



BATA Board of Directors Meeting Agenda
Thursday, September 26, 2024 @ 1:00pm
115 Hall St, Traverse City, MI

1. Call to Order - 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 on the agenda is approved by a single Board action adopting the consent calendar.
Consideration of Approving the following Minutes
 - a. *Regular Board of Directors Meeting Minutes of August 15, 2024*
 - b. *Special Board of Directors Meeting Minutes of September 5, 2024*
Consideration of Accepting the following Minutes and Reports
 - c. *August Income Statement*
 - d. *BATA Board Tracker*
 - e. *Staff Compliments*
7. Any items removed from the Consent Calendar
8. Executive Director's Report – Kelly Dunham
9. Chairperson's Report – Richard Cochrun
10. Old Business
11. New Business:
 - a. FY24 Q1 and Q2 Impact Index Results
 - b. FY25 Impact Index and Workplan
 - c. Strategic Communications Plan Presentation - Eric Lingaur / Jennifer Lake (Brand Tonic)

12. Board Discussion Item
13. Second Public Comment*
14. Directors Comments/Open Floor
15. Adjournment

BATA Regular Board of Directors Meeting Minutes

Location: BATA Transfer Station, 115 Hall St. Traverse City, MI

Date/Time: 10:00 AM, Thursday, August 15, 2024

1. Call to Order

The meeting was called to order by Chairperson Richard Cochrun at 10:04 AM.

2. Pledge of Allegiance and Moment of Silence

3. Roll Call

- John Sommovilla - PRESENT
- Wayne Schmidt – PRESENT
- Gwenne Allgaier - PRESENT
- Joe Underwood – TARDY ARRIVED @ 10:06
- Scott Sieffert - PRESENT
- Brad Jewett - ABSENT
- Richard Cochrun - PRESENT

4. First Public Comment*

Justin Reed addressed the Board with concern on behalf of Traverse House. Concerns that were shared are that quite a few people that use BATA on a regular basis are not able to schedule rides further out than 1 day. Also concerns with the ease of the app. Some people are struggling to use the app to schedule rides.

5. Approval of Agenda/Declaration of Conflict of Interest

Richard Cochrun requested adding the Oath of Office for Gwenne Allgaier as item 6a.

Moved by Scott Sieffert and supported by Wayne Schmidt to approve the August 15, 2024, Regular Meeting Agenda as amended.

- Ayes: 6
- Nays: 0
- Motion Carries: 6-0

6a. Oath of Office for Gwenne Allgaier

Gwenne Allgaier recited and signed the Oath of Office.

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

- a. Regular Board Meeting Minutes of June 27, 2024

Consideration of Accepting the Following Reports

- b. FY24 Q3 Ridership Report
- c. FY24 Q3 Turnover Report
- d. Correspondence – Staff Compliments
- e. BATA Board Tracker

Requested by Richard Cochrun to pull item 6b for discussion.

Moved by Joe Underwood and supported by Wayne Schmidt to approve the August 15, 2024, Consent Calendar as amended.

- Ayes:6
- Nays: 0
- Motion Carries: 6-0

7. FY24 Q3 Ridership Report

Eric Lingaur provided an update on the FY Q3 Ridership. BATA's Transit Master Plan has been in effect for 2 years. Part of the master plan has been to bring back routes and increase our staffing levels. Key updates include:

- Top performing fixed routes include: Bayline, City Loops 1 & 2, and Route 12 Interlochen.
- Increase in rides shown month to month.
- Fixed routes up 50% year over year and about 30% from this time last year.
- Performed over 115,000 rides.

Moved by Joe Underwood and supported by Scott Sieffert to approve the FY Q3 ridership report as presented.

- Ayes: 6
- Nays: 0
- Motion Carries: 6-0

8. Executive Director's Report – Kelly Dunham

Kelly reported that BATA has received the certificate of occupancy permit. Formally welcomed back Commissioner Allgaier. Mentioned that members of BATA's staff will be attending the Michigan Public Transit conference the following week. The FTA will be coming to visit the new headquarters. Harbor Transit will also be visiting the new headquarters. A public open house and a public block party will be in October. The rest of the route improvements will begin on September 3rd.

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

Jerry updated the Board on the procurement of the certificate of occupancy. Passed with a 7-0 vote. A few items still need to be finished, including the installation of the propane tank, which should take place around the end of the first week of September.

9. Chairperson's Report

Richard Cochrun updated the Board regarding the mediation with Grand Traverse County. At this time an agreement has not been reached and remains unresolved. The next scheduled date is September 30, 2024, for a combined hearing.

10. Finance Reports – Justin Weston

Justin provided the FY Q3 Finance Reports, which included the income statements, net position, operating and reserve funds. Key updates include:

- Increased advertising revenue.
- Interest rates remain high into 2024, 5.3885%
- Fuel prices and consumptions have been under expectations.

Moved by John Somnavilla and supported by Scott Sieffert to accept the FY24 Q3 Finance Reports as presented.

- Ayes: 6

- Nays: 0
- Motion Carries: 6-0

11. Old Business

No old business at this time.

12. New Business

a. New Headquarters Budget Update – Jerry Tomczak

Jerry provided an update to the Board on the new headquarters budget. Key updates included:

- NET savings of \$860,000 on the project.
- Absorbed over \$1 million in added scope into the project. Some of those items are:
 - Cross walk
 - Equipment/Mezzanine
 - Security, Video, Alarm and Door Access
 - Shelters at Transfer Station

b. FY2025 Budget Revision – Justin Weston

Justin updated the Board on the FY25 Budget Revision. He provided a comparison between FY23, FY24 and FY25 original and revised budget. Key updates include:

- Budget increase for passenger fares.
- Taxable values increased 8.5% from 2023.
- Funding change from large rural to small urban funding.
- Michigan class investments continue to earn an average of 5.37%
- Propane will be able to be bought in bulk, which should have a significant cost reduction.

Moved by Joe Underwood and supported by Wayne Schmidt to approve the FY2025 revised budget as presented.

- Ayes: 6
- Nays: 0
- Motion Carries: 6-0

c. MERS Contribution – Justin Weston

Justin provided an update to the Board regarding the MERS Contribution. There are two different MERS categories that are funded, Administrative and Driver benefit. Currently the Driver benefit is overfunded at 108% and the Admin side is underfunded at about 95% BATA is requesting approval for a one time contribution to bring it back to 100%

Moved by Wayne Schmidt and supported by Joe Underwood to approve the lump sum payment to the MERS admin defined benefit plan division as presented.

- Ayes: 6
- Nays: 0
- Motion Carries: 6-0

13. Discussion Topic – None this month.

14. Second Public Comment*

Justin Reed asked if with the new housing project on Garfield Rd if BATA would be extending the Route 7 service into Cherryland.

15. Directors' Comments and Announcements/Open Floor

Kelly thanked the Board for being flexible with their time and understanding regarding the time change for today's meeting. TC Housing groundbreaking will be taking place today, August 15th at 3:00.

16. Adjournment

Moved by Scott Sieffert and supported by Joe Underwood to adjourn the August 15, 2024, Regular Meeting of the BATA Board of Directors at 11:19 AM.

Meeting Minutes Submitted by: _____

Meeting Minutes Approved on: _____

Wayne Schmidt, Secretary: _____

BATA's next Board of Directors Meeting will be held September 26, 2024 @ 115 Hall St.

BATA Special Board of Directors Meeting Minutes

Location: BATA Headquarters, 1340 Hammond Rd West. Traverse City, MI

Date/Time: 10:00 AM, Thursday, September 5, 2024

1. Call to Order

The meeting was called to order by Chairperson Richard Cochrun at 10:07 AM.

2. Pledge of Allegiance and Moment of Silence

3. Roll Call

- John Sommavilla - PRESENT
- Wayne Schmidt – PRESENT
- Gwenne Allgaier - ABSENT
- Joe Underwood – PRESENT
- Scott Sieffert - ABSENT
- Brad Jewett - ABSENT
- Richard Cochrun - PRESENT

4. First Public Comment*

No public comment was made.

5. Approval of Agenda/Declaration of Conflict of Interest

Moved by John Sommavilla and supported by Joe Underwood to approve the September 5, 2024, Special Board Meeting Agenda as presented.

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

6. New Business

a. Consideration of authorizing Kelly Dunham to execute the purchase agreement presented for the sale of BATA's Diamond Drive facility.

Kelly provided the Board with the purchase agreement for the sale of the Diamond facility. Key items included:

- 75 days to close.

- Commission Fee dropped from 6% to 5%
- Purchase amount of \$400,000

Moved by Wayne Schmidt and supported by Joe Underwood to authorize Kelly Dunham to execute the purchase agreement submitted by Katy Bertodatto for the purchase of 2470 Diamond Drive as presented.

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

7. **Second Public Comment***

No public was made.

8. **Directors Comments/Open Floor**

No comments made.

9. **Adjournment**

Moved by John Sommavilla and supported by Joe Underwood to adjourn the September 5, 2024, Special Board Meeting of the BATA Board of Directors at 10:13 AM.

Meeting Minutes Submitted by: _____

Meeting Minutes Approved on: _____

Wayne Schmidt, Secretary: _____

BATA's next Board of Directors Meeting will be held September 26, 2024 @ 115 Hall St.

BATA Income Statement August 2024

	August 2024		\$ Over (Under)	August 2023
	Actual	Budget	Budget	Actual
Income				
Fare Box Revenue	\$ 593,300	\$ 486,056	\$ 107,244	\$ 505,571
Local Service Contracts	290,148	276,104	14,044	278,883
Auxiliary Trans Revenue	221,647 <u>1</u>	132,000	89,647	182,139
Non-Trans Revenue	1,945,081 <u>2</u>	688	1,944,393	10,470
Local Revenue	2,868,375 <u>3</u>	4,376,807	(1,508,432)	2,733,539
State Formula & Contracts	4,541,137	4,502,330	38,807	3,315,121
Federal Operating Grants	2,121,793	2,035,541	86,252	1,711,046
CRRSAA/CARES Act	-	-	-	1,589,464
Other Revenue	898,859 <u>4</u>	275,000	623,859	548,306
Refunds and Credits	184,101 <u>5</u>	91,667	92,434	227,804
Total Income	\$ 13,664,442	\$ 12,176,192	\$ 1,488,250	\$ 11,102,344
Expense				
Salaries & Wages	\$ 5,975,378	\$ 6,039,516	\$ (64,138)	\$ 4,363,507
Paid Leave	478,940	478,935	6	404,492
Fringe Benefits	1,893,455 <u>6</u>	1,753,535	139,920	1,916,859
Services	638,697	644,015	(5,318)	653,164
Fuel & Lubricants	644,128 <u>7</u>	851,156	(207,029)	558,218
Materials & Supplies	365,074	413,021	(47,946)	332,085
Utilities	123,562	165,035	(41,473)	122,235
Insurance	647,199 <u>8</u>	575,491	71,709	611,522
Misc Expense	53,888 <u>9</u>	47,180	6,708	40,393
Operating Leases & Rentals	14,559	14,942	(383)	13,809
Total Expense	\$ 10,834,880	\$ 10,982,824	\$ (147,945)	\$ 9,016,285
Net Income before Depreciation	\$ 2,829,562	\$ 1,193,368	\$ 1,636,194	\$ 2,086,059
Depreciation	1,095,501	1,018,072	77,429	1,018,072
Net Income (Loss)	\$ 1,734,061	\$ 175,296	\$ 1,558,765	\$ 1,067,987

BATA Income Statement Notes
August 2024 YTD

	<u>Account(s)</u>	<u>Explanation</u>
1	Auxiliary Trans Revenue	Increased Advertising Revenue
2	Non-Trans Revenue	Sale of Cass Building
3	Local Revenue	Expected to be lower than budget at this point in the year, majority of taxes are collected in the summer months
4	Other Revenue	Interest Rates remain high into 2024 (5.3698%).
5	Refunds and Credits	Alternative Fuel Credit and Insurance Claims
6	Fringe Benefits	Includes Board approved payment to MERS Admin Division \$173k
7	Fuel & Lubricants	Fuel Prices continue to be under expectations, as well as consumption
8	Insurance	Payout for Insurance Claim, Bus Repair #302
9	Misc Expense	Additional Training - Conference Registrations

BATA Board Request Tracker					
Topic	Board Meeting Date Discussed	Board/Staff Member	Status	Date Completed	Notes
BATA Link Service	6/27/2024	Adam BeVier	Will revisit again at the April 2025 meeting.		

COMPLIMENTS TO BATA STAFF

Date Received	Employee	Route #	Comment	Dept
8/19/2024	Nathan Esper	Link 10	I had skinny Nathan as a driver, and he was a fantastic driver. He was not too aggressive or too slow. He drove just perfect on these country roads out here.	
8/23/2024	Stacey/Pete/Kris	Link	I just wanted to give a shout out to Kris, Stacey, and Pete. They are great drives and make it easy for me to ride the bus. Thank you.	
08/26/24			I just wanted to say thank you to all the drivers for being patient with me. I really appreciate it.	
08/28/24	Nikeyia Lacount	7A	I would like you to compliment one of your bus drivers, Nikki, on the Loop bus, van 217, she is awesome. A lot of us older people and handicapped people can't carry our groceries, and not only did she carry the groceries to the foyer, but they also weighed a ton, she carried them down the steps and on the bench near the elevator. She shut off her engine she put on her flashers, and she helped me out she is awesome she needs to be employee of the month have a plaque and maybe a gift card any questions. Nikki is awesome. Thank you. Bye.	
09/03/24	Chris Gorance	14-Dec	Yes, my name is Maureen Saylor. I usually ride on Route 14, but today I rode on Route 12. And I don't know the bus driver's name, but he was wonderful. And I went up to Menards to do some shopping, and I love the new bus stop. Thank you so much. I don't go up there too often, only to get some dog food for my dog, because they're cheaper. Anyway, I just want say thank you for moving it. And you guys are absolutely wonderful. And I simply adore Chris on Route 14. He needs a raise.	
9/13/2024	Shane Johnson/ Dispatch		I want to commend Shane, the link driver with the brand new van that rides like a Cadillac. Well, okay, a Ford. But anyway, he went above and beyond helping me today because he didn't have the lift. And he did so above and beyond. He's a real gentleman, he helped me with my groceries, and thank you for hiring such excellent people. I also would love to commend your entire scheduling team, and I plan to look forward to meeting every one of them at your open house on October 5th. Thank you for having such great customer service.	

September 2024 Executive Director's Report

The Highlight Reel:

Internal

- We moved!
- Continued completion of punch list items at new HQ.
- Continued bringing new technologies online at new HQ.
- Continued working through installation of the propane fueling station at HQ.
- Developing and refining new procedures to operationalize HQ.
- Began procurement efforts for propane vendor to ensure competitive pricing.
- Continued procurement efforts of EV charging stations.
- Continued removal of anything remaining at Cass Road, preparing for hand over to Precision.
- Executed purchase agreement for Diamond with Katy Bertodatto (due diligence period is underway).
- Implemented fall service improvements utilizing the new LaFranier Transfer site.
- Reviewing annual employee benefits renewal impacts and preparing for open enrollment.
- Preparing response to an EEOC age discrimination claim from an applicant not hired.
- End of fiscal year finance activities.

External

- Participated in more than 10 school open houses to educate students and parents about BATA transportation options.
- Provided a tour of HQ to the FTA Region V Administrator and others from her staff.
- Attended the Michigan Public Transportation Association annual conference.
- Provided 209 free rides to the Cedar Polka Fest.
- Began promoting park-n-ride from LaFranier Transfer site.
- Received notice of \$5000 grant award from the Grand Traverse Regional Community Foundation to fund public EV chargers at LaFranier park-n-ride lot.
- Provided an interview to the TC Business News for their upcoming edition focused on transportation.

If you have any questions, please don't hesitate to reach out to me.

Submitted by: Kelly Dunham

Next meeting date:

- *Regular Meeting October 31, 2024 1:00pm*

BATA 2024 Organization Impact Index

Success Outcome	Metric	2023 Benchmark	Performance Goal	Points	Metric Definition	Q1	Pts	Q2	Pts
Customer Experience	Net Promoter Score	58%	61%	10	The percentage of promoters minus the percentage of detractors in response to the Net Promoter Score question	58%	9.5	58%	9.5
	Overall Customer Satisfaction	82%	86%	10	Average percentage of customer satisfaction with BATA's service delivery	82%	9.5	82%	9.5
				20			19.0		19.0
Employee Success	Employee Satisfaction	84%	88%	10	Overall score on annual survey which determines if employees feel they would refer BATA to their friends/family	84%	9.55	84%	9.55
	Employees' Equipped for Success	88%	92%	10	Overall score on annual survey which determines if employees feel as though they have the tools needed to deliver quality service	88%	9.57	88%	9.57
				20			19.1		19.1
Community Value	Special Services Support	*New	TBD	10	Number of rides provided for special service and community support transportation such as festivals, gov't tours, and community high-impact events				
	Community Value	*New	TBD	10	An annual evaluation of the % of the community that sees value in BATA				
				20*	*Beginning 10/1/24				
Financial Success	Cost recovery	9.25%	10%	5	The percent of eligible operating expenses recovered by direct revenues	12.35%	5.0	10.53%	5.0
	Operating Expense per Hour	\$77.64	\$77.64	5	Total eligible operating costs divided by number of service hours	\$91.61	4.2	\$95.40	4.1
	Operating Expense per Mile	\$5.35	\$5.35	5	Total eligible operating costs divided by number of miles	\$6.11	4.4	\$6.53	4.1
	Operating Expense per Trip	\$33.84	\$33.84	5	Total eligible operating costs divided by number trips (Link Only?)	\$ 38.00	4.5	\$ 39.57	4.3
				20			18		18
Safety	Preventable Passenger Injuries per 500k miles	0.34	0.34	5	Number of preventable passenger injuries per 500k miles.	0.00	5.0	0.00	5.0
	Days Since Last Preventable Accident	45	48	5	Highest number of days between all preventable accidents. This includes both non-reportable and reportable collisions. Number can roll over from previous quarters.	33	3.4	27	2.8
	Preventable Reportable Collisions (per 100k miles)	0.3	0.2	10	Number of preventable, reportable vehicle collisions recorded each quarter per 100k miles driven	0	10	0.2	10
	# of days between employee injuries	118	40	5	Number of days between employee reportable injuries	199	5	257	5
				25			23		23
Performance-Based Culture	Average Department Scorecard Score	92%	95%	5	A quarterly average of departmental performance scores	87%	4.4	91%	4.6
	Monthly Departmental Scorecard Results Shared	NA	100%	5	Departmental Scorecard results shared within each department each month		5		5
	Bus Observations by Admin Staff	86%	90%	5	An average of 3 bus observations/quarter performed by each member of the admin staff	86%	4.3	90%	4.5
				15			14		14
Overall Performance Score				100			93		93

BRANDING AND MARKETING

Bay Area Transportation Authority (BATA)

PRESENTED BY:

BRAND TONIC
Jennifer Lake



BRAND MESSAGING

Bay Area Transportation Authority (BATA)

BRAND MESSAGE:

INTRODUCTION

At Bay Area Transportation Authority (BATA), we are more than just a transit system—we are the lifeline that keeps our community connected. Serving Grand Traverse and Leelanau Counties, we are the vital link for residents and visitors alike to access essential services, local businesses, outlying communities, and the natural beauty that defines our region. For those needing to ride or choosing to ride, we connect you to local life.

Whether heading to work, school, shopping, appointments, the airport, or a ride along a bike trail, BATA is here to make your journey smooth and hassle-free. Our fixed-route and on-demand services are designed with your convenience in mind, offering reliable, safe, and friendly transportation solutions that are available to all. Our buses are ADA accessible and our routes are always expanding, making it possible for commuters, cyclists, students, seniors, and everyone in between, to travel with ease aboard BATA. And, with affordable fares, helpful drivers, and easy-to-use apps for payment, route planning, and bus tracking, getting around has never been easier.

At BATA, we are committed to providing services that solve everyday transit challenges while showcasing our neighborly values and community spirit. From essential transportation to convenient travel for festivals, events, road construction projects, and more, we are always evolving to meet needs and ensure a positive impact on our riders and surrounding community.

BATA connects our community, linking people, places, and possibilities so we can all thrive.



BRAND MESSAGING

Bay Area Transportation Authority (BATA)

UNIQUE POSITIONING:

- Fixed-route and on-demand regional transportation services available for all ages, backgrounds, and abilities.
- Bus routes prioritize key destinations in and around Traverse City — community services, local businesses, schools, recreational opportunities, and surrounding villages — to connect people to what matters most.
- Affordable fares and easy-to-use apps for payment, route planning, and bus tracking.

KEY MESSAGES:

- BATA is deeply vested in the community and committed to evolving to meet needs through ongoing improvements to bus frequency and routes, implementing new technology for easy route planning and ticketing, increasing rider comfort and safety, and reducing bus emissions for greener public transportation.
 - For riders who rely on us for transportation, we collaborate with community partners and prioritize areas of greatest need — shopping centers, healthcare services, large employers, community resources, key housing developments, high density neighborhoods, outlying communities, etc. — offering affordable transportation and improved access to everyday necessities.
- For riders who choose us for transportation, we provide travel to popular destinations, including downtown, Grand Traverse Commons, the Leelanau Trail, Sleeping Bear Heritage Trail, airport, area schools, and more to encourage convenient and environmentally-friendly transportation to local life.
- Our routes are far-reaching and responsive to community needs:
 - **City Loop Routes:** Fixed-routes to popular destinations near downtown Traverse City. City Loop routes include Route 1, 2, 7, Bayline, and West Flex.
 - *BayLine Route:* For free travel along East and West Grand Traverse Bay, with stops at hotels, Northwestern Michigan College, grocery stores, downtown, and more!
 - **Village Loop Routes:** Fixed routes to and from the nearby towns of Glen Arbor, Suttons Bay, Interlochen, Kinglsey, Acme, and Williamsburg. Village Loop routes include Route 10, 11, 12, 13, 14.
 - **Student/School Routes:** Seasonal routes for students to Old Mission Peninsula School, The Children’s House Montessori School, Grand Traverse Academy, Woodland School, Leelanau Montessori and Traverse City Area Public Schools (TCAPS).
 - **Link:** Flexible, on-demand, door-to-door ride service, especially for riders and destinations that are not near other routes. Rides must be requested/scheduled ahead of time.



BRAND MESSAGING

Bay Area Transportation Authority (BATA)

KEY MESSAGES — CONTINUED

- Fares can be paid with cash, fare cards, or with the Journey app. Reduced Fare Cards offer a 50% discount to those who qualify — seniors, veterans, active military, and persons with disabilities.
- BATA provides best-practice ADA-compliant transit services, continuously striving for equitable access and inclusive processes as new transit services are developed.
 - Every bus is equipped with lifts to provide access for riders with wheelchairs and other mobility devices or impairments. Our Adopt-a-Stop program utilizes volunteers to keep bus stops clear of snow and accessible for all riders during the winter season.
 - Service animals are welcome on all BATA buses, and our pet policy allows for travel with support animals and small pets when conditions are met.
- All buses are equipped with bike racks, allowing riders to combine bike and bus transportation year-round. This added convenience helps some bridge a gap between home and the bus stop and encourages others to utilize local trails and environmentally-friendly transportation.
- Park-n-Ride lots are available in Traverse City, Kingsley, Acme, Interlochen, and Peshawbestown
- Additional Services:
 - BATA Buddy: Learn to ride BATA with the assistance of a buddy to teach you how to ride and help you gain confidence in riding independently.
 - Bike-n-Ride to the Leelanau Trail and the Sleeping Bear Heritage Trail
 - Ski-n-Ride to local ski resorts
 - Airport and hotel transportation
 - Festival Shuttles: Cherry Festival and Cedar Polka Fest
 - Interlochen Center for the Arts: For students, faculty and concert goers.
 - Regional connections and multi-mobility options



BRAND MESSAGING

Bay Area Transportation Authority (BATA)

KEY MESSAGES — CONTINUED

- BATA provides important public transportation services that benefit the Traverse City area in many ways:
 - **Better Access to Essentials:** BATA buses help people get to work, school, healthcare, and recreational activities easily. This makes life better for everyone.
 - **Boosting the Local Economy:** We do more than just provide rides. By making it easier for people to visit shops and attractions, it helps increase sales and encourages new businesses to open. This also creates more jobs in the community.
 - **Helping the Environment:** Using buses instead of cars reduces traffic, lowers pollution, and keeps the air cleaner. This makes Traverse City a healthier and more attractive place to live and visit.
 - **Working with the Community:** BATA partners with local businesses and organizations to improve its services. These partnerships help meet the needs of the community and support local events, making Traverse City a more connected and engaged place.
 - **Supporting Transit-Oriented Housing:** BATA is dedicated to connecting the dots between transit, affordable housing, and jobs to make it easier for individuals to live and work in the Grand Traverse region. Together with partners like the Traverse City Housing Commission, we are helping to make much-needed progress on these crucial community issues, benefitting local families, employers, and our economy.
 - **Driving Prosperity:** BATA is crucial for the growth and well-being of our region. By providing reliable transportation, supporting the economy, and protecting the environment, BATA helps create a vibrant and prosperous community for all.

ADDITIONAL BRAND RECOMMENDATIONS:

- Use simple, high level information to connect with the public. This allows for easy entry into understanding BATA, with additional details provided on the website, brochures, etc.
- Consider an information hierarchy to organize information, prioritizing information most relevant rider and the general public while giving less emphasis to information relevant to community partners, very specific audiences, events, etc.
- Consider adding key categories, such as Main Services, Additional Value Services, Community Partnerships, to organize information and limit individual program names, when possible.
- Keep all content on the website and print materials year-round (ex. ski-n-ride, Cherry Festival shuttle, etc.).
- Continue to use “need to ride” and “choose to ride” to help riders see themselves in BATA and recognize the importance of BATA’s services for others too.



BRAND RECOMMENDATIONS AND VISUALS

Bay Area Transportation Authority (BATA)

• TONE/PERSONALITY:

- Community-centered/Collaborative
- Welcoming/Neighborly
- Adaptable/Solution-oriented
- Approachable/Easy to Understand

• VISUAL BRAND THEME:

- **Goals:** Bring fresh energy to the brand. Educate the public with simple graphics. (How to use BATA) Showcase local region and highlight real riders.
- **Colors:** Utilize current BATA blue and green, but expand the palette to bring warmth (gold) and stability (dark blue). Use tints and gradients to create a fresh look that is inviting, and distinct.
- **Photography:** Real people/riders, show diversity, keep it casual.
- **People campaign:** Highlight a route with each rider's points of connection called out, to tell a visual story. This allows others to see how BATA can connect you to various resources around the community. (appointments, shopping, work, friends, trails, school, etc.)
- **BATA 101:** Infographics are used to explain How to Ride BATA. (Types of services, how to pay, apps, etc.)
- **Other Graphics elements for design enhancement:** Map of TC from the wall, system routes, dot pattern.
- **Headlines:** Short, catchy, utilizing words that relate to BATA (ride, loop, route, going places)
- **Tone:** Positive, fresh, easy to understand, friendly.

• SLOGANS/HEADLINES

Connecting our Community
 Connecting People, Places, and Possibilities
 Ride Together, Thrive Together
 Connecting You to What Matters
 We Drive Community Connections

Get in the LOOP
 Your LINK to the community
 Let's GO places
 Take the scenic ROUTE
 Come along for the RIDE
 RIDE and shine

BATA

FREE along with bays



bayline

In Traverse City



city loop

Out to neighboring villages



village loop

Schedule on-demand



link

Let's get a MOVE on.

- 1 PLAN your trip.
- 2 TRACK your bus.
- 3 PAY your fare.

You're ready to RIDE!

TRAIL HEAD

With BATA
I take the scenic ROUTE.



Jackson, BATA rider

HOME

Come along for the RIDE.

BATA

Connecting our community.

connect



With BATA
I'm in the LOOP.



Whether work or play, BATA connects you to the community.

Nathan, BATA rider

WORK

HOME

BATA

We connect you to the community.

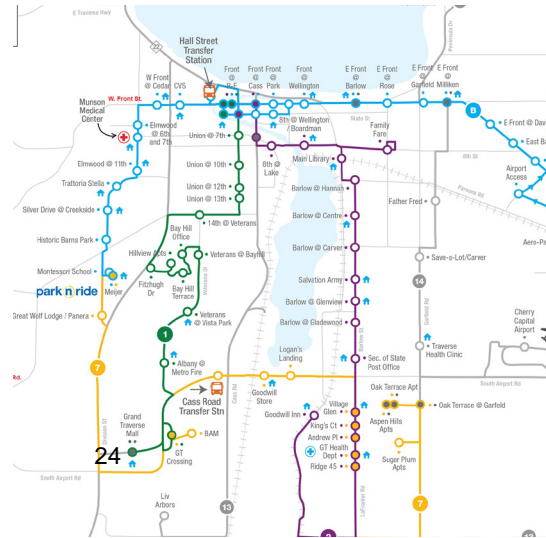
With BATA
I'm GOING places.



Beth, BATA rider

MEDICAL APPOINTMENT

HOME



With BATA
I can RIDE and shine.



Chloe, BATA rider

SCHOOL

HOME

BATA

**BRAND IMAGE
EXAMPLES**

Digital Ads / Social



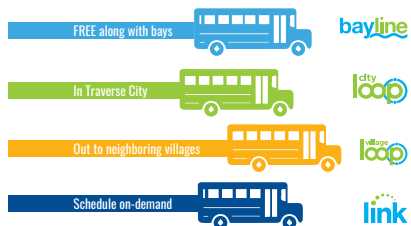
Station / Shelter Signs



Bus Wraps



Direct Mail



BATA 101: graphics



COMMUNICATIONS PLAN

Bay Area Transportation Authority (BATA)

PROCESS:

- Research: Community Survey, Focus Groups, Internal Discovery Meetings
- Findings Report
- Budget Development
- 1-year Strategic Communications Plan and Social Media Calendar (General Awareness & Targeted Campaigns)

COMMUNICATION PLAN: Oct 2024 - Sept 2025 *(Snapshot Here)*

YEAR-ROUND EFFORTS: GENERAL AWARENESS			
Season	Focus	Tactic	Tactic Details and Specs
All-Year	General	Social	Boosted Posts to Current Followers as Needed
All-Year	General	Digital	TC and Lealanau Ticker
All-Year	General	Social	Sponsored Posts to Non-Followers
All-Year	General	Signage	Misc. and Route Updates
All-Year	General	Bata Properties	Bus Wraps (x7)
All-Year	General	Bata Properties	Bus Shelters (x30)
All-Year	General	Broadcast - Radio	30-second spot. Rotating
All-Year	General	Broadcast - TV	30-second Spot
All-Year	General	Digital	Paid Search Ads on Google
All-Year	General	Digital	Paid Display Ads through Google Network
All-Year	Seniors	Advertising - Print	Senior Center Newsletter
QTR 1: Winter 2024: Focus on LaFranier/New HQ			
Season	Focus	Tactic	Tactic Details and Specs
Q1: Fall 2024	General	Photo / Video	Shoot #1: Capture downtown, Beaches, Lafranier Area
Q1: Fall 2024	General	Photo / Video	Web Video #1: BATA 101: Explain services, routes, and how to pay
Q1: Fall 2024	General	Social	Branded social templates to use for in-house posts from BATA
Q1: Fall 2024	General	Social	Sponsored Posts targeted non-followers promoting BATA Basics
Q1: Fall 2024	General	Broadcast - Radio	30-second spot covering BATA Basics: services, routes and how to ride
Q1: Fall 2024	General	Photo / Video	Production TV Spot #1: General Overview
Q1: Fall 2024	General	Broadcast - TV	Run TV Spot #1 General Overview
Q1: Fall 2024	General	Direct Mail	Apartments, Senior Centers, Hotels
Q1: Fall 2024	General	Photo / Video	Web Video #2: Understand the Routes
Q1: Fall 2024	General	Digital	Website Enhancements: Simplify Landing Page
Q1: Fall 2024	General	Photo / Video	Web Video #3: Mobile Tools
Q1: Fall 2024	General	Digital	TC Ticker (September 25) (1)
Q1: Fall 2024	General	Digital	TC Ticker (October 29) (2)
Q1: Fall 2024	General	Digital	TC Ticker (November 19) (3)
Q1: Fall 2024	Kingsley	Photo / Video	Shoot #2: Capture west-side and Kingsley
Q1: Fall 2024	Lafranier	PR	Press Release #1: Promote New HQ, Open House & Block Party
Q1: Fall 2024	Lafranier	Event	Signs, Bags, Swag
Q1: Fall 2024	Lafranier	PR	Media Alert: Attract media to open house and block party
Q1: Fall 2024	Lafranier	PR	Press Release #2: Open House and Block Party
Q1: Fall 2024	Lafranier	Direct Mail	Lafranier Communities Direct Mail promote service from new transfer st
Q1: Fall 2024	Lafranier	PR	Open House 1: Invited Guests
Q1: Fall 2024	Lafranier	Photo / Video	Open House 1: Invited Guests (Social Posts)
Q1: Fall 2024	Lafranier	PR	Open House 2: Block Party
Q1: Fall 2024	Lafranier	Photo / Video	Open House 2: Block Party
Q1: Fall 2024	Lafranier	Digital	Paid Search: Geo-Target Lafranier area
Q1: Fall 2024	Lafranier	Digital	Paid Display Ads: Geo-Target Lafranier area
Q1: Fall 2024	Lafranier	Bata Properties	Bus Shelters (x10) City Loop Focus
Q1: Fall 2024	Lafranier	Bata Properties	Bus Wraps (x3) City Loop Focus
Q1: Fall 2024	Seniors	Advertising - Print	Senior Center Newsletter



BUDGET

Bay Area Transportation Authority (BATA)

One-Year BATA Marketing and Media Budget

MEDIA BUYS/ADVERTISING

Broadcast

- TV - Continue or Renew TV Contract \$13,800
 - Radio - Continue or Renew Trade Trade
- \$13,800**

Digital

- TC and Leelanau Ticker Ads \$3,600
 - Boosted Posts and Targeted Ads \$20,000
- \$23,600**

Print Ads

- Senior Center Newsletter (12 issues, 1/3 page) **\$2,200**

Signage

- Replace Airport Banner \$300
 - Miscellaneous / Route Updates \$700
- \$1,000**

BATA Properties

- BATA Wraps (Production Cost) \$7,000
 - BATA Shelters (Production Cost) \$3,000
- \$10,000**

TOTAL: \$50,600

PRINT MATERIALS

Outreach Materials

- QR Code Handout for General Use \$1,500
 - QR Code Handout for Hospitality \$4,500
 - BATA Posters \$600
 - BATA Trifold \$600
- \$7,200**

Direct Mail

- Lafranier Community Direct Mail \$1,100
 - Hotel, Apartments, and Senior Centers \$500
- \$1,600**



BUDGET

Bay Area Transportation Authority (BATA)

DIGITAL MATERIALS

Website Edits **\$3,500**
(Home page enhancement and one landing page)

PROFESSIONAL AGENCY FEES

Brand Tonic **\$45,000**

Creative Development – Advertising, Print Materials
Brand Consulting & Support Elements
Media Management
Website Copy & Graphics
Project Management & Meetings

iSee Communications **\$18,600**

Photo and Video Shoots (Three shoots w. 2 person crew) \$4,800
Photo Edits and Testimonial Capture \$1,000
Video and Photo Project Management and Meetings
 • Creative Service and Scriptwriting \$3,200
Video Edits for Web (4 x \$2,000) \$8,000
 • BATA 101 Full System Overview video
 • Get to know the Mobile Tools
 • Understanding the Routes
 • How to Pay

Video Edits for TV (2 x \$800)* \$1,600
 • General
 • Kingsley + General

**Cost estimate assumes prior edit for web*

TOTAL **\$126,500**