential public transportation services in Blaine County. Akin to police, fire, roads, libraries, parks, and other public services and amenities, public transportation will likely continue to require public funding to sustain operations.

Absent a local option tax or similar funding mechanism dedicated to directly underwriting public transportation, Mountain Rides will continue to require local funding, including funding from Blaine County, as a requisite (match) for securing federal funds.

## Appendix A

- Funding Request & Presentation: Blaine County



### Blaine County Fiscal Year 2024 Funding Request Form

**9. What steps are you taking to become independent and not need Blaine County funding?**

Mountain Rides continues to diversify its funding sources and seek means for increasing non-JP funding. In recent years, Mountain Rides has cultivated revenue from new and ongoing business partners and from other local funding sources. Mountain Rides is diligent in identifying and tapping federal funding opportunities for both operating and capital resources. Furthermore, increased State funding for public transportation would help diminish our reliance on local funding; however, political realities suggest such increased State funding is unlikely for the foreseeable future. In FY19 and FY20, Mountain Rides applied for and received funds from the Idaho Department of Environmental Quality (ID-DEQ) vis-à-vis the Volkswagen Mitigation Settlement (VMS). In FY22, we used these funds as our local match of FTA funds to purchase battery electric buses and infrastructure.

**10. How does your organization or program benefit Blaine County and its citizens?**

Mountain Rides benefits Blaine County and its citizens by:

- Delivering enhanced mobility options for residents, visitors, businesses, and workers.
- Responding to the needs of the County, as evidenced by its support of and participation in County-sponsored activities, events, and planning.
- Continuing to grow ridership, with record-high ridership in 2022 of 597,000 riders. Through the first quarter of 2023, ridership was 291,000, up ~52% from the same quarter in 2022.
- Operating 36,000+ hours of service annually on routes serving the County.
- Delivering quality transportation services and infrastructure that underpin economic growth, vitality, and livability.
- Providing essential transportation services for transit-dependent essential workers.
- Contributing to the health and vitality of the local economy, with 45+ employees earning – and spending – ~\$2.5MM in annual wages and benefits. With its Federal funding, Mountain Rides is, de facto, a Federally underwritten workforce sustainability program.
- Operating within funding constraints as measured by its annual performance of actuals to budget.
- Contributing to calming traffic on the county's roadways, e.g., fewer cars, less traffic congestion.
- Effecting reduced pollution and transportation-related emissions.
- Availing citizens of high-quality transportation infrastructure.
- Contributing to improved public health by providing easy, reliable transportation to healthcare facilities and by encouraging and supporting citizens' engagement in active transportation...biking and walking.
- Saving money for Blaine County residents who use our services.
- Providing transportation services for a diverse community, including the elderly, disabled, youths, commuters, tourists, social-justice groups, transit-dependent patrons, and at-will riders.



## Appendix A

- Funding Request & Presentation: Blaine County



### Blaine County Fiscal Year 2024 Funding Request Form

11. If you received funds from Blaine County in fiscal year 2023 please provide specific examples of how those funds were used to benefit our community during the past year.

In FY23, Mountain Rides is using Blaine County funds to: i) operate and support our Valley Route, including enhanced service for The Meadows neighborhood; ii) develop, coordinate, and execute according to the County's Bike-Pedestrian Master Plan; iii) manage and operate a Safe Routes to School Program; iv) engage in regional transportation planning; and v) operate and support our regional vanpool services. Benefits to the community include:

- Workers accessing affordable, reliable, safe transportation getting them to/from jobs.
- Senior citizens accessing affordable, reliable, safe transportation getting them to/from shopping and activities.
- Cyclists and pedestrians moving along safe, secure, and scenic routes.
- Children experiencing greater mobility and independence.
- Less traffic, more balanced transportation options, and higher quality of life.

12. If you received funds from Blaine County in fiscal year 2023 please provide specific goals set by your organization.

a. Please provide all goals relevant to funds provided by Blaine County

Mountain Rides goals, set by our Board of Directors, remain consistent and relevant:

- Provide and advocate for well-funded public transportation that reduces single occupancy vehicle trips and meets the needs of our communities.
- Promote knowledge and increase awareness of the social, financial, environmental, and community benefits of transportation alternatives.
- Promote regional cooperation on transportation issues.

b. Please provide details regarding your organization's performance in achieving those goals

Mountain Rides is a vital thread in the fabric of the community, as it:

- Operates fixed-route bus service moving 550,000+ riders annually into, around, and about the County;
- Operates regional vanpool services providing safe, reliable, and affordable transportation for workers moving to and from workplaces in and around the County;
- Operates on-demand NEMT service between the Wood River Valley and Twin Falls;
- Engages in transportation planning – e.g., County Bike-Ped Master Plan; SH-75 Wood River Valley Mobility Corridor Plan – that benefits the County; and
- Builds out a zero-emissions, electric bus fleet that is good for the environment, aligns with the ethos of the community, and promotes a healthy, sustainable lifestyle.
- Continues to garner and increase Federal funding and special funding (ID DEQ VW Mitigation Grant Funds; RAISE Grant Funds).

## Appendix A

- Funding Request & Presentation: Blaine County



### Blaine County Fiscal Year 2024 Funding Request Form

13. Please review the Blaine County Strategic Objectives (included below) and respond to the following for fiscal year 2024:

a. What specific projects or programs will Blaine County funds be used to support?

Blaine County funds will support operation of the Valley Route connecting the Blaine County communities of Bellevue, Hailey, Ketchum, and Sun Valley. The Valley Route is the bellwether of our system, with riders of all ages and from across the socioeconomic spectrum. Any increased funding from Blaine County will support service improvements for commuter and evening trips, as well as support continuing enhancements to our Meadows service and our on-demand NEMT service to Twin Falls.

b. What goals do you hope to accomplish during fiscal year 2023?

Goal 1: Continue building ridership on all routes.

FY24 projects: Driver training and accountability for implementing measures that encourage riders to return and feel safe; in cooperation with the ITD-PT Office, marketing, educational, and public relations efforts that encourage the public to return to public transportation and/or try public transportation for the first time.

Goal 2: Build on success by increasing service on core routes and simplifying the system.

FY24 projects: Continued improvements to Valley, Hailey, and Blue routes, as well as additional vanpool routes.

Goal 3: Continue developing emerging transportation services to complement current services and meet community needs.

FY24 projects: The Meadows service – greater frequency of Valley Route service during commuter-hours. Continued development of on-demand NEMT van service between the Wood River Valley and Twin Falls.

Goal 4: Support and coordinate the development of safe, integrated pedestrian- and bicyclist-friendly communities, including infrastructure.

FY24 projects: Proceed with the SH-75 Wood River Valley Mobility Corridor project, focusing on transit enhancements, including bike-ped tunnels and bus stops. Support emerging/ongoing bike-ped projects in Ketchum and Hailey.

Goal 5: Develop and support incentives that inspire more people to take public transportation.

FY24 projects: Promote website/phone app. Community events. Continue to be zero-fare.

Goal 6: Build financial, structural, and organizational resources to achieve Goals 1 - 5.

FY24 projects: Bolster administrative, outreach, and support functions; continue to evaluate internships and contractors as ways to accomplish this.

Goal 7: Continue conversion to 100% battery electric bus (BEB) fleet.

FY24 projects: Construct/equip new BEB facility on Bellevue campus. Continue build out of BEB charging infrastructure at Bellevue and Ketchum depots; acquire two (2) additional light duty BEBs; put BEBs in-service on Valley, Hailey, Blue, and resort routes.

## Appendix A

- Funding Request & Presentation: Blaine County



### Blaine County Fiscal Year 2024 Funding Request Form

c. How do your goals promote the County's Strategic Objectives?

By our Joint Powers Agreement, Blaine County and Mountain Rides act in concert. As a result, Mountain Rides promotes and complements Blaine County's Strategic Objectives. We are accountable, transparent, fiscally responsible, and ethically upstanding. As a provider of essential public service with County-wide impact, Mountain Rides' goals align with the County's Delivery of Service and Public Policy goals as follows:

- Understand purpose is to serve county constituency.

Mountain Rides is committed to serving all citizens of and visitors to Blaine County by providing high-quality transportation services. As an open service, accessible to everyone in Blaine County, Mountain Rides' scope and diverse constituency of users is unmatched among public service providers in the County.

- Focus on customer and client service.

Mountain Rides success is driven by customer satisfaction. We strive for 100% customer satisfaction and support that aspiration with customer-service training, community outreach, and ever-enhanced customer information and communications systems. We seek ongoing feedback from customers and use that information in crafting improvements in our services and in developing new services.

- Working to meet community needs.

The essence of Mountain Rides is meeting and serving community needs. We proactively engage with the community on a constant basis to understand needs; we build, adapt, and adjust our services according to those needs. For example, Mountain Rides collaborates with jurisdictions' community development staffs, to understand and address community needs.

- Optimize public accessibility.

Mountain Rides is built on a foundation of open access. Our services are accessible to all; we nearly never turn anyone away. We serve "social justice communities," e.g., the Woodside community in Hailey and the Meadows community in Blaine County. All buses are ADA compliant. We work hard to serve those who need us most. We continue to increase bike capacity on buses, extending easy access to cyclists.

- Prepare for new development; plan for economic, social, environmental change.

Quality public transportation services are a key strategy of many of Blaine County's peer communities. To prepare for, and even attract, new development, we must have strong transit to compete. As the nation moves towards more sustainable transportation alternatives, with a resultant decrease in driving, communities with high-quality transit services will be best-prepared to accommodate and thrive in this new environment. Mountain Rides works with local jurisdictions on an ongoing basis in the planning and implementing of transit infrastructure and routes serving new subdivisions and other developments.

## Appendix A

### Funding Request & Presentation: Blaine County



#### Blaine County Fiscal Year 2024 Funding Request Form

- d. How will you measure your success relative to the projects or programs supported by Blaine County funds?

Ridership is our fundamental measure of success:

Mountain Rides  
Ridership by Route  
Mar 31, 2023

FYTD @ Mar 31										
Route	FY20	FY21	FY22	FY23	FY23 : FY22	FY23 : FY21	FY23 : FY20	FY23 : FY21	FY23 : FY20	FY23 : FY20
Blue	115,098	63,083	89,139	128,822	+ 39,683	144.5%	+ 65,739	204.2%	+ 13,724	111.9%
Valley	90,506	75,424	91,823	163,963	+ 72,140	178.8%	+ 88,539	217.4%	+ 73,457	181.2%
Hailey	19,983	11,398	14,546	20,088	+ 5,542	138.1%	+ 8,690	176.2%	+ 105	100.5%
Red	9,386	8,127	10,027	13,096	+ 3,069	139.8%	+ 4,969	181.1%	+ 3,710	139.5%
Bronze	10,476	9,616	12,872	17,892	+ 5,020	139.8%	+ 8,276	186.1%	+ 7,416	170.8%
Silver	41,938	20,889	36,640	50,286	+ 13,646	137.2%	+ 29,397	246.7%	+ 8,348	119.9%
Gold	34,378	18,374	32,890	39,576	+ 6,686	129.3%	+ 21,202	215.4%	+ 5,198	115.1%
Maize Valley	-	-	977	670	- 307	68.6%	+ 670	0.0%	+ 670	0.0%
Galena	993	968	723	-	- 723	0.0%	- 918	0.0%	- 918	0.0%
<b>Total</b>	<b>322,758</b>	<b>287,879</b>	<b>289,637</b>	<b>434,393</b>	<b>+ 144,756</b>	<b>159.9%</b>	<b>+ 226,514</b>	<b>289.9%</b>	<b>+ 111,635</b>	<b>134.8%</b>

We also measure performance regularly against benchmarks:

Metric	Benchmark	Performance
Riders per Service Hour	14.0	15.1
Cost per Service Hour	< \$ 86.00	\$ 80.65
Cost per Service Mile	< \$ 5.75	\$ 5.49
Road Calls/10,000 Service Miles	< 1.00	0.28
Accidents/100,000 Service Miles	< 1.00	0.02
Incidents/100,000 Service Miles	< 1.00	0.15

- e. Please provide goal measures in terms of one of the following:

- Activities: the processes or actions that use a range of inputs to produce the desired outputs and ultimately outcomes. In essence, activities describe "what we do."

Mountain Rides activities – providing public transportation services – are straightforward to measure. We count the number of people we serve and how effectively we serve them by measuring riders per hour and per mile, service frequency, and service area coverage.

- Outputs: the final products, or goods and services produced for delivery. Outputs may be defined as "what we produce or deliver."

Mountain Rides delivers a full range of public transportation mobility services for our community via a transportation network that we manage, operate, and help plan. When we are successful, Mountain Rides favorably impacts the quality of life, the economy, and the well-being of the community that is Blaine County.



## Appendix A

- Funding Request & Presentation: Blaine County



### Blaine County Fiscal Year 2024 Funding Request Form

3. Outcomes: the medium-term results for specific beneficiaries that are the consequence of achieving specific outputs. Outcomes should relate clearly to your strategic goals and objectives. Outcomes are "what we wish to achieve."

Mountain Rides is focused on four key performance outcomes – financial sustainability, ridership, accessibility, and safety. We continually assess our performance against benchmarks and industry standards. We also conduct periodic customer satisfaction and quality surveys, as well as measure things like on-time performance and employee satisfaction.

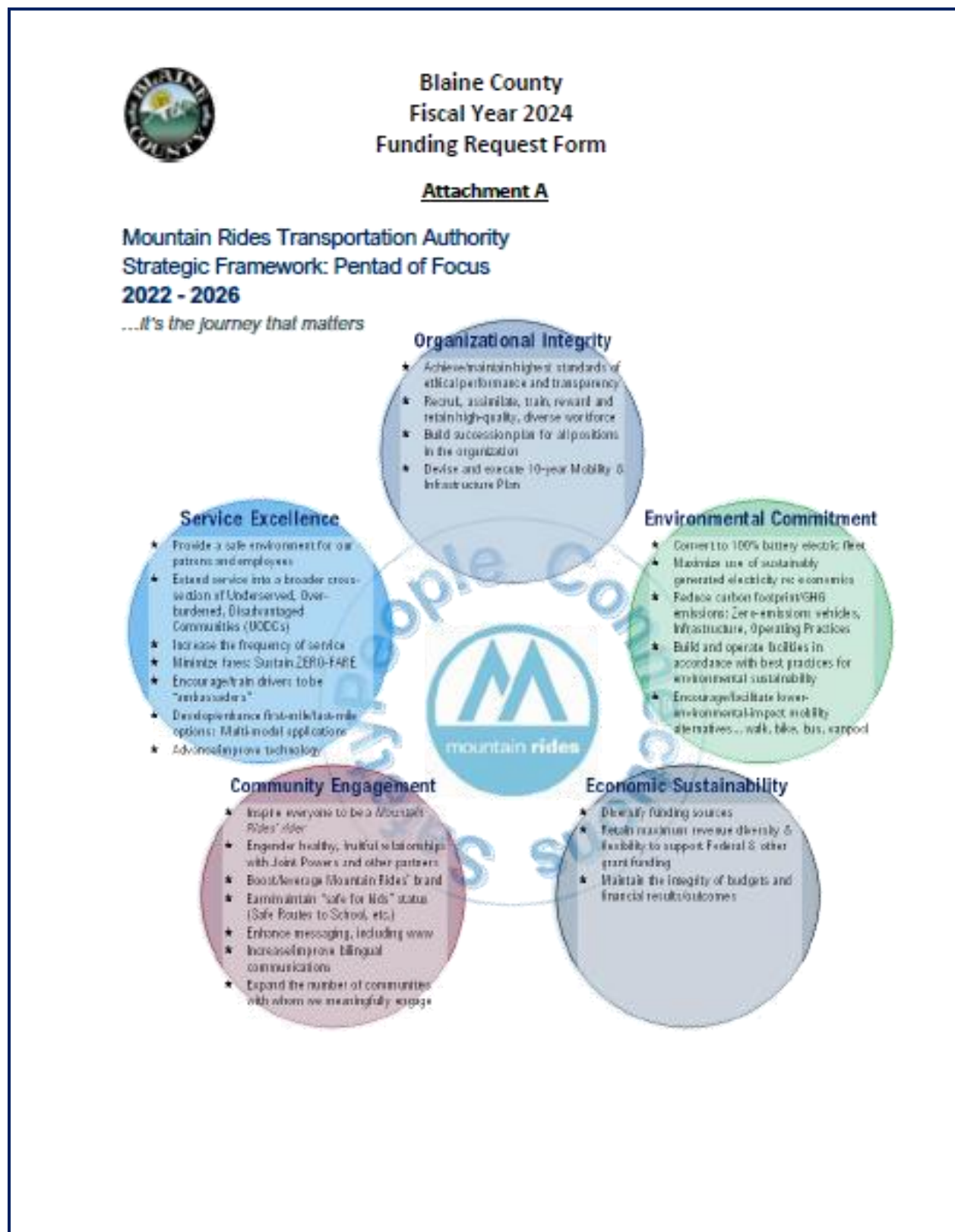
4. Impacts: the results of achieving specific outcomes, such as reducing poverty and creating jobs.

Mountain Rides is the local vehicle for a federally underwritten jobs-creation-and-sustaining program; to wit, the forty-five (45) employees at Mountain Rides, whose wages are underwritten (~70%) by Federal Transit Administration grant dollars, and whose wages are spent and invested in the local economy (setting in motion a multiplier-effect that ripples through and benefits the local economy).

Mountain Rides enhances quality of life and overall mobility in our community, which is important, regardless of whether one rides with Mountain Rides. Mountain Rides brings our community together...and it's the journey that matters...

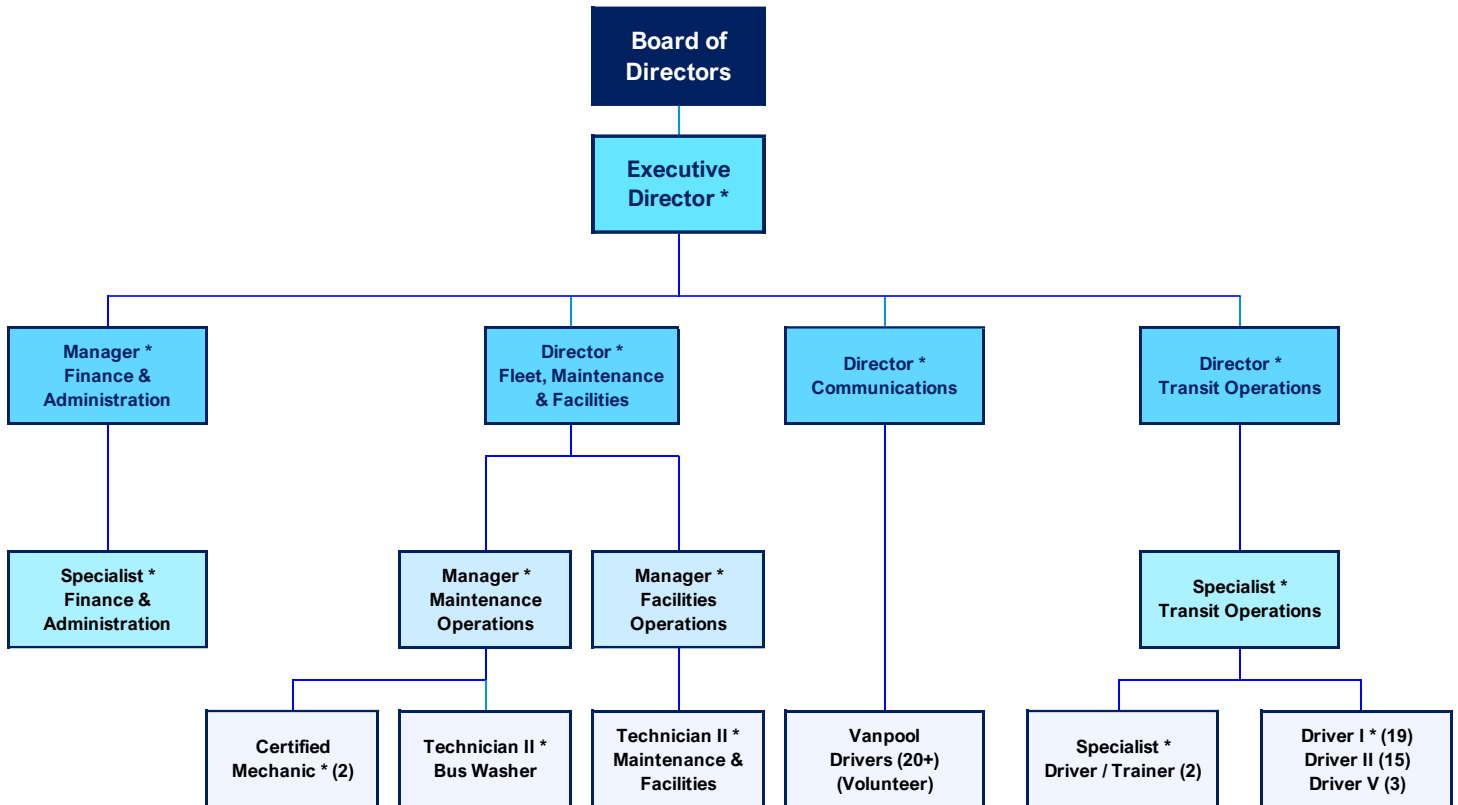
## Appendix A

### Funding Request & Presentation: Blaine County



## Appendix B

- MRTA Organizational Chart





## *Appendix B*

- **MRTA Joint Powers Agreement**

### **Extension of Agreement of Mountain Rides Transportation Authority to Provide Multimodal Public Transportation Services in Blaine County**

**WHEREAS**, on October 8, 2007, the undersigned governmental entities agreed to and caused to be recorded with the Blaine County Recorder that certain agreement known as the Amended Agreement of the Ketchum-Sun Valley Public Transit Authority to Provide Multimodal Public Transportation Services in Blaine County ("Joint Powers Agreement") on November 1, 2007, as Instrument No. 552903 in Blaine County, Idaho;

**WHEREAS**, on October 8, 2007, the "Ketchum-Sun Valley Public Transit Authority" was renamed the "Mountain Rides Transportation Authority";

**WHEREAS**, on September 28, 2011, the parties extended the Joint Powers Agreement until October 7, 2015, and on October 1, 2015, extended the Joint Powers Agreement until September 30, 2019, and on October 1, 2019, extended the Joint Powers Agreement until September 30, 2023; and

**WHEREAS**, the undersigned governmental agencies desire to extend the Joint Powers Agreement as set forth below.

**NOW THEREFORE**, the undersigned governmental agencies agree as follows:

1. The Joint Powers Agreement, currently set to expire September 30, 2023, attached hereto as Exhibit 1 and incorporated by reference, is hereby extended for four (4) years, until September 30, 2027.

2. Except as so changed herein, all provisions of the Joint Powers Agreement as amended from time to time shall remain in full force and effect.

-- more --

Extension of Joint Powers Agreement - 1

## Appendix B

- MRTA Joint Powers Agreement

### City of Sun Valley

By: Peter M. Hendricks  
Mayor

Date: 8-25-23

Attest: Wang Flanagan  
City Clerk



### City of Ketchum

By: [Signature]  
Mayor

Date: 8/23/23

Attest: [Signature]  
City Clerk



-- more --

Extension of Joint Powers Agreement - 2

## Appendix B

- MRTA Joint Powers Agreement

City of Hailey

By: Martha Burke Attest: [Signature]  
Mayor City Clerk  
Date: 8/30/2023



City of Bellevue



By: [Signature] Attest: [Signature]  
Mayor City Clerk  
Date: 08-28-2023

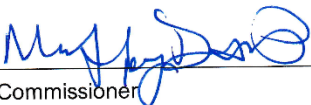
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Extension of Joint Powers Agreement - 3


## Appendix B

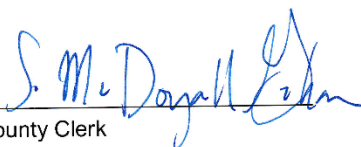
- MRTA Joint Powers Agreement

County of Blaine

By:   
Commissioner  
Date: 8/22/23

By: Lindsay Mollineux  
Commissioner  
Date: 8/22/2023

By:   
Commissioner  
Date: 8/22/23

Attest:   
County Clerk

-- #### --

Extension of Joint Powers Agreement - 4

## Appendix B

### • MRTA Joint Powers Agreement

#### Exhibit 1

##### AGREEMENT OF MOUNTAIN RIDES TRANSPORTATION AUTHORITY TO PROVIDE MULTIMODAL PUBLIC TRANSPORTATION SERVICES IN BLAINE COUNTY

This Agreement ("Agreement"), made and entered into on October 1, 2015, by and between the CITY OF KETCHUM, IDAHO, a municipal corporation ("Ketchum"), the CITY OF SUN VALLEY, IDAHO, a municipal corporation ("Sun Valley"), the CITY OF HAILEY, a municipal corporation ("Hailey"), the CITY OF BELLEVUE, a charter city ("Bellevue"), and the COUNTY OF BLAINE, a body politic and corporate ("Blaine County") all described, individually as "Party," or jointly as "Parties";

##### WITNESSETH:

WHEREAS, on June 5, 1989 the Cities of Ketchum and Sun Valley entered into an agreement for the formation of the Ketchum-Sun Valley Public Transit Authority ("Authority") and have since that commencing date jointly funded and operated a public transportation system commonly known as KART within and between the two municipalities through the Authority; and

WHEREAS, since June 2002, Ketchum, Sun Valley and Blaine County have participated in the funding of the PEAK Bus, a regional public transportation service along Idaho State Highway 75 between Bellevue and Ketchum and Sun Valley operated by Wood River Rideshare, a 501c3 non profit corporation; and

WHEREAS, on December 11, 2003, Ketchum and Sun Valley entered into an agreement extending the Ketchum-Sun Valley Public Transit Authority Agreement of June 5, 1989 to (1) ensure the June 5, 1989 Agreement remained in full force and effect, (2) set the term of commitment by Ketchum and Sun Valley to December 31, 2006; and 3) allow for renegotiation or dissolution of the Ketchum-Sun Valley Public Transit Authority Agreement in the event of the formation of a Regional Transportation Authority or similar agency; and

WHEREAS, in August 2005, Blaine County became the sole manager of the PEAK Bus service and solicited and received funding assistance from Ketchum, Sun Valley and Bellevue for fiscal year 2005-06; and

WHEREAS, on January 31, 2006, Ketchum, Sun Valley, Bellevue and Blaine County entered into an agreement (known as the "Amended Agreement of the Ketchum-Sun Valley Public Transit Authority") to operate the KART services in Ketchum and Sun Valley and the Highway 75 services from Bellevue to Ketchum; and

WHEREAS, in May 2006, the Ketchum-Sun Valley Public Transit Authority became the sole manager of the PEAK Bus service and solicited and received funding assistance from Ketchum, Sun Valley, Bellevue and Blaine County for fiscal year 2006-07; and

WHEREAS, on February 21, 2007, the Authority adopted a Vision, Mission and Goals Statement to reflect its broader role as the primary multimodal public transportation agency within Blaine County and outside of Blaine County to counties with commuters traveling to Blaine County. This statement may be periodically updated; and

Instrument # 629888

HAILEY, BLAINE, IDAHO  
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Recorded for : BLAINE COUNTY COMMISSIONERS  
JOLYNN DRAGE Fee: 0.00  
Ex-Officio Recorder Deputy  
Index to: COMMISSIONER AGREEMENTS



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WHEREAS, in August 2007, Wood River Rideshare merged with KART allowing the Authority to expand its services to all of those operated by Wood River Rideshare, to include vans, carpools, bicycles, walking, transportation information, counseling and advice and other multimodal public transportation services operating within Blaine County and outside of Blaine County to counties with commuters traveling to Blaine County; and

WHEREAS, the Parties have adopted comprehensive plans, transportation plans and/or governing policies identifying the goals, policies and/or action items to support county-wide transportation planning which includes multimodal public transportation services to meet the resident, visitor and commuter needs through regional transportation planning; and

WHEREAS, on September 28, 2011 the parties extended the Joint Powers Agreement until October 7, 2015; and

WHEREAS, the public transportation demands for residents, visitors and workers commuting to employment centers in the region are increasing and it is the desire of the Parties to provide for efficient and responsive multimodal public transportation services which are easily identifiable, are coordinated in a manner to encourage the ease of ridership with incentives such as a variety of high quality services, park and ride lots, and high occupancy vehicle lanes, in order to reduce the congestion, costs and pollution caused in part, by individual vehicular trips within Blaine County; and

WHEREAS, the City parties hereto are municipal corporations organized and existing under and by virtue of the laws of the State of Idaho and as such are authorized and empowered by Idaho Code, Section 50-322, to purchase, lease, or otherwise procure multimodal public transportation systems, and to provide by general ordinance for the regulations governing the maintenance and operation of the same; and

WHEREAS, it is the mutual desire of the Parties hereto, acting pursuant to Idaho Code, Section 67-2328, to maintain an Authority to procure, establish, operate, maintain and plan for a multimodal public transportation system in and between the corporate limits of Sun Valley, Ketchum, Hailey, Bellevue, and Carey and within Blaine County and outside of Blaine County to counties with commuters traveling to Blaine County; and

WHEREAS, it is the mutual desire of the Parties hereto that there are no disruptions to public transportation services as the mutual terms, covenant and conditions of this Agreement are implemented including that the current level of services historically provided by KART for the residents and visitors of Ketchum and Sun Valley and the services to Wood River Valley that were provided by the PEAK Bus are maintained.

NOW, THEREFORE, in order to accomplish the aforesaid purposes, and in consideration of the mutual terms, covenants and conditions set forth herein, the Parties hereto agree as follows:

#### **1. Corporate Name.**

Authority shall be renamed the "Mountain Rides Transportation Authority" which replaces the previous name: "Ketchum-Sun Valley Public Transit Authority" (or "KART").

## ***Appendix B***

### **• MRTA Joint Powers Agreement**

#### **2. Transportation Authority Membership.**

The governing Board of Directors of the Authority (the "Board") shall be configured as defined below:

- A. Subject to sub-paragraph E below, two (2) members from the City of Ketchum and two (2) members from the City of Sun Valley shall be appointed by the Mayors of Ketchum and Sun Valley with the concurrence of the City Council of each city.
- B. Subject to sub-paragraph E below, one (1) member each to be appointed by the Mayors of Hailey, and Bellevue with the concurrence of the City Council of each such City. The Board may also include one (1) member to be appointed by the Mayor of Carey as determined by the Board.
- C. Subject to sub-paragraph E below, one (1) member from Blaine County to be appointed by the Board of County Commissioners.
- D. One "Member-at-Large." The Authority will solicit nominations from a variety of organizations and individuals that it deems appropriate and have an interest in multi-modal transportation to fill this position, and such selection shall be made by the Board.
- E. Parties will join and become voting members of the Board upon execution of this Agreement by its respective governing body.
- F. The Mayors, Council Members, Commissioners and employees of the Parties hereto shall not be excluded from membership on the Authority by virtue of their relationship with the Cities and County involved.
- G. Employees, directors, shareholders, partners, owners and others with financial interests in any business, company or entity which the Authority has employed or contracted with to provide equipment or services shall be subject to the Authority's Conflict of Interest Policy as it may be amended from time to time.

#### **3. Term of Office.**

The term of office for each member of the governing Board of the Authority shall be for three (3) years. The current terms are set to expire as follows:

- a. Ketchum seat #1 – Oct 2017
- b. Ketchum seat #2 – Oct 2016
- c. Sun Valley seat #1 – Oct 2017
- d. Sun Valley seat #2 – Oct 2016
- e. Hailey – Oct 2015
- f. Bellevue – Oct 2017
- b) Blaine County – Oct 2015
- c) At large – October 2016



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### • MRTA Joint Powers Agreement

Subsequent appointments shall be for three (3) years and a Board member shall hold a seat on the Board until his or her successor has been appointed and qualified. Vacancies occurring otherwise than through the expiration of appointed terms, shall be filled for the remainder of the term by the Party that appointed the Board member.

#### **4. Organization.**

The Authority shall be governed by the Mountain Rides Transportation Authority By-laws specifying the method and manner by which it shall conduct its business and affairs, provided, however, that said By-laws shall be amended so as not be inconsistent with or contrary to the provisions of this Agreement, or any applicable local, state or federal law and shall provide that at least a simple majority must concur for the Authority to act.

#### **5. Purposes and Powers.**

The purpose of the Authority is to establish, implement, maintain, fund and operate a comprehensive multimodal public transportation system by motor buses, fixed guideway systems, van and car pools, bicycles, amenities for walking or other appropriate means, including transportation counseling and advice for scheduled or unscheduled and charter services within Blaine County and outside of Blaine County to counties with commuters traveling to Blaine County for the benefit of commuters and the inhabitants and visitors to Blaine County. In furtherance of that purpose, the Parties hereto hereby delegate to the Authority their power to purchase, lease, or otherwise procure multimodal transportation systems, and to promulgate regulations governing the maintenance and operation of the same. Such delegated powers shall more specifically include, but not be limited to, the following:

- A. As a separate legal entity under state and federal statutes, to apply for, receive and operate under financial assistance from the federal or state government, and from any agency or political subdivision thereof, or from any private sources;
- B. To acquire by purchase, gift, lease, sublease or otherwise, to the extent and in the manner that a city or county operating under the laws of the State of Idaho might do so, real or personal property necessary for the establishment, operation and maintenance of a multimodal public transportation system including but not limited to land and easement acquisitions, facilities, employee housing and rolling stock;
- C. To fund operational and maintenance costs of operating a comprehensive multimodal public transportation system;
- D. To contract with public or private agencies, companies or entities for the provision of multimodal public transportation services or for expansion of multimodal public transportation services in the Authority's service area;
- E. To undertake or contract for studies relating to the multimodal public transportation needs of the Parties and the methods by which said needs can best be served;

## Appendix B

### • MRTA Joint Powers Agreement

- F. To participate in, contribute to and support the regional transportation plans, as from time to time may be proposed, adopted and amended.

#### **6. Manner of Financing.**

The Authority shall annually adopt a budget. Each Party hereto will annually budget and contribute to the Authority an amount of money necessary to operate and maintain a comprehensive multimodal public transportation system. During each fiscal year, the Parties shall contribute their respective amount of money as determined by the adopted budget, subject to approval of each Party's governing Board. It is anticipated that each Party hereto may have a contract for services with the Authority that provides for a funding arrangement between each Party and the Authority. Upon approval of the Board, a Party may contribute its share of the budget through in-kind services, equipment, personal or real property or leases.

- A. In adopting the annual budget, it is anticipated that Ketchum and Sun Valley will continue, as a base, the fiscal year 2005-2006 level of financial support which has historically been provided through their respective local option tax ("LOT") revenue for KART and the PEAK Bus. Further, it is anticipated that the County will continue its financial support for the multimodal public transportation services operated by the Authority in and beyond the County.
- B. Any Party may contribute additional funds to the Authority. Said additional funds shall be deemed as contribution not subject to matching from any other Party and shall be calculated for division of property upon termination of the Authority under Paragraph 8 herein below, if such contribution(s) were for capital acquisitions.
- C. Any funds received by the Authority shall be used for the purpose of maintaining the Authority and planning for, establishing, acquiring, operating or maintaining a multimodal public transportation system, or for paying costs associated with a contract whereby multimodal public transportation services are provided by others. The budgeting, allocation and use of said funds by the Authority shall be in accordance with the purposes and powers herein provided for, and in no event shall the Authority use, spend, encumber or commit funds of the Parties hereto in amounts exceeding those actually budgeted and contributed to the Authority by the Parties.

#### **7. Duration.**

The duration of the Authority created by this Agreement shall be October 1, 2015 through September 30, 2019, provided, however, that the same may be extended for an additional period or periods of time, as the Parties hereto deem appropriate. Any such extension of this Authority shall be in writing, adopted by the governing body of each of the Parties hereto.

Any Party may withdraw from the Authority upon six (6) month's written notice. Such notice shall be effective upon the next October 1 which follows the expiration of the six (6) months' notice. For example, an entity would have to give notice no later than April 1 if it did not want to be a party to the Joint Powers Agreement the next fiscal year. Upon withdrawal of a party the Board seats

## Appendix B

### • MRTA Joint Powers Agreement

appointed by such withdrawing party shall be terminated. Withdrawal of either Ketchum or Sun Valley shall constitute dissolution of the Authority.

#### **8. Dissolution of the Authority.**

Subject to section 7 above, the Authority may be dissolved and terminated by majority vote of the Parties. Upon the dissolution of the Authority created by this Agreement or any extension or renewal thereof, for whatever reason, the property, real and personal, owned by the Authority shall be sold or distributed in the manner provided for by law for the disposition of property by cities and counties, and the proceeds of any such sale shall be divided between the Parties hereto in proportion equal to the annual operating and capital contributions of each to the Authority since its inception. Provided, however, that prior to any sale of property, real or personal, Parties may agree to distribute said property between themselves in a manner deemed by them to be equitable and approved in writing by the governing body of each. Property of KART or the Cities of Sun Valley or Ketchum existing at the date of this Agreement, or provided by them after the effective date of this Agreement, shall remain their sole and exclusive property and shall not be divided between the Parties hereto. A schedule of such property shall be prepared and attached hereto as Exhibit "A" upon execution of this Agreement. Such property includes, but is not limited to, buses, vans, vehicles, equipment, tools, furnishings, real property, bus maintenance facility and work force housing units.

#### **9. Mediation and Arbitration.**

Any controversy or claim arising out of or relating to this Agreement or breach thereof, shall first be submitted to mediation upon the written request of any Party and conducted by one (1) neutral mediator. If the Parties are unable to select a mediator, then selection shall follow the procedure published by the American Arbitration Association Commercial Mediation Rules. Mediation shall be held in Blaine County. This Agreement to mediate and any other agreement or consent to mediate entered into in accordance with this Agreement shall be specifically enforceable under the prevailing law of Idaho. Each party shall bear its own costs and the parties shall split equally the cost and expenses of the mediator. In the event that the parties are unable to resolve their disagreements through mediation, the parties agree to arbitrate the matter pursuant to the rules of and with the American Arbitration Association, or another mutually acceptable arbitrator.

#### **10. Execution and Effect.**

Upon execution of this Agreement by Ketchum and Sun Valley, the "Agreement Extending the Ketchum-Sun Valley Public Transit Authority" dated December 11, 2003, and the "Agreement by Ketchum, Sun Valley, Bellevue and Blaine County", and the "Amended Agreement of the Ketchum-Sun Valley Transit Authority" dated January 31, 2006, and the "Extension of Amended Agreement of the Ketchum-Sun Valley Public Transit Authority (Renamed in 2007 to to "Mountain Rides Transportation Authority") to Provide Multimodal Public Transportation Services in Blaine County", recorded with the Blaine County Recorder on September 28, 2011, shall be deemed cancelled and replaced by this Agreement. This Agreement may be executed in counterparts, each of which shall be deemed to be an original.

#### **11. Amendment.**



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- MRTA Joint Powers Agreement

This Agreement may only be amended upon the approval of a majority of the Parties. To be effective, any such amendment shall be in writing signed by the Chair of the Board certifying that such amendment had been approved by majority vote of the Parties.

IN WITNESS WHEREOF, the Parties hereto have caused this Agreement to be executed by the duly-authorized representatives this 1, 11, 16, 23<sup>rd</sup> day of SEPTEMBER, 2015.



ATTEST:

Sandra E. Cady  
City Clerk

CITY OF KETCHUM

By: [Signature]  
Mayor

Date: 9.11.15



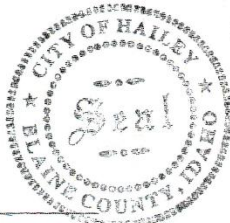
ATTEST:

[Signature]  
City Clerk

CITY OF SUN VALLEY

By: [Signature]  
Mayor

Date: 9/16/15



ATTEST:

[Signature]  
City Clerk

CITY OF HAILEY

By: [Signature]  
Mayor

Date: 9/23/15

CITY OF BELLEVUE

By: [Signature]  
Mayor

Date: 9/21/15

## Appendix B

- MRTA Joint Powers Agreement

ATTEST:

Narathy L. Barton  
City Clerk



BLAINE COUNTY COMMISSIONERS

By: James J. J. J.  
Date: 9.1.15

By: Angela M. Clay  
Date: 9/1/15

By: Absent  
Date:                     



ATTEST  
JoLynn Drage  
JoLynn Drage  
Blaine County Clerk

## Appendix B

- MRTA FY24 Contract for Services

### CONTRACT FOR SERVICES MOUNTAIN RIDES TRANSPORTATION AUTHORITY

**THIS CONTRACT FOR SERVICES** (hereinafter the "Contract") is made and entered this 15<sup>th</sup> day of September, 2023, by and between the **CITY OF SUN VALLEY, IDAHO**, a municipal corporation (hereinafter referred to as "the City") and the **MOUNTAIN RIDES TRANSPORTATION AUTHORITY** (hereinafter referred to as "Mountain Rides"), an Idaho Transportation Authority, formed and existing pursuant to a Joint Powers Agreement duly executed, extended, and recorded as Instrument #629888 in Blaine County, Idaho (recorded 9/29/15). This Contract is hereby entered into in contemplation of the following findings:

#### FINDINGS

1. Sun Valley is a municipal corporation duly organized and existing under the law of the State of Idaho §50-101 et seq.
2. Mountain Rides is an Idaho Transportation Authority formed and existing pursuant to a Joint Powers Agreement duly executed and recorded as Instrument #629888 in Blaine County, Idaho.
3. The City is a destination resort city as defined by Idaho Code § 50-1044, as it derives a major portion of its economic well-being from businesses catering to the recreational needs of people traveling to the City for an extended period of time. The City, as a resort city, is eligible to collect a local option non-property tax.
4. Pursuant to Idaho Code §50-301 and §50-302, the City is empowered to enter into contracts and take such steps as are reasonably necessary to maintain the peace, good government and welfare of the City and its trade, commerce and industry. Accordingly, the City has the power as conferred by the State of Idaho to provide directly for certain promotional activities to enhance the trade, commerce, industry, and economic wellbeing of the City.
5. City Ordinances Nos. 389 and 456 provide for the imposition of a non-property tax on the sales price of certain property sold or otherwise transferred in the City. Pursuant to the language of the Ordinances, which were approved by the voters of the City, the municipal sales tax revenue derived shall be used for, among other things, public transportation, information, education, and economic development activity.
6. Mountain Rides provides an efficient and responsive public transportation system which is easily identifiable, is coordinated in a manner to encourage the ease of ridership, is charged with planning and implementation of multi-modal transportation technologies, when feasible, and will seek to reduce the congestion and pollution of individual vehicular trips within Blaine County.
7. Mountain Rides' mission is to establish, implement, maintain, fund and operate a comprehensive public transportation system by motor buses, vans or other appropriate means, including but not limited to multi-modal transportation systems, on a scheduled or unscheduled and charter basis throughout Blaine County for the benefit of the inhabitants and visitors in Blaine County.
8. The organizational goals of Mountain Rides are consistent with the purposes and findings included in Ordinance Nos. 389 and 456.
9. Mountain Rides has faithfully and diligently carried out its mission to provide services that promote and enhance the trade, commerce, and industry of the City. It is in the best interests of the public health, welfare, and prosperity of the City to provide regional transportation services.
10. It is the intention of the City to contract with Mountain Rides to provide such services for consideration as hereinafter provided.
11. Mountain Rides desires to enter into a contract with the City to provide transportation services all as hereinafter provided.

## Appendix B

### • MRTA FY24 Contract for Services

NOW, THEREFORE, on the basis of the foregoing findings the Parties agree as follows:

1. Services to be Provided by Mountain Rides. Mountain Rides hereby agrees to provide transportation services for the City and to provide public transportation services to residents and visitors to the City and the Mountain Rides service area, within the confines of the Mountain Rides budget. Mountain Rides' FY2024 Service Plan is summarized in Exhibit A. Mountain Rides agrees that it shall provide, at its sole expense, all costs of labor, materials, supplies, business overhead and financial expenses, insurance, fidelity bonds, and all necessary equipment and facilities required to provide the transportation services as set forth in this Contract.
2. Term. The Term of this Contract shall commence October 1, 2023, and terminate September 30, 2024.
3. Consideration.
  - a. In consideration for providing the services herein described, the City agrees to pay to Mountain Rides the total sum of FOUR HUNDRED FIFTY THOUSAND DOLLARS (\$450,000), payable in four equal quarterly installments on November 17, 2023; February 16, 2024; May 17, 2024; and August 16, 2024. Mountain Rides will provide the City with an invoice 30 days in advance of the due dates setting forth the amount of the installment due. The City shall pay Mountain Rides the amount set forth in each such invoice no later than thirty (30) days after the date of each such invoice.
  - b. The City's contribution to Mountain Rides is part of the Mountain Rides FY2024 Budget to be adopted by the Mountain Rides Board on September 20, 2023. Mountain Rides' FY2024 Operating Budget is summarized in Exhibit B.
  - c. In consideration and as part of this Contract, and upon request, Mountain Rides will provide to Sun Valley City Council, on or after April 15, 2024, via presentation at a City Council meeting, a mid-year Report including activities, ridership, financial conditions, and other information describing the then-current condition of the transportation system. In addition, Mountain Rides will provide a budget request and, upon request, a report coincident with the City's FY2025 budget deliberations.
  - d. Notwithstanding the requirements to subparagraph 3(a) above, the Parties recognize and agree that payment source for the services called for herein is local option sales tax revenue. The City, as part of its budgeting process, has projected historical sales tax revenue data to determine it can retain Mountain Rides for the consideration called for herein. In the event the City fails to collect such local option tax revenue during the term of this Contract for any reason, the City may, at its sole option, terminate, or adjust the payments to Mountain Rides by reducing its contribution by the same ratio that the LOT revenues are below the projections. this Contract upon thirty (30) day written notice to Mountain Rides. In the event of such termination, Sun Valley shall have no further responsibility to make payment to Mountain Rides under this Contract beyond the thirty (30) day notice period. In the event that budgeted revenue from any of Mountain Rides' funding partners (local government, federal government, fares, or private business funding) identified in the Mountain Rides' FY2024 adopted budget is not collected as expected, Mountain Rides may need to adjust its adopted FY2024 Service Plan in order to balance revenue with expenses. In this event, Mountain Rides will give notice to the City as to the adjustments that impact transit service within the City. Mountain Rides and the City will work to come to a mutually acceptable adjusted service plan. If a mutually acceptable adjusted service plan cannot be reached, the City may terminate this Contract upon thirty (30) day written notice to Mountain Rides.



## Appendix B

### • MRTA FY24 Contract for Services

4. Termination. The City may, at its sole discretion, terminate, with or without cause, this Contract immediately upon one hundred twenty (120) days written notice to Mountain Rides. In the event of such termination, the City shall make all payments due to Mountain Rides through the end of the 120-day notice period and thereafter shall have no further responsibility to make any payment to Mountain Rides under this Contract. Mountain Rides, in its sole discretion, shall adjust services as may be necessitated as a result of any termination of this Contract.
5. Equal Employment Opportunity. Mountain Rides covenants that it shall not discriminate against any employee or applicant for employment because of race, religion, color, sex, or national origin.
6. Default. In the event either Party fails to perform its responsibilities, as set forth in this Contract during the contract term, this Contract may, at the option of the non-defaulting Party, be terminated. Upon termination under this paragraph, Mountain Rides, in the event it intentionally breaches its responsibilities, shall not be entitled to receive any unpaid installments of the consideration called for in paragraph 3 of the Contract.
7. Independent Contractor Status. The Parties acknowledge and agree that Mountain Rides shall provide its services for the fee specified herein in the status of independent contractor, and not as an employee of the City. Mountain Rides and its agents, employees, and volunteers shall not accrue leave, retirement, insurance, bonding, or any other benefit afforded to employees of the City. The sole interest and responsibility of the City under this Contract is to assure itself that the services covered by this Contract shall be performed and rendered by Mountain Rides in a competent, efficient, and satisfactory manner.
8. Hold Harmless. Any contractual obligation entered into or assumed by Mountain Rides, or any liability incurred by reason of personal injury and/or property damage in connection with or arising out of Mountain Rides' obligations pursuant to this Contract shall be the sole responsibility of Mountain Rides, and Mountain Rides covenants and agrees to indemnify and hold the City harmless from any and all claims or causes of action arising out of Mountain Rides' activities and obligations as set forth hereinabove, including, but not limited to, personal injury, property damage, and employee complaints.
9. Non-Assignment. This Contract may not be assigned by or transferred by Mountain Rides, in whole or in part, without the prior written consent of the City.
10. Miscellaneous Provisions.
  - a. Paragraph Headings. The headings in this Contract are inserted for convenience and identification only and are in no way intended to describe, interpret, define, or limit the scope, extent or intent of this Contract or any of the provisions of the Contract.
  - b. Provision Severable. Every provision of this Contract is intended to be severable. If any term or provision hereof is illegal or invalid for any reason whatsoever, such illegality or invalidity shall not affect the validity of the remainder of the Contract.
  - c. Rights and Remedies are Cumulative. The rights and remedies provided by this Contract are cumulative and the use of any one right or remedy by any Party shall not preclude nor waive its rights to use any or all other remedies. Any rights provided to the Parties under this Contract are given in addition to any other rights the Parties may have by law, statute, ordinance or otherwise.
  - d. Successor and Assigns. This Contract and the terms and provision hereof shall inure to the benefit of and be binding upon the heirs, personal representatives, successors and assigns of the Parties hereto.

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- MRTA FY24 Contract for Services

- e. Entire Contract. This Contract contains the entire agreement between the Parties respecting the matters herein set forth and supersedes all prior agreements between the Parties hereto respecting such matters.
- f. Governing Law. This Contract shall be construed in accordance with the laws of the State of Idaho.
- g. Preparation of Contract. No presumption shall exist in favor of or against any Party to this Contract as a result of the drafting and preparation of the document.
- h. No Waiver. No waiver of any breach by either Party of the terms of this Contract shall be deemed a waiver of any subsequent breach of the Contract.
- i. Amendment. No amendment of this Contract shall be effective unless the amendment is in writing, signed by each of the Parties.

IN WITNESS WHEREOF, the Parties have executed this Contract on the day and year first written above.

MOUNTAIN RIDES TRANSPORTATION AUTHORITY

CITY OF SUN VALLEY

  
Wallace E. Morgus, Executive Director

  
Peter M. Hendricks, Mayor

ATTEST:

  
Nancy Flannigan, Clerk

## Appendix B

- MRTA FY24 Contract for Services

### Exhibit A Mountain Rides FY2024 Service Plan Summary



Service	Service Hours	Notes
Blue	11,895.8 hours	Mon - Sun; 7:00am - 12:30am
Valley	15,852.8 hours	Sun - Fri; 6:00am - 12:30am; Sat 6:00am - 1:00am
Halley	2,322.8 hours	Mon - Fri; 8:00am - 5:00pm
Red	1,687.8 hours	Nov 23, 2023 - Apr 14, 2024: 8:30am - 5:00pm daily; Summer Music Festival (15 days): 4:00pm - 8:00pm
Bronze	1,024.8 hours	Dec 9, 2023 - Apr 14, 2024: 8:30am - 4:30pm
Silver	2,323.8 hours	Nov 23, 2023 - Apr 14, 2024: 8:00am - 6:30pm; June 29, 2024 - Sep 8, 2024: 9:00am - 5:30pm (plus 5 Wk)
Gold	983.8 hours	Dec 9, 2023 - Mar 24, 2024: 8:00am - 5:00pm
Total	36,066.8 hours	

## Appendix B

- MRTA FY24 Contract for Services

### Exhibit B Mountain Rides FY2024 Operating Budget



	FY24 Budget
<b>Income</b>	
Total 41000 - Federal Funding	\$ 2,077,012
Total 42000 - State Funding	-
Total 43000 - Local Funding	1,555,110
Total 44000 - Fares	200,000
Total 45000 - Other Revenue	90,000
Total 47000 - Private Donations	1,000
48000 - Transfer from Housing Fund	10,000
49000 - Interest Income	3,000
50000 - Excess Operating Funds	100,000
<b>Total Income</b>	<b>\$ 4,469,122</b>
<b>Expenses</b>	
Total 51000 - Payroll Expenses	\$ 3,146,550
Total 52000 - Insurance Expense	194,244
Total 53000 - Professional Fees	39,000
Total 54000 - Equipment/Tools	13,000
Total 55000 - Rent and Utilities	35,000
Total 56000 - Supplies	34,000
Total 57000 - Repairs and Maintenance	53,000
Total 58000 - Communications	45,300
Total 59000 - Travel and Training	33,950
Total 60000 - Business Expenses	16,200
Total 61000 - Advertising	39,409
Total 62000 - Marketing and Promotion	22,000
Total 63000 - Printing and Reproduction	19,000
64000 - Fuel Expense	500,000
Total 65000 - Vehicle Maintenance	187,500
69500 - Contribution to Fund Balance	90,969
<b>Total Expenses</b>	<b>\$ 4,469,122</b>
<b>Net Surplus (Deficit)</b>	<b>\$ -</b>

## *Appendix B*

- **MRTA FY23 Audited Financial Statements**

**MOUNTAIN RIDES  
TRANSPORTATION AUTHORITY**

**Financial Statements  
Year Ended September 30, 2023**

## Appendix B

- MRTA FY23 Audited Financial Statements

<b>MOUNTAIN RIDES TRANSPORTATION AUTHORITY</b>	
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<b>For the year ended September 30, 2023</b>	
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- **MRTA FY23 Audited Financial Statements**





## Appendix B

### • MRTA FY23 Audited Financial Statements

#### Report Continued—

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Mountain Rides Transportation Authority's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Mountain Rides Transportation Authority's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planning scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

#### Required Supplementary Information

Accounting principles generally accepted in the United States of America require that the management's discussion and analysis, and budgetary comparison information on pages 3–8 and 19–21 be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board, who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

#### Supplementary Information

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise the Mountain Rides Transportation Authority's basic financial statements. The schedule of expenditures of federal awards is presented for purposes of additional analysis as required by Title 2 U.S. Code of Federal Regulations (CFR) Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, and is also not a required part of the basic financial statements.

The schedule of expenditures of federal awards is the responsibility of management and was derived from and relate directly to the underlying accounting and other records used to prepare the basic financial statements. Such information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the schedule of expenditures of federal awards is fairly stated in all material respects in relation to the basic financial statements as a whole.

#### Other Reporting Required by Government Auditing Standards

In accordance with Government Auditing Standards, we have also issued our report dated November 27, 2023, on our consideration of the Mountain Rides Transportation Authority's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Authority's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with Government Auditing Standards in considering the Authority's internal control over financial reporting and compliance.

Worlman & Company

Certified Public Accountants  
Twin Falls, Idaho

## Appendix B

- MRTA FY23 Audited Financial Statements

**Mountain Rides Transportation Authority ("Mountain Rides" or "MRTA")  
Management's Discussion and Analysis  
Fiscal Year Ended September 30, 2023 ("FY2023")**

**Executive Summary and Overview**

The Financial Statements comprise three (3) sections:

- (1) Management's Discussion and Analysis (page 3);
- (2) Basic Financial Statements – a Statement of Net Position (page 9) and a Statement of Activities (page 10) – which present a holistic view of recent financial activities, as well as support reasonable projections for longer-term financial performance; and
- (3) Fund Financial Statements (pages 11-13), which detail recent expenditures for and financing of capital programs and services, as well as projections for future capital spending and financing.

The Basic Financial Statements, compiled using the modified accrual basis of accounting (similar to the accounting used by most private-sector companies), enumerate and report changes in Mountain Rides' assets and liabilities and financial activities. These Statements include all current year revenue and expenses irrespective of when cash is actually received or paid.

Net Position – assets minus liabilities – is a measure of Mountain Rides' financial health, or financial position. Over time, increases and decreases in Net Position can indicate whether financial health is improving or deteriorating. Other factors, such as changes in sources of revenue and/or the age and condition of Mountain Rides' assets, particularly its fleet of vehicles, may also contribute in assessing overall financial health.

The Statement of Activities (page 10), reporting Net (Expense) Revenue and Changes in Net Position, indicates the extent of financial resources available and expended in the near-term to underwrite Mountain Rides' activities and programs.

The Fund Financial Statements (pages 11-13) comprise:

- (1) The Balance Sheet – Governmental Funds, enumerating Mountain Rides' consolidated financial position, including its Operations Fund and all Capital Funds.
- (2) The Statements of Revenues, Expenditures, and Changes in Fund Balance, itemizing activities in each Mountain Rides Fund: i) General Operations; ii) Capital Projects; and iii) Workforce Housing.

Mountain Rides' basic services are accounted for and reported in the General Operations Fund. Each Fund's Financial Statements are compiled using the modified accrual basis of accounting (similar to the accounting used by most private-sector companies), which measures cash and all other financial assets that can be readily converted to cash.

**Management's Discussion and Analysis**

This MD&A provides an overview of Mountain Rides' FY2023 financial activities, highlighting FY2023's financial activities and resulting changes and underscoring currently known facts regarding financial performance. The reader should review the MD&A as part of the package that also includes the Independent Auditor's Report and the Basic Financial Statements.

## Appendix B

### • MRTA FY23 Audited Financial Statements

#### **Financial Highlights**

- (1) In FY2023, Mountain Rides, as a provider of public transportation services in Blaine County, continued to receive, as a sub-recipient of the Idaho Transportation Department (ITD), significant funding from the Federal Transit Administration (FTA) to underwrite the operation of public transportation services in a rural area (5311 Rural Transportation Grant Funding (5311 Rural)). In FY2023, Mountain Rides received \$2,057,012 in regular, anticipated, and budgeted 5311 Rural funds, plus drew down \$745,288 in anticipated and budgeted 5311 CARES Grant for Rural Area Programs (5311 CARES) funds. (In June 2020, the FTA, via the ITD, awarded Mountain Rides \$3,262,771 of 5311 CARES funding to be used to support operations through June 30, 2025.)
- (2) Beginning October 1, 2022 Mountain Rides received a two-year 5311 Rural award in the amount of \$4,114,024 (\$2,057,012 annually), a 26% increase in funding over the previous two-year funding cycle. In addition, to support operations in FY2023, Mountain Rides drew down \$745,288, the remaining balance of the 5311 CARES award.
- (3) In FY2023, Local funding as underwritten by local tax receipts from the cities of Sun Valley, Ketchum, Halley, and Bellevue, as well as from Blaine County, and by Sun Valley Company, increased by 12% year-over-year. Mountain Rides relies on Local Funding to help underwrite operations, maintain service levels, and provide the local match required for receipt of Federal funding – by and large Federal transit funding programs require local entities to share in the cost of operating and maintaining transit systems. In FY2023, Local Funding was allocated 55% to operations and 45% to capital accounts.
- (4) In FY2023, Mountain Rides purchased seven (7) battery electric buses ("BEBs") and related charging infrastructure.
- (5) The Coronavirus pandemic declared in March 2020 did not have a negative material financial impact on Mountain Rides in the fiscal year 2023. Management believes that there will be no negative material impact of the pandemic on future revenues, expenses, or net assets.

#### **Financial Analysis**

##### ***Condensed Statement of Net Position (Table 1)***

In FY2023, Mountain Rides' Total Net Position (total assets minus total liabilities) increased by \$ 4,630,457 over FY2022, rising from \$12,649,289 at September 30, 2022, to \$17,279,746 at September 30, 2023.

In FY2023, Unrestricted Net Position, which includes funds available, without constraint, to finance day-to-day operations, decreased by 3%, from \$3,361,733 at September 30, 2022, to \$3,254,205 at September 30, 2023.

In FY2024, a portion of the Unrestricted Net Position will be applied to underwrite operating expenses and capital expenditures; the balance will be held on-hand as contingency funds to meet cash needs arising from delays in receipts of Federal or Local Funding and/or resulting from unanticipated emergencies.

At September 30, 2023, Mountain Rides' Restricted Net Position balance is \$0.

In FY2023, Mountain Rides' Contingency Fund was fourteen percent (14%) of annual operating expenses.

In upcoming years, Mountain Rides intends to maintain sufficient Capital Funds to ensure local matching funds for underwriting capital projects, including vehicle additions and replacements; facilities' enhancements; bus stop improvements; and construction of a new building at the Bellevue, Idaho, depot.



## Appendix B

- MRTA FY23 Audited Financial Statements

**Table 1: Condensed Statement of Net Position - Compared  
As of September 30, 2023 and 2022**

	FY 2023	FY 2022
<b>Current Assets:</b>		
Cash and Deposits	\$ 3,153,277	\$ 2,184,162
Receivables	1,027,624	1,360,236
Inventories	73,829	73,427
Total Current Assets	4,254,730	3,617,825
<b>Capital Assets:</b>		
Capital Assets (Net of Depreciation)	14,025,541	9,287,556
Total Assets	\$ 18,280,271	\$ 12,905,381
<b>Current Liabilities</b>	\$ 918,458	\$ 167,690
Long-term Liabilities	82,067	88,402
Total Liabilities	1,000,525	256,092
<b>Net assets:</b>		
Invested in capital assets	14,025,541	9,287,556
Restricted		
Unrestricted	3,254,205	3,361,733
Total Net Position	\$ 17,279,746	\$ 12,649,289

**Statement of Revenues, Expenses, and Changes in Fund Balance (Table 2)**

Mountain Rides' FY2023 Total Revenues increased two hundred and three percent (203%) from FY2022 Total Revenues. The increase is due to the purchase of seven (7) battery electric buses and associated grant revenue.

Driven primarily by FY2023-over-FY2022 increases in Capital Expenditures, Mountain Rides' total cost of all programs and services increased by two hundred and seventy percent (270%) in FY2023 over FY2022.

## Appendix B

- MRTA FY23 Audited Financial Statements

**Table 2: Statement of Revenues, Expenses,  
and Changes in Fund Balance - Compared  
For the Fiscal Years Ended September 30, 2023 and 2022**

	FY 2023	FY 2022
<b>Revenues:</b>		
Federal Funding	\$ 7,846,596	\$ 2,885,795
State Funding	0	71,793
Local Funding	1,814,910	1,559,460
Fare Revenues	222,124	193,857
Charter Bus and Bike Share Revenues	0	1,435
Workforce Housing Revenues	33,175	31,300
Advertising	105,270	85,394
Interest from Investments	95,012	9,219
Proceeds on Sale of Assets	0	37,126
Private Donations	21,600	20,062
Other Revenues	859	1,777
<b>Totals</b>	<b>10,140,546</b>	<b>4,997,218</b>
<b>Expenditures:</b>		
Wages	2,900,095	2,504,095
Fuel	375,712	429,918
Repairs and Maintenance	256,757	194,288
Utilities	42,878	30,930
Contracted Services	40,224	32,018
Marketing and Promotion	43,837	69,197
Insurance	136,377	145,727
Capital Expenditures	6,303,744	263,586
Supplies	26,688	31,422
Traveling and Training	40,258	32,086
Business Expenses	28,605	15,645
Printing and Reproduction	18,457	13,439
Communication Expense	41,179	30,989
<b>Totals</b>	<b>10,254,811</b>	<b>3,793,340</b>
<b>Excess (Deficiency)</b>	<b>\$ (114,265)</b>	<b>\$ 1,203,878</b>

### General Fund Highlights

In FY2020, Mountain Rides was awarded 5311 CARES funding of \$3,262,771, to be fully obligated (spent) by June 30, 2025. In FY2023, Mountain Rides drew down \$745,288 of this funding, bringing total 5311 CARES funding used to date to \$3,262,771 and leaving a balance yet to be drawn down of \$0.

In FY2023, the General Fund realized a surplus (revenues minus expenses; budgeted as a loss of \$59,000) of \$219,789. This positive variance (+\$278,789) accrued primarily through diligent management, tight expense control, and revenue over-performance. The surplus will be used to underwrite future operations and capital projects.

## Appendix B

### • MRTA FY23 Audited Financial Statements

#### **Capital Funds Highlights**

Mountain Rides' FY2023 capital budget included \$9,626,470 for vehicles, equipment, and facility upgrades, with funding for these projects in place – Federal grant awards; Mountain Rides' cash reserves; and Local Match funds.

In FY2020, Mountain Rides began a fleet electrification project, including the installation of battery electric bus charging infrastructure at its Ketchum, Idaho, and Bellevue, Idaho, depots ("1<sup>st</sup> Phase"). In FY2021, Mountain Rides completed the 1<sup>st</sup> Phase with the charging infrastructure operational and servicing its nascent fleet of four (4) BEBs. In FY2023, after delays by the OEM, MRTA added seven (7) BEBs to its fleet, with six (6) of those BEBs put in service in FY2023 and one (1) of those BEBs received, accepted, and put in service in November 2023, after repairs of damage to said BEB incurred while in transit from the manufacturer to Mountain Rides, were completed by the manufacturer..

In FY2023, Mountain Rides completed the installation of TransLoc Intelligent Transportation System hardware and software on its buses.

#### **Workforce Housing ("WFH") Fund Highlights**

Mountain Rides owns and maintains five (5) workforce housing units in its Ketchum, Idaho, depot facility. All were occupied throughout FY2023 – four (4) units by Mountain Rides' employees and one (1) unit by a police officer for the City of Ketchum (a party to the Mountain Rides' Joint Powers Agreement formational document). Rents, the primary source of WFH Fund revenue, for the workforce housing units are maintained at below-market rates.

#### **Capital Asset and Debt Administration**

##### **Capital Assets (Table 3)**

At September 30, 2023, Mountain Rides' Net Capital Assets (asset cost minus accumulated depreciation) balance stood at \$14,025,541, which is \$4,737,985, or 51%, more than the Net Capital Assets balance at September 30, 2022. The vast majority of the year-over-year increase in this balance is attributable to FY2023 purchase of four (4) vans and seven (7) buses. Mountain Rides is invested in a broad range of capital assets, including its Ketchum and Bellevue depot facilities; bus stop shelters across its system of routes; buses, vans, and support vehicles; tools; and equipment.

**Table 3: Capital Assets for all Funds**

	FY 2023	FY 2022
<b>Governmental Activities:</b>		
Land	\$ 441,608	\$ 441,608
Construction In Progress	0	115,729
<b>Depreciable Capital Assets:</b>		
Buildings and Improvements	5,673,075	5,349,363
Buses and Vehicles	14,902,565	8,905,954
Equipment	500,014	500,014
<b>Totals</b>	<b>21,517,262</b>	<b>15,312,668</b>
<b>Less: Accumulated Depreciation</b>		
Buildings and Improvements	1,952,678	1,743,966
Buses and Vehicles	5,256,425	4,091,599
Equipment	282,618	189,547
<b>Totals</b>	<b>7,491,721</b>	<b>6,025,112</b>
<b>Net Capital Assets</b>	<b>\$ 14,025,541</b>	<b>\$ 9,287,556</b>

## Appendix B

- MRTA FY23 Audited Financial Statements

### **FY2024 and Beyond**

In September 2023, the Mountain Rides Board of Directors approved a balanced Consolidated Budget for FY2024, including Total Revenues of \$12,634,994; Total Expenses of \$11,753,514; and Total Fund Balances in Reserve of \$881,480. The FY2024 Operating Budget, a component of the Consolidated Budget, is balanced and includes Total Revenues of \$4,481,664 and Total Expenses of \$4,481,664.

Integral to the FY2024 Budget, Mountain Rides considered the following:

- FY2024 5311 Federal funding for operations – \$2,057,012 – is known and locked in via an executed two-year funding agreement for FY2023 and FY2024 between Mountain Rides (sub-recipient, via the ITD, of Federal funding) and the Idaho Transportation Department (direct recipient of Federal funding).
- With the known and quantifiable revenues in place, in FY2024 Mountain Rides will sustain service at post-pandemic recovery levels, expanding said service only to the extent that any such expanded service proves to be sustainable longer-term, thereby avoiding the detrimental impacts to the organization that typically accompany arbitrarily increasing and decreasing service levels.
- FY2024 Local funding will increase by 3.7% over FY2023 levels.
- FY2024 Capital Budgets were built by first identifying revenues and funds at-hand (Federal grant awards, Mountain Rides' Capital Funds' balances, Local Match funding) for underwriting capital expenditures and then building a capital improvements plan, with its resulting capital expenditures, that can be funded by the revenues and funds at-hand. Of particular note in the FY2024 Capital Budgets (Facilities Budget) is the budgeting for funding and constructing a new BEB facility on MRTA's Bellevue, Idaho, campus. This \$6.046M project is underwritten by Federal grant and Local Match Funding, \$4.837M and \$1.209M, respectively, and is scheduled to commence construction in Spring 2024.
- In October 2020, Mountain Rides took a proactive step to do its part in mitigating the impacts of the Covid-19 pandemic on the community by, via resolution (the "Zero-Fare Resolution") of its Board of Directors, providing all of its fixed-route bus service on a fare-free basis. Mountain Rides' Zero-Fare Resolution stipulates continuing zero-fare fixed-route bus service into the future for as long as is financially feasible.

### **Contacting Financial Management**

This financial report, which is available to all, provides a substantive overview of Mountain Rides' finances and attests to its accountability for spending the funding it receives. If you have questions about this report or need additional financial information, please contact Jerry Garcia, Finance and Administration Manager, at (208) 788-7433 or [jerry@mountainrides.org](mailto:jerry@mountainrides.org).



## Appendix B

- MRTA FY23 Audited Financial Statements

MOUNTAIN RIDES TRANSPORTATION AUTHORITY		
Statement of Net Position		
at September 30, 2023		
		Governmental Activities
<b><u>ASSETS</u></b>		
Current Assets:		
Cash and Deposits	\$ 3,153,277	
Accounts Receivable	9,238	
Grants Receivable	1,018,386	
Inventories	73,829	
Total Current Assets		\$ 4,254,730
Non-Current Assets:		
Land	441,608	
Buildings and Improvements	5,673,075	
Vehicles and Equipment	15,402,579	
Totals	21,517,262	
Accumulated Depreciation	(7,491,721)	
Total Non-Current Assets		14,025,541
Total Assets		\$ 18,280,271
<b><u>LIABILITIES</u></b>		
Current Liabilities:		
Accounts Payable	\$ 899,117	
Other Accrued Liabilities	13,191	
Deferred Revenues	6,150	
Total Current Liabilities		\$ 918,458
Long-term Liabilities:		
Compensated Absences		82,067
Total Liabilities		1,000,525
<b><u>NET POSITION</u></b>		
Invested in Capital Assets	14,025,541	
Unrestricted	3,254,205	
Total Net Position		\$ 17,279,746
The accompanying notes are a part of these financial statements.		
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## Appendix B

- MRTA FY23 Audited Financial Statements

MOUNTAIN RIDES TRANSPORTATION AUTHORITY				
Statement of Activities				
For the Year Ended September 30, 2023				
Activities:	Expenses	Program Revenues Changes for Services	Capital Grants and Contributions	Net (Expense) Revenues and Changes in Net Position Governmental Activities
Governmental:				
General Operations	\$ 5,482,854	\$ 327,304	\$ 2,836,446	\$ (2,319,014)
Special Services:				
Capital Projects	0		5,010,150	5,010,150
Work Force Housing	27,235	33,175		5,940
Total MRTA	\$ 5,510,089	\$ 360,569	\$ 7,846,596	2,697,076
General Revenues:				
Local Government Funding				1,814,910
Private Donations				21,800
Interest Income				98,012
Gain (Loss) on Disposition of Assets				0
Miscellaneous				859
Total general revenues and transfers				1,933,381
Changes in net assets				4,630,457
Net Position - Beginning				12,649,289
Net Position - Ending				\$ 17,279,746
The accompanying notes are a part of these financial statements.				
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## Appendix B

- MRTA FY23 Audited Financial Statements

MOUNTAIN RIDES TRANSPORTATION AUTHORITY				
Balance Sheet				
Governmental Funds				
for the year ended September 30, 2023				
	General Fund	Capital Reserve Fund	Work Force Housing Fund	Total
<b>ASSETS:</b>				
Cash and Cash Deposits	\$ 1,349,858	\$ 1,767,652	\$ 35,767	\$ 3,153,277
Accounts Receivable	9,238	0		9,238
Grants Receivable	585,747	432,639		1,018,386
Prepaid Expenses				0
Due From Other Funds		67,164	1,050	68,214
Total Assets	\$ 1,944,843	\$ 2,267,455	\$ 36,817	\$ 4,249,115
<b>LIABILITIES:</b>				
Accounts Payable	82,626	816,163	328	899,117
Accrued Payroll Expenses	13,191			13,191
Tenant Deposits			6,150	6,150
Due To Other Funds	68,214			68,214
Total Liabilities	164,031	816,163	6,478	986,672
<b>FUND BALANCE:</b>				
Non-spendable				0
Restricted				0
Committed		1,451,292		1,451,292
Assigned	501,578		30,339	531,917
Unassigned	1,279,234			1,279,234
Total Fund Balance	1,780,812	1,451,292	30,339	3,262,443
Total Liabilities and Fund Balance	\$ 1,944,843	\$ 2,267,455	\$ 36,817	\$ 4,249,115
Amounts reported for governmental activities in the Statement of Net Position (page 9) are different because:				
Governmental fund capital assets are not financial resources and therefore are not reported in the funds. The cost of assets is \$ 21,517,262 and the accumulated depreciation is \$ 7,491,721				14,025,541
Inventory				73,829
Compensated absences				(82,067)
Net Position of Governmental Funds				\$ 17,279,746
The accompanying notes are a part of these financial statements.				
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## Appendix B

- MRTA FY23 Audited Financial Statements

<b>MOUNTAIN RIDES TRANSPORTATION AUTHORITY</b> <b>Statement of Revenues, Expenditures, and Changes in Fund Balances</b> <b>Governmental Funds</b> <b>for the year ended September 30, 2023</b>				
	<u>General Fund</u>	<u>Capital Reserve Fund</u>	<u>Work Force Housing Fund</u>	<u>Totals</u>
<b>REVENUE:</b>				
Federal Funding	\$ 2,836,446	\$ 5,010,150	\$	\$ 7,846,596
State Funding		0		0
Local Funding	1,012,410	802,500		1,814,910
Fare Revenues	222,124			222,124
Charter Bus and Bike Share Revenue	0			0
Workforce Housing Revenue			33,175	33,175
Advertising	105,270			105,270
Interest Income	32,280	63,019	713	96,012
Proceeds on Sale of Assets		0		0
Private Donations	10,100	11,500		21,600
Other Revenues	0		859	859
<b>Total Revenue</b>	<b>4,218,630</b>	<b>5,887,169</b>	<b>34,747</b>	<b>10,140,546</b>
<b>EXPENDITURES:</b>				
Wages and Benefits	2,900,095			2,900,095
Fuel	375,712			375,712
Repairs and Maintenance	247,225		9,532	256,757
Utilities	35,175		7,703	42,878
Contracted Services	40,224			40,224
Marketing and Promotion	43,837			43,837
Insurance	136,377			136,377
Capital Expenditures	15,009	6,288,735		6,303,744
Supplies	26,688			26,688
Travel and Training	40,258			40,258
Business Expenses	28,605			28,605
Printing and Reproduction	18,457			18,457
Communication Expense	41,179			41,179
<b>Total Expenditures</b>	<b>3,948,841</b>	<b>6,288,735</b>	<b>17,235</b>	<b>10,254,811</b>
<b>EXCESS REVENUE (EXPENDITURES)</b>	<b>269,789</b>	<b>(401,566)</b>	<b>17,512</b>	<b>(114,265)</b>
<b>OTHER FINANCING SOURCES (USES):</b>				
Operating transfers from other funds	10,000	60,000		70,000
Operating transfers (to) other funds	(60,000)	0	(10,000)	(70,000)
<b>NET CHANGE IN FUND BALANCES</b>	<b>219,789</b>	<b>(341,566)</b>	<b>7,512</b>	<b>(114,265)</b>
<b>FUND BALANCE - BEGINNING</b>	<b>1,561,023</b>	<b>1,792,858</b>	<b>22,827</b>	<b>3,376,708</b>
<b>FUND BALANCE - ENDING</b>	<b>\$ 1,780,812</b>	<b>\$ 1,451,292</b>	<b>\$ 30,339</b>	<b>\$ 3,262,443</b>
The accompanying notes are a part of these financial statements.				
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## Appendix B

- MRTA FY23 Audited Financial Statements

<b>MOUNTAIN RIDES TRANSPORTATION AUTHORITY</b> <b>Reconciliation of the Statement of Revenues,</b> <b>Expenditures, and Changes in Fund Balances of Governmental Funds</b> <b>To the Statement of Activities</b> <b>for the year ended September 30, 2023</b>	
Net Change in Fund Balance - Total Governmental Funds (Page 12)	\$ (114,265)
Governmental funds report capital outlays as current year expenditures. In the Statement of Activities, the cost of these assets is allocated over their estimated useful lives as depreciation expense. This is the amount of current capital outlay for new fixed assets.	
This is the amount of current year depreciation.	(1,491,331)
This is the amount of new assets acquired in the Government Funds.	6,229,316
This is the amount of proceeds from the sale of assets included in the change in the Net Change in Fund Balance	0
Change in inventory is not included in the governmental fund statements	402
Liability for personal leave days are not recorded in Governmental Funds.	
This is the decrease in compensated leave during the year	6,335
Change in Net Position of Governmental Activities (Page 10)	\$ <u>4,630,457</u>
The accompanying notes are a part of these financial statements.	
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## Appendix B

- MRTA FY23 Audited Financial Statements

**MOUNTAIN RIDES TRANSPORTATION AUTHORITY  
NOTES TO FINANCIAL STATEMENTS  
FOR THE YEAR ENDED SEPTEMBER 30, 2023**

**Introduction**

The Mountain Rides Transportation Authority (MRTA) is a local government entity created by a joint powers agreement between Blaine County and the Cities of Ketchum, Sun Valley, Halley, and Bellevue – as prescribed under Idaho code. MRTA was formerly known as the Ketchum-Sun Valley Public Transit Authority. MRTA serves transportation needs in the Wood River Valley, extending along the valley corridor from Ketchum/Sun Valley on the north to Bellevue on the south, and routes to Twin Falls.

**NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES AND PROCEDURES**

**Scope of Entity**

The Authority's financial statements include the accounts of all operations under the oversight authority of the Board. Oversight responsibility is derived from the governmental unit's authority and includes, but is not limited to, financial interdependency, selection of governing authority, designation of management, ability to significantly influence operations and accountability for fiscal matters. Based on the foregoing criteria, no component units are included in the Authority's financial statements.

**Basis of Accounting/Measurement Focus**

The accounts of MRTA are organized on the basis of funds, each of which is considered a separate accounting entity. The operations of each fund are accounted for with a separate set of self-balancing accounts that comprise its assets, liabilities, reserves, fund balance, revenues, and expenditures. MRTA has a general operating fund, a capital reserve fund, and a work force housing fund.

**Government-wide Financial Statements:**

The statement of net position and the statement of activities display information about the Authority as a whole. These statements include the financial activities of the Authority.

The statement of net position presents the financial condition of the governmental activities of the Authority at year-end. The statement of activities presents a comparison between direct expenses and program revenues for each activity. Direct expenses are those that are specifically associated with a service, program, or department and therefore clearly identifiable to a particular function. Program revenues include charges paid by the recipient of the goods or services offered by the program. Revenues that are not classified as program revenues are presented as general revenues of the Authority. The comparison of direct expenses with program revenues identifies the extent to which each governmental function is self-financing or draws from the general revenues of the Authority.

**Fund Financial Statements:**

Governmental funds are accounted for using the modified accrual basis of accounting. Accordingly, only current assets and current liabilities are included on the balance sheet. Under modified accrual basis of accounting, revenues are recognized when they become both measurable and available. Available for purposes of revenue recognition is defined as sixty days. Revenue sources susceptible to accrual include advertising, charter, state, federal and intergovernmental revenues. Expenditures are recognized when the related fund liability is incurred. Exceptions to this general rule include the accrual of payroll and related payroll liabilities.

The accounts of the Authority are organized and operated on the basis of funds and account groups. A fund is an independent fiscal and accounting entity with a self-balancing set of accounts. Fund accounting segregates funds according to their intended purpose and is used to aid management in demonstrating compliance with finance-related legal and contractual provisions. The minimum number of funds is maintained consistent with legal and managerial requirements.

The Authority has adopted GASB Statement No. 54 "Fund Balance Reporting and Governmental Fund Type Definitions" (GASB 54) which defines how fund balances of the governmental funds are presented in the financial statements. There are five classifications of fund balances as presented below:



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- MRTA FY23 Audited Financial Statements

**MOUNTAIN RIDES TRANSPORTATION AUTHORITY  
NOTES TO FINANCIAL STATEMENTS  
FOR THE YEAR ENDED SEPTEMBER 30, 2023**

**Note 1 – Continued**

**Non-spendable** – These funds are not available for expenditures based on legal or contractual requirements. In this category, one would see inventory, long-term receivables, unless proceeds are restricted, committed, or assigned and legally or contractually required to be maintained intact (corpus or a permanent fund).

**Restricted** – These funds are governed by externally enforceable restrictions. In this category, one would see restricted purpose grant funds, debt service or capital projects.

**Committed** – Fund balances in this category are limited by the governments' highest level of decision making. Any changes of designation must be done in the same manner that it was implemented and should occur prior to the end of the fiscal year, though the exact amount may be determined subsequently.

**Assigned** – These funds are intended to be used for specific purposes, intent is expressed by a governing body or an official delegated by the governing body.

**Unassigned** – This classification is the default for all funds that do not fit into the other categories. This, however, should not be a negative number for the general fund. If it is, the assigned fund balance must be adjusted.

**Order of Use of Fund Balance** – The Authority's policy is to apply expenditures against non-spendable fund balance, restricted fund balance, committed fund balance, assigned fund balance and unassigned fund balance at the end of the fiscal year. For all funds, non-spendable fund balances are determined first and then restricted fund balances for specific purposes are determined.

**Capitalizing Assets**

Tangible and/or intangible assets used in operations with an initial useful life that extends beyond one year are capitalized. Capital assets are recorded at their historical cost and are depreciated using the straight-line method of depreciation over their estimated useful lives. They are reported net of accumulated depreciation on the Statements of Net Position. The Authority has established a capitalization threshold of items costing in excess of \$5,000.

Depreciation of buildings, buses, and machinery and equipment is computed using the straight-line method over the following estimated useful lives:

Buildings and Improvements	20-40 Years
Buses	10-12 Years
Machinery and Equipment	5-15 Years

**Restricted Net Assets**

Restricted net assets are those for which a constraint has been imposed either externally or by law. MRTA recognized the use of restricted resources or expenditures that comply with the specific restrictions. Restricted resources are exhausted before unrestricted net assets are used. MRTA did not have any restricted net assets as of the financial statement date.

**Budgets and Budgetary Accounting**

Annual appropriated budgets are adopted for each fund before October 1 of each year in accordance with Idaho code. The budgets are prepared in accordance with the modified accrual basis of accounting. Budgeted amounts shown are as originally adopted and as amended by MRTA.

**Cash and Cash Equivalents**

MRTA's cash and cash equivalents are considered to be cash on hand, demand deposits, and short-term investments with maturities of less than 90 days.



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**MOUNTAIN RIDES TRANSPORTATION AUTHORITY  
NOTES TO FINANCIAL STATEMENTS  
FOR THE YEAR ENDED SEPTEMBER 30, 2023**

Note 1 - Continued

**Investments**

State statutes authorize MRTA to invest in obligations of U.S. Treasury, commercial paper, corporate bonds and repurchase agreements, and the Idaho State Treasurer Local Government Investment Pool. All investments of MRTA are placed in the State Investment Pool and stated at fair value as provided by the Pool.

**Inventories**

Inventory is valued at cost using the first in, first out method. Inventory consists of expendable supplies held for future consumption or capitalization. The cost is recorded as an expense as inventory items are consumed and is reflected in the government-wide financial statements only. Inventory items are reported as expenditures in the fund statements when purchased.

**NOTE 2 – CASH AND CASH DEPOSITS**

Cash and cash deposit balances at September 30, 2023:

	<u>Book Balance</u>	<u>Bank Balance</u>
Petty cash/undeposited funds	\$ 76	\$ 0
Mountain West Bank checking accounts	312,608	347,543
State of Idaho Local Government Investment Pool	<u>2,840,693</u>	<u>2,840,693</u>
Total Cash/Cash Deposit	<u>\$ 3,153,277</u>	<u>\$ 3,188,236</u>

Investments in the Local Government Investment Pool are valued at fair value. The Local Government Investment Pool is managed by the State of Idaho Treasurer's office. The funds of the pool are invested in certificates of deposit, repurchase agreements, and U.S. government securities. The certificates of deposit are federally insured. The U.S. government securities and the collateral for the repurchase agreements are held in trust by a safekeeping bank.

**Risk Exposure**

**Interest Rate Risk** – MRTA does not have a formal investment policy that limits investment maturities as a means of managing its exposure to fair value losses arising from increasing interest rates.

**Credit Risk** – MRTA has no formal investment policy which would further limit its investment choices beyond those stated in the Idaho Code.

MRTA does not currently have any outside investments. Excess cash is deposited into the Idaho Local Government Investment Pool.

**Concentration of Credit Risk** – MRTA places no formal limits on the amount the Treasurer may invest in any one issuer.

**Custodial Credit Risk, Deposits** – Custodial credit risk is the risk that funds would be lost in the event of bank failure. Bank balances in excess of the FDIC insured amount of \$ 250,000 are subject to custodial credit risk. MRTA working policy is to limit custodial credit risk by limiting balances in checking accounts to operational needs and transferring the remaining amounts to the Idaho Local Government Investment Pool.

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- MRTA FY23 Audited Financial Statements

**MOUNTAIN RIDES TRANSPORTATION AUTHORITY  
NOTES TO FINANCIAL STATEMENTS  
FOR THE YEAR ENDED SEPTEMBER 30, 2023**

**NOTE 3 – CAPITAL ASSETS**

Capital asset activity for the year ended September 30, 2023, is as follows:

	Beginning Balances	Increases	Decreases	Ending Balances
<b>Governmental Activities:</b>				
Land	\$ 441,608	\$		\$ 441,608
Construction In Progress	115,729		(115,729)	0
<b>Capital Assets being depreciated:</b>				
Buildings and Improvements	5,349,363	323,712		5,673,075
Vehicles	8,905,954	6,021,333	(24,722)	14,902,565
Office Equipment	28,831			28,831
Other Machinery and Equipment	471,183			471,183
<b>Total</b>	<u>15,312,668</u>	<u>6,345,045</u>	<u>(140,451)</u>	<u>21,517,262</u>
<b>Less: Accumulated Depreciation:</b>				
Buildings and Improvements	(1,743,966)	(208,712)		(1,952,678)
Vehicles	(4,091,599)	(1,189,548)	24,722	(5,256,425)
Office Equipment	(23,024)	(1,916)		(24,940)
Other Machinery and Equipment	(166,523)	(91,155)		(257,678)
<b>Total Accumulated Depreciation</b>	<u>(6,025,112)</u>	<u>(1,491,331)</u>	<u>24,722</u>	<u>(7,491,721)</u>
<b>Governmental capital assets, net</b>	<u>\$ 9,287,556</u>	<u>\$ 4,853,714</u>	<u>\$ (115,729)</u>	<u>\$ 14,025,541</u>

**NOTE 4 – ACCRUED COMPENSATED ABSENCES**

This amount includes personal leave time earned by employees, but not used as of fiscal year end.

**NOTE 5 – EMPLOYEE RETIREMENT PLAN**

MRTA has a noncontributory defined contribution pension plan covering substantially all employees who have been employed for the lesser of twelve months or 1,000 hours. MRTA's contributions are made at the discretion of the board of directors. Vesting of accrued benefits occurs at the rate of 20% after two years of service, plus 20% for each year of service, thereafter. Contributions to the plan for the years ended September 30, 2023, 2022 and 2021 were \$169,680, \$152,192, and \$138,305, respectively.

**NOTE 6 – COMMITMENTS AND CONTINGENCIES**

MRTA receives a significant portion of its support from the cities of Ketchum and Sun Valley. Should the cities decrease their share of participation, MRTA would be forced to find other sources of revenue or make a significant reduction in services.

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- **MRTA FY23 Audited Financial Statements**

**MOUNTAIN RIDES TRANSPORTATION AUTHORITY  
NOTES TO FINANCIAL STATEMENTS  
FOR THE YEAR ENDED SEPTEMBER 30, 2023**

**NOTE 7 – RISK MANAGEMENT**

The Authority is exposed to various risks of loss related to torts; theft of, damage to, and destruction of assets; errors and omissions; injuries to employees; and natural disasters. During the fiscal year, the Authority contracted with Idaho County Risk Management Program (ICRMP) for property, crime and fleet insurance and the State Insurance Fund for Worker's compensation. The current year policy expires October 1, 2023 and has been renewed with ICRMP through September 30, 2024. The policy coverages include property, crime, general liability, automobile liability and public officials.

**NOTE 8 – ENVIRONMENTAL FACTORS**

MRTA owns land and facilities to provide repair and maintenance of their transportation equipment. These items carry a responsibility for environmental issues, which, if violated, would be a liability to MRTA. There has been no environmental study to determine the existence of any such liabilities.

**NOTE 9 – SUBSEQUENT EVENTS**

Subsequent events were evaluated through the date of the auditor's report, which is the date the financial statements were available to be issued.

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- **MRTA FY23 Audited Financial Statements**

REQUIRED  
SUPPLEMENTARY INFORMATION

## Appendix B

- MRTA FY23 Audited Financial Statements

<b>MOUNTAIN RIDES TRANSPORTATION AUTHORITY</b> <b>Schedule of Revenues, Expenditures and Changes in Fund Balances</b> <b>Budget and Actual -- General Fund</b> <b>for the year ended September 30, 2023</b>				
	<u>Original Budget Amounts</u>	<u>Final Budget Amounts</u>	<u>Actual Amounts</u>	<u>Variance with Final Budget Positive (Negative)</u>
<b>REVENUE:</b>				
Federal Funding	\$ 2,843,877	\$ 2,843,877	\$ 2,836,446	\$ (7,431)
State Funding	0	0		0
Local Funding	1,010,410	1,010,410	1,012,410	2,000
Fare Revenues	160,000	160,000	222,124	62,124
Charter Bus and Bike Share Revenue	0	0	0	0
Workforce Housing Revenue	0	0		0
Advertising	90,000	90,000	105,270	15,270
Interest Income	4,000	4,000	32,280	28,280
Proceeds on Sale of Assets	0	0		0
Private Donations	11,000	11,000	10,100	(900)
Other Revenues	0	0	0	0
<b>Total Revenue</b>	<b>4,119,287</b>	<b>4,119,287</b>	<b>4,218,630</b>	<b>99,343</b>
<b>EXPENDITURES:</b>				
Wages and Benefits	2,954,013	2,954,013	2,900,095	53,918
Fuel	470,883	470,883	375,712	95,171
Repairs and Maintenance	244,500	244,500	247,225	(2,725)
Utilities	26,000	26,000	35,175	(9,175)
Contracted Services	36,000	36,000	40,224	(4,224)
Marketing and Promotion	71,409	71,409	43,837	27,572
Insurance	141,392	141,392	136,377	5,015
Capital Expenditures	13,000	13,000	15,009	(2,009)
Supplies	41,000	41,000	26,688	14,312
Travel and Training	60,090	60,090	40,258	19,832
Business Expenses	22,700	22,700	28,605	(5,905)
Printing and Reproduction	15,000	15,000	18,457	(3,457)
Communications	32,300	32,300	41,179	(8,879)
<b>Total Expenditures</b>	<b>4,128,287</b>	<b>4,128,287</b>	<b>3,948,841</b>	<b>179,446</b>
<b>EXCESS REVENUE (EXPENDITURES)</b>	<b>(9,000)</b>	<b>(9,000)</b>	<b>269,789</b>	<b>278,789</b>
<b>OTHER FINANCING SOURCES (USES):</b>				
Operating transfers from other funds	10,000	10,000	10,000	0
Operating transfers (to) other funds	(60,000)	(60,000)	(60,000)	0
<b>NET CHANGE IN FUND BALANCES</b>	<b>(59,000)</b>	<b>(59,000)</b>	<b>219,789</b>	<b>278,789</b>
<b>FUND BALANCE - BEGINNING</b>	<b>1,561,023</b>	<b>1,561,023</b>	<b>1,561,023</b>	<b>0</b>
<b>FUND BALANCE - ENDING</b>	<b>\$ 1,502,023</b>	<b>\$ 1,502,023</b>	<b>\$ 1,780,812</b>	<b>\$ 278,789</b>
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- MRTA FY23 Audited Financial Statements

<b>MOUNTAIN RIDES TRANSPORTATION AUTHORITY</b> <b>Schedule of Revenues, Expenditures and Changes in Fund Balances</b> <b>Budget and Actual -- Capital Reserve Fund</b> <b>for the year ended September 30, 2023</b>				
	<u>Original Budget Amounts</u>	<u>Final Budget Amounts</u>	<u>Actual Amounts</u>	<u>Variance with Final Budget Positive (Negative)</u>
<b>REVENUE:</b>				
Federal Funding	\$ 7,486,500	\$ 7,486,500	\$ 5,010,150	\$ (2,476,350)
State Funding	0	0	0	0
Local Funding	802,500	802,500	802,500	0
Fare Revenues				0
Charter Bus and Bike Share Revenue				0
Workforce Housing Revenue				0
Advertising				0
Interest Income	1,100	1,100	63,019	61,919
Proceeds on Sale of Assets	0	0	0	0
Other Revenues	11,000	11,000	11,500	500
<b>Total Revenue</b>	<u>8,301,100</u>	<u>8,301,100</u>	<u>5,887,169</u>	<u>(2,413,931)</u>
<b>EXPENDITURES:</b>				
Wages and Benefits				0
Fuel				0
Repairs and Maintenance				0
Utilities				0
Contracted Services				0
Marketing and Promotion				0
Insurance				0
Capital Expenditures	9,626,470	9,626,470	6,288,735	3,337,735
Supplies				0
Travel and Training				0
Printing and Reproduction				0
Miscellaneous				0
<b>Total Expenditures</b>	<u>9,626,470</u>	<u>9,626,470</u>	<u>6,288,735</u>	<u>3,337,735</u>
<b>EXCESS REVENUE (EXPENDITURES)</b>	<u>(1,325,370)</u>	<u>(1,325,370)</u>	<u>(401,566)</u>	<u>923,804</u>
<b>OTHER FINANCING SOURCES (USES):</b>				
Operating transfers from other funds	60,000	60,000	60,000	0
Operating transfers (to) other funds				0
<b>NET CHANGE IN FUND BALANCES</b>	<u>(1,265,370)</u>	<u>(1,265,370)</u>	<u>(341,566)</u>	<u>923,804</u>
<b>FUND BALANCE - BEGINNING</b>	<u>1,792,858</u>	<u>1,792,858</u>	<u>1,792,858</u>	<u>0</u>
<b>FUND BALANCE - ENDING</b>	<u>\$ 527,488</u>	<u>\$ 527,488</u>	<u>\$ 1,451,292</u>	<u>\$ 923,804</u>
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- MRTA FY23 Audited Financial Statements

<b>MOUNTAIN RIDES TRANSPORTATION AUTHORITY</b> <b>Schedule of Revenues, Expenditures and Changes in Fund Balances</b> <b>Budget and Actual -- Work Force Housing Fund</b> <b>for the year ended September 30, 2023</b>				
	<u>Original Budget Amounts</u>	<u>Final Budget Amounts</u>	<u>Actual Amounts</u>	<u>Variance with Final Budget Positive (Negative)</u>
<b>REVENUE:</b>				
Federal Funding	\$	\$	\$	\$ 0
State Funding				0
Local Funding				0
Fare Revenues				0
Charter Bus and Bike Share Revenue				0
Workforce Housing Revenue	32,400	32,400	33,175	775
Advertising				0
Interest Income	100	100	713	613
Proceeds on Sale of Assets				0
Other Revenues	700	700	859	159
<b>Total Revenue</b>	<u>33,200</u>	<u>33,200</u>	<u>34,747</u>	<u>1,547</u>
<b>EXPENDITURES:</b>				
Wages and Benefits				0
Fuel				0
Repairs and Maintenance	16,500	16,500	9,532	6,968
Utilities	6,700	6,700	7,703	(1,003)
Contracted Services				0
Marketing and Promotion				0
Insurance				0
Capital Expenditures				0
Supplies				0
Travel and Training				0
Printing and Reproduction				0
Miscellaneous				0
<b>Total Expenditures</b>	<u>23,200</u>	<u>23,200</u>	<u>17,235</u>	<u>5,965</u>
<b>EXCESS REVENUE (EXPENDITURES)</b>	<b>10,000</b>	<b>10,000</b>	<b>17,512</b>	<b>7,512</b>
<b>OTHER FINANCING SOURCES (USES):</b>				
Operating transfers from other funds				0
Operating transfers (to) other funds	(10,000)	(10,000)	(10,000)	0
<b>NET CHANGE IN FUND BALANCES</b>	<b>0</b>	<b>0</b>	<b>7,512</b>	<b>7,512</b>
<b>FUND BALANCE - BEGINNING</b>	<u>22,827</u>	<u>22,827</u>	<u>22,827</u>	<u>0</u>
<b>FUND BALANCE - ENDING</b>	<u>\$ 22,827</u>	<u>\$ 22,827</u>	<u>\$ 30,339</u>	<u>\$ 7,512</u>
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## Appendix B

- MRTA FY23 Audited Financial Statements

MOUNTAIN RIDES TRANSPORTATION AUTHORITY BLAINE COUNTY, IDAHO			
Schedule of Expenditures of Federal Awards for the year ended September 30, 2023			
Federal Grantor/Pass-through Grantor/Program Title	Catalog of Federal Domestic Assistance Number	Expenditures During Audit Period	Totals
<i>Federal Transit - Cluster</i>			
U.S. Department of Transportation:			
Buses and Bus Facilities Programs	20.526	\$ 4,989,000	
Total			\$ 4,989,000
<i>Other Programs</i>			
U.S. Department of Transportation:			
Formula Grants for Rural Areas	20.509	2,057,012	
U.S. Department of Transportation:			
CARES Grant for Rural Areas	20.509	766,438	
U.S. Department of Transportation:			
Highway Planning and Construction	20.205	15,564	
U.S. Department of Transportation:			
Rural Transportation Assistance Program	20.509	18,582	
Total			2,857,596
Total All Programs			\$ 7,846,596
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- MRTA FY23 Audited Financial Statements

**MOUNTAIN RIDES TRANSPORTATION AUTHORITY  
BLAINE COUNTY, IDAHO**

**Schedule of Expenditures of Federal Awards  
for the year ended September 30, 2023**

**NOTE 1 - BASIS OF PRESENTATION**

The accompanying schedule of expenditures of federal awards includes the federal grant activity of the Mountain Rides Transportation Authority. The information in this Schedule is presented in accordance with the requirements of Title 2 U.S. Code of Federal Regulations Part 200, Uniform Administrative Requirements, Costs Principles, and Audit Requirements for Federal Awards (Uniform Guidance). Because the Schedule presents only a selected portion of the operations of the Mountain Rides Transportation Authority, it is not intended to and does not present the financial position, changes in net assets, or cash flows of the Authority.

**NOTE 2 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES**

Expenditures reported on the Schedule are reported on the accrual basis of accounting. Such expenditures are recognized following the cost principles contained in the Uniform Guidance, wherein certain types of expenditures are not allowable or are limited as to reimbursement.

**NOTE 3 - DE MINIMIS INDIRECT COST RATE**

The Mountain Rides Transportation Authority has elected not to use the 10% de minimis indirect cost rate allowed under the Uniform Guidance.

**SUMMARY SCHEDULE OF PRIOR AUDIT FINDINGS**

The examination of the records of the Mountain Rides Transportation Authority for the year ended September 30, 2022 revealed no areas of comments, findings or questioned costs.

**SUMMARY SCHEDULE OF FINDINGS AND QUESTIONED COSTS**

The examination of the records of the Mountain Rides Transportation Authority for the year ended September 30, 2023 revealed no areas of comments, findings or questioned costs.

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- MRTA FY23 Audited Financial Statements

MOUNTAIN RIDES TRANSPORTATION AUTHORITY Year Ended September 30, 2023 SCHEDULE OF FINDINGS AND QUESTIONED COSTS	
<b><u>Section I – Summary of Auditor's Results</u></b>	
<b><u>Financial Statements</u></b>	
Type of auditor's report issued:	Unmodified
Internal control over financial reporting:	
Material weakness(es) identified?	<input type="checkbox"/> yes <input checked="" type="checkbox"/> No
Significant deficiencies identified that are not considered to be material weakness(es)	<input type="checkbox"/> yes <input checked="" type="checkbox"/> None reported
Noncompliance material to financial statements noted?	<input type="checkbox"/> yes <input checked="" type="checkbox"/> No
<b><u>Federal Awards</u></b>	
Internal control over major programs:	
Material weakness(es) identified?	<input type="checkbox"/> yes <input checked="" type="checkbox"/> No
Significant deficiencies identified that are not considered to be material weakness(es)	<input type="checkbox"/> yes <input checked="" type="checkbox"/> None reported
Type of auditor's report issued on compliance for major programs:	Unmodified
Any audit findings disclosed that are required to be reported in accordance with Uniform Guidance 2 CFR 200.516?	<input type="checkbox"/> yes <input checked="" type="checkbox"/> No
<b><u>Identification of major programs:</u></b>	
<b><u>Other Programs</u></b>	<b><u>Federal CFDA Number</u></b>
U.S. Department of Transportation Buses & Bus Facilities Program	20.526
Dollar threshold used to distinguish between type A and type B programs:	\$ 750,000
Auditee qualified as low-risk auditee?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> no
<b><u>Section II – Financial Statement Findings</u></b>	
No significant deficiencies, material weaknesses, fraud, noncompliance with provisions of laws, regulations, contracts, and grant agreements were reported.	
<b><u>Section III – Federal Award Findings and Questioned Costs</u></b>	
No significant deficiencies, material weaknesses, fraud, noncompliance with provisions of laws, regulations, contracts, and grant agreements were reported.	

- **MRTA FY23 Audited Financial Statements**



## *Appendix B*

- **MRTA FY23 Audited Financial Statements**

Report Continued—

*Purpose of this Report*

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Authority's internal control or on compliance. This report is an integral part of an audit performed in accordance with Government Auditing Standards in considering the Authority's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

*Workman & Company*

WORKMAN AND COMPANY  
Certified Public Accountants  
Twin Falls, Idaho

## Appendix B

- MRTA FY23 Audited Financial Statements

<div><div><div>WORKMAN &amp; COMPANY</div><div>Office of Accounting</div></div><div>2190 Village Park Avenue, Suite 300 • Twin Falls, ID 83301 • 208.733.1161 • Fax: 208.733.6100</div><div>INDEPENDENT AUDITOR'S REPORT ON COMPLIANCE FOR EACH MAJOR PROGRAM AND ON INTERNAL CONTROL OVER COMPLIANCE REQUIRED BY THE UNIFORM GUIDANCE</div><div>November 27, 2023</div><div>Board of Directors Mountain Rides Transportation Authority Ketchum, Idaho</div><div>Report on Compliance for Each Major Federal Program</div><div>We have audited the Mountain Rides Transportation Authority's compliance with the types of compliance requirements described in the OMB Compliance Supplement that could have a direct and material effect on each of the Mountain Rides Transportation Authority's major federal programs for the year ended September 30, 2023. Mountain Rides Transportation Authority's major federal programs are identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.</div><div>Management's Responsibility</div><div>Management is responsible for compliance with federal statutes, regulations, and the terms and conditions of its federal awards applicable to its federal programs.</div><div>Auditor's Responsibility</div><div>Our responsibility is to express an opinion on compliance for each of the Mountain Rides Transportation Authority's major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in Government Auditing Standards, issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance). Those standards and the Uniform Guidance require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about the Mountain Rides Transportation Authority's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.</div><div>We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination of the Mountain Rides Transportation Authority's compliance.</div><div>Opinion on Each Major Federal Program</div><div>In our opinion, the Mountain Rides Transportation Authority, complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended September 30, 2023.</div><div>Other Matters</div><div>The results of our auditing procedures disclosed no instances of noncompliance, which are required to be reported in accordance with the Uniform Guidance.</div><div>-27-</div></div>
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## Appendix B

- MRTA FY23 Audited Financial Statements

Report Continued—

### Report on Internal Control over Compliance

Management of the Mountain Rides Transportation Authority, is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered the Mountain Rides Transportation Authority's internal control over compliance with the types of requirements that could have a direct and material effect on each major federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of the Mountain Rides Transportation Authority's internal control over compliance.

A deficiency in internal control over compliance exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. A material weakness in internal control over compliance is a deficiency, or combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. A significant deficiency in internal control over compliance is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

*Workman & Company*

WORKMAN AND COMPANY  
Certified Public Accountants  
Twin Falls, Idaho



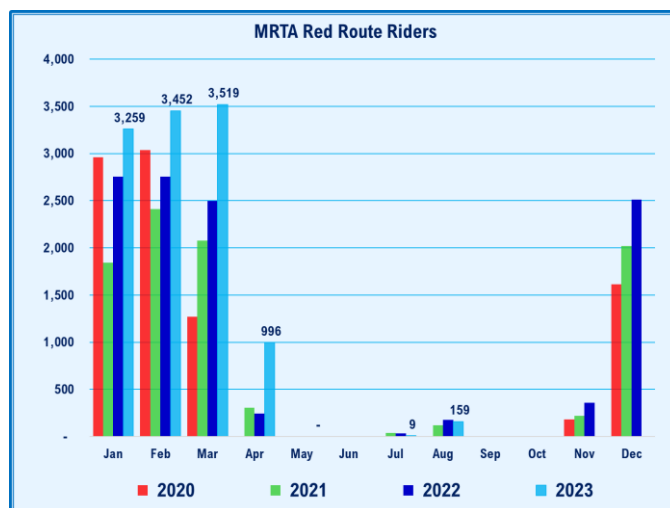
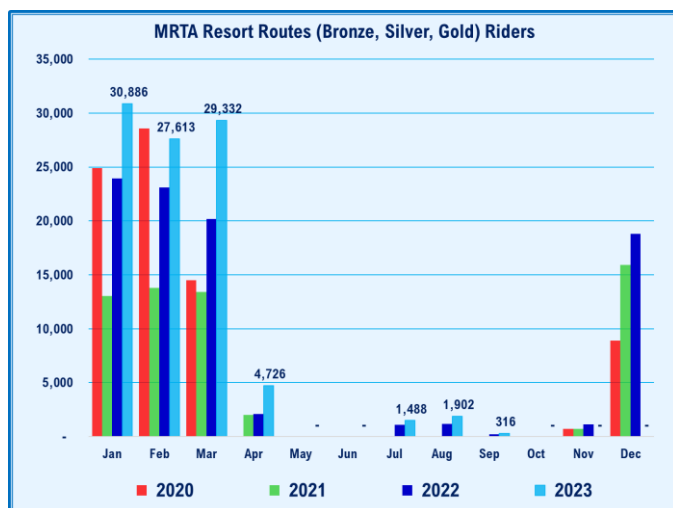
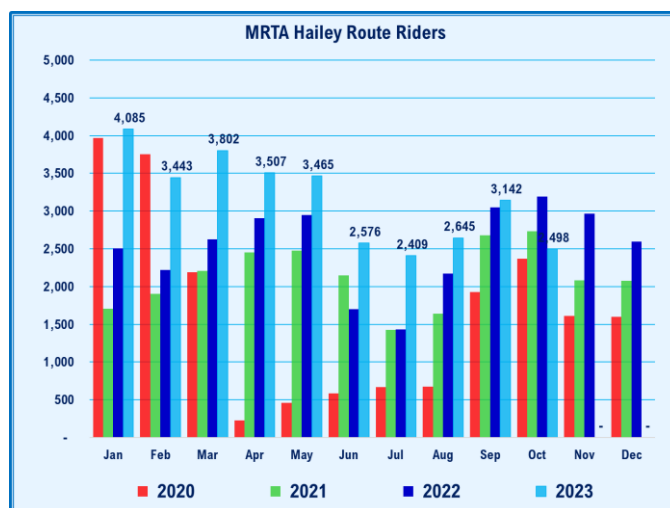
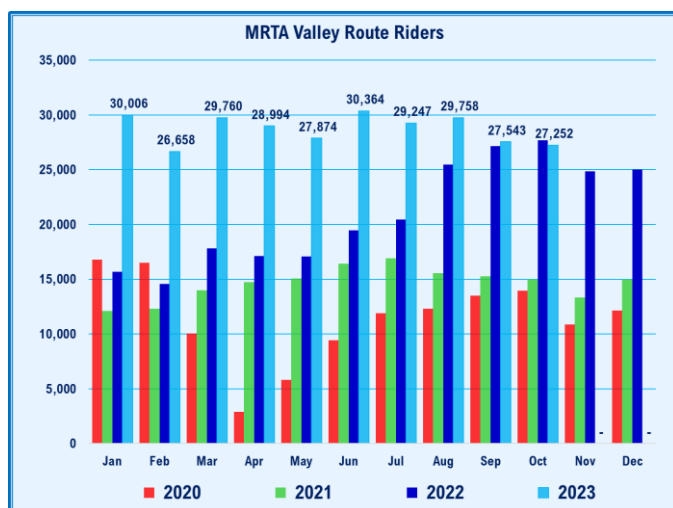
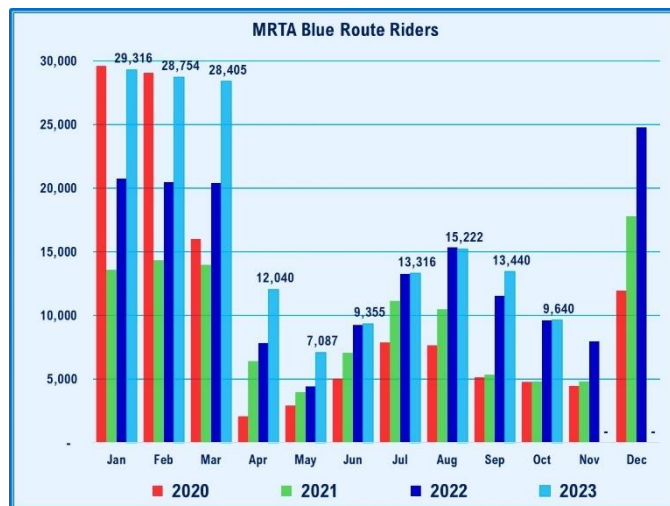
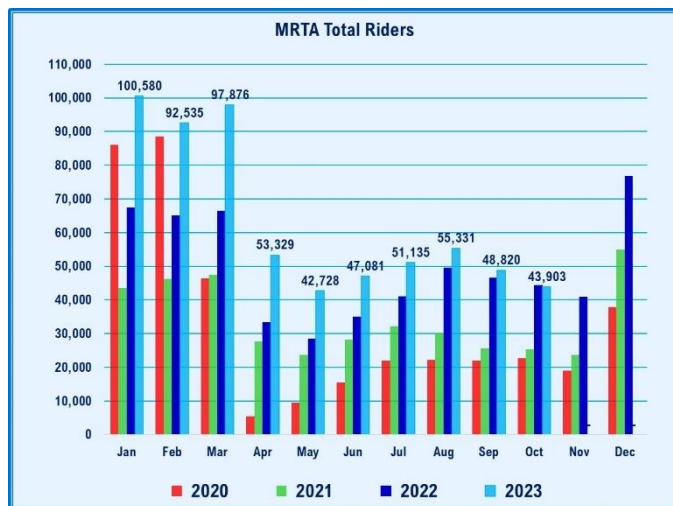
## Appendix C

- MRTA FY24 (Oct 1, 2023 - Sep 30, 2024) Operating Budget

Mountain Rides Transportation Authority Operating Budget		FY2024
<b>Revenue</b>		
41000 • Federal Funding	\$	2,157,012
42000 • State Funding		-
43000 • Local Funding		1,906,950
44000 • Fares		200,000
45000 • Other Revenue		147,702
<b>Total Revenue</b>	<b>\$</b>	<b>4,411,664</b>
<b>Expenses</b>		
51000 • Payroll Expense	\$	3,180,061
52000 • Insurance Expense		194,244
53000 • Professional Fees		39,000
54000 • Equipment/Tools		13,000
55000 • Rent & Utilities		35,000
56000 • Supplies		34,000
57000 • Repairs & Maintenance		53,000
58000 • Communications Expense		45,300
59000 • Travel & Training		33,950
60000 • Business Expenses		16,200
61000 • Advertising		39,409
62000 • Marketing & Promotion		22,000
63000 • Printing & Reproduction		19,000
64000 • Fuel Expense		500,000
65000 • Vehicle Maintenance		187,500
<b>Total Expense</b>	<b>\$</b>	<b>4,411,664</b>

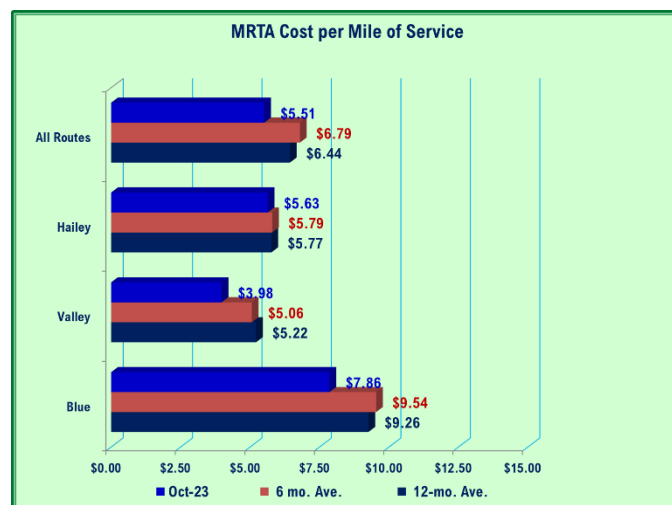
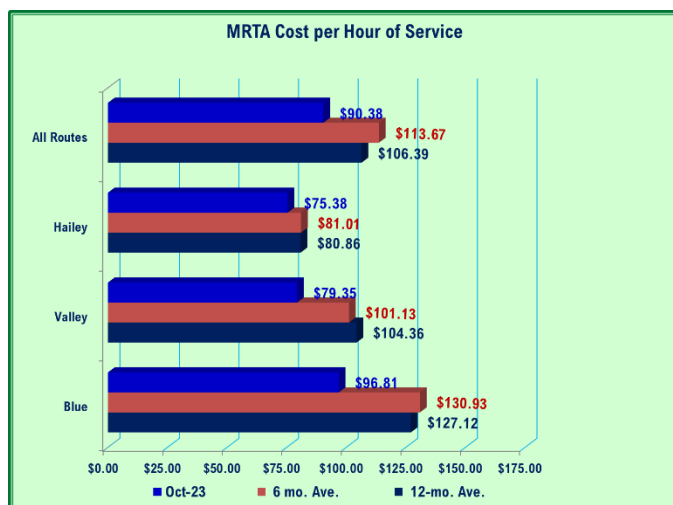
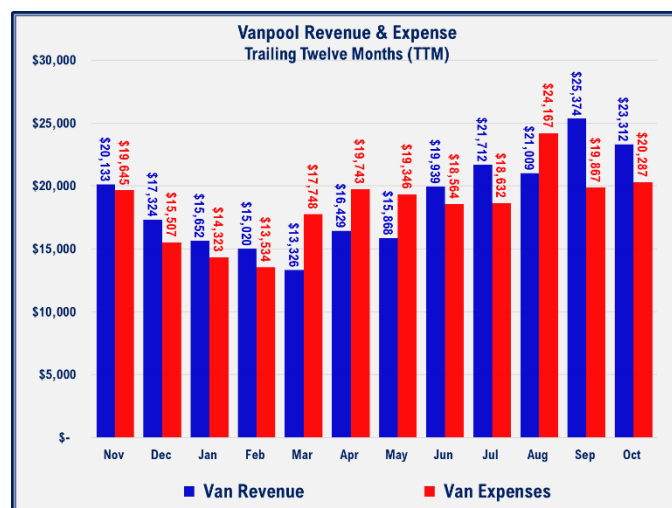
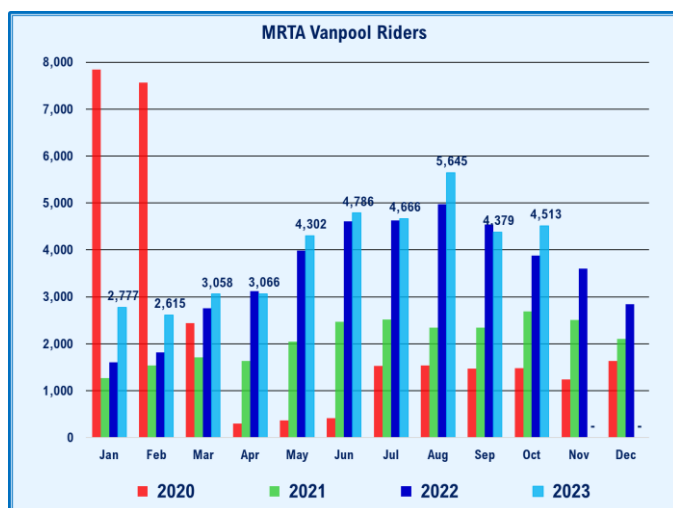
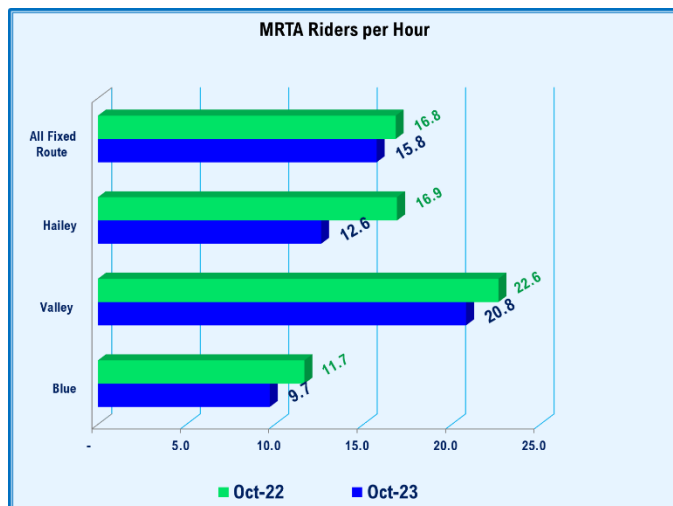
## Appendix D

### • MRTA Monthly Dashboard of Performance Metrics



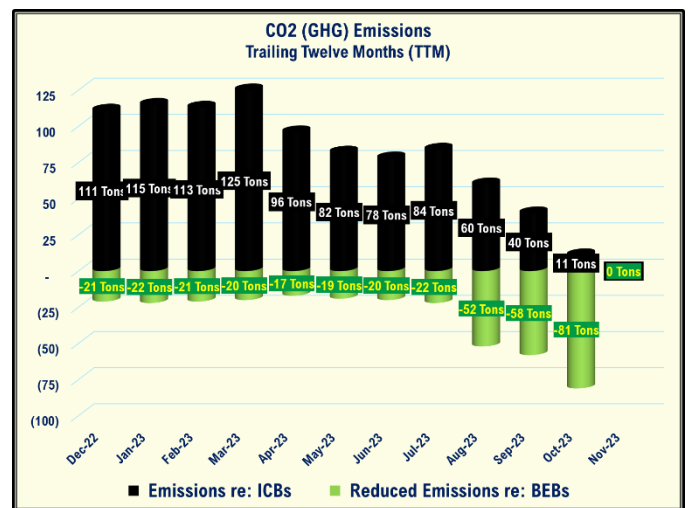
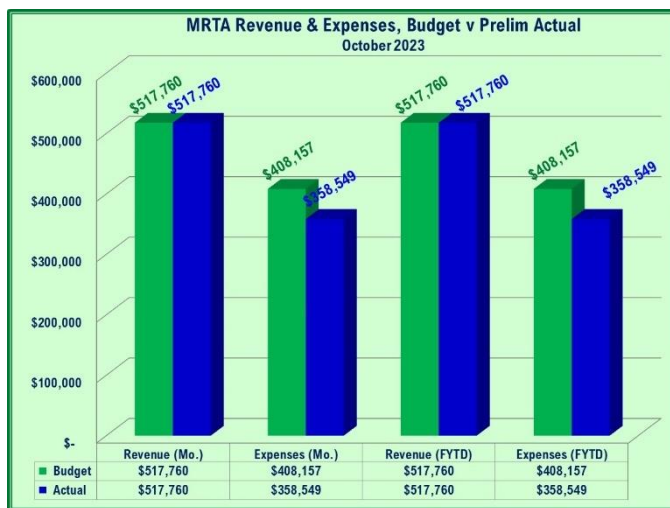
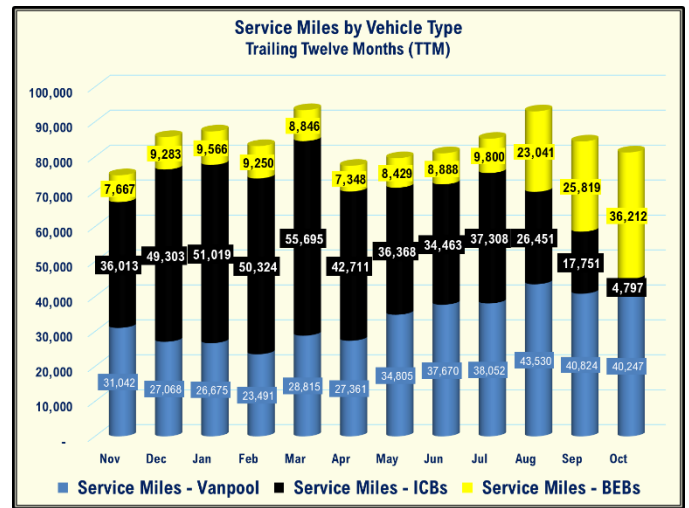
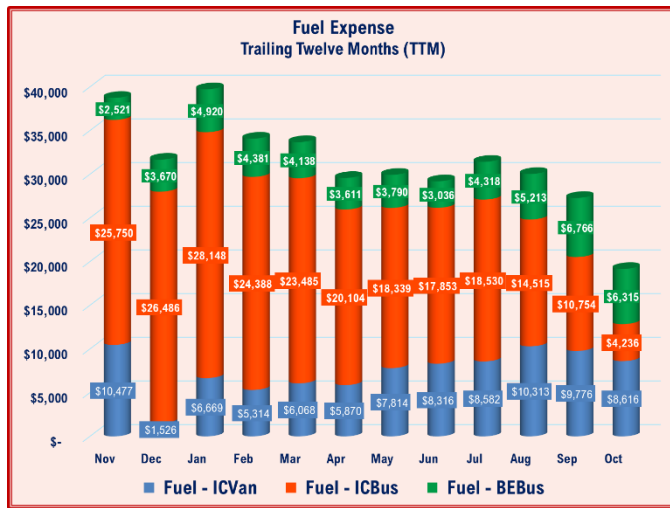
## Appendix D

### • MRTA Monthly Dashboard of Performance Metrics



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## Appendix D

### • MRTA Monthly Dashboard of Performance Metrics

Mountain Rides  
Ridership by Route  
Sep 30, 2023

FYTD @ Sep 30										
Route	FY20	FY21	FY22	FY23	FY23 : FY22		FY23 : FY21		FY23 : FY20	
Blue	146,780	107,621	151,185	199,282	+ 48,097	131.8%	+ 91,661	185.2%	+ 52,502	135.8%
Valley	146,361	169,433	219,580	337,743	+ 118,163	153.8%	+ 168,310	199.3%	+ 191,382	230.8%
Hailey	24,532	24,225	28,835	37,832	+ 8,997	131.2%	+ 13,607	156.2%	+ 13,300	154.2%
Red	9,386	8,656	10,482	14,260	+ 3,778	136.0%	+ 5,604	164.7%	+ 4,874	151.9%
Bronze	10,476	10,423	14,048	20,221	+ 6,173	143.9%	+ 9,798	194.0%	+ 9,745	193.0%
Silver	41,938	22,100	40,079	56,389	+ 16,310	140.7%	+ 34,289	255.2%	+ 14,451	134.5%
Gold	34,378	18,374	32,890	39,576	+ 6,686	120.3%	+ 21,202	215.4%	+ 5,198	115.1%
TWF NEMT	-	325	1,785	863	- 922	48.3%	+ 538	265.5%	+ 863	0.0%
Galena	993	968	723	-	- 723	0.0%	- 968	0.0%	- 993	0.0%
Total	414,844	362,125	499,607	706,166	+ 206,559	141.3%	+ 344,041	195.0%	+ 291,322	170.2%

Route	October				November				December			
	FY20	FY21	FY22	FY23	FY20	FY21	FY22	FY23	FY20	FY21	FY22	FY23
Blue	8,000	4,797	4,841	9,590	7,860	4,454	4,827	7,963	24,495	11,910	17,796	24,794
Valley	17,444	13,964	14,996	27,682	14,797	10,869	13,330	24,839	14,933	12,158	14,979	25,018
Hailey	3,634	2,370	2,733	3,195	3,073	1,610	2,085	2,967	3,363	1,598	2,075	2,596
Red	-	-	-	-	180	183	-	356	1,945	1,612	2,021	2,510
Bronze	-	-	-	-	-	-	-	-	1,991	1,454	2,256	2,932
Silver	-	-	-	-	979	703	-	1,110	10,362	4,330	7,804	9,831
Gold	-	-	-	-	-	-	-	-	6,296	2,889	5,813	6,050
TWF NEMT	-	-	63	85	-	-	82	87	-	-	157	247
Galena	-	-	-	-	3	20	-	-	201	228	24	-
Total	29,078	21,131	22,633	40,552	26,892	17,839	20,324	37,322	63,586	36,179	52,925	73,978
Year-over-Year		72.7%	107.1%	179.2%		66.3%	113.9%	183.6%		56.9%	146.3%	139.8%

Route	January				February				March			
	FY20	FY21	FY22	FY23	FY20	FY21	FY22	FY23	FY20	FY21	FY22	FY23
Blue	29,609	13,584	20,758	29,316	29,097	14,357	20,515	28,754	16,037	13,981	20,402	28,405
Valley	16,773	12,114	15,666	30,006	16,519	12,311	15,051	26,658	10,040	14,008	17,801	29,760
Hailey	3,967	1,707	2,508	4,085	3,755	1,902	2,521	3,443	2,191	2,211	2,624	3,802
Red	2,959	1,843	2,753	3,259	3,034	2,411	2,756	3,452	1,268	2,078	2,497	3,519
Bronze	3,284	2,426	3,529	5,100	3,570	2,830	3,669	4,649	1,631	2,906	3,418	5,211
Silver	11,239	4,939	10,153	13,690	12,602	5,290	9,904	11,932	6,756	5,627	8,779	13,723
Gold	9,975	5,264	9,854	12,096	12,021	5,342	9,234	11,032	6,086	4,879	7,989	10,398
TWF NEMT	-	-	248	251	-	-	201	-	-	-	226	3
Galena	390	413	389	-	369	307	310	-	30	-	-	-
Total	78,196	42,290	65,858	97,803	80,967	44,750	64,161	89,920	44,039	45,690	63,736	94,821
Year-over-Year		54.1%	155.7%	148.5%		55.3%	143.4%	140.1%		103.7%	139.5%	148.8%

Route	April				May				June			
	FY20	FY21	FY22	FY23	FY20	FY21	FY22	FY23	FY20	FY21	FY22	FY23
Blue	2,073	6,423	7,834	12,040	2,931	3,992	4,773	7,087	5,039	7,077	9,234	9,355
Valley	2,913	14,757	17,114	28,994	5,800	15,075	18,135	27,874	9,433	16,432	19,445	30,364
Hailey	228	2,454	2,907	3,507	458	2,474	3,023	3,465	588	2,151	1,703	2,576
Red	-	304	246	996	-	-	-	-	-	-	-	-
Bronze	-	807	1,176	2,329	-	-	-	-	-	-	-	-
Silver	-	1,211	925	2,397	-	-	-	-	-	-	-	-
Gold	-	-	-	-	-	-	-	-	-	-	-	-
TWF NEMT	-	50	83	5	-	37	103	20	-	58	112	40
Galena	-	-	-	-	-	-	-	-	-	-	-	-
Total	5,214	26,006	30,285	50,268	9,189	21,578	26,034	38,446	15,060	25,718	30,494	42,335
Year-over-Year		498.8%	116.5%	166.0%		234.8%	120.7%	147.7%		170.8%	118.6%	138.8%

Route	July				August				September			
	FY20	FY21	FY22	FY23	FY20	FY21	FY22	FY23	FY20	FY21	FY22	FY23
Blue	7,869	11,177	13,268	13,316	7,645	10,501	15,373	15,222	6,125	5,368	11,564	13,440
Valley	11,905	16,913	20,460	29,247	12,317	15,570	25,470	29,758	13,487	15,262	27,133	27,543
Hailey	669	1,429	1,431	2,409	677	1,640	2,173	2,645	1,929	2,679	3,052	3,142
Red	-	39	33	9	-	119	176	159	-	67	-	-
Bronze	-	-	-	-	-	-	-	-	-	-	-	-
Silver	-	-	1,097	1,488	-	-	1,187	1,902	-	-	230	316
Gold	-	-	-	-	-	-	-	-	-	-	-	-
TWF NEMT	-	98	145	51	-	82	230	47	-	-	135	27
Galena	-	-	-	-	-	-	-	-	-	-	-	-
Total	20,443	29,656	36,434	46,520	20,639	27,912	44,609	49,733	21,541	23,376	42,114	44,468
Year-over-Year		145.1%	122.9%	127.7%		135.2%	159.8%	111.5%		108.5%	180.2%	105.6%

## Appendix E

- MRTA Marketing & Communications Action Plan



### Marketing & Communications Action Plan

#### I. Purpose

- Provide roadmap for marketing, communications, public relations and outreach for the coming year.

#### II. Goals

- Maintain 100% Customer Satisfaction for Mountain Rides Services
- Increase Ridership on bus fixed routes and vanpool services
- Increase public and private awareness and support
- Leverage technology to increase access to MR services and internal information

#### III. Market Segments

- Identify the markets to reach
  - Neighborhoods
  - Employers (i.e. restaurants/retail/service/non-profits)
  - Recreationists (users and providers)
  - School District
  - Other schools/daycare providers
  - Demographics
  - Transit Dependent

#### IV. Positioning & Key Messaging

- Identify the Mountain Rides Brand
  - Convenience
    - Time Savings
    - Reliability
  - Community Benefits
    - Investment in Community
    - Relieve congestion and parking issues
    - Environmental Sustainability

## Appendix E

### • MRTA Marketing & Communications Action Plan

#### V. Provide Information to Targeted Groups

- Social Media
  - Instagram
  - Facebook
  - Eye on Sun Valley
  - YouTube
  - Twitter
- Print Advertising
- Resource Guides for Employers/Organizations
- Attend on-boarding sessions for Employers/Organizations to educate new staff about the brand and services of MR
- Attend staff meetings of Employers/Organizations to educate existing staff about the brand and services of MR
- Develop Quick Reference Guides for businesses/organizations with targeted needs
- Promote the Mountain Rides App (TransLoc)

#### VI. Increase Awareness, Bolster Support, Enlist Funding of Services

- Bus Stop Improvements
- Create Videos for Online Distribution
- Create Profiles of Passengers for Print Media & Online Use
- Signage at High Priority Stops re Scheduling/Arrival/Departures
- Update materials and website to increase brand awareness
- Improvements to Rider Experience
  - Wifi
  - Music

#### VII. Measurements and Metrics

- Develop Metrics to measure effectiveness of Action Plan

#### VIII. Resources and Budget

- Current Budget is \$40,000
- Community Transportation Services Director — 15-20 hours per week
- Mountain Rides Staff Training to focus on customer service and brand — 2+ times/year