

BATA Regular Board of Directors Meeting Agenda

115 Hall St. Traverse City, MI
2:00pm Thursday, June 27, 2024

1. Call to Order by Chairperson
2. Pledge of Allegiance and Moment of Silence
3. Roll Call
4. First Public Comment*
5. Approval of Agenda/Declaration of Conflict of Interest

6. Consent Calendar
The purpose of the consent calendar is to expedite business by grouping non-controversial items together to be dealt with in one Board motion without discussion. Any member of the Board, staff or the public may ask that any item on the consent calendar be removed and placed elsewhere on the agenda for full discussion. Such requests will be automatically respected. If an item is not removed from the consent calendar, the action noted in parentheses on the agenda is approved by a single Board action adopting the consent calendar.

Consideration of Approving the following Minutes
 - a. *Regular Board Meeting Minutes of May 30, 2024*
Consideration of Accepting the following Reports
 - b. *Transit Asset Management (TAM) Plan.*
 - c. *Correspondence – Staff Compliments*
 - d. *May 2024 Income Statement*
7. Any items removed from the Consent Calendar
8. Executive Director's Report – Kelly Dunham
 - a. HQ Facility/Owner's Representative Report
Jerry Tomczak, Program Manager, Cunningham-Limp
9. Chairperson's Report
10. Old Business
11. New Business
 - a. FY2023 Surplus Recommendation
 - b. BATA Procurement Policy
 - c. ACH Policy
 - d. Automated Scheduling Software Requisition Request

12. Discussion Topic – BATA Link Service
13. Second Public Comment*
14. Directors' Comments and Announcements/Open Floor
15. Adjournment

***Public Comment:**

Any interested party or person may address the board on any matter of BATA concern during public comment. Comments will be limited to 5 minutes and a one-minute warning will be given when needed. Any public comment that becomes disruptive, unduly repetitive, or impedes the orderly progress of the meeting may be terminated by the presiding officer. Once you have completed your public comment the board may ask any clarifying questions. If needed, you will be assigned a member of BATA's staff to follow up directly on any open concerns.

Next Meeting Date: August 15, 2024

BATA Regular Board of Directors Meeting Minutes

Location: Sutton's Bay Library, 416 Front St, Suttons Bay, MI 49682

Date/Time: 1:00 PM, Thursday, May 30, 2024

1. Call to Order

The meeting was called to order by Chairperson Richard Cochrun at 1:14 PM.

2. Pledge of Allegiance and Moment of Silence

3. Roll Call

- John Sommovilla - PRESENT
- Wayne Schmidt - ABSENT
- Jamie Kramer - ABSENT
- Joe Underwood - PRESENT
- Scott Sieffert - ABSENT
- Brad Jewett - PRESENT
- Richard Cochrun - PRESENT

4. First Public Comment*

No public comment was made.

5. Approval of Agenda/Declaration of Conflict of Interest

Moved by Brad Jewett and supported by John Sommovilla to approve the agenda as presented.

- Ayes: 4
- Nays: 0
- Motion Carries: 4-0

6. Consent Calendar

The purpose of the consent calendar is to expedite business by grouping non-controversial items together to be dealt with in one Board motion without discussion. Any member of the Board, staff, or the public may ask that any item on the consent calendar be removed and placed elsewhere on the agenda for full discussion. Such requests will be automatically respected. If an item is not removed from the consent calendar, the action noted in parentheses on the agenda is approved by a single Board action adopting the consent calendar.

Consideration of Approving the Following Minutes

- Regular Board Meeting Minutes of April 25, 2024
- Study Session Meeting Minutes of April 25, 2024

Consideration of Accepting the Following Reports

- LAC Meeting Minutes of April 29, 2024
- Correspondence – Staff Compliments
- April 2024 Income Statement

Item 6 b was requested to be removed by Brad Jewett.

Moved by Brad Jewett and supported by John Somavilla to approve the consent calendar as amended.

- Ayes: 4
- Nays: 0
- Motion Carries: 4-0

7. Any Items Removed from the Consent Calendar

- Study Session Meeting Minutes of April 25, 2024

Brad noted that his last name was spelled incorrectly in the Study session minutes.

Moved by Brad Jewett and supported by Joe Underwood to approve the study session meeting minutes of April 27, 2024, with the correction noted above.

- Ayes: 4
- Nays: 0
- Motion Carries: 4-0

8. Executive Director's Report – Kelly Dunham

Kelly introduced Rich Cherry, BATA's new legal counsel. Rich has been assisting BATA with transitioning into a small urban transportation authority, the sale of the Diamond property, easements with the new facility, and the Veterans Preference Act. Updates were provided on:

- Groundbreaking for the TC Housing Commission scheduled for June 24, 2024.
- Purchase agreement for Diamond executed with closing scheduled for July 15, 2024, and exit date of the Diamond facility on September 15, 2024.
- Pending application for hosting a Mobility Fellow.

- Smart commute week with free loop rides.

a. HQ Facility/Owner's Representative Report – Jerry Tomczak, Program Manager, Cunningham-Limp

Jerry updated the Board on the progress of the new facility. The project continues to be ahead of schedule with various installations and upcoming tasks, including:

- Carpet, millwork, counters, lockers, window blinds installed.
- Bus wash started; plumbing and backfill soon.
- Trees planted; asphalt for the transfer center and facility scheduled.
- Signage by Image 360.
- Issues when pouring the concrete at the Transfer site. The concrete dried/cured too quickly and will need to be removed. The section of concrete included snowmelt tubing which will require the new installation of tubing, causing delays at the opening of the transfer station.

b. Five-Year Technology Plan Update – Eric Lingaur and Paul Clausen

BATA's Technology Roadmap highlights upcoming projects and completed updates. Currently, 4 out of 6 projects are complete, with remaining implementations including a new fare collection system and automated route planning and scheduling software. Future upgrades include:

- New phone system
- Windows 11
- Cradle point vehicle router replacements
- Bus camera system replacements
- Vehicle tablet replacement
- Marquee integration
- APC/NTD re-certification
- Financial software update
- Rider experience improvements

9. Chairperson's Report

Richard Cochrun reported on a walkthrough at the new facility, expressing amazement at the progress and accomplishments.

10. Old Business

No old business at this time.

11. New Business

a. 2024 Tax Rate Request Resolution, L-4029 for Grand Traverse and Leelanau Counties – Justin Weston

Moved by Brad Jewett and supported by Joe Underwood to approve the 2024 Tax Rate Request Resolution as presented.

- Ayes: 4
- Nays: 0
- Motion Carries: 4-0

b. Public Transit Agency Safety Plan (PTASP) – Erik Falcon

Erik presented the PTASP, a living document for public transit safety accountability, covering various safety metrics and requiring annual recertification for federal funding.

Moved by Joe Underwood and supported by John Sommovilla to approve the Public Transit Agency Safety Plan (PTASP) as presented.

- Ayes: 4
- Nays: 0
- Motion Carries: 4-0

c. NTD Validation Vendor Recommendation – Eric Lingaur

The FTA requires APCs to be certified through an extensive validation process. BATA recommends selecting HopThru for their manual counting services, project timeline, cost efficiency, user-friendly interface, and prior experience.

Moved by Joe Underwood and supported by John Sommovilla to approve the NTD Validation Vendor Recommendation as presented.

- Ayes: 4
- Nays: 0
- Motion Carries: 4-0

12. Discussion Topic

Kelly Dunham informed the Board about TCAPS seeking support for the TCAPS Bond Proposal. The Board consensus was not to support the Bond Proposal at this time. Kelly also discussed issues surrounding the sewer and water public infrastructure and thanked Brad Jewett for his help in working with the Township. She further explained that the original cost sharing agreement documented in an MOU between BATA and the TCHC was not being

supported by Garfield Township and an alternative cost-sharing option had been presented by Garfield Township. The Board supported proceeding with the new cost sharing presented by Garfield Township as a replacement to the MOU originally executed between BATA and TCHC. Kelly will proceed in that direction.

13. Second Public Comment*

No public comment was made.

14. Directors' Comments and Announcements/Open Floor

15. Adjournment

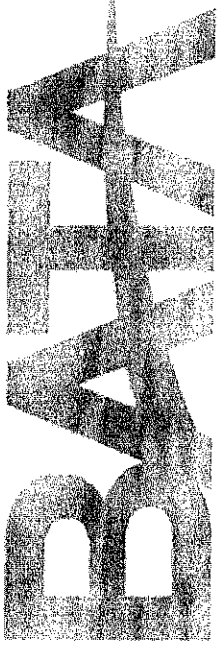
Moved by Brad Jewett and supported by Joe Underwood to adjourn the May 30, 2024, Regular Meeting of the BATA Board of Directors at 2:44 PM.

Meeting Minutes Submitted by: _____

Meeting Minutes Approved on: _____

Wayne Schmidt, Secretary: _____

BATA's next Board of Directors Meeting will be held June 27, 2024 @ 115 Hall St.



Bay Area Transportation Authority (BATA) Annual TAM Plan Targets Approval

As the Accountable Executive, I approve of the Transit Asset Management Targets set in BATA's FY24 TAM Plan.

A handwritten signature in black ink, appearing to read "Kelly Dunham", is written over a horizontal line.

Kelly Dunham

Executive Director

A handwritten date "6/6/24" is written in black ink over a horizontal line.

Date

BATA

Capital Asset Inventory

Please see Appendix A (Asset Register) for the asset inventory listing

Asset Category	Total Number	Avg. Age (yrs)	Avg. Replacement Cost
Revenue Vehicles	85	5.3	\$ 200,362
BU - Bus	6	13.9	\$ 246,479
CU - Cutaway bus	65	4.8	\$ 208,879
VN - Van	9	1.9	\$ 116,637
SB- Schoolbus	5	16.8	\$ 185,000

Asset Category	Total Number	Avg. Age	Avg. Value
Equipment - Service Vehicles	6	10.4	\$ 25,647
Trucks and Other Rubber Tire Vehicles	2	12	\$ 33,905
Vans	3	9.2	\$ 26,732
Cutaway	1	10.9	\$ 6,959
Equipment - Maintenance Shop	1	0.5	\$ 69,658

Asset Category	Total Number	Avg. Age	Avg. Value
Facilities	1	18	\$ 1,870,218
Passenger Facilities			

**Bay Area Transportation Authority (BATA)
Transit Asset Management (TAM) Plan**

TAM Plan Type: Tier II

Kelly Dunham , Accountable Executive

Last Modified Date: 5/23/2024

Introduction

The Bay Area Transportation Authority (BATA) operates public transportation services throughout Grand Traverse and Leelanau Counties in Northwest Lower Michigan and provides more than 500,000 rides a year. The service area population is roughly 100,000 persons, with 40,000 of these living within the core urbanized area. BATA offers transportation through two distinct types of services: fixed route and micro-transit/demand response. At this time, all services of BATA are directly operated by the transit system. BATA is committed to maintaining its assets in a State of Good Repair to promote safety, reliability, and a strong customer experience.

Performance Targets and Measures

Asset Category- Performance Measure

		2025 Target	2026 Target	2027 Target	2028 Target	2029 Target
Revenue Vehicles						
Age - % of revenue vehicles within an asset class that have met or exceeded their Useful Life Benchmark (ULB)	BU - Bus	100%	100%	100%	100%	100%
	CU - Cutaway Bus	12%	12%	25%	26%	43%
	VN - Van	0%	22%	22%	33%	33%
	SB - Schoolbus	100%	60%	60%	60%	60%
Equipment						
Age - % of vehicles that have met or exceeded their Useful Life Benchmark (ULB)	Trucks and other Rubber Tire Vehicles	50%	50%	50%	50%	50%
	Vans	66%	0%	33%	33%	33%
	Cutaway	100%	100%	100%	100%	100%
	Maintenance Shop equipment	0%	0%	0%	0%	0%
Facilities						
Condition - % of Facilities with a condition rating below 3.0 on the FTA Transit Economic Requirements Model (TERM) Scale	Passenger Facilities	0%	0%	0%	0%	0%

BATA sets targets based upon the review of current operational needs as well as current and future funding limits. BATA also takes into account anticipated levels of transit service.

BATA

Decision Support

Investment Prioritization

BATA prioritizes projects by acknowledging current and anticipated funding levels and by utilizing the following criteria: 1. Safety
 2. Maintain Existing Level of Service 3. Maintain Existing Level of Passenger Amenities 4. Expanded Level of Service 5. Expanded
 Passenger Amenities

Decision Support Tools

The following tools are used in making investment decisions:

Process/Tool	Brief Description
Management Meetings	Bi-monthly meetings with all Department Heads and senior staff. Capital asset condition and asset needs discussed and developed
Dispatch Software	Ridership trends evaluated based on data from scheduling software
RTA & Fleetio Fleet Maintenance Softwares	Fleet maintenance software used to track vehicle PMs and vehicle warranties
Facilities Maintenance Plan review/updated	BATA's Facilities Maintenance Plan is routinely updated and assessed every three years to ensure all relevant maintenance areas and newly discovered issues are addressed in the plan
Annual TAM scoring of Facilities	Staff inspects facilities and scores using FTA's TERM scale
Annual TAM review of fleet condition	Fleet data is updated to reflect current condition of vehicles
Senior Management Meetings for project selection	Senior staff meet to discuss data and condition assessments & capital planning projects are identified and selected for programming
Development of Traverse Transportation Coordinating Initiative Study TIP and MPO TIP	Current and future projects eligible are programmed into the TIP
MDOI annual application	MDOI annual application requires review and input of anticipated 5 year capital projects
Project Procurement following BATA procurement policy	Capital project is implemented/procured

Investment Prioritization

The list of prioritized investment projects is provided in Appendix D.

Appendices

- Appendix A Revenue Vehicle (Rolling Stock) Register and Condition Data
- Appendix B Equipment Register and Condition Data
- Appendix C Facilities Register and Condition Data
- Appendix D Proposed Investment Project List

BATA

current year

Appendix A

Revenue Vehicle (Rolling Stock) Register and Condition Data

2024

Bus Number	Make	Model	Acquisition year	Age	ULB	Over (under) ULB	At or Past ULB	Bus Category	Census by Category	Current Replacement Cost
30	Thomas	MVP-EF	2011	13	14	-1		BU- Bus	4	\$ 246,479
31	Thomas	MVP-EF	2011	13	14	-1		BU- Bus	5	\$ 246,479
32	Thomas	MVP-EF	2011	13	14	-1		BU- Bus	6	\$ 246,479
46	Thomas	MVP-EF	2008	16	14	2		BU- Bus	1	\$ 246,479
65	Thomas	MVP-EF	2010	14	14	0		BU- Bus	2	\$ 246,479
71	Thomas	MVP-EF	2011	13	14	-1		BU- Bus	3	\$ 246,479
86	Eldorado	Ford E450	2010	14	10	4		CU- Cutaway Bus	8	\$ 206,217
88	Eldorado	Aerotech E450	2011	13	10	3		CU- Cutaway Bus	2	\$ 206,217
94	Eldorado	Aerotech E450	2012	12	10	2		CU- Cutaway Bus	3	\$ 206,217
97	Eldorado	Aerotech E450	2012	12	10	2		CU- Cutaway Bus	3	\$ 206,217
108	Thomas	FS 65	2003	21	14	7		SB - School Bus	1	\$ 185,000
109	Thomas	FS 65	2003	21	14	7		SB - School Bus	1	\$ 185,000
111	Thomas	Pusher	2010	14	14	0		SB - School Bus	5	\$ 185,000
112	Thomas	Safe T Liner	2011	13	14	-1		SB - School Bus	2	\$ 185,000
113	Thomas	Safe T Liner	2011	13	14	-1		SB - School Bus	2	\$ 185,000
201	Eldorado	Aerotech E450	2016	8	10	-2		CU- Cutaway Bus	11	\$ 190,016
202	Eldorado	Aerotech E450	2016	8	10	-2		CU- Cutaway Bus	11	\$ 190,016
203	Eldorado	Aerotech E450	2016	8	10	-2		CU- Cutaway Bus	9	\$ 190,016
204	Eldorado	Aerotech E450	2016	8	10	-2		CU- Cutaway Bus	9	\$ 190,016
206	Eldorado	Aerotech E450	2017	7	10	-3		CU- Cutaway Bus	17	\$ 190,016
207	Eldorado	Aerotech E450	2017	7	10	-3		CU- Cutaway Bus	17	\$ 190,016
208	Eldorado	Aerotech E450	2017	7	10	-3		CU- Cutaway Bus	17	\$ 190,016
209	Eldorado	Aerotech E450	2017	7	10	-3		CU- Cutaway Bus	17	\$ 190,016
211	Eldorado	Aerotech E450	2018	6	10	-4		CU- Cutaway Bus	22	\$ 190,016
212	Eldorado	Aerotech E450	2018	6	10	-4		CU- Cutaway Bus	22	\$ 190,016
213	Eldorado	Aerotech E450	2018	6	10	-4		CU- Cutaway Bus	22	\$ 190,016
214	Eldorado	Aerotech E450	2018	6	10	-4		CU- Cutaway Bus	22	\$ 190,016
215	Eldorado	Aerotech E450	2018	6	10	-4		CU- Cutaway Bus	22	\$ 190,016
217	Eldorado	Aerotech E450	2019	5	10	-5		CU- Cutaway Bus	21	\$ 190,016
218	Eldorado	Aerotech E450	2019	5	10	-5		CU- Cutaway Bus	13	\$ 190,016
219	Eldorado	Aerotech E450	2019	5	10	-5		CU- Cutaway Bus	13	\$ 190,016
220	Eldorado	Aerotech E450	2019	5	10	-5		CU- Cutaway Bus	13	\$ 190,016
221	Eldorado	Aerotech E450	2020	4	10	-6		CU- Cutaway Bus	27	\$ 190,016
222	Eldorado	Aerotech E450	2020	4	10	-6		CU- Cutaway Bus	27	\$ 190,016
223	Eldorado	Aerotech E450	2020	4	10	-6		CU- Cutaway Bus	27	\$ 190,016
224	Eldorado	Aerotech E450	2020	4	10	-6		CU- Cutaway Bus	27	\$ 190,016
225	Eldorado	Aerotech E450	2020	4	10	-6		CU- Cutaway Bus	27	\$ 190,016

38	226	Eldorado	Aerotech E450	2020	4	10	-6	CU- Cutaway Bus	27	\$	190,016
39	227	Eldorado	Aerotech E450	2020	4	10	-6	CU- Cutaway Bus	27	\$	190,016
40	228	Eldorado	Aerotech E450	2021	3	10	-7	CU- Cutaway Bus	26	\$	190,016
41	229	Forrest River	Champion E450	2023	1	10	-9	CU- Cutaway Bus	49	\$	197,569
42	230	Forrest River	Champion E450	2023	1	10	-9	CU- Cutaway Bus	33	\$	206,217
43	231	Forrest River	Champion E450	2023	1	10	-9	CU- Cutaway Bus	49	\$	197,569
44	232	Forrest River	Champion E450	2023	1	10	-9	CU- Cutaway Bus	49	\$	197,569
45	233	Forrest River	Champion E450	2023	1	10	-9	CU- Cutaway Bus	49	\$	197,569
46	234	Forrest River	Champion E450	2024	0	10	-9	CU- Cutaway Bus	48	\$	190,016
47	301	Eldorado	Aerolite F550	2018	6	10	-4	CU- Cutaway Bus	47	\$	242,372
48	302	Eldorado	Aerolite F550	2018	6	10	-4	CU- Cutaway Bus	45	\$	242,372
49	303	Eldorado	Aerolite F550	2019	5	10	-5	CU- Cutaway Bus	46	\$	242,372
50	304	Eldorado	Aerolite F550	2019	5	10	-5	CU- Cutaway Bus	39	\$	242,372
51	305	Eldorado	Aerolite F550	2019	5	10	-5	CU- Cutaway Bus	42	\$	242,372
52	306	Eldorado	Aerolite F550	2019	5	10	-5	CU- Cutaway Bus	39	\$	242,372
53	307	Eldorado	Aerolite F550	2019	5	10	-5	CU- Cutaway Bus	42	\$	242,372
54	308	Eldorado	Aerolite F550	2019	5	10	-5	CU- Cutaway Bus	39	\$	242,372
55	309	Eldorado	Aerolite F550	2019	5	10	-5	CU- Cutaway Bus	44	\$	242,372
56	310	Eldorado	Aerolite F550	2020	4	10	-6	CU- Cutaway Bus	38	\$	242,372
57	311	Eldorado	Aerolite F550	2020	4	10	-6	CU- Cutaway Bus	36	\$	242,372
58	312	Eldorado	Aerolite F550	2020	4	10	-6	CU- Cutaway Bus	34	\$	242,372
59	313	Eldorado	Aerolite F550	2020	4	10	-6	CU- Cutaway Bus	34	\$	242,372
60	314	Eldorado	Aerolite F550	2020	4	10	-6	CU- Cutaway Bus	34	\$	242,372
61	315	Eldorado	Aerolite F550	2020	4	10	-6	CU- Cutaway Bus	36	\$	242,372
62	316	Forrest River	Aerolite F550	2024	0	10	-10	CU- Cutaway Bus	56	\$	242,372
63	317	Forrest River	Aerolite F550	2024	0	10	-10	CU- Cutaway Bus	56	\$	242,372
64	318	Forrest River	Aerolite F550	2024	0	10	-10	CU- Cutaway Bus	56	\$	242,372
65	319	Forrest River	Aerolite F550	2024	0	10	-10	CU- Cutaway Bus	56	\$	242,372
66	320	Forrest River	Aerolite F550	2024	0	10	-10	CU- Cutaway Bus	56	\$	242,372
67	321	Forrest River	Aerolite F550	2024	0	10	-10	CU- Cutaway Bus	56	\$	242,372
68	401	Forrest River	Freightliner MDL	2023	1	10	-9	CU- Cutaway Bus	65	\$	246,479
69	402	Forrest River	Freightliner SZC	2024	0	10	-10	CU- Cutaway Bus	55	\$	236,999
70	403	Forrest River	Freightliner SZC	2023	1	10	-9	CU- Cutaway Bus	63	\$	246,242
71	404	Forrest River	Freightliner SZC	2024	0	10	-10	CU- Cutaway Bus	54	\$	228,378
72	405	Forrest River	Freightliner SZC	2023	1	10	-9	CU- Cutaway Bus	64	\$	246,361
73	502	Mobility Works	Ford Transit	2018	6	8	-2	VN - Van	2	\$	116,208
74	503	Mobility Works	Ford Transit	2018	6	8	-2	VN - Van	1	\$	116,208
75	504	Mobility Works	Ford Transit	2020	4	8	-4	VN - Van	3	\$	116,208
76	505	Mobility Works	Ford E-Transit	2024	0	8	-8	VN - Van	4	\$	116,208
77	506	Mobility Works	Ford E-Transit	2024	0	8	-8	VN - Van	4	\$	116,208
78	507	Mobility Works	Ford E-Transit	2024	0	8	-8	VN - Van	4	\$	116,208
79	508	Mobility Works	Ford E-Transit	2024	0	8	-8	VN - Van	4	\$	116,208
80	509	Forrest River	Ford E-Transit	2024	0	8	-8	VN - Van	4	\$	116,208
81	510	Forrest River	Ford E-Transit	2024	0	8	-8	VN - Van	8	\$	118,138
82	50A	Champion	Challenger E450	2011	13	8	-8	VN - Van	8	\$	118,138
83	56A	Champion	Challenger E450	2011	13	10	3	CU- Cutaway Bus	5	\$	130,281
84	57A	Champion	Challenger E450	2011	13	10	3	CU- Cutaway Bus	1	\$	130,281
85	58A	Champion	Challenger E450	2011	13	10	3	CU- Cutaway Bus	5	\$	130,281

Fleet Totals

Total Fleet census	85
Average Age	5.87
Avg Repl cost	\$ 200,362
At or Past ULB	13
% At or Past ULB	15%

Van Fleet VW census	9
Average Age	1.78
Avg Repl cost	\$ 116,637
At or Past ULB	0
% At or Past ULB	0%

School Bus Fleet SB census	5
Average Age	16.4
Avg Repl cost	\$ 185,000
At or Past ULB	3
% At or Past ULB	60%

BU Fleet census	6
Average Age	13.67
Avg Repl cost	\$ 246,479
At or Past ULB	2
% At or Past ULB	33%

CU Fleet census	65
Average Age	4.91
Avg Repl cost	\$ 208,879
At or Past ULB	8
% At or Past ULB	12%

BATA
Appendix B

Equipment Register and Condition Data

current year
2024

Asset Category	Asset Class	Asset Name	Count	ID/Serial No. Tennant	Acquisition Year	Age (Yrs)	Useful Life Benchmark ULB (Yrs)	Over- (under) ULB	At or Past ULB	Current Replacement Cost	Total Count	Average Age	Avg Repl cost	% At or Past ULB	
															Year
Equipment	Maintenance Shop Equipment	Tennant Floor Scrubber	1		2024	0	10	-10	NO	\$ 69,658					
Equipment	Trucks and other Rubber-Tire Vehicles	#80	1	1FTFF2153SE	2005	19	14	5	NO	\$ 25,864					
Equipment	Trucks and other Rubber-Tire Vehicles	#580	1	3C7WRSAB6KG680833	2019	5	14	-9	NO	\$ 41,946					
Equipment	Van	#501	1	1GCHG39K781169295	2014	10	8	2	NO	\$ 17,001					
Equipment	Van	#500	1	NM00LS6AN9CT099373	2019	5	8	-3	NO	\$ 9,009					
Equipment	Van	#89	1	1FTSS53ELXCDA04688	2011	13	8	5	NO	\$ 53,104					
Equipment	Cutaway	#20	1	1FDXE455X6H78180	2013	11	10	1	NO	\$ 6,959					
											6	10.5	\$ 25,647	4	67%

BATA

Appendix C Facilities Register and Condition Data

Current Year
2024

<u>Asset Category</u>	<u>Asset Class</u>	<u>Asset Name</u>	<u>Count</u>	<u>Description</u>	<u>Year built</u>	<u>Age (Yrs)</u>	<u>IERM Scale Condition</u>	<u>Replacement Cost/Value</u>
Facilities	Passenger Station	115 Hall Street	1	Passenger Station	2006	18	4	\$ 1,870,218

BATA

Appendix D: Proposed Investment Project List

<u>Project Year</u>	<u>Project Name</u>	<u>Asset/Asset Class</u>	<u>Cost</u>	<u>Priority</u>
2025	Snow Melt System Replacement	Facilities	\$ 300,000	High
2028	Shingle Roof Replacement	Facilities	\$ 80,000	Medium
2029	Interior Paint	Facilities	\$ 50,000	Low
2025	Replace 9 Cutaways / 2 School Buses / 1 Bus	Revenue Vehicles	\$ 2,247,502	High
2026	Replace 2 Buses	Revenue Vehicles	\$ 502,432	Medium
2027	Replace 3 Buses	Revenue Vehicles	\$ 753,647	Medium
2028	Replace 4 Cutaways	Revenue Vehicles	\$ 806,238	Low
2029	Replace 4 Cutaways	Revenue Vehicles	\$ 806,238	Low
2026	Replace 2 Service Vans	Equipment	\$ 120,000	Low

COMPLIMENTS TO BATA STAFF

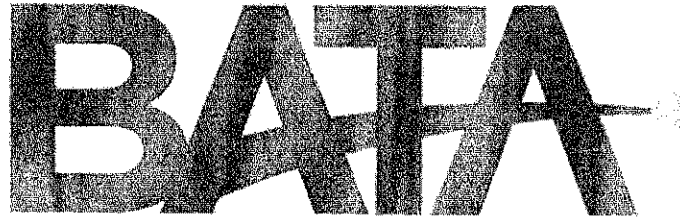
Date Received	Employee	Route #	Comment	Dept
5/16/2024	Justin Jones	Route 12	I just wanted to give a shout out to your driver on route 12 Justin ones. He's always so helpful. I noticed he's been a little down lately but he still always has a friendly greeting. He's very knowledgeable on the city routes and route12. I always feel safe when he's at the wheel.	
5/23/2024	Matt Ide	Dispatch	Just wanted to give a shout out to Matt. I am using the Link app for the first time and he explained it really well. I am super impressed thank you.	
5/31/2024	Mark Ewing	Route 1	Mark Ewing is an amazing driver who does so much for the community. Would also like BATA to review the cart policy and have ridership be able to put a seat up if no one is on the bus so they don't need to fold the cart up and remove all items. Please work with us not against us.	
6/4/2024	Joy Luebke	Route 1	Joy is a great driver and she has great customer service. I always have great rides when she is driving.	
6/6/2024	Thomas Turner	Link 15	This driver was great. He was able to help multiple people, one was blind and another had a walker. He was very patient with both of them, and very kind. This makes me smile and I know he treats every customer this way.	

BATA Income Statement May 2024

	May 2024		\$ Over (Under)	May 2023
	Actual	Budget	Budget	Actual
Income				
Fare Box Revenue	\$ 433,339	\$ 353,495	\$ 79,844	\$ 363,675
Local Service Contracts	224,072	200,803	23,269	196,265
Auxiliary Trans Revenue	190,934 <u>1</u>	96,000	94,934	137,956
Non-Trans Revenue	1,944,841 <u>2</u>	500	1,944,341	10,333
Local Revenue	1,864,805 <u>3</u>	3,183,133	(1,318,327)	1,757,802
State Formula & Contracts	3,074,936	3,274,422	(199,486)	2,093,479
Federal Operating Grants	1,590,690	1,480,393	110,297	1,166,517
CRRSAA/CARES Act	-	-	-	1,084,144
Other Revenue	648,594 <u>4</u>	200,000	448,594	283,410
Refunds and Credits	149,484	66,667	82,818	216,397
Total Income	\$ 10,121,696	\$ 8,855,413	\$ 1,266,284	\$ 7,309,979
Expense				
Salaries & Wages	\$ 4,162,221	\$ 4,392,375	\$ (230,154)	\$ 3,167,489
Paid Leave	348,320	348,316	4	294,176
Fringe Benefits	1,232,999	1,275,298	(42,299)	1,029,802
Services	428,396	468,375	(39,978)	492,448
Fuel & Lubricants	468,164	619,023	(150,859)	408,287
Materials & Supplies	262,494	300,379	(37,885)	230,414
Utilities	92,306	120,025	(27,719)	93,297
Insurance	482,596 <u>5</u>	418,539	64,057	436,536
Misc Expense	45,648 <u>6</u>	34,313	11,335	36,785
Operating Leases & Rentals	11,724	10,867	857	11,124
Total Expense	\$ 7,534,868	\$ 7,987,509	\$ (452,641)	\$ 6,200,357
Net Income before Depreciation	\$ 2,586,828	\$ 867,904	\$ 1,718,924	\$ 1,109,622
Depreciation	796,728	740,416	56,312	740,416
Net Income (Loss)	\$ 1,790,100	\$ 127,488	\$ 1,662,612	\$ 369,206

BATA Income Statement Notes
May 2024 YTD

	<u>Account(s)</u>	<u>Explanation</u>
<u>1</u>	Auxiliary Trans Revenue	Increased Advertising Revenue
<u>2</u>	Non-Trans Revenue	Sale of Cass Building
<u>3</u>	Local Revenue	Expected to be lower than budget at this point in the year, majority of taxes are collected in the summer months
<u>4</u>	Other Revenue	Interest Rates remain high into 2024 (5.3885%).
<u>5</u>	Insurance	Payout for Insurance Claim, Bus Repair #302
<u>6</u>	Misc Expense	Additional Training - Conference Registrations



Bay Area Transportation Authority

Procurement Policy

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1.) Applicability:

As required by 2 CFR 200.318 (a), the subsequent documented procurement policy described herein will govern Bay Area Transportation Authority's (BATA) procurements utilizing Federal funding. All Federally-funded Bay Area Transportation Authority procurements shall be executed and documented in conformity with 2 CFR 200.318 through 2 CFR 200.327 (as amended or superseded) and the Federal Transit Administration Third Party Contracting Guidance (Circular 4220.1F (as amended)). If any conflicting language or verbiage is present between 2 CFR 200.318 – 2 CFR 200.327 and the most current Third-Party Contracting Guidance, 2 CFR 200.318 – 2 CFR 200.327 shall take precedence, and the individual procurement action should be executed and documented accordingly.

2.) 2 CFR 200.318 - General Procurement Standards

- A. BATA will maintain oversight to ensure that contractors perform in accordance with the terms, conditions, and specifications of its contracts or purchase orders.
- B. No BATA employee, officer, agent, Board member or their immediate family member, partner, or organization will participate in the selection, award, or administration of a contract if a conflict of interest, real or apparent, is involved. BATA is concerned with Conflicts of Interest that create actual or potential job-related concerns, especially in the areas of confidentiality, customer relations, safety, security, and morale. If there is any actual or potential conflict of interest between a BATA employee and a competitor, supplier, distributor, or contractor to the organization, the BATA employee must disclose the conflict with your manager/supervisors. If an actual or potential conflict of interest is determined to exist, BATA will take such steps as it deems necessary to reduce or eliminate this conflict. When a BATA employee has a question concerning a possible conflict of interest, it is expected that they will request advice from the Executive Director. A few examples of conflicts of interest that should always be avoided are listed below but are not exhaustive of every potential conflict of interest.
 - o If a BATA employee has a direct or indirect financial interest in a firm that does business with BATA and the interest might be sufficient to affect the employee's decisions or actions, the employee must report the interest to BATA and must not represent BATA in such transactions.
 - o No BATA employee or member of the employee's immediate family shall directly or indirectly accept gifts from any persons or firms doing or seeking to do business with BATA under circumstances where it might reasonably be inferred that the purpose of the gift is to influence the employee in the conduct of BATA business with the donor. Such gifts should be returned with a note of explanation.
 - o Employees are not prohibited from accepting advertising novelties such as pens, pencils, calendars, or other gifts of nominal value when circumstances clearly show that the gifts are offered for reasons of personal esteem.



- C. Violations of the conflict-of-interest policy by any BATA employee described in part 2-B above may result in discipline up to and including discharge.
- D. BATA will avoid the acquisition of unnecessary or duplicative items. Consideration will be given to the consolidation or breaking out of procurements to obtain the most economical purchase. A lease versus purchase analysis will be conducted where appropriate. This will ensure that only necessary and required items are procured at the most economical price.
- E. When feasible, BATA will investigate the option to enter into state and local intergovernmental agreements or inter-entity agreements for procurement or use of common or shared goods and services. Any competition requirements will be met with documented procurement actions using strategic sourcing, shared services, and other similar procurement arrangements.
- F. When feasible, BATA will encourage the use of value engineering clauses in construction projects of sufficient size to offer reasonable opportunities for cost reductions.
- G. BATA must award contracts only to responsible contractors possessing the ability to perform successfully under the terms and conditions of a proposed procurement. Consideration will be given to such matters as contractor integrity, record of past performance, compliance with public policy, and financial and technical resources.
 - o BATA will restrict awards, sub-awards, and contracts with certain parties that are debarred, suspended, or otherwise excluded from or ineligible for participation in Federal assistance programs or activities.
- H. BATA will maintain documentation and records sufficient to detail the history of each procurement. The documentation and records will include, but are not necessarily limited to:
 - o Rationale for the method of procurement
 - o Selection of contract type
 - o Contractor selection or rejection
 - o The basis for the contract price
- I. BATA may use a time and materials contract only after a determination that no other contract is suitable and if the contract includes a ceiling price that the contractor exceeds at its own risk. When and if a time and materials contract is used, BATA will assert a high degree of oversight in order to obtain reasonable assurance that the contractor is using efficient methods and effective cost controls.
- J. BATA will be solely responsible, in accordance with good administrative and sound business judgment, for the settlement of all contractual and administrative issues arising out of procurements. These issues include, but are not limited to, source evaluation, protests, disputes, and claims. These standards do not relieve BATA of any contractual responsibilities under its contracts. The Federal awarding agency will not substitute its judgment for that of the BATA unless the matter is primarily a Federal concern. Any violations of law will be referred to the local, state, or Federal authority having proper jurisdiction.



3.) 2 CFR 200.319 – Competition

- A. All procurement transactions for the acquisition of property or services required under a Federal award must be conducted in a manner that provides full and open competition.
- B. In order to ensure objective contractor performance and eliminate unfair competitive advantage, contractors that develop or draft specifications, requirements, statements of work, or invitations for bids or requests for proposals must be excluded from competing in such procurements. Situations that are considered to be restrictive of competition include but are not limited to:
 - a. Placing unreasonable requirements on firms in order for them to qualify to do business;
 - b. Requiring unnecessary experience and excessive bonding;
 - c. Noncompetitive pricing practices between firms or between affiliated companies;
 - d. Noncompetitive contracts to consultants that are on retainer contracts;
 - e. Organizational conflicts of interest;
 - f. Specifying only a “brand name” product instead of allowing “an equal” product to be offered and describing the performance or other relevant requirements of the procurement;
 - g. Creating a specification that is exclusionary or discriminatory; and
 - h. Any arbitrary action in the procurement process.
- C. BATA will conduct procurements in a manner that prohibits the use of statutorily or administratively imposed state, local, or tribal geographical preferences in the evaluation of bids or proposals, except in those cases where applicable Federal statutes expressly mandate or encourage geographical preference. When contracting for architectural and engineering (A&E) services, geographic location may be a selection criterion provided that its application leaves an appropriate number of qualified firms, given the nature and size of its projects.
 - a. Brooks Act procedures will apply for procurements of A&E services, and BATA will:
 - i. Evaluate qualifications excluding price as a factor;
 - ii. Negotiate with only the most qualified offeror; and
 - iii. Failing agreement on price, negotiate with the next most qualified offeror until an agreement is reached on a price that is determined to be fair and reasonable.
- D. BATA will ensure that all solicitations will incorporate a clear and accurate description of the technical requirements for the material, product, or service to be procured. Such description must not, in competitive procurements, contain features that unduly restrict competition. The description may include a statement of the qualitative nature of the material, product, or service to be procured and, when necessary, must set forth those minimum essential characteristics and standards to which it must conform if it is to satisfy its intended use. Detailed product specifications should be avoided if at all possible. When it is impractical or uneconomical to make a clear and accurate description of the technical requirements, a “brand name or equivalent” description may be used as a means to define the performance or other salient requirements of procurement. The specific features of the

The logo for BATA, featuring the word "BATA" in a bold, stylized, blocky font with a textured, metallic appearance.

named brand which must be met by offers must be clearly stated and will identify all of the requirements which the offerors must fulfill and all other factors to be used in evaluating bids or proposals.

- E. BATA will ensure that all prequalified lists of persons, firms, or products which are used in acquiring goods and services are current and include enough qualified sources to ensure maximum open and free competition. BATA will not preclude potential bidders from qualifying during the solicitation period.

4.) 2 CFR 200.320 – Methods of Procurements to be Followed

- A. The following methods of procurements must be used for the acquisition of property or services required under a Federal award or sub-award:
 - a. Micro-Purchases (Informal)
 - b. Small Purchases (Informal)
 - c. Sealed Bid (Formal)
 - d. Proposals (Formal)
 - e. Noncompetitive Procurement (Formal)
- B. The determination of the method of procurement selected is the responsibility of BATA's Procurement department as well as the required documentation that relates to each method.
- C. **Informal** procurement methods: When the value of the procurement for property or services under a Federal award does not exceed the *simplified acquisition threshold* (SAT) as defined by 2 CFR 200.1, formal procurement methods are not required. BATA may use informal procurement methods to expedite the completion of its transactions and minimize the associated administrative burden and cost. The informal methods used for the procurement of property or services at or below the SAT include:
 - a. **Micro-Purchases**
 - i. The acquisition of supplies or services, the aggregate dollar amount of which does not exceed the micro-purchase threshold (defined by 2 CFR 200.1).
 - ii. To the maximum extent practicable, BATA will distribute micro-purchases equitably among qualified suppliers.
 - iii. Micro-purchases may be awarded without soliciting competitive price or rate quotations if BATA considers the price to be reasonable based on research, experience, purchase history, or other information and is documented accordingly.
 - iv. BATA will not divide or reduce the size of its procurements merely to come within the micro-purchase limit.
 - v. BATA will include a fair and reasonable price determination and supporting documentation in its procurement file.
 - vi. These purchases are exempt from FTA's Buy America requirements.
 - vii. These purchases are not exempt from Davis-Bacon prevailing wage requirements for construction projects exceeding \$2,000.



b. Small Purchases

- i. The acquisition of property or services, the aggregate dollar amount of which is higher than the micro-purchase threshold but does not exceed the SAT.
- ii. Price or rate quotations must be obtained from an adequate number of qualified sources, as determined to be appropriate by BATA, but not less than 2.
- iii. BATA will not divide or split a procurement to avoid additional procurement requirements that apply to the larger acquisitions.
- iv. BATA will include a fair and reasonable price determination and supporting documentation in its procurement file.
- v. Supported documentation of quotes include: product/service catalogs, current price lists, emails, website documents, and documented verbal telephone contact with the vendors to obtain quotes.
- vi. A Request for Quote (RFQ) is required for all "written quotes". The RFQ should specify quantities, timeframes, and necessary requirements of the product or service. Quotes must be solicited from vendors that can reasonably be expected to provide goods or services being procured. Identification of sources and the solicitation of quotes must be documented. The RFQ must be provided to the vendor in writing, or transmitted as uniformly as possible over telephone, fax, or email. The vendor response must include a vendor logo or business name, address, contact information, and date of correspondence.

D. Formal procurement methods: When the value of the procurement for property or services under a Federal financial assistance award exceeds the SAT, formal procurement methods are required.

a. Sealed Bids

- i. A procurement method in which bids are publically solicited and a firm-fixed-price contract (lump sum or unit price) is awarded to the responsible bidder whose bid, conforming with all the material terms and conditions of the invitation for bids, is the lowest in price. The sealed bids method is the preferred method for procuring construction.
- ii. In order for sealed bidding to be feasible, the following conditions should be present:
 1. A complete, adequate, and realistic specification or product description is available;
 2. Two or more responsible bidders are willing and able to compete effectively for the business, and;
 3. The procurement lends itself to a firm-fixed-price contract and the selection of the successful bidder can be made on the basis of price.
- iii. If sealed bids are used, the following requirements apply:
 1. Bids must be solicited from an adequate number of qualified sources, providing them sufficient time to respond prior to the date



set for opening the bids, and the invitation for bids must be publically advertised.

2. The invitation for bids, which will include any specifications and pertinent attachments, must define the items or services in order for the bidder to properly respond.
3. All bids will be publically opened at the time and place prescribed in the invitation for bids.
4. A firm-fixed-price contract award will be made in writing to the lowest responsive and responsible bidder. Where specified in the bidding documents, factors such as discounts, transportation costs, and life cycle costs must be considered in determining which bid is lowest. Payment discounts will only be used to determine the low bid when prior experience indicates that such discounts are usually taken advantage of; and
5. Any and all bids may be rejected if there is a sound documented reason.

b. Proposals

- i. A procurement method in which either a fixed price or cost-reimbursement type contract is awarded. Proposals are to be used when the lowest price is not necessarily the determining factor in the award, and more than one offeror is willing to submit a proposal.
- ii. Requests for proposals must be publicized and identify all evaluation factors and their relative importance. Proposals must be solicited from an adequate number of qualified offerors. Any response to publicized requests for proposals must be considered to the maximum extent practical;
- iii. In each procurement that lends itself to the proposal method, a review committee will be identified and documented before the proposal is published and advertised that will be responsible for conducting technical evaluations of the proposals to be received and making selections on a numerically weighted basis. The award will be made to the responsive and responsible offeror with the highest numeric cumulative score.
- iv. BATA may use competitive proposal procedures for qualifications-based procurement of Architectural and Engineering (A&E) professional services whereby the offeror's qualifications are evaluated and the most qualified offeror is selected, subject to negotiation of fair and reasonable compensation. Failing an agreement on pricing with the initial offeror deemed to be the most qualified, BATA will negotiate with the next most qualified offeror until an agreement is reached on a price that is determined to be fair and reasonable.



c. Noncompetitive Procurement

- i. A noncompetitive procurement is a solicitation of a proposal from a single source, or the solicitation of a proposal from more than one source and competition is determined to be inadequate to fulfill the requirements of the funding agency. This method can only be used and awarded if one or more of the following circumstances apply:
 1. The acquisition of property or services, the aggregate dollar amount of which does not exceed the micro-purchase threshold (2 CFR 200.1);
 2. The item is only available from a single source;
 3. The public exigency or emergency for the requirement will not permit a delay resulting from publicizing a competitive solicitation.
 4. The Federal awarding agency or pass-through entity expressly authorizes a noncompetitive procurement in response to a written request from BATA.
 - a. FTA has explicitly made the following authorizations regarding permissible sole source procurements as noted in the Third-Party Contracting Guidance (4220.1F Chapter VI – 3.i.1.e – or as amended)
 - i. Team, Consortium, Joint Venture, Partnership
 - ii. Statutory Authorization or Requirement
 - iii. National Emergency
 - iv. Research
 - v. Protests, Disputes, Claims, Litigation
 - vi. International Arrangements
 - vii. National Security
 - viii. Public Interest
 5. After solicitation of a number of sources, competition is determined inadequate.

5.) 2 CFR 200.321 - Contracting with Small and Minority Businesses, Women's Business Enterprises, and Labor Surplus Area Firms

- A. BATA will take all of the necessary affirmative steps to assure that small & minority businesses, women's business enterprises, and labor surplus area firms are used when possible.
 - a. Affirmative steps must include:
 - i. Placing qualified small and minority businesses and women's business enterprises on solicitation lists;
 - ii. Assuring that small and minority businesses and women's business enterprises are solicited whenever they are potential sources;



- iii. Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;
 - iv. Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;
 - v. Using the services and assistance, as appropriate, or such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and
 - vi. Requiring the prime contractor, if subcontractors are to be let, to take the affirmative action steps aforementioned in this section.
- B. BATA will include the two provisions from 49 CFR 26.13 below in every procurement where Federal financial assistance is involved.

6.) 2 CFR 200.322 - Domestic Preferences for Procurements

- A. As appropriate and to the extent consistent with the law, BATA should, to the greatest extent practicable under a Federal award, provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products).
- B. BATA will implement the Buy America preferences set forth in 2 CFR part 184 in all infrastructure projects.

7.) 2 CFR 200.323 – Procurement of Recovered Materials

- A. BATA will comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act.

8.) 2 CFR 200.324 – Contract Cost and Price

- A. BATA must perform a cost or price analysis in connection with every procurement action in excess of the Simplified Acquisition Threshold (SAT), including contract modifications. The method and degree of analysis is dependent on the facts surrounding the particular procurement situation, but as a starting point, BATA must make independent cost estimates before receiving bids or proposals for all procurements exceeding the SAT.
- B. BATA must negotiate profit as a separate element of the price for each contract in which there is no price competition and, in all cases, where a cost analysis is performed. To establish a fair and reasonable profit, consideration must be given to the complexity of the work to be performed, the risk borne by the contractor, the contractor's investment, the amount of subcontracting, the quality of its record of past performance, and industry profit rates in the surrounding geographical area for similar work.
- C. Costs or prices based on estimated costs for contracts under the Federal award are allowable only to the extent that costs incurred or cost estimates included in negotiated



prices would be allowable for the BATA under subpart E (2 CFR 200.400 – 2 CFR 200.476). BATA may reference its own cost principles that comply with the Federal cost principles.

- D. Cost plus a percentage of cost and percentage of construction cost methods of contracting will not be used.

9.) 2 CFR 200.325 – Federal Awarding Agency or Pass-Through Entity Review

- A. BATA will make available, upon request of the Federal awarding agency or pass-through entity, technical specifications on proposed procurements where the Federal awarding agency or pass-through entity believes such review is needed to ensure that the item or service specified is the one being proposed for acquisition.
- B. BATA will make available upon request, for the Federal awarding agency or pass-through entity pre-procurement review, procurement documents, such as requests for proposals or invitations for bids, or independent cost estimates, when:
- a. BATA's procurement procedures or operations fail to comply with the procurement standards in this part;
 - b. The procurement is expected to exceed the SAT and is to be awarded without competition or only one bid or offer is received in response to a solicitation;
 - c. The procurement, which is expected to exceed the SAT, specified a "brand name" product;
 - d. The proposed contract is more than the SAT and is to be awarded to other than the apparent low bidder under a sealed bid procurement; or
 - e. A proposed contract modification changes the scope of a contract or increases the contract amount by more than the SAT.

10.) 2 CFR 200.326 – Bonding Requirements

- A. For construction or facility improvement contracts or subcontracts exceeding the SAT, the Federal awarding agency or pass-through entity may accept the bonding policy and requirements of the BATA provided that the Federal awarding agency or pass-through entity has made a determination that the Federal interest is adequately protected. If such a determination has not been made, the minimum requirements for successful bidders or responders is as follows:
- a. A bid guarantee from each bidder equivalent to five (5) percent of the bid price. The "bid guarantee" must consist of a firm commitment such as a bid bond, certified check, or other negotiable instrument accompanying a bid as assurance that the bidder will, upon acceptance of the bid, execute such contractual documents as may be required within the time specified.
 - b. A performance bond on the part of the contractor for one hundred (100) percent of the contract price. A "performance bond" is one executed in connection with a contract to secure fulfillment of all contractor's requirements under such contract.
 - c. A payment bond on the part of the contractor for one hundred (100) percent of the contract price. A "payment bond" is one executed in connection with a contract to



assure payment as required by law of all persons supplying labor and material in the execution of the work provided for in the contract.

11.) 2 CFR 200.327 – Contract Provisions

- A. BATA's contracts will contain the applicable provisions as described in Appendix II to CFR Part 200:
- a. Contracts for more than the SAT, which is the inflation-adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.
 - b. All contracts in excess of \$10,000 must address termination for cause and for convenience by the BATA including the manner by which it will be affected and the basis for settlement.
 - c. Equal Employment Opportunity. Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity" and implementing regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."
 - d. Davis-Bacon Act, as amended (40 U.S.C. 3141-3148). When required by Federal program legislation, all prime construction contracts in excess of \$2,000 must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction"). In accordance with the statute, contractors will be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. BATA must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. BATA must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision for compliance with the Copeland "Anti-Kickback" Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction,



completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. BATA must report all suspected violations to the Federal awarding agency.

- e. Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708). Where applicable, all contracts awarded by the BATA in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous, or dangerous. These requirements do not apply to the purchases of supplies, materials, or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.
- f. Rights to Inventions Made Under a Contract or Agreement. If the Federal award meets the definition of "funding agreement" under 37 CFR § 401.2(a) and BATA or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that "funding agreement" BATA or subrecipient must comply with the requirements of 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts, and Cooperative Agreements," and any implementing regulations issued by the awarding agency.
- g. Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended. Any BATA contract in excess of \$150,000 must contain a provision that requires the vendor to comply with all applicable standards, orders, or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).
- h. Debarment and Suspension (Executive Orders 12549 and 12689). A contract award (2 CFR 180.220) must not be made to parties listed on the governmentwide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orderes 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235) "Debarment and Suspension." SAM exclusions contain the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared under statutory or regulatory authority other than Executive Order 12549. Contractors wishing to do business with the BATA in excess of \$25,000 must sign a certification prior to



entering into a contract stating that they are not on the list of parties excluded from Federal procurement.

- i. Byrd Anti-Lobbying Amendment (31 U.S.C. 1352). Contractors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant, or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with Non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.
- j. Procurement of Recovered Materials (2 CFR 200.323). BATA and its contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in EPA guidelines.
- k. Prohibition on Certain Telecommunications and Video Surveillance Services or Equipment (2 CFR 200.216). BATA or sub-recipients are prohibited from obligating or expending loan or grant funds to:
 - i. Procure or obtain;
 - ii. Extend or renew a contract to procure or obtain; or
 - iii. Enter into a contract (or extend or renew a contract) to procure or obtain equipment, services, or systems that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. As described in Public Law 115-232, section 889, covered telecommunications equipment is telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities).
 1. For the purposes of public safety, security or government facilities, physical security surveillance of critical infrastructure, and other national security purposes, video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikivision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate or such entities).



2. Telecommunications or video surveillance services provided by such entities or using such equipment.
 3. Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, in consultation with the Director of the National Intelligence or the Director of the Federal Bureau of Investigation, reasonably believes to be an entity owned or controlled by, or otherwise connected to, the government of a covered foreign country.
- l. Domestic Preferences for Procurements (2CFR 200.322). As appropriate and to the extent consistent with law, BATA should, to the greatest extent practicable under a Federal award, provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products). The requirements of this section must be included in all sub-awards including all contracts and purchase orders for work or products under this award. BATA will implement the Buy America preferences set forth in 2 CFR part 184 as it relates to any infrastructure project.
- B. BATA will continue to review the following sources to ensure that all contracts that BATA enters will include the Federal Transit Administration required and applicable clauses:
 - a. FTA Master Agreement
 - b. FTA Contractor Manual
 - c. National Rural Transit Assistance Program (RTAP)'s Procurement Pro
 - d. FTA Third Party Contracting Guidance (Circular 4220.1F or as amended)
 - e. Clause Matrix on FTA's Third-Party Procurement FAQ's

12.) Federal Grants Administered by the State of Michigan

- A. BATA will adhere to the Michigan Department of Transportation's (MDOT) "Procurement Guidelines for Grantees Receiving Federal Transit Administration Funds via MDOT" revised April 2023 or as amended, for all such procurements.

13.) Capital Purchases Funded with 100% Local Dollars

- A. Capital purchases funded entirely (100%) with local funds can be procured using local preference or any other method provided. Any purchase exceeding \$25,000 requires approval by BATA's Board of Directors.



Guidance used in gathering the above information:

- [Uniform Guidance \(2 CFR 200.318 – 2 CFR 200.327\)](#)
- [Third-Party Contracting Guidance \(Circular 4220.1F Rev. 4\)](#)
- [Fiscal Year 2024 CORTAP Contractors Manual](#)
- [FTA Master Agreement \(Version 30 – November 2, 2022\)](#)
- [RTAP – Procurement PRO – All Federal Clauses](#)
- [Best Practices Procurement & Lessons Learned Manual \(October 2016\)](#)

Current Procurement Method Thresholds – 05/29/2024	
Procurement Method	Threshold
Micro-Purchase	At or below Micro-Purchase threshold (\$10,000 or less)
Small Purchase	At or below Simplified Acquisition Threshold (\$250,000 or less)
Sealed Bids	\$ Any
Request for Proposals	\$ Any
Noncompetitive Procurement	\$ Any – but must meet requirements of section 4.D.c.i.1-5 above



Bay Area Transportation Authority
Policy/Procedure

SUBJECT: ACH Payments Policy
EFFECTIVE DATE: Pending
ISSUED BY: BATA Board of Directors
APPROVED DATE: Pending

I. Purpose

This policy's purpose is to ensure timely payment to vendors to avoid late fees and interest. The current procedure has resulted in payments being processed late, even when sent timely. The United States Postal Service has become less reliable, delivering mail later than expected. We work with vendors to reduce or eliminate fees, but this is time consuming month over month. This ACH policy allows a direct payment to vendors eliminating fees and saving time.

II. Scope

The composition of this procedure will follow the same guidelines outlined to authorize and approve payments to BATA vendors. The purpose of this procedure is to ensure on-time payment to vendors who frequently charge interest or late fees. While our preferred method of payment is a paper check, we can pay vendors securely through their website, or by ACH authorization.

III. Policy

ACH payments may be initiated by authorized personnel with prior approval/reconciliation. Final ACH authorization and approval will be done at the Director level or higher. Payments will be authorized from the same checking account BATA checks are issued.

Types of Transactions allowed by ACH payments include:

- Line of Credit/Credit Cards
 - Hard due dates with the possibility of late fees or interest
- Employee Fringe Benefit(s) – Require monthly reconciliation and authorization approval.
 - Includes Medical, Dental, Vision, or other insurances covering employees and their families.
 - Late payments result in cancellation of coverage.
- Utilities including Internet/Phone Service/Electricity/Gas/Waste/Sewer/Water
 - Late fees apply as well as disconnection if not paid timely.
- Time sensitive invoices, cost-savings processing, and emergency purchases approved by Directors.

ACH Rules include the following:

The Agency will protect the confidentiality and integrity of vendor information. The Agency will protect against anticipated threats or hazards to the security of information and act against unauthorized attempts. Authorizations/Payments will be stored in a safe, secure location and access will be granted to appropriate personnel. Secure and encrypted technology will be used to process ACH transactions. Only authorized personnel will be allowed to initiate and approve ACH transactions. ACH transactions will be reviewed and verified during the reconciliation process, monthly. Documentation will be kept according to the State of Michigan General Retention Schedule for Local Government Financial Records.

Contingency Plan

If the Bank or the Vendor's system is down, and an ACH transaction cannot be originated, the Agency will issue paper checks to vendors. ACH transactions will not be reinitiated more than twice unless verification has been completed with the vendor and the information is changed.

Executive Director

Chair, Board of Directors

Date Approved: _____

To:

Kelly Dunham, Executive Director
BATA Board of Directors

Date: June 21, 2024**From:** Adam BeVier, Operations Manager**Subject:** Request for Purchase of Remix Automated Planning and Scheduling Software

Dear Kelly Dunham & BATA Board Members,

I am writing on behalf of the operations department to request approval for the purchase of the Remix Software for the Operations Department. After conducting thorough research and evaluating our current and future needs, I believe that acquiring this software will provide significant benefits and improvements to our operations.

1. Enhanced Efficiency and Productivity

Remix software offers advanced tools and features that will streamline our workflow and increase our productivity. Its intuitive interface and powerful functionalities will enable our team to complete tasks more efficiently and accurately. The Software's automation capabilities will also reduce the time spent on repetitive tasks, allowing us to focus on more strategic initiatives. Currently, the Operations Department cannot create or design new route options in a reasonable amount of time.

2. Improved Collaboration and Communication

One of the key advantages of Remix is its collaborative features. The software supports real-time collaboration, which will enhance communication and coordination among BATA team members. One example of this is the GTFS feed into GMV. This will lead to more cohesive project management and a more unified approach in our work for the community we serve.

3. Cost Savings

While the initial investment (see enclosure for costs) in Remix software is significant, it will lead to substantial cost savings in the long run. By improving efficiency and reducing the time spent on manual processes, we can achieve more with our existing resources. Additionally, the software's robust data analytics and reporting tools will help us identify areas where we can further optimize and save costs. This software reduces the need for potential future operations staffing.

4. Positive ROI

Based on our analysis, the return on investment for Remix software is projected to be positive within the first year of implementation. The productivity gains, cost savings, and improved project outcomes will outweigh the initial expenditure, making this a financially sound decision.

Conclusion

The purchase of Remix software represents a strategic investment in our department's future. It will enhance our efficiency, improve collaboration, generate cost savings, and help us stay relevant

in meeting community transportation needs. I am confident that this investment will deliver substantial value and contribute to our long-term success.

I request your approval for the purchase of Remix software. Thank you for considering this request. Please let me know if you have any additional information or have any questions.

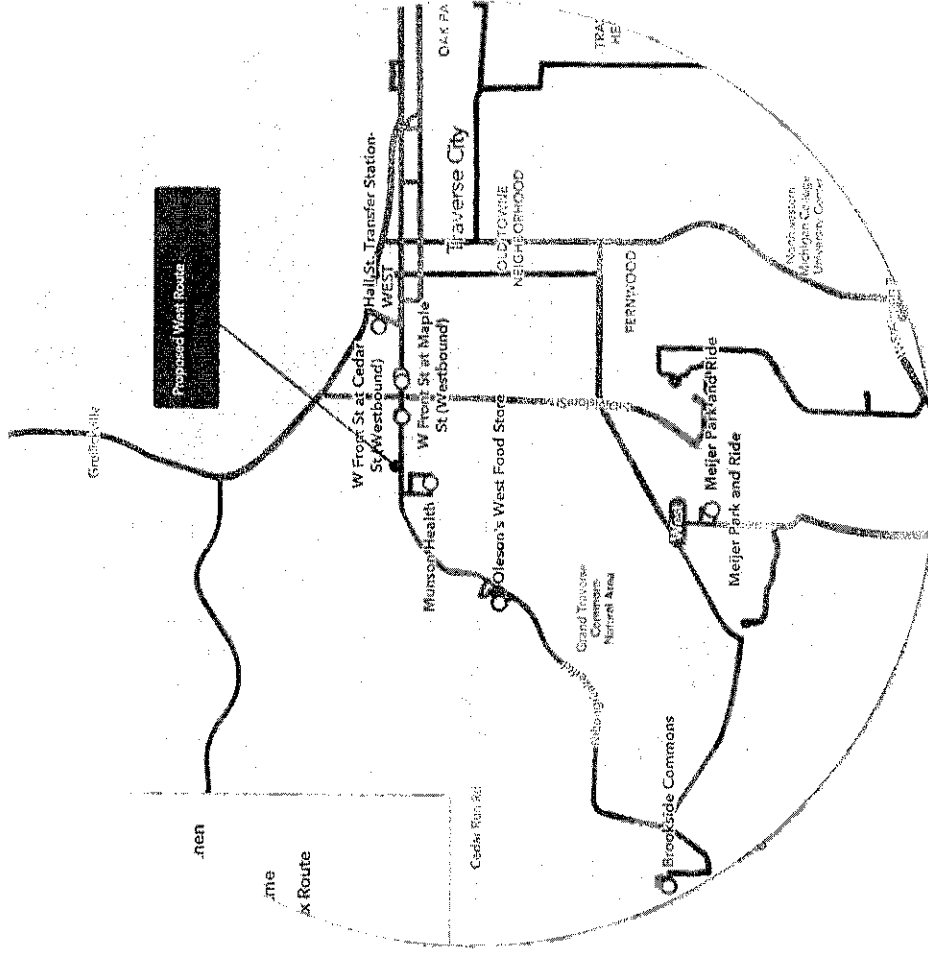
Sincerely,
Operations Department



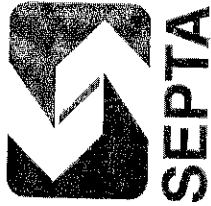
Remix Proposal

Bay Area Transportation Authority

5/9/2024



Remix is Widely Trusted in Michigan and Across the US



193 Routes

Leveraging Remix for SEPTA's "Bus Revolution" - a comprehensive network redesign across both fixed route and microtransit planning



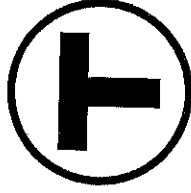
96 Routes

For their network redesign, the "Better Bus Network," Miami-Dade County used Remix for multimodal planning



323 Routes

With Remix NYC MTA completes their borough-by-borough analysis and all route detours



152 Routes

MBTA weighed trade offs between different network variations



REGIONAL
TRANSIT AUTHORITY
OF SOUTHEAST MICHIGAN



The Ride
Ann Arbor Area Transportation Authority



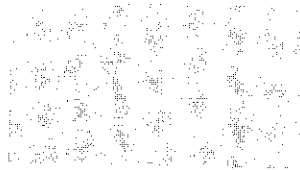
Remix Scheduling

Quantifiable improvements to operational and staff efficiency.

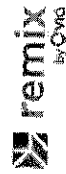


North Central Regional Transit District
reduced driver shifts by 20%

20% reduction

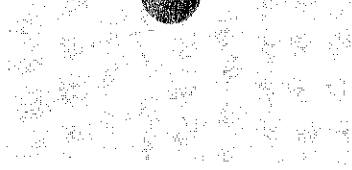


Pre-Remix

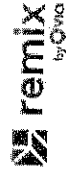


Mountain Line reduced staff time
spent on Scheduling by 75%

75% reduction



Pre-Remix



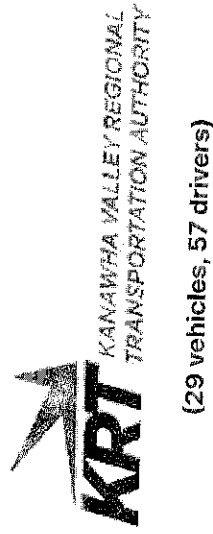
“

Big picture: Remix Scheduling makes my life easier. We used Remix to plan and schedule the system expansion. Now the overtime we have is planned, and we've been able to cut driver overtime in half.

Amy Proseus, Assistant Director of Operations
CoRaleigh (Raleigh, NC)



We have deep experience providing planning and scheduling software for organizations similar to BATA

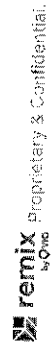


(29 vehicles, 57 drivers)

↓ 5 Fewer vehicles needed

↓ 200+ Fewer driver hours per week

↓ \$1.3M Est. annual cost savings



Proprietary & Confidential.

Remix Planning & Scheduling Pricing Proposal

Remix Proposal for BATA

	Year 1	Year 2	Year 3	Total	Average Annual Product Cost
Installation Fee	\$10,000			\$10,000	
Annual Fee - 1 Year Contract	\$32,500			\$32,500	\$32,500
Total Cost - 1-Year Contract	\$42,500			\$42,500	
Installation Fee	\$10,000	\$0		\$10,000	
Annual Fee - 2 Year Contract	\$31,000	\$32,500		\$63,500	\$31,750
Total Cost - 2-Year Contract	\$41,000	\$32,500		\$73,500	
Installation Fee	\$10,000	\$0	\$0	\$10,000	
Annual Fee - 3 Year Contract	\$29,500	\$31,000	\$32,500	\$93,000	\$31,000
Total Cost - 3-Year Contract	\$39,500	\$31,000	\$32,500	\$103,000	

What's included?

- 1-year free access to Remix On-demand Planning (\$10k value)
- Tailored in person training
- Unlimited users
- Unlimited training & support

REMIX LICENSE

More than just a software platform.

1



Remix Licenses for unlimited users

An annual subscription to our elected software products for your entire staff offers unlimited maps, concept designs, and scenarios to rethink the ROW alongside key Census datasets.

2



A simplified approach to technology

All you ever need is the latest version of a browser window and an internet connection. We'll make sure you have the latest version of Remix without any upgrades, downloads, or installation needed.

3



Learnings from across the nation and the world

There are 500+ transit agencies relying on Remix for their most critical work. As we enable them, we enable you. Benefit from their ideas as we evolve alongside a global network of innovative thinkers.

Purchasing best practices.

We have extensive experience replacing legacy systems, while making the change management process an easy one for planners, schedulers, and operators. We have refined our tactics based on the lessons from these transitions.

1. Add it into your existing contract!

- Pro-rate to existing contract or renewal
- Save time and avoid an RFP – less paperwork!
- Remix is sole-source-able and we have documentation to help

2. Easy on budgets!

- Existing partners get discounted pricing and perks

3. Up and running fast!

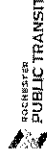
- We already have your data: ready to go!
- Same Partner Success Team: you know Ben!
- We integrate with all major CAD/AVL vendors

4. Only platform with microtransit planning capabilities

- Automatic integration with Via data



400+ Remix Customers



... and more



BATA Link

Service Design Review



May 23, 2024 (originally presented)

2024 Recap

BATA Link has strong demand, but not enough supply for its size; bringing down rider experience and overall service efficiency



18,206 requests / month

Demand has remained relatively stable; suggesting we've reached an equilibrium



25+ min ETAs

For some on demand rides; particularly in the Outer Zone; this has driven de-facto Pre-booking behavior



2.4 rides per driver hour

The large zone size is preventing this service from being more efficient



72.5% rides are now pre-booked

As riders feel they cannot rely on On Demand rides

2024 Recap

BATA Link is really two different services; each with its own rider needs, behaviors, and expectations



Small Urban Zone (Core Zone)

- ✓ Quick, casual trips around town
- ✓ Supplements fixed route service
- ✓ Must be convenient (low ETAs)



Large Rural Zone (Outer Zone)

- ✓ Longer, pre-planned trips in/out of town
- ✓ Functions like a Dial-a-Ride
- ✓ Must be reliable (high PB availability)

2024 Recap

Trips within the Core Zone look very different than those in the Outer Zone

In January:

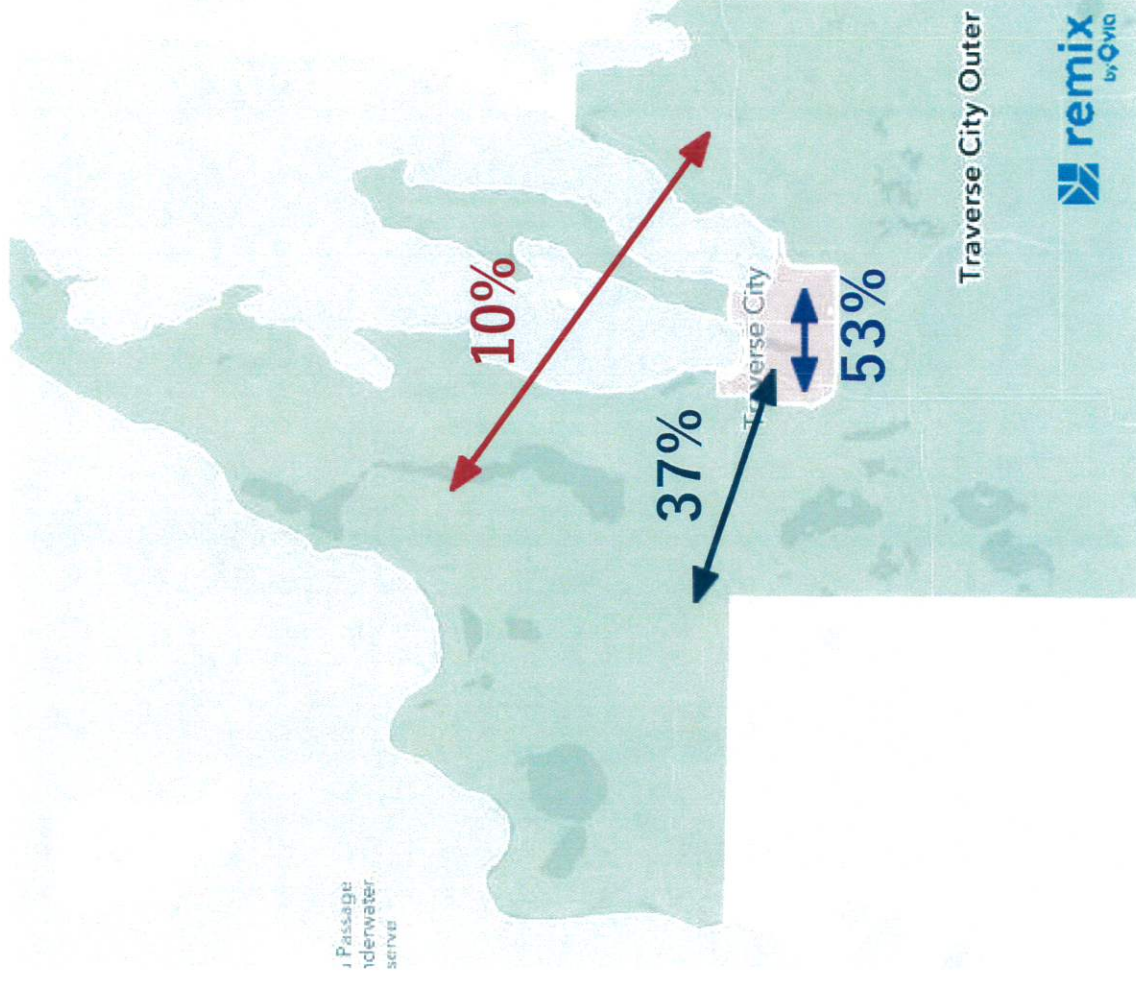
- 53% of rides were Core to Core
- 19% were from Outer to Core
- 18% were from Core to Outer
- 10% were from Outer to Outer

And since service began:

Core to Core rides take 14 minutes and travel 4 miles on average.

Core to Outer and Outer to Core rides take 27 minutes and travel 11 miles on average.

Outer to Outer rides take 23 minutes and travel 12 miles on average.

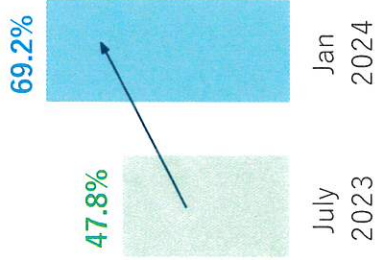


2024 Recap

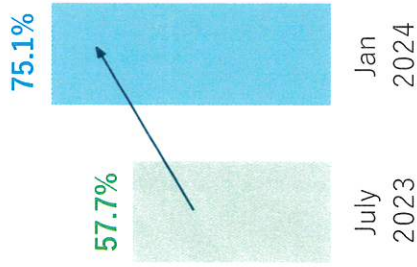
A Vicious Cycle: Low supply means long ETAs, so riders pre-book, further reducing supply, which means longer ETAs...

Pre-Booked Rides by Zone

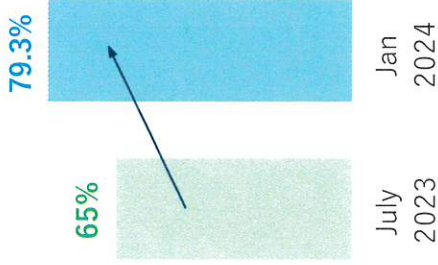
Core to Core
+21.4%



C2O / O2C
+17.4%



Outer to Outer
+14.3%



In the Core Zone; most riders initially wanted On Demand rides

Link Service Stats

Month	October	November	December	January	February	March	April	May
Total Requests	17,848	16,481	16,625	19,325	17,799	18,607	17,476	18,575
Met Demand	14,193	13,040	13,256	15,309	14,13	15,399	14,621	14,658
Met Demand % (06:00-12:00)	79.5%	79.1%	79.7%	79.2%	83.2%	82.8%	84.9%	78.9%
(12:00-1800)	80.4%	79.1%	82.8%	82.8%	82.9%	81.4%	81.4%	76.5%
(20:30-22:30)	88.3%	89%	87%	87%	85.7%	86.8%	90.2%	82.6%
	60.1%	54.4%	55.8%	55.8%	69.5%	62.7%	72.1%	63.5%
Completed Rides	8,764	8,547	8,564	9,617	9,532	9,660	9,476	9,440
Driver Hours	3,785	3,775	3,582	3,967	3,817	4,102	4,312	4,217
Utilization	2.3	2.3	2.4	2.4	2.5	2.4	2.2	2.2
No-Show %	2.7%	2.4%	2.7%	2.8%	2.4%	2.9%	1.5%	1.7%

Checking Assumptions

1

Twin Goals: Cover entire zone while serving as many riders as possible; but open to Via's recs on best way to achieve that.

2

Supply Constraints: BATA has had trouble hiring and sourcing vehicles; will only have up to 29 vehicles available for the next 12 months.

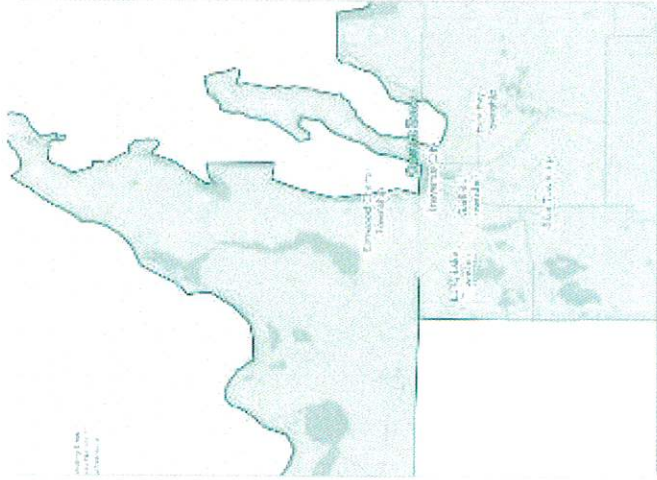
3

Remix: Long-term, BATA is looking at planning/scheduling software to tweak future zones, redesign existing and add new Fixed Routes.

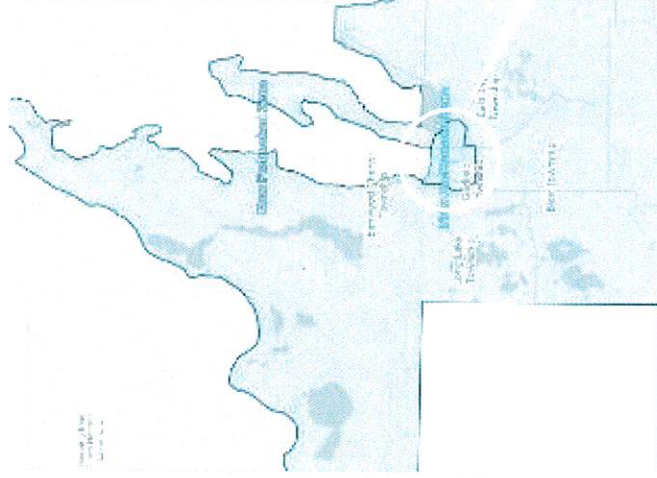
Recommendation 1A: Zone Boundaries

We recommend splitting the current zone into a smaller on-demand zone and a larger pre-booked zone

Current Service



New Service Design



Impact

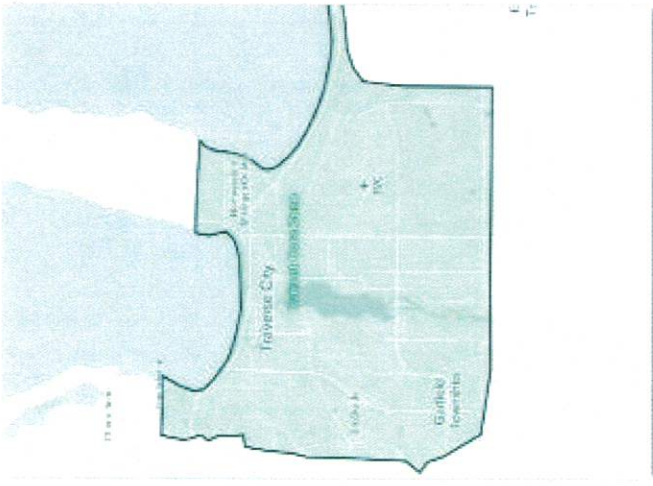
- ✓ Increased reliability for longer, PB trips
- ✓ True OD convenience for short micro trips
- ✓ Better overall service efficiency
- ✓ Balance between OD and PB rides

Traverse City becomes all On Demand; everywhere else is all Pre-booked

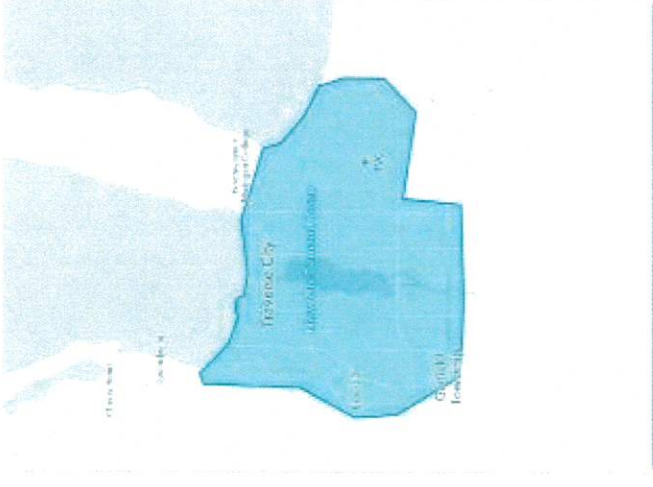
Recommendation 1A: Zone Boundaries

This new zone is similar to your current Inner Zone; but has been optimized for easy, efficient On Demand service

Current Service



New Service Design



Redesign Process

In redesigning this zone, Via considered:

- Quarterly and weekly Via rides (Demand)
- Geography; compact zone with greater population density
- Complementing, not duplicating Fixed Route
- Demographics, poverty, car ownership

Recommendation 1B: Ride Patterns

Under this new arrangement, all Core trips would be OD, everything else would be PB; Riders' destinations now inform their ride type

Pick Up	Drop Off	Ride Type	Additional Considerations
Outer Zone	Outer Zone	Pre-Booked	Do we want to break up the outer zone into smaller sub-zones?
Outer Zone	Core Zone	Pre-Booked	Do we want to encourage FMLM trips / target specific connections to Fixed Route?
Core Zone	Outer Zone	Pre-Booked	
Core Zone	Core Zone	On Demand	Do we want to turn on mode preference; pushing riders to take Fixed Route where convenient?

Recommendation 1: Simulations

Splitting into two zones with the same vehicle supply will yield more rides, more efficiency, and a lower cost per trip

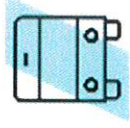
	Current Service	New Design	Potential Impact
Completed Rides	355	420 ¹	↑ 18%
Number of Vehicles	19	19 ²	↔
Utilization	2.3	2.7	↑ 17%
Cost per trip	TBD	TBD	↓ 15%

¹ Assumes seat availability remains at ~80 - 90% (similar to current levels). However, if demand is lower than expected, seat availability will likely exceed 90% with fewer completed trips.

² Assumes 13 vehicles for PB service; 6 vehicles in OD

Recommendation 1: Simulations

However, to meet BATA's goals for quality of service and to grow ridership, Via recommends increasing fleet size by 20%



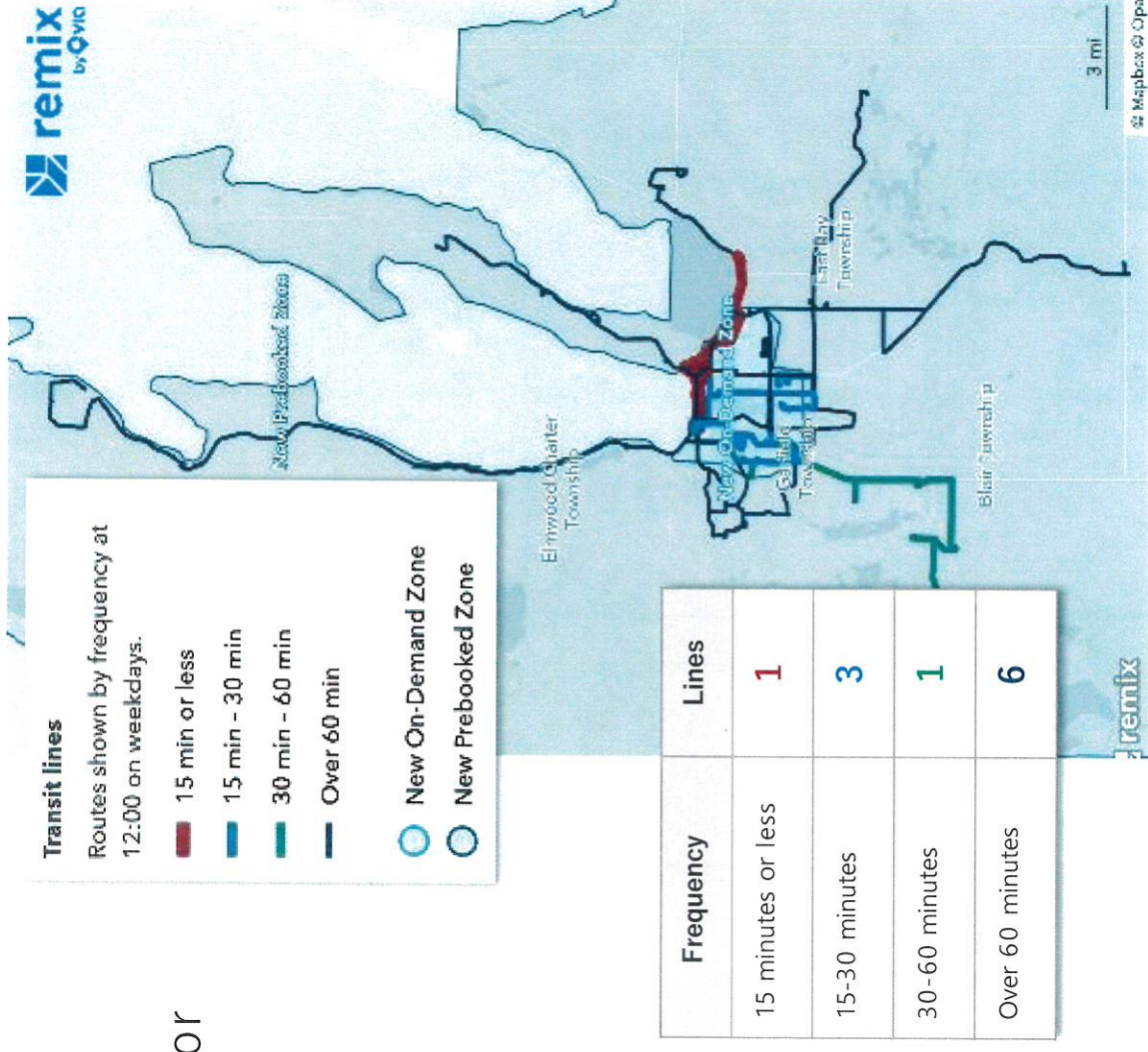
25 - 30 vehicles

- ✓ Increased met demand
- ✓ Decreased wait times
- ✓ Better PB experience
- ✓ More riders, more often

Looking Ahead: Integrated Transit

Future Analysis: Consider enhancing or replacing low performing fixed routes

- Long Fixed Routes + low ridership = low productivity and high costs
- Some of BATA's Fixed Routes are averaging ~3 rides/vehicle rev hour
- Fixed-route frequencies > 60 min may discourage riders from intermodal trips as transfers can be hard to time
- Enhance FR: Drive more riders to FR through:
 - ✓ Core Zone → Mode Preference
 - ✓ Outer Zone → Intermodal



Discussion + Next Steps

May/June

Workshop; commit to (and begin planning) zone + ride pattern changes

August

Research compliance; focus on rider comms + education

Fall

Implement new zones; Assess impact

