



## RTA BOARD AGENDA

**Wednesday, March 5, 2025 at 9:00 AM  
BOARD OF SUPERVISORS' CHAMBERS  
COUNTY GOVERNMENT CENTER  
1055 Monterey Street, San Luis Obispo, California 93401**

**Teleconference Location:  
Sterling Hotel, 1300 H Street, Sacramento, CA 95814**

The AGENDA is available/posted at: <http://www.slorta.org>

**President: Jimmy Paulding**

Board Members:

John Peschong (First District – SLO County)  
Bruce Gibson (Second District – SLO County)  
Dawn Ortiz-Legg (Third District – SLO County)  
Jimmy Paulding (Fourth District – SLO County)  
Heather Moreno (Fifth District – SLO County)  
Aileen Loe (Arroyo Grande)

**Vice President: Carla Wixom**

Heather Newsom (Atascadero)  
Cassi Dee (Grover Beach)  
Carla Wixom (Morro Bay)  
Fred Strong (Paso Robles)  
Ed Waage (Pismo Beach)  
Erica Stewart (San Luis Obispo)

Individuals wishing accessibility accommodations at this meeting under the Americans with Disabilities Act (ADA) may request such accommodations to aid hearing, visual, or mobility impairment (including Limited English Proficiency) by contacting the RTA offices at (805)541-2228 x4833. Please note that 48 hours advance notice will be necessary to honor a request.

RTA, de acuerdo con la Ley de Estadounidenses con Discapacidades (ADA), acomodará a las personas que requieran una modificación de la adaptación para participar en esta reunión. RTA también se compromete a ayudar a las personas con dominio limitado del inglés a acceder a los servicios públicos esenciales de la agencia y a la información pública en español. Para solicitar una adaptación, por favor llame al (805)541-2228 x4833. Requerimos al menos 48 horas de anticipación para proporcionar adaptaciones razonables.

### **CALL MEETING TO ORDER, ROLL CALL**

**PUBLIC COMMENT:** The Board reserves this portion of the agenda for members of the public to address the San Luis Obispo Regional Transit Authority Board on any items not on the agenda and within the jurisdiction of the Board. Comments are limited to three minutes per speaker. The Board will listen to all communication, but in compliance with the Brown Act, will not take any action on items that are not on the agenda.

### **EMPLOYEE RECOGNITION**

- Employee of the Quarter
- Employees who Attained 10- and 20-Year Awards

**A. CONSENT AGENDA:**

- A-1 RTA Executive Committee Meeting Minutes December 11, 2024 (Information)
- A-2 Joint SLOCOG/RTA Board Meeting Minutes of January 8, 2025 (Approve)
- A-3 RTA Board Meeting Minutes of January 8, 2025 (Approve)
- A-4 2025 Youth Ride Free Program (Approve)
- A-5 Employment Agreement with Executive Director (Approve)
- A-6 Authorize Revised SB125 Cooperative Agreement and Contactless Fare Program Agreements (Approve)
- A-7 Authorize Agreement for Bus Engine Replacements (Approve)
- A-8 Authorize Agreement for Bus Charging & Electrification Study Services (Approve)
- A-9 Mid-Year FY24-25 Strategic Business Plan Results (Receive)
- A-10 Authorize Procurement of CAD/AVL System for Demand Response Services (Approve)

**B. INFORMATION AGENDA:**

- B-1 Executive Director's Report (Receive)
- B-2 Battery-Electric Bus Operational Results (Receive)
- B-3 Presentation of Draft Short-Range Transit Plan (Review and Comment)

**C. ACTION AGENDA:**

- C-1 Fiscal Year 2025-26 Budget Assumptions (Approve)
- C-2 Agreement to Operate Atascadero Dial-A-Ride Services (Approve)
- C-3 Environmental Documentation for Inductive Charging Stations (Approve)
- C-4 Public Participation Process – Fare and Service Changes (Approve)

**D. CLOSED SESSION:**

None

**BOARD MEMBER COMMENTS**

The next regularly-scheduled RTA Board meeting is scheduled for May 7, 2025



## San Luis Obispo Regional Transit Authority

### Executive Committee Meeting

Minutes 12/11/2024

A-1

Members Present: Jimmy Paulding, District 4 Supervisor, **Vice President**  
Debbie Arnold, District 5 Supervisor, **Past President**

Members Absent: VACANT, **President**

Staff Present: Geoff Straw, Executive Director  
Anthony Kalvans, Administrative Assistant  
Jon Ansolabehere, RTA Counsel  
Pete Rodgers, SLOCOG Executive Director

Public Present: Eric Greening

1. **Call to Order and Roll Call:** **Vice President Jimmy Paulding** called the meeting to order at 10:01 a.m. and roll call was taken. A quorum was present.
2. **Public Comment:**  
**Mr. Eric Greening** thanked Ms. Debbie Arnold for her service and willingness to listen to others. He also asked about bus routing and adding a bus stop shelter to the Route 9 North in downtown Atascadero. **Mr. Straw** said that the RTA works closely with the City of Atascadero regarding detours and has a ridership standard for bus shelters.
3. **Closed Session:** None
4. **Consent Items**  
A-1 Executive Committee Meeting Minutes of October 9, 2024 (Approve)

Public Comment:

There was no public comment given on this item.

**Ms. Debbie Arnold** motioned to approve, seconded by **Mr. Paulding**. There was unanimous consensus of those present to approve the meeting minutes as is.

<b><u>BOARD MEMBER</u></b>	<b><u>YES</u></b>	<b><u>NO</u></b>	<b><u>ABSENT</u></b>
DEBBIE ARNOLD	X		
JIMMY PAULDING	X		
VACANT			X

5. **Information Items:**

B-1 Executive Director's Report (Verbal, Receive)

**Mr. Straw** started his report by informing the Committee of the continued work towards consolidation with Morro Bay Transit and Atascadero Transit. The Morro Bays agreement is slated for approval at the January Board meeting while Atascadero's may get pushed off until the March meeting.

**Mr. Straw** gave an update on Bus Operator recruitment and said that there are two open bids left to fill. In addition, he said that once the hiring situation stabilizes the RTA will look into restoring express and tripper services.

Finally, **Mr. Straw** gave an update on the battery-electric buses. He noted that they have traveled over 34,000 miles and that while energy efficiency is better than expected on the Route 9, he did note that the rear tires are wearing out quicker than those of diesel-powered buses.

**Mr. Paulding** brought up the topic of increased growth in Nipomo and that the Route 10 only serves the east side of the freeway. A discussion ensued on potential challenges and solutions for increasing service for the west side of Nipomo.

Public Comment:

**Mr. Greening** said he understands the Route 10 challenges. He also brought up the electric bus wrap and his concerns about visibility for riders. A discussion ensued.

B-2 Summary of SRTP Working Papers (Verbal, Receive)

**Mr. Straw** gave an update on the Short-Range Transit Plan (SRTP) and noted the consultant is currently developing Working Paper #8 Joint Coordination Opportunities. He also noted that Working Paper #6 Marketing has been delayed so it can be released at the same time as SLO Transits'.

Public Comment:

**Mr. Greening** said he is looking forward to the finished plan, and asked about having the RTAC Minutes available for the RTA Board to review.

6. **Action Items:**

There were no action items for the Committee to consider

January 8, 2025 Draft RTA Board Agenda

**Mr. Straw** said that agenda item A-12 is designed to extend the life of the diesel buses and reiterated that agenda item C-3 will be most likely pushed to the March Board meeting.

Public Comment:

**Mr. Greening** asked if agenda item A-11 needed to be an action or consent item. **Mr. Straw** said consent is fine because it's a routine item and not an expansion of the fleet.

The draft agenda was supported by unanimous consent of those present.



<u>BOARD MEMBER</u>	<u>YES</u>	<u>NO</u>	<u>ABSENT</u>
DEBBIE ARNOLD	X		
JIMMY PAULDING	X		
VACANT			X

**7. Adjournment**

The meeting was adjourned at 10:38 AM

Next RTA Executive Committee Meeting: **February 12, 2025**

Respectfully Submitted,

Acknowledged by,

\_\_\_\_\_  
Anthony Kalvans  
Administrative Assistant

\_\_\_\_\_  
Jimmy Paulding  
RTA Board Vice President 2024

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# DRAFT

## SAN LUIS OBISPO COUNCIL OF GOVERNMENTS REGIONAL TRANSIT AUTHORITY

### “Joint Board Meeting” Minutes

Wednesday, January 8, 2025, 9:00 a.m.

The following action minutes are listed as they were acted upon by the San Luis Obispo Council of Governments (SLOCOG) and Regional Transit Authority (RTA), *and* as listed on the agenda for the Joint Board meeting held on January 8, 2025, together with staff reports and related documents attached thereto and incorporated therein by reference. To see a video of the meeting proceedings, go to the **Linked Agenda:** SLO-SPAN: [SLOCOG & RTA Joint Board Meeting – January 8, 2025](#) (Click the play button on the video window to view from the beginning of the meeting or click on a particular agenda item to go directly to that part of the meeting).

#### **1. FLAG SALUTE CALL TO ORDER AND ROLL CALL:**

**2024 Vice President Jimmy Paulding** called the January 8<sup>th</sup> Joint SLOCOG & RTA Board meeting to order at **9:00 a.m.** and led the flag salute. **Board Secretary Aida Nicklin** conducted a roll call.

#### **BOARD MEMBERS PRESENT:**

Jimmy Paulding, Fourth District, County of San Luis Obispo (Newly elected President)  
Carla Wixom, City of Morro Bay (Newly elected Vice President)  
Emily Francis, City of San Luis Obispo (Alternate Board Member)  
Bruce Gibson, Second District, County of San Luis Obispo  
Aileen Loe, City of Arroyo Grande  
Heather Newsom, City of Atascadero  
Dawn Ortiz-Legg, Third District, County of San Luis Obispo  
Fred Strong, City of Paso Robles  
Ed Waage, City of Pismo Beach

#### **BOARD MEMBERS ABSENT:**

John Peschong, First District, County of San Luis Obispo  
Heather Moreno, Fifth District, County of San Luis Obispo  
(Vacant currently), City of Grover Beach

**SLOCOG STAFF PRESENT:** Peter Rodgers, James Worthley, Richard Murphy, Tim Gillham, John DiNunzio, Stephen Hanamaikai, Annie Bowsky, Stacey Dougan, Aida Nicklin, Jon Ansolabehere (Legal Counsel)

**RTA STAFF PRESENT:** Geoff Straw, Tania Arnold, Anthony Kalvans, Omar McPherson, Andy Wyly, and Mary Gardner

**OTHERS PRESENT:** AGP Video Staff

**2. PUBLIC COMMENTS (on any item of interest not on the agenda within the jurisdiction of the Board):**

**Mr. Eric Greening (Garden Farms):** thanked SLOCOG & RTA Board members (past and present) for their service on these Boards. He noted he would be back for more public comments later for SLOCOG and RTA.

**3. JOINT SLOCOG AND SLORTA BOARD ADMINISTRATIVE ITEMS:**

- a. **WELCOME NEW BOARD MEMBERS: 2024 Vice President Jimmy Paulding** welcomed new SLOCOG & RTA Board members: Council Member Heather Newsom (City of Atascadero), Council Member Emily Francis (remains as Alternate, City of San Luis Obispo), and Council Member Aileen Loe (City of Arroyo Grande).
- b. **ELECTION OF OFFICERS: Elect President and Vice President: 2024 Vice President Paulding** called for any comments from SLOCOG & RTA staff and members of the public. There were no comments.

**Nomination for President:** Board Member Carla Wixom nominated 2024 Vice President Jimmy Paulding for President. Board Member Fred Strong seconded; Board members concurred.

**SLOCOG & RTA Board action on a roll call vote: Approve Jimmy Paulding for President.**

**Motion by:** Carla Wixom (Board Member) **Second by:** Fred Strong (Board Member)

BOARD MEMBERS	AYES	NOES	ABSENT	ABSTAIN	RECUSE
Paulding, Jimmy (President)	X				
Francis, Emily (Alternate)	X				
Gibson, Bruce	X				
Loe, Aileen	X				
Moreno, Heather			X		
Newsom, Heather	X				
Ortiz-Legg, Dawn	X				
Peschong, John			X		
Strong, Fred	X				
Waage, Ed	X				
Wixom, Carla	X				
City of Grover Beach - vacant			X		

*Note: The City of Grover Beach's position was vacant at this time until the City assigns their new representative next week (at their city council meeting).*

**President Jimmy Paulding** extended his appreciation to SLOCOG and RTA Board members, noting he is looking forward to serving the Board as President.

**Nomination for Vice President:** Board Member Ed Waage nominated Board Member Carla Wixom for Vice President. Board Member Bruce Gibson seconded; Board members concurred.

**SLOCOG & RTA Board action on a roll call vote: Approve Carla Wixom for Vice President.**

BOARD MEMBERS	AYES	NOES	ABSENT	ABSTAIN	RECUSE
Paulding, Jimmy (President)	X				
Wixom, Carla (Vice President)	X				

Francis, Emily (Alternate)	X				
Gibson, Bruce	X				
Loe, Aileen	X				
Moreno, Heather			X		
Newsom, Heather	X				
Ortiz-Legg, Dawn	X				
Peschong, John			X		
Strong, Fred	X				
Waage, Ed	X				
City of Grover Beach - vacant			X		

*Note: The City of Grover Beach's position was vacant at this time until the City assigns their new representative next week (at their city council meeting).*

**Public comments:** There were no public comments.

**c. EXECUTIVE COMMITTEE ASSIGNMENT:**

In the absence of an immediate Past President, **President Jimmy Paulding** called for a nomination to appoint a former Board president to serve on the Executive Committee. He noted that Board Member Fred Strong (President in 2020) indicated his interest to serve as Past President on the Executive Committee. The Board concurred.

**Public comments:** There was no public comment.

**SLOCOG & RTA Board action on a voice vote: Approve Fred Strong to serve as Past President on the Executive Committee.**

**Motion by:** Dawn Ortiz-Legg (Board Member) Ed Waage (Board Member)

**The motion carried in the absence of Board Members Heather Moreno and John Peschong (the City of Grover Beach was unrepresented at this time until their Council make their appointments).**

**President Paulding:** asked for any Board/public comments. There were no comments.

**SLOCOG & RTA Board action on a voice vote: Confirm the composition of the 2025 Executive Committee as: 2025 President Jimmy Paulding, 2025 Vice President Carla Wixom, and Past President Fred Strong.**

**Motion by:** Bruce Gibson (Board Member) Carla Wixom (Vice President)

**The motion carried in the absence of Board Members Heather Moreno and John Peschong (the City of Grover Beach was unrepresented at this time until their Council make their appointments).**

**d. Presentation of a Resolution of Appreciation to Outgoing Board Member Debbie Arnold (5th District, County of San Luis Obispo), recognizing her service as Board Member of the SLOCOG and RTA Boards from January 2013 to through December 2024: President Jimmy Paulding** read and presented the Resolution of Appreciation to outgoing Board Member Debbie Arnold.

**Debbie Arnold:** thanked the SLOCOG and RTA Board and staff for the recognition, noting that her years on this Board have been amazing. She said, "I appreciate all of you. I have learned so much, and it has been an honor to serve, thank you!" A photo op followed.

**President Paulding:** thanked Debbie Arnold and stated that the Board appreciates her service.

**Board Member Dawn Ortiz-Legg:** thanked Debbie Arnold for her dedication to this Board and to transportation, noting the long commutes Arnold took (coming all the way from Pozo to San Luis Obispo) during her years of serving the County and SLOCOG/RTA Board. **Board Member Ortiz-Legg** wished Arnold

a happy retirement.

**Board Member Ed Waage:** said he appreciates working with Debbie Arnold over the years, noting that Arnold will be going back to probably her most important job – that of being a grandmother. He added that Arnold's passion for public service is amazing. **Board Member Waage** said, "I appreciate all your efforts and wish you well!"

**Board Member Fred Strong:** thanked Debbie Arnold, stating, "You may think you are retiring, but you got a lot of work ahead of you, I know, I have been there. Congratulations!"

**Board Member Heather Newsom:** thanked Debbie Arnold for her service and for everything she has done for the citizens of this county.

**e. Presentation of a Plaque of Appreciation & Bus Sign to Outgoing Board Member Daniel Rushing (City of Grover Beach), recognizing his service as Board Member of the SLOCOG and RTA Boards in 2023 and 2024:** **President Jimmy Paulding** read and presented the Plaque of Appreciation to outgoing Board Member Daniel Rushing, noting it has been an absolute pleasure working with Rushing.

**Daniel Rushing:** noted it was not his intent to have to leave this Board. He thanked everybody, SLOCOG/RTA Board and staff for all their help in bringing funding and completion of projects to south county, specifically to Grover Beach. A photo op followed.

**Board Member Ortiz-Legg:** commented that it is an unfortunate situation in Grover Beach, it was hard to watch and to know what was happening. She noted that the Board does know Daniel Rushing is a dedicated public servant, adding that sitting and listening in meetings are also part of participation on how we advocate with entities. She encouraged Rushing to keep doing what he is doing for this region.

**Board Member Bruce Gibson:** thanked Daniel Rushing, noting that the SLOCOG/RTA Board and staff are appreciative of his service and of his detailed understanding of the issues in front of him. He said, "I wish you the best in this business."

**Board Member Waage:** stated, "It was really sad, and it is hard to see what was happening in your City. I appreciate what you did and what you were trying to do. We will miss you on this Board. Thank you!"

**f. Presentation of a Plaque of Appreciation to Outgoing Alternate Board Member Karen Bright (City of Grover Beach), recognizing her service as Board Member of the SLOCOG and RTA Boards from January 2020 to January 2023, and as Alternate Board Member from 2023 through 2024:** **President Jimmy Paulding** announced that outgoing Alternate Board Member Karen Bright (former Mayor of the City of Grover Beach) had a schedule conflict and could not attend; hence, this recognition will be presented to her outside of this meeting. **President Paulding** stated, "Karen, if you are watching, we appreciate you!"

**Public Comments:** There were no public comments.

**4. ADJOURNMENT:** **President Jimmy Paulding** adjourned the Joint SLOCOG & RTA Board meeting to the SLOCOG Board meeting at **9:20 a.m.**

Respectfully Submitted,

Aida Nicklin  
Executive Secretary

**DRAFT**  
**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**  
**BOARD MEETING MINUTES OF JANUARY 8, 2025**  
**A-3**

**BOARD MEMBERS PRESENT:**

JIMMY PAULDING, FOURTH DISTRICT, COUNTY OF SAN LUIS OBISPO (President)  
CARLA WIXOM, CITY OF MORRO BAY (Vice President)  
EMILY FRANCIS, CITY OF SAN LUIS OBISPO  
BRUCE GIBSON, SECOND DISTRICT, COUNTY OF SAN LUIS OBISPO  
AILEEN LOE, CITY OF ARROYO GRANDE  
HEATHER NEWSOM, CITY OF ATASCADERO  
DAWN ORTIZ-LEGG, THIRD DISTRICT, COUNTY OF SAN LUIS OBISPO  
FRED STRONG, CITY OF PASO ROBLES (Past President)  
ED WAAGE, CITY OF PISMO BEACH

**BOARD MEMBERS ABSENT:**

HEATHER MORENO, FIFTH DISTRICT, COUNTY OF SAN LUIS OBISPO  
JOHN PESCHONG, FIRST DISTRICT, COUNTY OF SAN LUIS OBISPO  
VACANT, CITY OF GROVER BEACH

**STAFF PRESENT:**

GEOFF STRAW, RTA EXECUTIVE DIRECTOR  
TANIA ARNOLD, DEPUTY DIRECTOR/CFO  
JON ANSOLABEHERE, SAN LUIS OBISPO COUNTY COUNSEL  
ANTHONY KALVANS, ADMINISTRATIVE ASSISTANT  
OMAR MCPHERSON, OPERATIONS MANAGER  
ANDY WYLY, MAINTENANCE AND FACILITIES MANAGER  
MARY GARDNER, MARKETING AND COMMUNITY RELATIONS MANAGER  
PETE ROGERS, SLOCOG EXECUTIVE DIRECTOR

**CALL MEETING TO ORDER, ROLL CALL:** Following the end of the joint SLOCOG-RTA Board meeting, **President Jimmy Paulding** called the RTA Board meeting to order at 9:45 AM. Roll call was taken, and a quorum was present.

**PUBLIC COMMENT:**

**Mr. Eric Greening** thanked staff and drivers for their hard work. In his remarks, he talked about the various construction projects impacting the fixed-routes. While he was happy with progress on the projects impacting Route 9, he expressed concerns about potential construction delays on Route 10 and asked if a reroute would be considered.

**A. CONSENT AGENDA:**

- A-1 RTA Executive Committee Meeting Minutes October 9, 2024 (Information)
- A-2 RTA Board Meeting Minutes of November 6, 2024 (Approve)
- A-3 FTA 5307, 5339 & CMAQ Grant Programs Administration (Adopt Resolution)
- A-4 FTA Section 5311 Grant Application (Adopt Resolution)
- A-5 Low-Carbon Transit Operations Program Grant Application (Adopt Resolution)
- A-6 Rural Transit Funds Grant Application (Adopt Resolution)
- A-7 SB-1 State of Good Repair Grant Application (Adopt Resolution)

- A-8 FTA Annual Certifications and Assurances (Authorize)
- A-9 Update RTA Contracting and Procurement Policies, Practices and Procedures Manual (Approve)
- A-10 Transfer of Surplus Vehicles (Authorize)
- A-11 Procurement of Demand Response Van and Support Vehicle; Declare Surplus (Authorize)
- A-12 Procurement of Third-Party Engine Replacement Services (Authorize)
- A-13 PRISM Paid Family Leave Memorandum of Understanding (Adopt)
- A-14 Draft RTAC Minutes of January 18, 2024, March 13, 2024, June 5, 2024, and October 16, 2024 (Information)
- A-15 Bus Maintenance Facility CEQA Mitigations 3rd Annual Monitoring Report (Receive)

Public Comment:

There was no public comment received for these items.

**Board Member Strong** made a motion to approve consent agenda item A-1 through A-15 as is, and **Vice President Wixom** seconded the motion. The motion passed unanimously of those present via roll call vote.

<u>BOARD MEMBER</u>	<u>YES</u>	<u>NO</u>	<u>ABSENT</u>
EMILY FRANCIS	X		
BRUCE GIBSON	X		
AILEEN LOE	X		
HEATHER MORENO			X
HEATHER NEWSOM	X		
DAWN ORTIZ-LEGG	X		
JIMMY PAULDING (President)	X		
JOHN PESCHONG			X
FRED STRONG (Past President)	X		
VACANT (Grover Beach)			X
ED WAAGE	X		
CARLA WIXOM (Vice President)	X		

**B. INFORMATION AGENDA:**

B-1 Executive Director's Report (Receive)

**Mr. Straw** presented a slide show highlighting major RTA updates. In his report he noted major operational changes including the temporary reduced schedule for the holidays and the consolidation efforts with Morro Bay and Atascadero. He also noted that the RTA will be looking at modernizing its dispatching system.

**Mr. Straw** noted the staffing status at the RTA to fill vacated positions. He highlighted that two Bus Operators were promoted to Operations Supervisor and James Stogsdill was promoted to Assistant Maintenance Manager. He also noted that there are currently four open Bus Operator positions: three full-time and one part time.

**Mr. Straw** highlighted the major marketing efforts that the RTA is conducting. Specifically, he noted that the personalized transit plans have had a strong response and a potential partnership with Cuesta College to train commercial drivers. He also noted that the efforts to introduce contactless payment and fare capping are still ongoing.



Finally, **Mr. Straw** explained the productivity charts and noted that ridership continues to increase with the caveat that regional fixed-routes are lagging below pre-pandemic numbers while Paso City Routes are above pre-pandemic numbers.

**President Paulding** thanked Mr. Straw for the report and was happy about the culture of innovation at the RTA.

Public Comment:

**Mr. Greening** said that he understands that Route 15 is a deviated fixed-route and was curious if that hybrid format could be used in other areas to contain costs. He also expressed concerns about the battery-electric buses. Specifically, if the technology will become outdated in a few years, be impacted by changing political climates, and be revised if current state mandates change.

B-2 Summary of Short-Range Transit Plans Working Papers (Receive)

**Mr. Straw** gave an update on the Short-Range Transit Plan (SRTP). He noted that Working Paper #8 focuses on coordination with the City of San Luis Obispo and should be posted on our website shortly. He thanked the steering committee and the consultant for their hard work and said that the draft plan will likely be available for Board review in March.

**President Paulding** thanked Mr. Straw for the report.

Public Comment:

**Mr. Eric Greening** thanked staff for their hard work and for getting the draft RTAC minutes into the RTA agenda. He highlighted a need for better weekend coordination between SLO Transit and RTA fixed-route services.

**C. ACTION AGENDA:**

C-1 Agreement to Operate of Morro Bay Transit Services (Authorize)

**Mr. Straw** presented the agreement and noted its many benefits while still maintaining local control. Mr. Straw noted that the agreement would become effective June 1<sup>st</sup>.

**Vice President Wixom** thanked Mr. Straw and Morro Bay Staff for making this happen.

**President Paulding** noted that a similar format was implemented for South County Transit (SCT) and that it was beneficial.

Public Comment:

There was no public comment received on this item.

**Vice President Wixom** made a motion to approve action agenda item C-1 and **Board Member Strong** seconded the motion. The motion passed unanimously of those present via roll call vote.

<b><u>BOARD MEMBER</u></b>	<b><u>YES</u></b>	<b><u>NO</u></b>	<b><u>ABSENT</u></b>
EMILY FRANCIS	X		
BRUCE GIBSON	X		
AILEEN LOE	X		
HEATHER MORENO			X
HEATHER NEWSOM	X		
DAWN ORTIZ-LEGG	X		
JIMMY PAULDING (President)	X		
JOHN PESCHONG			X
FRED STRONG (Past President)	X		
VACANT (Grover Beach)			X
ED WAAGE	X		
CARLA WIXOM (Vice President)	X		

#### C-2 Procurement of Four Battery-Electric Buses; Declare Surplus (Authorize)

**Mr. Straw** presented the item to the Board and noted that the older vehicles are past their economic useful life, and this item is being brought forward now due to the ongoing price escalation and the long lead time to receive vehicles after issuing a purchase order. **Mr. Straw** said that the next order of battery-electric buses will likely use a four-battery pack instead of seven and have inductive charging to allow on-route opportunity charging. This will reduce the weight of the buses and help close the approximately \$1.3 million dollar funding gap.

**Board Member Ortiz-Legg** asked if the RTA is an early adopter and if there is a cutoff with utilizing non-electric buses. **Mr. Straw** noted that others have tested the technology and that the RTA has been more conservative in adopting the technology due to historical issues, such as when hybrids first came out. He also noted that the RTA must get an exemption for every diesel bus that it purchases. **Board Member Ortiz-Legg** also expressed concerns over tire wear.

**President Paulding** asked about using the buses for the Cuesta College partnership. **Mr. Straw** said that will come back before the Board when the new vehicles have arrived.

**Board Member Strong** asked about reaching out to 3CE for grants. **Mr. Straw** said that they were identified as a potential funding source.

#### Public Comment:

**Mr. Eric Greening** said that it seems like this decision is mandated but expressed reservations if electric vehicles will save the climate. He also expressed concerns about the range of the four battery packs and what the Bus Operators are experiencing.

**Mr. Pete Rogers** of SLOCOG said that he supports the staff recommendation.

**Board Member Waage** made a motion to approve action agenda item C-2 and **Board Member Strong** seconded the motion. The motion passed unanimously of those present via roll call vote.

<b><u>BOARD MEMBER</u></b>	<b><u>YES</u></b>	<b><u>NO</u></b>	<b><u>ABSENT</u></b>
EMILY FRANCIS	X		
BRUCE GIBSON	X		
AILEEN LOE	X		
HEATHER MORENO			X
HEATHER NEWSOM	X		
DAWN ORTIZ-LEGG	X		
JIMMY PAULDING (President)	X		
JOHN PESCHONG			X
FRED STRONG (Past President)	X		
VACANT (Grover Beach)			X
ED WAAGE	X		
CARLA WIXOM (Vice President)	X		

**D. CLOSED SESSION ITEMS: CONFERENCE WITH LEGAL COUNSEL**

D-1 Executive Director Performance Evaluation (Govt. Code Section 54957)

CONFERENCE WITH LABOR NEGOTIATORS

Agency designated representatives: Jon Ansolabehere, RTA Counsel

Unrepresented employee: Geoff Straw, Executive Director

Public Comment:

**Mr. Greening** said that he supported Mr. Straw.

The Board entered closed session at 10:45 AM.

The Board returned from closed session at 11:04 AM.

There was no reportable action from closed session.

**E. BOARD MEMBER COMMENTS:**

**Board Member Strong** thanked the Board for its support for nominating him as Past President.

**President Paulding** thanked the Board for its support for nominating him as Board President.

The meeting was adjourned at 11:05 AM.

Next regularly scheduled RTA Board meeting is **March 5, 2025**.

Respectfully Submitted,

Acknowledged by,

\_\_\_\_\_  
Anthony Kalvans, Administrative Assistant

\_\_\_\_\_  
Jimmy Paulding, RTA President 2025

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**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY  
MARCH 5, 2025  
STAFF REPORT**

**AGENDA ITEM:** A-4

**TOPIC:** 2025 Summer Youth Ride Free Program

**PRESENTED BY:** Geoff Straw, Executive Director

**STAFF RECOMMENDATION:** Participate in the 2025 Summer *Youth Ride Free* Program and Require Payment for Larger Youth Groups Traveling Together

**BACKGROUND/DISCUSSION:**

Direction is needed from the Board on whether or not to continue the RTA's participation in the countywide summer *Youth Ride Free* (YRF) program. SLOCOG's *Regional Rideshare* program, the agency that promotes YRF in SLO County, has asked that the RTA honor the YRF program from mid-June 2025 through mid-August 2025.

Since summer 2014, with the exception of 2020 and 2021 (due to the COVID-19 pandemic), the RTA participated in the YRF program from middle-of-June through middle-of-August period in order to avoid an overlap with the academic year. In addition, each group size is limited so that a bus will not become overloaded and dissuade fare-paying passengers from riding; if the YRF group is greater than the agency-identified fare-free maximum, the remaining group members are required to pay. Staff has worked closely with the YMCA and other youth camp officials to train their on-bus chaperones to minimize service disruptions and to handle any fare responsibilities. This helped address the overcrowding issues that occurred in 2012 and 2013.

It is difficult to track the longer-term ridership impact of participating in the YRF program, since it is not possible to determine the number of students boarding throughout the year in the absence of periodic surveys.

Benefits of extending the summer free ride program to K-12 youth have proven to be the following:

1. Easy to communicate.
2. Gets youth to try using transit and it instills an ethic of using transit in the future.
3. Increases access for kids to travel independently (and reduce parent taxiing).

Disadvantages include:

1. Small loss of cash fare revenue for non-group riders.

2. Increased passenger loads on some bus trips can degrade the riding experience for non-youth riders.
3. In the past, two or more unrelated groups occasionally attempted to board the bus on the same bus trip, which resulted in an overcrowding situation. However, the number of instances where that became a problem has greatly abated due to better coordination with youth activity agencies, and we expect the same cooperation this summer.

The RTA will require YMCA and other youth groups to pay when more than fifteen YRF persons are traveling together (plus two adult chaperones); for the four local fixed-routes in South County, the limit is ten YRF riders due to the smaller bus size (26-foot or 35-foot vs. 40-foot) used. For ease of boarding, and for budget and cash control issues, organizers for groups such as YMCA camps are encouraged to pre-purchase passes.

Staff will continue to track the response to the program by measuring:

1. Ridership is already tracked using a specific farebox key.
2. Customer feedback from youth and families taking advantage of the program (face-to-face interviews, Facebook and social media programs, texts, etc.).

**Staff Recommendation**

Participate in the 2025 summer *Youth Ride Free* program and require payment for larger youth groups traveling together.

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**MARCH 5, 2025**

**STAFF REPORT**

<b>AGENDA ITEM:</b>	<b>A-5</b>
<b>TOPIC:</b>	<b>Amended Contract with RTA Executive Director</b>
<b>ACTION:</b>	<b>Approve</b>
<b>PRESENTED BY:</b>	<b>Geoff Straw, RTA Executive Director</b>
<b>STAFF RECOMMENDATION:</b>	<b>Authorize the RTA Board President to Execute the Amended Annual Employment Contract for the Executive Director.</b>

**BACKGROUND/DISCUSSION:**

Following the employee review process conducted in closed session by the RTA Board at its January 8<sup>th</sup> meeting, I am presenting proposed changes to my annual Employment Contract.

Due to continued financial uncertainties caused by the COVID-19 pandemic and other economic challenges in California, I am seeking a modest 2.0% merit increase in 2025. My proposed 2.0% merit increase results in a new base salary of \$193,620 – which is near the top of my salary range. When other salary-based expenses (payroll taxes, pension, disability, etc.) are added to the \$3,799 base salary increase, the annual budgetary impact would be approximately \$5,880.

I am asking the Board to authorize its President to execute the final Employment Contract (which will be a cleaned-up version of the attached redline draft) on the Board's behalf.

**Staff Recommendation**

Authorize the RTA Board President to execute the amended annual Employment Contract for the Executive Director.

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**EXECUTIVE DIRECTOR EMPLOYMENT CONTRACT  
BETWEEN SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY  
AND GEOFF STRAW**

**THIS CONTRACT** entered into this 5<sup>th</sup> day of March 2025 by and between the SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY, a California Joint Powers Authority (hereinafter referred to as “SLORTA”) and GEOFF STRAW, an individual (hereinafter referred to as “Employee”).

**WITNESSETH**

**WHEREAS**, SLORTA desires to continue the employment of Geoff Straw as Executive Director of the San Luis Obispo Regional Transit Authority; and

**WHEREAS**, Geoff Straw desires to serve as the Executive Director of the San Luis Obispo Regional Transit Authority pursuant to the provisions of this Contract; and

**WHEREAS**, the Board of Directors, as appointing authority, and Geoff Straw desire to specify in a contract as to the terms and conditions of Geoff Straw’s continuing employment as Executive Director.

**NOW, THEREFORE**, the parties do mutually agree as follows:

**1. Employment.** SLORTA hereby engages Employee as Executive Director of SLORTA, and Employee hereby agrees to perform for SLORTA the services hereinafter set forth for the compensation and benefits hereinafter set forth, all pursuant to the terms and conditions herein.

**2. Scope of Services.** Pursuant to this Contract, Employee shall perform all functions and duties of the Executive Director, as specified in the SLORTA Joint Powers Agreement, and such other legally permissible and proper duties and functions as may be assigned by the Board of Directors.

**3. Employment Status.** Employee will be eligible for membership in any and all benefits from any group plan for hospital, surgical, or medical insurance provided to SLORTA employees, as well as being eligible for membership in any retirement program, or for such other job benefits accruable to an employee in the classified service of SLORTA.

Employee understands and agrees that his term of employment is governed only by this Contract, that no right of tenure is created hereby, that he serves SLORTA as an “at-will” employee, and is exempt from the provisions of the Federal Fair Labor Standards Act (FLSA).

**4. Term of Contract.** This Contract shall commence on the 8<sup>th</sup> day of January 2020 and shall continue until terminated by either party in accordance with the provisions set forth herein. This Contract replaces the original employment contract entered into between SLORTA and Employee in January, 2012, and all subsequent amendments thereto.

**5. Compensation.** Commencing January 5, 2025, SLORTA shall pay to Employee as compensation in full for all services performed by Employee pursuant to this Contract an annual salary of \$193,620 per year, payable in increments compatible with SLORTA’s payment of other employees. The Employee’s annual salary and salary range shall be adjusted annually based on the same cost of living adjustment provided to other SLORTA employees as part of the annual budget-making process.

**6. Other Supplemental Benefits.**

**a. Vacation, Holidays, Sick, Administrative Leave, and Jury Duty.**

Employee shall be entitled to accrue up to twelve (12) vacation days annually accrued at the rate of 3.69 hours per pay period, and one (1) additional day per year, in accordance with the RTA Vacation Accrual Rate Table, up to a maximum of twenty (20) vacation days annually. Vacation may be carried over to a maximum of two years of entitlement.

Employee shall be entitled to thirteen (13) holidays per year as specified in accordance with a holiday schedule for the San Luis Obispo Regional Transportation Authority as approved by the Board of Directors.

Employee shall be entitled to accrue up to twelve (12) sick days of paid sick leave per year, at an accrual rate of 3.69 hours per pay period, with a maximum accrual of 260 days.

Employee shall further be entitled to compensation at the end of employment for all unused vacation time and for 1/2 of the accrued sick leave up to a maximum of 180 days.

Employee is also entitled to paid administrative leave of up to six (6) days per year.

Employee shall be further entitled to leave of absence with pay for jury duty, provided all jury fees shall be paid to the County Treasurer on behalf of SLORTA.

**b. Retirement.** SLORTA agrees to provide to Employee retirement benefits in the San Luis Obispo County Pension Trust (SLOCPT) retirement plan which provides 2% at age 60, averaging the highest final 36 months of compensation, with a maximum benefit of 2.5% at age 65, as approved by the Board of Directors on January 8, 2020. Employee's entitlement to benefits in the SLOCPT retirement plan and contributions to Employee's IRS 457 plan are more particularly described in that certain Settlement Agreement and Release of Claims between SLORTA and Employee and approved by SLORTA on January 8, 2020.

**c. Medical, Dental and Vision.** SLORTA agrees to provide 100% of the premium towards the SLORTA approved medical health program for purposes of health coverage, dental, and vision insurance premiums for the Employee and all eligible family members. Medical, Dental, and Vision coverage is to be provided through the Special District Risk Management Authority (SDRMA) as part of the CSAC-EIA Small Group Health Benefits Program. Should Employee wish to increase health care coverage with SDRMA, the premium

difference will be the Employee's sole responsibility, and will be paid on a pre-tax basis. The medical health care allowance shall be automatically adjusted throughout the term of this Agreement to be equivalent to the allowance provided to all other SLORTA employees.

**d. Disability and Life Insurance.** SLORTA shall provide the following insurance benefits: (1) Long-term disability insurance providing 2/3 of gross monthly salary to age 65 for any sickness or accident after a 90-day waiting period up to a maximum salary of \$4,500; and (2) \$100,000 term life insurance.

**e. Private Vehicle Use, Automobile Allowance, and Transit Pass.** SLORTA shall reimburse Employee at such rate as is adopted by the Board of Directors for the use of a private vehicle on "authorized agency business" conducted "outside the County of San Luis Obispo." Employee agrees to carry all necessary vehicle insurance. Employee shall also be entitled to four-hundred fifty (\$450) dollars per month as an automobile allowance, and shall further be entitled to a Monthly Regional Transit Pass.

**f. Severance pay.** If Employee is terminated by the Board of Directors while still willing and able to perform the duties of Executive Director, SLORTA agrees to pay Employee, in addition to any other amounts that may be due Employee at the time of separation of employment, a lump sum cash payment equal to three (3) months salary, retirement and insurance benefits covered by this Contract, or a continuation of salary and benefits for a period of three (3) months, the particular method to be negotiated at the time of separation.

However, if Employee is terminated pursuant to the provisions of Paragraph 8 of this Contract, then SLORTA shall have no obligation to pay the severance set forth herein.

**g. Social Security and Deferred Compensation.** SLORTA shall provide the employer contribution to the federal Social Security Program, and shall also provide \$200 per pay period into a private deferred compensation program established by SLORTA for Employee.

**h. General Expenses.** Employee shall be permitted to attend relevant conferences, seminars, and other such meetings, the reasonable cost of which shall be paid by SLORTA. SLORTA shall reimburse Employee in accordance with its customary expense reimbursement policies and procedures for expenses incurred by Employee in the execution of his duties under this Contract.

**i. Other Benefits.** Employee, as Executive Director, shall be entitled to an agency cell phone for continual access in the execution of his duties under this Contract. Employee shall also be entitled to enjoy such other benefits that SLORTA may establish in the future for its employees.

**7. Termination of Contract for Convenience.** Either party may terminate this Contract at any time by giving to the other party fourteen (14) days written notice of such termination specifying the effective date of such termination. Termination shall have no effect upon the rights and obligations of the parties arising out of transactions occurring prior to the effective date of such termination. Employee shall be paid for all work satisfactorily completed prior to the effective date of such termination and for all unused vacation time, and ½ of accrued sick leave accrued to date of termination as specified in section 6(a). However, employee shall only be entitled to Severance Pay, as identified in paragraph 6f, upon “Termination of Contract for Convenience” by action taken by the SLORTA Board of Directors.

**8. Termination of Contract for Cause.** If Employee fails to fulfill in a timely and professional manner any obligations under this Contract, SLORTA shall have the right to terminate this Contract effective immediately upon giving written notice thereof to Employee. Termination of this Contract under the provisions of this paragraph shall have no effect upon the rights and obligations of the parties arising out of any transaction occurring prior to the effective date of such termination. In the event of termination, Employee shall be paid for all

work satisfactorily completed prior to the effective date of such termination, all unused vacation time, all benefits or prorated portions thereof through the date of termination, and all reimbursed Employee expenses pursuant to paragraph 6(h) therein. However, Employee shall not be entitled to any severance pay.

**9. Performance Evaluation.** SLORTA shall evaluate Employee's performance annually as set forth in the adopted Executive Director Performance Evaluation Process, and described in Section 5, and shall establish, with the Employee, performance goals, and objectives for the ensuing year. The performance evaluation shall be facilitated with the assistance of legal counsel and shall be performed by the SLORTA Board of Directors and SLORTA staff.

**10. Modification.** This Contract constitutes the entire understanding of the parties hereto and no changes, amendments, or alterations shall be effective unless in writing and signed by both parties.

**11. Non-Assignment of Contract.** This Contract is intended to secure the unique and individual services of the Employee and thus Employee shall not assign, transfer, delegate, or sublet this Contract or any interest herein.

**12. Covenant.** The validity, enforceability, and interpretation of any of the clauses of this Contract shall be determined and governed by the laws of the State of California.

**13. Enforceability.** The invalidity and unenforceability of any terms or provisions hereof shall in no way affect the validity or enforceability of any other terms or provisions.

**14. Nondiscrimination.** There shall be no discrimination against any person employed pursuant to this Contract in any manner forbidden by law.

**15. Copyright.** Any reports, maps, documents, or other materials produced in whole or part under this Contract shall be the property of SLORTA and shall not be subject to any application for copyright by or on behalf of the Employee.

**16. Findings Confidential.** No reports, maps, information, documents, or any other materials given to or prepared by Employee under this Contract shall become the property of Employee, nor shall be made available to any individual or organization by Employee without the approval of the SLORTA.

**IN WITNESS WHEREOF,** SLORTA and Employee have executed this Contract on the day and year first hereinabove set forth.

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GEOFF STRAW

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JIMMY PAULDING, President

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ANTHONY KALVANS, Recording Secretary

APPROVED AS TO FORM AND LEGAL EFFECT

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JON ANSOLABEHERE, SLORTA Legal Counsel

Dated: \_\_\_\_\_

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**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**MARCH 5, 2025**

**STAFF REPORT**

**AGENDA ITEM:** A-6

**TOPIC:** Amended SB125 Cooperative Agreement and Execute Agreements for Contactless Fare Program

**PRESENTED BY:** Tania Arnold, Deputy Director/CFO

**STAFF RECOMMENDATION:** Authorize the Executive Director to:

1. Execute Amendment #1 to SB125 Cooperative Agreement
2. Execute Agreements for Contactless Fare Program

**BACKGROUND/DISCUSSION:**

Senate Bill 125 (SB125) guides the distribution of \$4 billion in California General Fund through the Transit and Intercity Rail Capital Program (TIRCP) on a population-based formula to regional transportation planning agencies, which will have the flexibility to use the money to fund transit operations or capital improvements. The transportation budget trailer bill also establishes the \$1.1 billion Zero-Emission Transit Capital Program (ZETCP) to be allocated to regional transportation planning agencies on a population-based formula and another formula based on revenues to fund zero-emission transit equipment and operations.

On November 2, 2023, the RTA submitted a multi-project Statement of Interest to SLOCOG for SB125 funding that included 13 projects, including one for contactless fare payment system. This project was changed to a SLOCOG sponsored project to allow for region wide coordination and implementation, with the goal of making the transit experience seamless for all riders and consistent across all travel destinations. SLOCOG received SB125 funds allocated by the California State Transportation Agency (CalSTA) for this project but because the RTA and SLO Transit will be executing the agreements, SLOCOG is amending the cooperative agreements with the RTA and SLO Transit which will allow each agency to cover their costs associated with the contactless fare program.

As a reminder, the desire to implement the contactless fare program is to make buying a ride fast and simple, while moving away from the legacy farebox system which is expensive as well as expensive to maintain. Riders can use their contactless bank cards or smart device that they already have and use, which reduces dwell time. Riders also do not need to learn the fare policies prior to boarding, the program will automatically calculate the fare and cap payments for appropriate time constraints.

Cal-ITP has secured master service agreements (MSA) for transit providers to support the implementation process.

To implement the contactless fare payment program, the RTA has participated in the coordinated process with SLOCOG, SLO Transit, the City of Morro Bay and California Integrate Travel Project (Cal-ITP) staff. SLOCOG facilitated the submission of the scope of work to the various vendors identified in the MSA, and the region reviewed the responses received. There are three different agreements needed, and the region has agreed to move forward with the following vendors:

1. Payment Acceptance Device –agreement with Kuba, Inc.
2. Transit Processor Services – agreement with Littlepay, Inc.
3. Payment Acceptance Services - agreement with Elavon, Inc.

The amount of this amendment is for \$388,000 which includes the equipment, installation, warranty, and ongoing processing fees for the first five years.

**Staff Recommendation**

Authorize the Executive Director to:

1. Execute Amendment #1 to SB125 Cooperative Agreement
2. Execute Agreements for Contactless Fare Program

**TRANSIT AND INTEROPERATOR RAIL CAPITAL PROGRAM (TIRCP) AND**  
**ZERO-EMISSION TRANSIT CAPITAL PROGRAM (ZETCP)**  
**SUBRECIPIENT COOPERATIVE AGREEMENT**  
**Amendment No. 1 to Agreement No. RTA-SB 125-01**

THIS AGREEMENT, ENTERED INTO ON THE DATE BELOW STATED is between the San Luis Obispo Council of Governments, referred to herein as "SLOCOG", and the

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**  
a joint powers authority in San Luis Obispo County,  
referred to herein as the "OPERATOR".

**RECITALS**

**WHEREAS**, on December 5, 2023, the SLOCOG Board approved programming for the OPERATOR for transit capital projects and authorized the Executive Director to submit the program of projects to CalSTA and adjust programming as needed and to return them to the Board for endorsement; and,

**WHEREAS**, SLOCOG and the OPERATOR are authorized, pursuant to requirements of Assembly Bill 102 (2023) and SB 125 (2023), to enter into a Cooperative Agreement for high-priority transit capital projects consistent with the uses allowed in Cycle 6 of the TIRCP, zero-emission transit vehicles and supporting infrastructure, transit operating expenses that prevent service cuts, and other projects subject to compliance and requirements set forth in the SB 125 program guidelines; and,

**WHEREAS**, SLOCOG and the OPERATOR entered into Agreement No. RTA-SB 125-01 ("Agreement") on January 17, 2025; and,

**WHEREAS**, SLOCOG was designated as the project sponsor for use of Transit and Intercity Rail Capital Program ("TIRCP") funds to implement and support the San Luis Obispo Region Cal-ITP Implementation Project ("Project"); and,

**NOW THEREFORE**, the parties mutually agree as follows:

- 1) That Agreement No. RTA-SB 125-01 is hereby amended by adding programming amounts of December 5, 2023 for the Project as identified in Table 1 (attached hereto and incorporated herein by this reference).
- 2) That SLOCOG, as grantor of these funds, be recognized in all promotions of the Project in the Amendment. OPERATOR shall include the recognition of SLOCOG in all project branding, signage, press releases, and other marketing materials related to the Project.
- 3) That remaining terms and conditions of the original Agreement No. RTA-SB 125-01 shall remain in full force and effect unless otherwise amended per agreement.

**SIGNATURES:**

SAN LUIS OBISPO  
REGIONAL TRANSIT AUTHORITY

By: \_\_\_\_\_  
Geoff Straw, Executive Director

Date: \_\_\_\_\_

SAN LUIS OBISPO  
COUNCIL OF GOVERNMENTS

By: \_\_\_\_\_  
Peter Rodgers, Executive Director

Date: \_\_\_\_\_

**ATTEST:**

By: \_\_\_\_\_  
Anthony Kalvans, Clerk

**APPROVED AS TO FORM AND LEGAL EFFECT:**

By: \_\_\_\_\_  
Jon Ansolabehere, OPERATOR Counsel

Date: \_\_\_\_\_

By: \_\_\_\_\_  
Jon Ansolabehere, SLOCOG Counsel

Date: \_\_\_\_\_

**TABLE 1**  
**OPERATOR PROJECTS**  
for  
**Amendment No. 1 Agreement No. RTA-SB 125-01**

SLOCOG#	Project Name	TIRCP	ZETCP	FY
RTA-14	Cal-ITP Implementation Project – RTA	\$388,000	-	2024/25

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**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**MARCH 5, 2025**

**STAFF REPORT**

**AGENDA ITEM:** A-7

**TOPIC:** Authorize Purchase for Bus Engine Replacement Services

**PRESENTED BY:** Melissa C. Mudgett, Grants and Finance Manager

**STAFF RECOMMENDATION:** Authorize the Executive Director to Award a Purchase Order for Bus Engine Replacement Services to Cummins Sales and Service in the amount of \$586,821.36

**BACKGROUND/DISCUSSION:**

At its January 8, 2025 meeting, the RTA Board of Directors authorized the RTA Executive Director to solicit proposals from qualified firms to provide Bus Engine Replacement services.

This project will provide critical engine replacement services for our fleet of three 2018 and three 2019 Gillig heavy-duty 40-foot diesel-powered buses. These buses are nearing the required Federal Transit Administration (FTA) economic useful life standard of 12-years or 500,000 miles, and several buses are experiencing significant mechanical issues, resulting in costly repairs and creating challenges in providing reliable transit services to the public. The engine replacements for these buses is essential in ensuring these fixed-route buses can cost-effectively remain in service until their projected replacement date in FY28-29 and FY29-30.

Following the Board's approval, staff solicited responses from qualified and interested firms to provide Bus Engine Replacement Services (RFP #2025-02) through an online bidding process (PlanetBids) linked on the RTA's website at <http://www.slorta.org/about-rt/request-for-proposals/>. The RTA received four proposals by the February 7<sup>th</sup> deadline. One proposal was deemed not responsible, as the bid submittal was incomplete. The RTA evaluation team determined the remaining three proposals as responsive and responsible. Two of the proposals significantly exceeded the available project funds of \$750,000. One proposal was within available project funds.

Individual team members evaluated each responsive proposal. Points were then averaged to determine a total quality points score for each proposer, based on the following criteria:

1. Responsiveness to RFP (10 pts). Overall quality and completeness of the proposal.
2. Technical (10 pts). Bidder's understanding of requirements. Bidder's compliance with applicable laws, regulations, policies and guidelines governing contracts performed by the Bidder. Quality, performance and effectiveness of the solution, goods and/or services to be provided by the Bidder; Technical ability and licensing.
3. Management Plan (5 pts). Bidder's ability to perform the work within the time specified to RTA locations, designated contact person(s) and availability during project. Qualifications of key personnel.
4. Past Performance (5 pts). Bidder's experience, including the experience of staff to be assigned to the project, the engagements of similar scope and complexity; Bidder's prior record of performance with the RTA or others in similar agencies.
5. References (5 pts). At least three references, to include recent experience, contract size, and duration of the relationship.
6. Service Cost (60 pts). The RTA shall use the cost as a criteria in selecting the most qualified proposal but the RTA is not required to accept the lowest bid if the other criteria is not met.

All bid results are posted on the RTA website.

<b>BIDDER</b>	<b>DETERMINATION</b>	<b>SCORE (100 pts)</b>	<b>Cost</b>
Cummins, Inc.	Responsive	89	\$586,821.36
Complete Coach Works	Responsive	75	\$856,849.08
ABC Bus, Inc	Responsive	58	\$977,822.90
Ideal Enterprises, LLC	Unresponsive	42	\$835,936.43

On February 14, 2025 staff informed Cummins, Inc. of Fresno, California (dba Cummins Sales and Service) that its bid was deemed responsive and received the highest score of 89 out of 100 points. Staff is recommending that the Board authorize the Executive Director to award the purchase order to Cummins Sales and Service as the highest scoring responsive and responsible bidder, for the one-time purchase order price of \$586,821.36.



Cummins Sales and Service has provided evidence of meeting federal government grant registration, compliance with lobbying restrictions and all necessary insurances, endorsements, certifications and assurance of adequate personnel trained in bus engine replacement techniques. The Cummins cost proposal is inclusive of all labor, materials, taxes, profit, overhead, transportation costs (to and from the facility), subcontractor costs and other expenses incurred by the bidder. This project will be funded by FTA Section 5339 grant #CA-2024-131-01 and a subsequent FY24-25 FTA Section 5339 grant application that is currently in progress, which identifies an 80% federal and 20% local funding split.

**Staff Recommendation**

Authorize the Executive Director to award a Purchase Order for Bus Engine Replacement Services to Cummins Sales and Service in the amount of \$586,821.36.

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**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY  
MARCH 5, 2025  
STAFF REPORT**

**AGENDA ITEM:** A-8

**TOPIC:** Bus Charging and Electrification Study

**PRESENTED BY:** Geoff Straw, Executive Director

**STAFF RECOMMENDATION:** Authorize the Executive Director to Execute an Agreement with Stantec to Conduct the Bus Charging & Electrification Study for a Price Not to Exceed \$200,000

**BACKGROUND/DISCUSSION:**

At its November 2024 meeting, the RTA Board of Directors authorized procurement of professional planning and engineering services to assist in our transition to zero-emission buses. The Bus Charging and Electrification Study request for proposal was published through our PlanetBids portal on December 20, 2025. We conducted a virtual pre-proposal meeting on January 3<sup>rd</sup>, and published two amendments that provided clarifications and answers to questions submitted by prospective bidders. This study is being funded with \$200,000 in SB125 funds, and will provide a master plan for depot charging at all three bus park-out yards (Arroyo Grande, SLOI and Paso Robles) and for opportunity charging at four transit centers / layover locations (North County Transportation Center, SLO Government Center, Morro Bay Transit Center, and Santa Maria Transit Center).

Stantec Engineering was the sole proposer, despite outreach through PlanetBids, DBE/Small Business circles, and direct outreach to engineering/planning firms known for completing this type of work. Stantec was deemed responsible and responsive, particularly since the firm helped us develop our 2018 Bus Electrification Readiness Plan.

It should be noted that Stantec's proposal included a significant level of effort and resulting price to conduct back-end investigations into route profiling that we have already chronicled through our ChargePoint and Vericiti software packages that we have collected since July 2024. Their proposal also included modeling to help us determine which zero-emission technology we might choose. But, again, the RTA has already made the decision to pursue Battery-Electric Bus (BEB) in lieu of Hydrogen Fuel Cell Electric Bus (HFCEB) technology. Finally, their original proposal included the next-step design-build level of effort and costs, which will be included after the study findings and recommendations are evaluated by the RTA Board.

Due to time constraints of the selection committee and Stantec team members, we were not able to schedule the scoping and level of effort interview until March 4. Staff is

seeking the Board's authority for the Executive Director, following the selection committee's interview of Stantec on March 4, to execute the draft agreement included in the procurement documents that has been updated with the final scope of work and a price not to exceed \$200,000.

**Staff Recommendation**

Authorize the Executive Director to execute an agreement with Stantec to conduct the Bus Charging & Electrification Study for a price not to exceed \$200,000.

**SAN LUIS OBIPO REGIONAL TRANSIT AUTHORITY  
PROFESSIONAL SERVICES AGREEMENT  
WITH \_\_\_\_\_**

**AGREEMENT NUMBER 2025-01**

This “Agreement” is made as of this \_\_\_\_\_ day of \_\_\_\_\_, 2025, by and between the San Luis Obispo Regional Transit Authority (“RTA” or “Purchaser”), and “\_\_\_\_\_, (“Contractor”).

**RECITALS**

A. The RTA desires to retain a qualified and committed professional transportation planning firm or team of firms to prepare the Bus Charging & Electrification Plan.

B. The RTA desires to retain a qualified firm to conduct the services described above in accordance with the Scope of Services the RFP document.

C. Contractor represents to the RTA that it is a firm composed of highly trained professionals and is fully qualified to conduct the services described above and render advice to the RTA in connection with said services.

D. The parties have negotiated upon the terms pursuant to which Contractor will provide such services and have reduced such terms to writing.

**AGREEMENT**

**NOW, THEREFORE**, the RTA and Contractor agree as follows:

**1. SCOPE OF SERVICES**

Contractor shall provide to RTA the services described in Exhibit A (“Scope of Services”). Contractor shall provide these services at the time, place, and in the manner specified in Exhibit A. Exhibit A is attached hereto solely for the purpose of defining the manner and scope of services to be provided by Contractor and is not intended to, and shall not be construed so as to, modify or expand the terms, conditions or provisions contained in this Agreement. In the event of any conflict between the terms in Exhibit A and the Agreement, the terms of this Agreement shall control and prevail. The parties agree that any term contained in Exhibit A that adds to, varies or conflicts with the terms of this Agreement is null and void.

## **2. COMPENSATION**

a. The RTA shall pay Contractor for services rendered pursuant to this Agreement at the rates, times and in the manner set forth in this Agreement. Contractor shall submit monthly statements to the RTA which shall itemize the services performed as of the date of the statement and set forth a progress report, including work accomplished during the period, percent of each task completed, and planned effort for the next period. Invoices shall identify personnel who have worked on the services provided, and the percent of the total project completed, consistent with the rates and amounts set forth in this Agreement.

b. The payments prescribed herein shall constitute all compensation to Contractor for all costs of services, including, but not limited to, direct costs of labor of employees engaged by Contractor, travel expenses, telephone charges, copying and reproduction, computer time, and any and all other costs, expenses and charges of Contractor, its agents and employees. In no event shall the RTA be obligated to pay late fees or interest, whether or not such requirements are contained in Contractor's invoice.

c. Notwithstanding any other provision in this Agreement to the contrary, the total maximum compensation to be paid for the satisfactory accomplishment and completion of all services to be performed hereunder shall in no event exceed the sum of \_\_\_\_\_. The RTA's Chief Financial Officer is authorized to pay all proper claims.

## **3. DOCUMENTATION; RETENTION OF MATERIALS**

a. Contractor shall maintain adequate documentation to substantiate all charges as required under Section 2 of this Agreement.

b. Contractor shall keep and maintain full and complete documentation and accounting records concerning all extra or special services performed by it that are compensable by other than an hourly or flat rate and shall make such documents and records available to authorized representatives of the RTA for inspection at any reasonable time.

c. Contractor shall maintain the records and any other records related to the performance of this Agreement and shall allow the RTA access to such records during the performance of this Agreement and for a period of four (4) years after completion of all services hereunder.

## **4. INDEMNITY**

Contractor shall, to the fullest extent permitted by law, indemnify, protect, defend and hold harmless the RTA, and its employees, officials and agents ("Indemnified Parties") for all claims, demands, costs or liability (including liability for claims, suits, actions, arbitration proceedings, administrative proceedings, regulatory proceedings, losses, expenses or costs of any kind, interest, defense costs, and expert witness fees), that arise out of, pertain to, or relate to the negligence, recklessness, or willful

misconduct of Contractor, its officers, employees, agents, in said performance of this Agreement, excepting only liability arising from the sole negligence, active negligence or intentional misconduct of the RTA.

## **5. INSURANCE**

Contractor shall maintain in full force and effect all of the insurance coverage described in, and in accordance with, Attachment One, "Insurance Requirements." Maintenance of the insurance coverage set forth in Attachment One is a material element of this Agreement and a material part of the consideration provided by Contractor in exchange for the RTA's agreement to make the payments prescribed hereunder. Failure by Contractor to (i) maintain or renew coverage, (ii) provide the RTA notice of any changes, modifications, or reductions in coverage, or (iii) provide evidence of renewal, may be treated by the RTA as a material breach of this Agreement by Contractor, whereupon the RTA shall be entitled to all rights and remedies at law or in equity, including but not limited to immediate termination of this Agreement. Notwithstanding the foregoing, any failure by Contractor to maintain required insurance coverage shall not excuse or alleviate Contractor from any of its other duties or obligations under this Agreement. In the event Contractor, with approval of the RTA pursuant to Section 6 below, retains or utilizes any subcontractors in the provision of any services to the RTA under this Agreement, Contractor shall assure that any such subcontractor has first obtained, and shall maintain, all of the insurance coverage requirements set forth in the Insurance Requirements at Attachment One.

## **6. ASSIGNMENT**

Contractor shall not assign any rights or duties under this Agreement to a third party without the express prior written consent of the RTA, in the RTA's sole and absolute discretion. Contractor agrees that the RTA shall have the right to approve any and all subcontractors to be used by Contractor in the performance of this Agreement before Contractor contracts with or otherwise engages any such subcontractors.

## **7. TERMINATION**

a. This Agreement may be terminated by the RTA at any time by giving Thirty (30) days written notice to the Contractor of its intent to terminate the Agreement.

b. Upon such termination, Contractor shall submit to the RTA an itemized statement of services performed as of the date of termination in accordance with Section 2 of this Agreement. These services may include both completed work and work in progress at the time of termination. If the AVL system has been installed, Contractor shall provide a working installation and configuration of the AVL system to the RTA within Thirty (30) days of the termination date. The RTA shall pay Contractor for any services for which compensation is owed; provided, however, the RTA shall not in any manner be liable for lost profits that might have been made by Contractor had the Agreement not been terminated or had Contractor completed the services required by this Agreement. Contractor shall promptly deliver to the RTA all documents related to the performance of this Agreement in its possession or control.

All such documents shall be the property of the RTA without additional compensation to Contractor.

## 8. NOTICES

Except as otherwise provided in this Agreement, any notice, submittal or communication required or permitted to be served on a party, shall be in writing and may be served by personal delivery to the person or the office of the person identified below. Service may also be made by mail, by placing first-class postage, and addressed as indicated below, and depositing in the United States mail to:

### **RTA Representative:**

Geoff Straw  
San Luis Obispo RTA  
253 Elks Lane  
San Luis Obispo, CA 93401  
(805) 541-2228  
[gstraw@slorta.org](mailto:gstraw@slorta.org)

### **Contractor Representative:**

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## **9. INDEPENDENT CONTRACTOR**

The parties intend that Contractor, in performing the services specified, shall act as an independent Contractor and shall have control of its work and the manner in which it is performed. Contractor, including Contractor's employees, shall not be considered agents or employees of the RTA. Neither Contractor nor Contractor's employees shall be entitled to participate in any pension plan, medical, or dental plans, or any other benefit provided by the RTA for its employees.

## **10. ADDITIONAL SERVICES**

Changes to the Scope of Services shall be by written amendment to this Agreement and shall be paid on an hourly basis at the rates set forth in this Agreement, or paid as otherwise agreed upon by the parties in writing prior to the provision of any such additional services.

## **11. SUCCESSORS AND ASSIGNS**

The RTA and Contractor each binds itself, its partners, successors, legal representatives and assigns to the other party to this Agreement and to the partners, successors, legal representatives and assigns of such other party in respect of all promises and agreements contained herein.

## **12. TIME OF PERFORMANCE**

The services described herein shall be provided during the period, or in accordance with the schedule, set forth in Exhibit A – Scope of Services.

## **13. MISCELLANEOUS**

a. Entire Agreement. This Agreement contains the entire agreement between the parties. Any and all verbal or written agreements made prior to the date of this Agreement are superseded by this Agreement and shall have no further effect.

b. Modification. No modification or change to the terms of this Agreement will be binding on a party unless in writing and signed by an authorized representative of that party.

c. Compliance with Laws. Contractor shall perform all services described herein in compliance with all applicable federal, state and local laws, rules, regulations, and ordinances, including but not limited to, (i) the Americans with Disabilities Act of 1990 (42 U.S.C. 12101, et seq.) ("ADA"), and any regulations and guidelines issued pursuant to the ADA; and (ii) Labor Code sections 1700-1775, which require prevailing wages (in accordance with DIR schedule at

[www.dir.ca.gov](http://www.dir.ca.gov)) be paid to any employee performing work covered by Labor Code sections 1720 et seq..

The RTA may deduct any delinquent business taxes, and any penalties and interest added to the delinquent taxes, from its payments to Contractor.

d. Governing Law; Venue. This Agreement shall be governed, construed and enforced in accordance with the laws of the State of California. Venue of any litigation arising out of or connected with this Agreement shall lie exclusively in the state trial court in Sonoma County in the State of California, and the parties consent to jurisdiction over their persons and over the subject matter of any such litigation in such court, and consent to service of process issued by such court.

e. Conflict of Interest. The RTA's Conflict of Interest Code requires that individuals who qualify as "Contractors" under the Political Reform Act, California Government Code sections 87200 et seq., comply with the conflict of interest provisions of the Political Reform Act and the RTA's Conflict of Interest Code, which generally prohibit individuals from making or participating in the making of decisions that will have a material financial effect on their economic interests. The term "Contractor" generally includes individuals who make governmental decisions or who serve in a staff capacity. In the event that the RTA determines, in its discretion, that Contractor is a "Contractor" under the Political Reform Act, Contractor shall cause the following to occur within 30 days after execution of this Agreement: (1) Identify the individuals who will provide services or perform work under this Agreement as "Contractors," and (2) Cause these individuals to file with the RTA's Representative the "assuming office" statements of economic interests required by the RTA's Conflict of Interest Code. Thereafter, throughout the term of the Agreement, Contractor shall cause these individuals to file with the RTA Representative annual statements of economic interests, and "leaving office" statements of economic interests, as required by the RTA's Conflict of Interest Code. The above statements of economic interests are public records subject to public disclosure under the California Public Records Act. The RTA may withhold all or a portion of any payment due under this agreement until all required statements are files.

f. Waiver of Rights. Neither RTA acceptance of, or payment for, any service or performed by Contractor, nor any waiver by either party of any default, breach or condition precedent, shall be construed as a waiver of any provision of this Agreement, nor as a waiver of any other default, breach or condition precedent or any other right hereunder.

g. Ownership and Use of Property Rights. Unless otherwise expressly provide herein, all original works created by Contractor for the RTA hereunder shall be and remain the property of the RTA. Contractor agrees that any patentable

or copyrightable property rights, to the extent created for the RTA as part of the services provided hereunder, shall be in the public domain and may be used by anyone for any lawful purpose.

h. Incorporation of attachments and exhibits. The attachments and exhibits to this Agreement are incorporated and made part of this Agreement, subject to terms and provisions herein contained.

i. Dispute resolution - Except as otherwise provided in this Agreement, any dispute concerning a question of fact arising under this Agreement which is not disposed of by agreement shall be decided by the RTA Project Manager, who shall reduce the decision to writing and mail or otherwise furnish a copy thereof to the Contractor. The decision of the Project Manager shall be final and conclusive unless within ten working (10) days from the date of receipt of such copy the Contractor mails or otherwise furnishes a written appeal addressed to the Director of the Department of Transportation and Public Works, with a copy to the Project Manager. The determination of such appeal by the Director of the Department of Transportation and Public Works shall be final and conclusive unless within ten working (10) days from the date of receipt of such copy the Contractor mails or otherwise furnishes a written appeal addressed to the RTA Board of Directors. The decision of the RTA Board shall be final and conclusive unless determined by a court of competent jurisdiction to have been fraudulent or capricious, arbitrary, or not supported by substantial evidence. In connection with any appeal preceding under this clause the Contractor shall be afforded an opportunity to be heard and to offer evidence in support of its appeal. Pending final decision of a dispute hereunder, the Contractor shall proceed diligently with the performance of the Agreement and in accordance with the Project Manager's decision.

The duties and obligations imposed by the Agreement and the rights and remedies available hereunder shall be in addition to and not a limitation of any duties, obligations, rights and remedies otherwise imposed or available by law.

#### **14. ACCESSIBILITY REQUIREMENTS**

In addition to those requirements set forth in Subsection 13(C), the RTA requires that all RTA telecommunication services, websites and web-based applications and services are accessible to, and usable by, persons with disabilities. Contractor shall provide all electronic, telecommunication, and information technology products and services to be provided under this Agreement in conformance with title 28, Part 35 of the Code of Federal Regulations, 28 C.F.R. §§ 35.130, et seq., and the accessibility standards set forth in Section 508 of the Rehabilitation Act of 1973, as amended. Section 508 standards are viewable at <http://access-board.gov/sec508/standards.htm>.

## **15. AUTHORITY; SIGNATURES REQUIRED FOR CORPORATIONS**

Contractor hereby represents and warrants to the RTA that it is (a) a duly organized and validly existing Corporation, formed and in good standing under the laws of the State of California, (b) has the power and authority and the legal right to conduct the business in which it is currently engaged, and c) has all requisite power and authority and the legal right to consummate the transactions contemplated in this Agreement. Contractor hereby further represents and warrants that this Agreement has been duly authorized, and when executed by the signatory or signatories listed below, shall constitute a valid agreement binding on Contractor in accordance with the terms hereof.

If this Agreement is entered into by a corporation, it shall be signed by two corporate officers, one from each of the following two groups: a) the chairman of the board, president or any vice-president; b) the secretary, any assistant secretary, chief financial officer, or any assistant treasurer. The title of the corporate officer shall be listed under the signature.

Executed as of the day and year first above stated.

**CONSULTANT:**

Name of Firm: \_\_\_\_\_

TYPE OF BUSINESS ENTITY (*check one*):

- ☐ Individual/Sole Proprietor  
☐ Partnership  
☐ Corporation  
☐ Limited Liability Company  
☐ Other (please specify: \_\_\_\_\_)

*Signatures of Authorized Persons:*

By: \_\_\_\_\_

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_

By: \_\_\_\_\_

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_

Taxpayer I.D. No. \_\_\_\_\_

SAM UEI No. \_\_\_\_\_

**SAN LUIS OBISPO REGIONAL TRANSIT  
AUTHORITY**

By: \_\_\_\_\_

Geoff Straw  
RTA Executive Director

APPROVED AS TO FORM:

\_\_\_\_\_  
RTA Counsel

ATTEST:

\_\_\_\_\_  
RTA Clerk

Attachments:

- San Luis Obispo Regional Transit Authority Request for Proposal
- Final Exhibit A - Scope of Services (*if amended from original RFP*)
- Contractor's Proposal
- Supplemental Questions/Clarifications
- Contractor's Response to Supplemental Questions/Clarifications
- Contractor's Best and Final Offer

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**MARCH 5, 2025**

**STAFF REPORT**

**AGENDA ITEM:** A-9

**TOPIC:** Strategic Business Plan Results

**PRESENTED BY:** Geoff Straw

**STAFF RECOMMENDATION:** Receive and File the SBP Results through December 2024

**BACKGROUND/DISCUSSION:**

In October 2008, the RTA Board, RTA staff, SLOCOG staff and members of the general public met in a day-long workshop to craft the elements of the first *RTA Strategic Plan*. The result of this workshop was a draft outline that contained the major sections and components of the plan. During the development of the FY09-10 Operating and Capital Program, staff developed the four key sections of the plan and this was approved by the Board during the budget process. The major components of the plan are the RTA Vision, Vision Elements, Mission of the Organization, and Strategies in achieving the Mission.

The 2012-14 Strategic Business Plan (SBP) was subsequently adopted in October 2011, and it incorporated goals and objectives developed as part of the *2010 RTA Short Range Transit Plan*. Staff used the measurable standards in the SBP to help guide the organization toward meeting the agency's goals and objectives. The subsequent 2015-2017 SBP was adopted in July 2014, and the most recent 2018-20 SBP was adopted in March 2018.

The 2018-20 SBP incorporated both new and revised standards developed in the 2016 *RTA Short Range Transit Plan*, as well as information gleaned from a customer perception survey completed in October 2017. Finally, the 2018-20 SBP examined real-time data gleaned from our comprehensive GPS-based Intelligent Transportation System (ITS), which helped determine appropriate performance standards.

As noted during the presentation at the March 2021 Board meeting, because the COVID-19 pandemic had drastically altered ridership patterns, and the RTA was seeking outside funding to update our 5-year Short-Range Transit Plan (SRTP), staff recommended that the update to the 2018-20 SBP be postponed. The RTA is currently wrapping up the SRTP, which includes revised performance standards that we can use to measure progress toward full ridership recovery. Staff anticipates updating the SBP to reflect these revised performance standards for the FY25-26. In the meantime, staff continues to provide bi-annual reports to the Board on our results in comparison the current objective and subjective performance standards.

It should be noted that two sections of the SBP include ridership-based metrics that will be impossible to meet due to the drastic reduction in demand caused by the COVID-19 pandemic. These currently unattainable standards include:

1. **Standards of Excellence Section 1: Service Quality and Efficiency** – We will deliver dependable, customer focused and efficient transit services to the communities that we serve. Further, we will look for opportunities to deploy innovative new service within budgetary constraints.

**Standard 1:** The Productivity (passengers per vehicle service hour) standards are presented below for regularly-scheduled / year-round services:

- A. Regional intercity fixed-route (RTA Routes 9, 10, 12 & 14) services shall be 22 or greater.
- B. Local fixed-route (Paso Express Routes A & B, and SoCo Transit Routes 21, 24, 27 & 28) shall be 17 or greater.
- C. Runabout and other demand response services will be 2.0 or greater.
- D. Route deviation services (such as RTA Route 15) will be 8.0 or greater.

Any recommended changes to seasonal or lifeline services (i.e., Shandon Dial-A-Ride) will include target productivity standards that must be met in order to qualify for continued funding.

2. **Standards of Excellence Section 2: Revenue and Resources** – While providing excellent service to our customers and communities, we will do so within the financial resources available to us. The financial health of the organization will not be compromised, and we will work to deliver good value for the taxpayers' investment in the RTA.

**Standard 2:** The Farebox Recovery Ratio for all regularly scheduled / year-round services shall be 20% greater than the minimum standard required by SLOCOG to meet TDA requirements. Measurement: Objective.

Staff plans to present updated SBP metrics over two Board meetings in September and November 2025, which follows the Board's planned consideration for adoption of the Short-Range Transit Plan in May 2025.

**Staff Recommendation:**

Receive and file the SBP results through December 31, 2024.

## RTA Strategic Business Plan Standards of Excellence

**Standards of Excellence Section 1: Service Quality and Efficiency** – We will deliver dependable, customer focused and efficient transit services to the communities that we serve. Further, we will look for opportunities to deploy innovative new service within budgetary constraints.

**Standard 1:** The Productivity (one-way passenger-boardings per vehicle service hour) standards are presented below for regularly-scheduled / year-round services:

- A. Regional intercity fixed-route (RTA Routes 9, 10, 12 & 14) services shall be 22 or greater.
- B. Route deviation services (such as RTA Route 15) will be 8.0 or greater.
- C. Local fixed-route (Paso Express Routes A & B, and SoCo Transit Routes 21, 24, 27 & 28) shall be 17 or greater.
- D. Runabout and other demand response services will be 2.0 or greater.

Any recommended changes to seasonal or lifeline services (i.e., Shandon Dial-A-Ride) will include target productivity standards that must be met in order to qualify for continued funding.

*Measurement:* Objective.

- Reviewed monthly by Operations Manager and reported by Executive Director at each Board meeting.

FY 24 Productivity													
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	YTD
RTA Fixed	12.4	14.4	16.8	16.5	15.9	13.3	13.5	14.7	14.9	15.4	15.6	14.5	14.5
Route Deviation	3.8	4.2	3.5	5.5	3.7	3.8	4.2	4.0	3.3	4.6	3.4	1.5	3.7
Paso Express	16.7	19.7	24.4	25.2	22.4	20.6	20.9	21.7	25.0	22.7	26.4	23.1	22.4
SCT	13.2	13.7	14.9	14.9	14.3	12.5	11.4	12.4	12	12.7	12.5	13.1	13.1
Runabout	1.3	1.5	1.3	1.3	1.3	1.3	1.5	1.3	1.4	1.3	1.4	1.3	1.4
Paso DAR	1.9	2.4	2.1	2.2	2.0	1.9	2.0	1.7	1.9	1.7	1.9	1.9	2.0
Nipomo DAR	1.7	2.3	2.8	2.7	2.6	2.2	2.0	2.3	2.5	2.4	2.6	1.7	2.4

FY 25 Productivity													
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	YTD
RTA Fixed	14.1	16.6	17.4	17.2	16.6	14.5							16.1
Route Deviation	3.1	4.4	3.3	3.8	3.7	3.3							3.6
Paso Express	18.8	23.7	28.0	27.5	24.5	25.4							24.7
SCT Fixed	12.5	13.1	13.1	13	12.4	12.3							12.7
Runabout	1.3	1.6	1.3	1.3	1.3	1.2							1.3
Paso DAR	1.7	1.7	2.0	2.0	1.7	1.6							1.8
Nipomo DAR	1.8	2.4	3.0	2.9	2.8	2.6							2.6

The tables above show that we did not meet the standards for RTA regional fixed-routes, Route Deviation or Runabout for FY24. However, Paso Express, Nipomo DAR and Paso DAR met the standards. In comparing FY25 to FY24, the difference is that we didn't meet the standard for Nipomo DAR. Similar to national ridership trends, the COVID-19 pandemic and statewide stay at home orders beginning in March 2020 drastically



reduced demand for public transit services, although productivity remained relatively high since service levels were reduced at the outset of the pandemic to coincide with demand. Overall ridership is modestly trending upwards, and staff will continue to look at alternatives to improve results.

**Standard 2:** The Service Delivery rate for all regularly-scheduled / year-round services shall be 99% or greater.

*Measurement:* Objective.

- Reviewed quarterly by Operations, and reported by Executive Director bi-annually to the Board.

As long as a scheduled fixed-route bus trip is delivered ahead of the next scheduled bus trip, then service is considered “delivered” (but that late trip will still be reported under the on-time performance measure discussed below). The service delivery goal is 99% or greater. The RTA delivers about 2,574 trips per month. For FY23-24, RTA missed 24 trips and Paso Express missed 14 trips, resulting in a 99% delivery rate for both. For FY24-25 through December 2024, RTA missed 15 trips and Paso Express missed 10 trips and SCT missed 7, resulting in a 99% delivery rate.

**Standard 3:** “On-time” is defined as no later than six minutes from any time point in the published schedule. We recognize that making scheduled transfers between buses is vitally important to riders, and staff will explore methods of regularly measuring missed transfers. The following On-Time Performance (OTP) standards shall apply to regularly-scheduled / year-round services:

- Regional intercity fixed-route and Express runs shall be 85% or greater.
- Local fixed-route shall be 90% or greater.
- Route deviation services shall be 70% or greater.

*Measurement:* Objective.

- Reviewed quarterly by Operations, and reported by Executive Director bi-annually to the Board.

FY 2024													
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	YTD
RTA	82%	81%	79%	79%	78%	81%	85%	86%	86%	86%	85%	85%	83%
Paso	87%	88%	87%	87%	87%	85%	94%	91%	94%	97%	90%	85%	89%
Route 15	79%	75%	81%	76%	77%	73%	97%	95%	96%	94%	93%	86%	85%
SCT	85%	83%	85%	85%	86%	89%	89%	85%	83%	85%	85%	85%	86%

**FY 2025**

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	YTD
RTA	86%	83%	85%	82%	82%	82%							83%
Paso	90%	88%	87%	92%	89%	89%							89%
Route 15	84%	83%	84%	87%	85%	88%							85%
SCT	85%	83%	83%	85%	86%	89%							85%

For FY24, RTA and Paso Robles services did not meet standards, but the Route 15 and SCT meet the standard with a result of 85%. To date FY25 through December 2024, we achieved the same result as FY24. Staff will continue to look for ways to improve this result.

**Standard 4:** The On-Time Performance (OTP) for Runabout and other demand response services shall be 95% or greater.

*Measurement:* Objective.

- Reviewed quarterly by Operations, and reported by Executive Director bi-annually to the Board.

Runabout service is considered on-time if the van arrives within 30 minutes of the appointed pick-up time. The goal is 95% or greater, and Runabout surpassed this goal in each month of FY25 YTD through December 31, 2024, with a 99% on-time average. Staff will continue to monitor Runabout's OTP to ensure we continue to achieve these strong results.

**Standard 5:** The RTA will make consistent efforts to explore new service and service delivery options as well as work with regional efficiencies in the delivery of transportation to the jurisdictions

*Measurement:* Subjective.

- Reported by the Executive Director and Division Heads annually.
  - Schedule revisions and minor route alignment changes are evaluated routinely to improve service delivery.
  - Staff monitors ridership and customer comments looking for system improvements.

**Standard 6:** The RTA will measure Overcrowding as the frequency of instances that the number of passengers on a bus exceeds the number of seats (i.e., 34 passengers on a 34-seat bus equates to a Load Factor of 1.00), as well as the duration of exceedances. The Overcrowding standards are as follows:

- The standard for regular fixed-route services is no more than 10% of the monthly total number of bus trips that exceed a Load Factor of 1.25 for greater than 20 minutes.
- The standard for Express services is no more than 10% of the monthly total number of bus trips exceeds a Load Factor of 1.00 for greater than 20 minutes.

If the Load Factor standards are exceeded, staff will assign a larger vehicle (if possible); otherwise, the Board will direct staff to evaluate adding scheduled bus trips to spread out the passenger loads.

*Measurement: Objective.*

- Reviewed quarterly by Operations Manager and reported by the Executive Director biannually to the Board.

For FY23-24, there were two trips that experienced overcrowding. The first was the 8:33am northbound Route 12 from the Government Center. The second was the Paso Robles Express Route A in the afternoon due to the large number of high school and junior high students riding. FY25 through December 31, 2024 we continue to see the same trips being impacted. Staff will continue to monitor the service for overcrowding as it relates to riders' comfort levels.

**Standards of Excellence Section 2: Revenue and Resources** – While providing excellent service to our customers and communities, we will do so within the financial resources available to us. The financial health of the organization will not be compromised, and we will work to deliver good value for the taxpayers' investment in the RTA.

**Standard 1:** The annual operating budget will be based upon projected revenue and the total operating cost will not exceed the budget adopted by the Board.

*Measurement: Objective.*

- Tracked monthly in financial statements and reported bimonthly to the RTA Board. Below are results for the past five fiscal years, plus YTD for FY23-24:

FY19-20 Result: Operating Costs were 94% of the adopted budget

FY20-21 Result: Operating Costs were 88% of the adopted budget

FY21-22 Result: Operating Costs were 95% of the adopted budget

FY22-23 Result: Operating Costs were 92% of the adopted budget (net of depreciation and pension expense/GASB 68 adjustment)

FY23-24 Result: Operating Cost are 95.6% of the adopted budget (net of depreciation and pension expense/GASB 68 adjustment)

FY24-25 Result: Operating Costs are 44.5% of the adopted budget through December 2024 (unaudited)

Budget versus actual expenses data is calculated and reviewed on a monthly basis by RTA staff. This information is reported to the Board at each meeting (typically every other month) to help inform decisions.

**Standard 2:** The Farebox Recovery Ratio for all regularly scheduled / year-round services shall be 20% greater than the minimum standard required by SLOCOG to meet TDA requirements.

*Measurement: Objective.*

- Tracked monthly and reported bimonthly to the RTA Board. Below are results for the past five fiscal years, plus YTD for FY23-24:

FY19-20 Result: 12.7% (including Paso Express); prior to the COVID-19 pandemic (through January 2020), we achieved a result 18.0%.

FY20-21 Result: 3.5% (*including Paso Express and South County Transit from January 1 – June 30, 2021*) – COVID-19 pandemic limited fare period  
FY21-22 Result: 8.2% (*including Paso Express and South County Transit*)  
FY22-23 Result: 8.7% (*including Paso Express and South County Transit*) (net of depreciation and pension expense/GASB 68 adjustment)  
FY23-24 Result: 8.9% (*including Paso Express and South County Transit*) (net of depreciation and pension expense/GASB 68 adjustment) – 44.2% after factoring in 5307 Federal Transit Administration Operating Funds  
FY24-25 Result: 9.1% (*including Paso Express and South County Transit*) through December 2024, unaudited, before adjustments

In recent years, the RTA has struggled to meet this standard. Due to the global pandemic, the California legislature passed AB 149 which authorizes transit operators to include federal grant funds as local funds for the purpose of computing fare revenue ratios. In FY23-24 the RTA noted the federal 5307 operating funds as part of the other local support for the farebox calculation.

**Standard 3:** No significant annual fiscal and compliance audit findings.

*Measurement:* Objective.

- Finance and Administration will report any negative audit findings to the RTA Board.

The RTA consistently achieves positive annual fiscal and compliance reports with no significant financial audit findings. Staff strives to improve transparency and continues to implement procedures that exceed the auditors' expectations.

**Standard 4:** Ensure that all capital procurements provide good value to our customers and our employees.

*Measurement:* Subjective.

- Evaluated through the Marketing Department's biannual Community Perception Survey, feedback from communities, and review of the annual 5-year capital program by the RTA Board.

The annual capital program is developed by staff and presented to the Board as part of the annual budget-making process. In addition, staff presents budget revision recommendations if conditions change.

**Standards of Excellence Section 3: Safety** – We recognize the tremendous importance of safety in the operation of RTA service to our customers and communities. Therefore, the safety of our customers and employees will be an organizational priority and we will be proactive in promoting system safety.

**Standard 1:** Rate of preventable vehicle collisions will not exceed 1.0 per 100,000 miles.

*Measurement:* Objective.

- Rate shall be tracked by the Safety and Training Manager, and reported annually to the RTA Board. Below are results for the past five fiscal years:

FY18-19 Result: 1.14  
FY19-20 Result: 2.56  
FY20-21 Result: 1.65 RTA-only, and 1.48 combined RTA/SoCo  
FY22-23 Result: 1.75 Combined  
FY23-24 Result: 0.77 Combined  
FY24-25 Result: 1.17 Combined through December 2024

Bus Operators are held to a higher safety standard than the general public. Staff will continue to track this KPI closely. We have put together a team to monitor causative factors, including trends by route, years of experience, location, type of collision, etc. New Bus Operators return for refresher training after three months after graduating from the training program.

**Standard 2:** Address all safety hazards identified by the Safety Resource Committee.

*Measurement:* Objective.

- List shall be compiled with action items and timelines by the Safety and Training Manager.

Employees are engaged in the Safety Resource and Employee Committee by submitting suggestions. Suggestions that are not directly related to the Committee's mission are forwarded to the appropriate department for resolution.

In FY24-25 through December 2024, the Safety Resource Committee closed 24 action items, with 3 open action items and two recurring items remaining. The action items involve purchasing atomic clocks with temperature read-out in support of our Heat Illness plan. Suggestions on how our paratransit vehicles can service the new restriping on Marsh Street safely. Painted height measurements on the inside of RTA vehicles so drivers are aware of their vehicle clearance. Using cones to help cutaway vehicles when backing in the SLO Yard parking stalls to minimize trip hazards. Provided step stools in each yard for drivers to check the engine fluids safely. Requests concerning areas where the weeds or tree limbs are blocking the view of traffic were sent to appropriate jurisdictions to have them trimmed to improve visibility. A few bus stop lights were fixed so passengers are visible during hours of darkness. RTA employees continue to demonstrate attentiveness and communication in mitigating hazards and engage in improving the quality of our work environment. The Committee continues to address difficult locations on fixed-route services by working with the jurisdictions to ensure bus stops are easily accessible. The Committee also continues to address difficult locations on the demand response services, particularly those area that require navigating around or away from hazards at customer pick-up/drop-off locations.

**Standard 3:** Preventable workers compensation lost-time claims will not exceed six annually, and preventable medical-only claims will not exceed five annually.

*Measurement:* Objective.

- All work comp claims shall be duly investigated and immediately reported by Finance and Administration staff to our carrier. Below are results for the past five fiscal years:

FY19-20 Result: 7 lost-time claims (two are open as of December 31, 2024), and 14 first aid/incidents/medical-only (all have closed)

FY20-21 Result: 4 lost-time claims (all have closed), and 14 first aid/incidents/medical-only (all have closed)

FY21-22 Result: 3 lost-time claims (all have closed) and 5 first aid/incidents/medical-only (they are all closed)

FY22-23 Result: 7 lost-time claims (five are closed as of June 30, 2024), and 8 first aid/incidents/medical-only (they are all closed)

FY23-24 Result: 9 lost-time claims (three are open as of December 31, 2024) and 9 first aid/incidents/medical-only (they are all closed)

FY24-25 Result: 1 lost-time claim (it is open as of December 31, 2024) and 8 first aid/incidents/medical-only (3 are open)

**Standard 4:** Customer and community perception of system safety will be at least 90%.

*Measurement:* Objective.

- As measured in biannual Community Perception Survey.

Based on the Short-Range Transit Plan passenger surveys conducted in October 2023, customer perception of system safety/security was rated 4.4 out of 5, which equates to 88%. Staff strives to improve satisfaction regarding this standard.

**Standard 5:** Total risk management costs shall not exceed industry norms. Staff will undertake alternating market surveys every four years for vehicle liability / physical damage coverage and for workers compensation coverage.

*Measurement:* Objective.

- Tracked monthly by Finance and Administration and reported bimonthly to the RTA Board. Reported monthly by Finance and Administration in financials and YTD budget reports. Below are results for the past five fiscal years:

FY19-20 Result: 10.9% of total operating costs

FY20-21 Result: 9.9% of total operating costs

FY21-22 Result: 7.6% of total operating costs

FY22-23 Result: 10.2% of total operating costs (net of depreciation and pension expense/GASB 68 adjustment)

FY23-24 Result: 9.7% of total operating cost (net of depreciation and pension expense/GASB 68 adjustment)

FY24-25 Result: 11.8% of total operating costs through December 2024 (unaudited)

Staff has worked hard to close claims opened in prior years. Although this is good news, due to the tightening market in California, staff expects risk management costs to continue to escalate unless tort reform or other adjustments are made by the Legislature that could reduce transit agencies' exposure to frivolous lawsuits. If exposure could be reduced, it would likely increase competition in the market and reduce our risk management costs. Staff is closely monitoring this issue and will report developments back to the Board as information is collected.

**Standards of Excellence Section 4: Human Resources** – Our employees are the foundation of the organization. We will support our employees in achieving excellence through training and development, teamwork, and continuous efforts at effective communication while treating each with integrity and dignity.

**Standard 1:** Recruit, promote and retain highly qualified employees to achieve our service standards.

*Measurement:* Subjective.

- Annual assessment by Executive Director and Department Heads.

The annual calendar year turnover rates for RTA are as follows:

2020 – 13%

2021 – 19%

2022 – 16%

2023 – 17%

2024 – 18%

**Standard 2:** Provide continuous development of skills and capabilities through ongoing training and development programs that foster personal and professional growth. Department Heads develop training plans as part of annual budget-making process, according the following minimum standards:

- A. Maintenance: 30 Hours per technician annually.
- B. Operations Supervisors: 24 Hours annually.
- C. Bus Operators: 8 Hours Annually.
- D. Finance and Administration: 16 Hours per employee annually.

*Measurement:* Objective.

- Department Heads evaluated annually for achievement of training objectives.

Staff appreciates the Board’s commitment to funding a relatively robust training budget. It should be noted that ongoing training is a major part of what staff does on a daily basis to help both the organization and staff grow professionally and enhance safe operations.

- Maintenance: In FY24-25 (as of December 2024), our Mechanics have averaged 14 hours per person, including training for Lift-U, Electric Vehicle HVAC, CHP Inspection, CARB Compliance, and Rules of the Road.

In FY23-24, our Mechancis averaged 20 hours per person, including scissor lift operator training, and high voltage awareness and contact release training. Additional training will be occurring as the agency expands use of battery-electric buses. The Utility and Parts Clerk staff averaged 10 hours per person.

- Operations Supervisors: In FY24-25 through December 2024, the average was 13 training hours per Operations Supervisor; standard is 24 hours annually. Our Training staff and our third-party trainers have conducted 186 total training hours. These training modules include the following:
  - Heat Illness and Prevention,
  - ChargePoint EV training,
  - De-Escalation Training,
  - New vehicle type (ArBOC) training,
  - Classroom and Behind-the-Wheel training completed for EV Buses,
  - Drug and Alcohol Collection Certification,
  - Wheelchair securement on newer buses,
  - TSI Transit Trainer course (two Supervisors), and
  - DMV Examiner Training.
  
- Bus Operator training: Besides the required 8 hours of annual Verification of Transit Training, Bus Operators have received a combined total of 266 additional training hours conducted by our training department for topics listed below, but not limited to:
  - Three-month refresher training for new Bus Operators,
  - New Bus Operator Trainees receive a 6-week training program, plus additional training with a qualified Line Instructor operating in revenue service before working alone,
  - Bus Fleet Orientation for three new vehicles types and refresher training as needed,
  - Four Bus Operators completed new hire training through December 31, 2024,
  - Three promoted employees completed new hire training (one Operations Supervisor, one Assistant Facility Manager, and one administrative employee),
  - Twenty-one Bus Operators completed the required annual one-hour Sexual Harassment Prevention training,
  - ChargePoint EV training, and
  - Three applicants attended DMV Permit Study Classes with the Training staff.
  
- Finance and Administration: These training hours are used by each employee in various ways based on their responsibilities and in consultation with his or her direct supervisor. In FY24-25, these have included the CALPELRA Human Resources Conference and the CalTIP Board of Directors Meetings. In FY23-24, these included the CALPELRA Human Resources Conference, CalACT Fall Conference, CAPPO Conference, virtual FTA Triennial Workshop, video editing training, SLO Leadership program, Strengths Training, and the CalTIP Board of Directors meetings.



**Standard 3:** Enable our employees to achieve excellence in serving our customers by building teamwork and understanding effective communication within the organization.

*Measurement:* Subjective.

- Employees provided opportunity to provide feedback on organizational communication as part of the Executive Director's annual evaluation.

We continually stress the tenets of *Verbal Defense and Influence*, which focuses on how to communicate more effectively with each other and our customers – particularly in difficult or threatening situations. All employees have completed de-escalation and implicit bias training to enhance employee customer service. The Executive Director and the three RTA department heads meet weekly to ensure consistency in messaging and direction for the organization. The Executive Director and the three department heads also conducted an annual manager retreat focusing on strategic initiatives.

**Standard 4:** Employees will be evaluated annually in a fair and equitable way to judge performance and be provided a developmental plan for the next fiscal year.

*Measurement:* Objective.

- Employee merit evaluations will be provided to each employee annually with the evaluation grading measurement of attainment of department objectives developed during the budget process and achievement of RTA's Standards and RTA's KPIs.

The RTA currently completes formal annual evaluations for administration and management staff. For non-management staff not covered by the Collective Bargaining Agreement, we have implemented improved annual performance planning and appraisal documents to better reflect the role of each classification. Employees in the Bus Operator, Mechanic, Parts Clerk, and Utility classifications are evaluated based on the requirements of the Collective Bargaining Agreement (CBA) and to ensure the public's safety. CBA employees are also evaluated as part of the RTA Safety Awards program on their individual anniversary dates.

**Standards of Excellence Section 5: Fleet and Facility** – We will operate and maintain a modern and clean fleet and facilities that will be pleasing to our customers and a source of pride for our employees and our communities.

**Standard 1:** If funding permits, the RTA will match SLO Transit's standard of replacing revenue vehicles when they reach the FTA-defined useful life minimums in terms of service years or miles. If funding remains constrained, negotiate with SLO Transit to ensure neither agency's buses surpass 40% beyond the FTA standards.

*Measurement:* Objective.

As of December 31st, 2024 the average age of our 32 fixed-route vehicles is 9 years with an average of 396,871 miles per vehicle. The average age of our 32 demand-response vehicles (including Runabout and other Dial-A-Ride vans) is 5 years with an average of 73,672 miles. We are currently within the RTA's vehicle life standards.

Staff is working closely with our Short-Range Transit Plan consultants and partner agencies to update the previous SRTP, which was adopted in July 2016. The fleet plan was updated partially (primarily for heavy-duty buses and larger cutaway vans) as part of the ICT Rollout Plan in 2023. In addition, a five-year capital program is included in each annual budget document.

**Standard 2:** Road calls will not exceed five per 100,000 vehicle service miles. A road call is defined as all mechanical or other vehicle-related failures that affect the completion of a scheduled revenue trip or the start of the next scheduled revenue trip, including failures during deadheading and layover.

*Measurement:* Objective.

- As tracked and reported by the Maintenance Department, and reported biannually to the RTA Board.

As of December 31, 2024, there were seven major mechanical system failures and twelve other mechanical system failures in FY24-25. This equates to 3.1 failures per 100,000 vehicle revenue miles for fixed-route buses and 0.53 for demand response vans.

As of June 30 2024, there were 18 major mechanical system failures and 25 other mechanical system failures in FY23-24. This equates to 3.09 failures per 100,000 vehicle revenue miles for fixed-route buses and 1.67 for demand response vans.

**Standard 3:** Maintain a clean, attractive fleet. Maintain our facilities so that they are safe and appealing to customers and employees.

*Measurement:* Subjective.

- As measured by employee and customer feedback.

Based on the results of the SRTP survey that was conducted in October 2023, cleanliness of buses ranked 4.4 out of 5, which equates to 88%.

**Standard 4:** Achieve an 80% favorable rating of bus stop appearance by customers and the communities that we serve.

*Measurement:* Objective.

- As measured in the biannual Community Perception Survey.

Bus stop appearance was included in the October 2023 Short-Range Transit Plan passenger survey, and we achieved a ranking of 3.8 out of 5, which equates to 74%. Although this does not meet the 80% standard, staff is developing a strategy to address this standard, including updating/replacing the bus stop signs in South County and repairing/enhancing bus stop lighting.

Bust stop location was also included in the October 2023 Short-Range Transit Plan survey and we achieved a ranking of 4 out of 5, which equates to 80%.

**Standard 5:** Achieve all federal- and state-mandated maintenance minimums, as well as vendor recommended maintenance schedules, for our fleet and facilities. The following standards apply:

- A. No negative CHP Annual Terminal Inspection, FTA Triennial Review or TDA Triennial Performance Audit findings.
- B. Preventative maintenance schedules for all equipment shall be done on a timely basis (3,000-mile intervals or as mandated by equipment OEM vendor).

*Measurement:* Objective.

- As tracked by the Maintenance Department, and reported annually to the RTA Board.

There were no negative findings in the 2023 TDA Triennial Performance Audit or in the 2023 FTA Triennial Review, nor in the most recent CHP Terminal Inspection completed in September 2024. Preventive maintenance has been completed on a timely basis, with no CHP findings.

**Standards of Excellence Section 6: Leadership** – We will strive to be one of the nation’s leading small transit operators. We will work to maintain collaborative relationships within the industry, within our community, and with our stakeholders. We will develop future leaders from within our organization.

**Standard 1:** Maintain cooperative relationships with federal, state and local funding agencies.

*Measurement:* Subjective.

- Will be reviewed by staff and RTA Board.

Staff continues to build upon an already strong relationship with our partners at the federal, state and local levels. The Executive Director has worked cooperatively with the transit agency leaders in the county to advocate for and develop a consistent message on issues related to SLOCOG’s 5307 POP Working Group and for transit projects that are eligible for formula SB125 (TIRCP/ZETCP) funds. If any issues arise (i.e., collisions or personnel issues that require Board notification), it is brought to the Board leadership’s attention for direction so that staff can work with our cohorts in the region to provide a reasonably consistent response. The Executive Director serves on the CTA Small Operators Committee. Despite recently negotiating a fare-sharing agreement with Monterey-Salinas Transit, we have not yet been successful in negotiating a fare-sharing agreement or a mutual aid agreement with Santa Maria Regional Transit.

**Standard 2:** Develop partnerships with stakeholders, community leaders and decision makers, while keeping them well informed of the integral role of RTA and contributions to the communities that we serve.

*Measurement:* Subjective.

- To be evaluated and monitored by RTA Board.

The cities of Atascadero and of Morro Bay recently elected to consolidate local transit services into the RTA, demonstrating the trust in our professional services. The agency’s partnership successes are formally discussed by the Board during the Executive

Director's annual evaluation. In addition, issues and ideas are also forwarded by community members to both the Board and staff throughout the year. The Executive Director also attends City Council and other public meetings in each RTA jurisdiction throughout the year. The Executive Director also actively participates as a member of Rotary SLO de Tolosa, which provides an important link to thought leaders and prominent community members throughout our county.

**Standard 3:** Promote effective internal communications and promote the values of the organization.

*Measure:* Subjective.

- To be evaluated by Executive Director.

Promoting effective internal communication is a task that always requires high- and mid-level nurturing, which is especially important now that we are embarking on an intensive capital program to electrify our buses. Senior staff members meet weekly to discuss effective communications and our organizational values, while a broader group meets monthly to strive to ensure messaging is consistent and useful. The Executive Director also informs the Board President of on-going efforts to improve communications and employee morale within our organization. While we believe we are making strides in improving internal communications, this is an area in which the work is never "done."

**Standard 4:** Provide effective leadership for public transportation within the County.

*Measurement:* Subjective.

- To be evaluated by Executive Director and RTA Board.

Similar to the discussion on Standard 3 above, the Executive Director's leadership is evaluated annually as part of his review. The Executive Director also discusses leadership successes and goals with his three department heads as part of their annual evaluation. Finally, the Executive Director and other senior RTA staff discuss direction with other transit agency staff during quarterly RTAC meetings and other transit-focused meetings (i.e., FTA 5307 planning, UZA MOU discussions, SSTAC, etc.) throughout the year.

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**MARCH 5, 2025**

**STAFF REPORT**

**AGENDA ITEM:** A-10

**TOPIC:** CAD/AVL System

**PRESENTED BY:** Omar McPherson, Operations Manager

**STAFF RECOMMENDATION:** Authorize the Executive Director to issue an RFP for a New CAD/AVL System

**BACKGROUND/DISCUSSION:**

Staff is requesting Board authority for the procurement of computer-aided dispatch / automatic vehicle location (CAD/AVL) software and hardware to replace our current scheduling system used for the Runabout ADA Paratransit and Dial-a-Ride services. At the May 1, 2024 meeting, the Board approved funds in the budget for the grant applications for funding the CAD/AVL system. The RTA implemented the current Routematch CAD/AVL software system in 2012, and staff recommends that we replace this outdated system.

A draft Scope of Work that would be included in a Request for Proposals (RFP) is attached. If authorized by the Board, the CAD/AVL system would be procured in accordance with the RTA Purchasing Policy at a price not to exceed \$250,000. Once the proposals are received, ranked and any interviews completed, staff would bring a draft Agreement to the Board for possible execution at the July meeting.

**Recommendation**

Authorize the Executive Director to issue an RFP for a new CAD/AVL system.

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## **EXHIBIT I**

### **SCOPE OF WORK**

#### **Demand Response Scheduling and Dispatching Software**

##### **INTRODUCTION**

RTA seeks proposals from qualified firms with strong experience in all aspects of complementary paratransit demand response operations including but not limited to scheduling, dispatching, labor/union rules, reservation policies, etc. as they pertain to providing transportation compliant with the Americans with Disabilities Act, etc. The demand response scheduling and dispatching systems shall use the state-of-the-art automatic vehicle location (AVL), global positioning satellite (GPS), and mobile data computer (MDC) technology available in terms of hardware and software. The system shall be interactive and shall integrate into RTA's technology infrastructure. RTA reserves the right to choose a portion, all, or none of the features.

##### **1.0 Demand Response**

This section does not describe how a proposed system is to implement these functions as each proposer's system will be unique in that respect. It is important, however, that proposers describe in their proposals how their system implements the functions, i.e., how their system works. The proposer shall also list all exceptions to the functions specified in this section. Failure to do so may be cause for disqualification or RTA may direct the proposer, if selected, to implement the missing features at no cost to RTA.

##### **2.0 Purpose**

Proposer shall provide a complete Computer Aided Dispatching Scheduling System for demand response public transportation services for local and county transfer services as defined in this RFP. The system shall also include automatic vehicle location (AVL), global positioning satellite (GPS), and Mobile Data Computer (MDC) technologies. The integration of these technologies shall provide functions and capabilities to display in text and graphic format real-time vehicle location and tracking, allow in-take and assign demand trips, display electronic manifest for the driver, provide navigation for drivers, canned messages between dispatch, road supervisor and driver, and update various status level of each vehicle trip. The system will automate real time, interactive and/or batch-scheduling functions, optimizing and manifests for each vehicle and driver. The user shall be able to adjust parameters to test, save, and compare solutions for performance, efficiency, and cost.

The basic system features should include:

- Client intake, registration and eligibility, vehicle management, driver management, trip reservations;
- Automated fare assignments to trips.
- Automated scheduling and coordination between other third parties including but not limited to RTA fixed-route data, peer providers and social service agencies, including capability to coordinate with ~~taxi services and~~ timed transfers, and assign riders to the correct service;

- Dispatching, billing, all Federal and State required reporting, geo-coding, mapping including the rider origins and destinations by eligibility (e.g., all ADA riders) and associated reports;
- Documentation of customer service requests and tracking responses,
- Seamless Interactive Voice Response (IVR) telephone system to direct calls, allow riders to book rides and remind riders of scheduled rides (both the day before actual service and immediately before a ride arrives);
- Automated vehicle location, onboard mobile data connection availability both when the vehicle is stationary and turned off,
- Fleet management to inventory all vehicles and rider capacities.

### **3.0 Objectives and Goals**

RTA wishes to procure and install a system that automates the daily operations and management functions while seamlessly integrating GIS, advanced scheduling and routing capabilities to reduce operating expenses, improve customer service and automate the billing and reporting process. Proposers are expected to discuss their approach to providing these benefits. Proposers are also expected to clearly define their features and functionality in the technical proposal, and clearly define the costs and services required to implement a fully-functional system.

The overall objective is to increase efficiency in RTA's demand response service and optimize service performance by using the state-of-art technologies that will improve RTA's ability to manage the demand response service while improving the customer's ability to schedule trips.

RTA's expectation of the system is not limited to but includes dispatching, invoicing, reporting, geo-coding, and mapping functions as well as the following functions:

1. Data collection, accurate reporting and record keeping - reducing staff time and generating required reports,
2. Scheduling trips more efficiently.
3. Scheduling trips that do not exceed comparable travel time on fixed route service.
4. A rapid reservation and trip confirmation process.
5. Dispatching tools that assist the dispatcher in making decisions.
6. Vehicle Tracking - including reporting and record keeping.
7. Ability to utilize programs from multiple locations utilizing the same database via networking or preferably by web base application. Must be able to accommodate seven concurrent users on the system.
8. Automated report generation and back up report generation to support maintenance of service provision when power outages occur.
9. Automated report generation that minimizes auditing efforts in standard data reports.
10. Improve ability to coordinate trips/transfers with other agencies.
11. Standardize/streamline scheduling, routing, and other operational procedures.
12. Reduce duplication of data entry for client and vehicle data.
13. Automate and provide real-time interactive and/or batch scheduling functions.
14. Improve auditing of data management.
15. Reduce time utilized for administrative and reporting activities while increasing the productivity.



16. Reduce overall vehicle miles and hours while maintaining passenger counts.
17. Increase vehicle capacity and vehicle loads/shared trips without prolonging passenger travel beyond comparable fixed route travel.
18. Improve customer service
19. Include and improve client registration and eligibility,
20. Integrate vehicle and driver management software with scheduling software.
21. Include ability to efficiently assign same day trips to available vehicle
22. Include the ability to automate scheduling and coordinate with fixed route services and other agencies same day service options.

#### **4.0 System Integration**

RTA requires a computer aided routing and scheduling system with GPS, AVL, and GIS integration that is fully functional and operational in real time. The proposer shall accept full responsibility for integrating all components into a fully functional system. Proposer will recommend various hosting environments and clearly articulate the pros and cons of the options. The system shall allow users to operate the system using web, mobile, tablet, and desktop systems. Users must be able to access the system from one physical location, RTA office for all functions and remote access if needed.

Proposer should describe the following proposed software components that are required from all Proposers:

- Demand Response and paratransit scheduling and dispatch software with multiple avenues for tracking billing, funding, and ADA eligibility
- Automated Vehicle Locator (AVL) System
- Integrated mobile data technology that includes commercial, off the shelf Mobile Data Terminals. The current system utilizes Samsung Android tablets on all vehicles and RTA greatly prefers to retain these for use with the new system and anticipated future applications on this platform. RTA is not interested in proposals that include proprietary Mobile Data Terminals or storage components.
- Vehicle Logic Units (VLU) with a three (3) to five (5) year warranty
- Data analysis and tools to assist in planning and operations
- Interactive Voice Response (IVR) system
- Automated phone notification module
- Hosted or web-based software that includes five (5) to seven (7) years of product support, user support, and warranties.

The Proposer should also address how the product is expected to evolve over the next few years and discuss elements that simplify the use of their system including wizards, editing, and data integrity tools.

#### **4.1 GIS Functionality**

GIS and mapping functions shall be provided as part of the software system proposed by the Proposer. At a minimum, the service area maps shall encompass all of San Luis Obispo County. It is essential that the mapping capabilities and the dispatcher's abilities to identify approximate current locations, based on last known point in the schedule. Additionally, GPS / AVL technology should be able to integrate with the proposer's GIS

base maps. RTA requires that the service area boundary be readily identifiable and graphic or query function must be present to determine if requested trip origins and destinations are within the service area.

The system software should allow for staff assignments. Trips downloaded from electronic trip requests should be sorted by staff. The software must incorporate routing and scheduling with GIS/GPS/AVL active (real-time) tracking capabilities and allow user access to the service area through a map view. The GIS map view must be capable of displaying individual routes or runs, and/or bus stops; specific street address; or other specified user-defined physical features. In addition to providing support to the software's primary scheduling and customer information functions, the GIS functionality of the proposed software must support other GIS analyses. The system shall be capable of:

- Printing/producing camera ready printed output
- Providing geographically based query functions
- Displaying census or other demographic/socio-economic data in thematic layers to assist staff to better understand area characteristics

The system shall be capable of importing and exporting data and graphic images from and to other software platforms. System shall be capable of printing maps to a wide range of printers/plotter devices.

#### **4.2 Map Features and Attributes**

Access to maps should be seamless from within the scheduling software (e.g., user should be able to generate needed maps with single mouse click or menu selection).

Base maps should contain current attributes on street segments, addressing, speed limits, etc. Proposer shall be responsible for supplying a fully up-to-date map complete with all attributes necessary for point-to-point scheduling using coordinate geography (not zones). Street network shall permit definition of segment characteristics, such as speed limits, one-way direction, etc. Proposer shall outline in its proposal how RTA should expect to receive updates on maps and what the associated costs would be. Failure by the Proposer to include cost estimates associated with map upgrades allows RTA to assume this cost will be included in the annual maintenance fees.

System shall provide methods of allowing user editing of the base map to add new streets, change municipal boundaries, define incomplete address ranges Paratransit S&D Software (if they exist), etc.

GIS functionality shall include ability to develop overlays or coverage of municipal census tracts, or block groups and zip code boundaries.

As noted previously in the RFP, RTA defines and needs the capability to handle multiple fares. GIS functionality shall include ability to define service-based fares, such as set fares, zone fares, contract fares, varying fares, in/out of service area, etc. This functionality is in addition to consideration of client codes such as elderly, disabled, medical assistance, etc.

System shall permit definition and display of physical features that act as barriers to transportation. System shall permit ease in the addition and removal of temporary barriers to accommodate community events.

System shall be capable of defining and displaying point files, indicating system time points, major intersections, possible future major transfer points, and major destinations of travel, landmarks, or other points of interest.

#### **4.3 Geo Coding**

Service area map shall contain definitions of street segment name and address ranges. System shall have full geo coding capability allowing RTA to enter an address and locate the address on the map. System shall have the capability to enter locations (i.e. origins, geographic features, destinations, garages, landmarks, and places of interests, etc.) System shall have the capability of view street names, postal codes, and municipal boundaries; and create multiple definable polygons (i.e. fare zones, ADA corridor, etc.). System shall have the capability of the user to easily zoom in/out and pan in any direction. System shall be capable of handling various abbreviations and spellings of names (e.g., St. for Street, etc) in the geo coding process. System shall permit manual assignment of latitude and longitude coordinates in the event an address cannot be geo coded based on existing map address range attributes (i.e. bus stops). Geo coding should include a minimum of the San Luis Obispo County and portion Northern Santa Barbara County (City of Santa Maria).

#### **4.4 Distance Computation**

Systems shall have the capability of allowing user to calculate distance between points or along a specified portion of the street or route network. System shall include a capability to compare route scenarios such as shortest distance, shortest time, barriers or construction impacts. System shall also have the ability to override mileage calculations, for manual mileage calculations in cases of mileage disputes with other carriers or known GPS errors.

#### **4.5 Graphical Display of Trips**

For any trip reservation, system shall be capable of providing, using the GIS capabilities of the software, a map image of the trip origin and/or destination in real time.

#### **4.6 Client Database**

Data entry must be easy and efficient. All tables must be exportable in a commonly used format.

RTA's current scheduling system and database is RouteMatch hosted by Tripspark. The successful Proposer, as soon as practical after notice to proceed, shall be responsible for providing a data conversion strategy/plan in order for staff to begin to compile the necessary information that needs to be transferred into the Proposer's software in order to complete the client database elements required for use in scheduling, trip assignment, and reporting. RTA may provide sample data for testing to insure a smooth conversion

process. Database conversion should be included in cost. Client database shall be capable of providing a full range of data elements for each client in the system. Information should include full identification (including at a minimum Medi-CAL number (as needed), birth date, address, contact, third party/emergency contacts, disability status, mobility aides used, program affiliation, and third party contract payee options. RTA will need assistance in defining the required fields for data to populate the client database fields. Proposer shall be responsible for providing a fully functional client file suitable to RTA demand response system needs. System shall be capable of producing reports based upon client, sponsoring agency, transportation provider, origins or destinations, cities, or zip code, trip purpose, billing rules, birth date and status. A reservation/confirmation number for subscription trips should be as stated in the electronic file. Other trips will bear unique numbers generated by the system. Date of trip in combination with reservation/confirmation number will uniquely identify all other trips in the system.

Data integrity means that the data values in the database are correct and consistent. Proposer should present the features of their system that prevent the input of invalid data and that minimize human errors when data is entered. Proposer should also detail the testing that will be performed to verify the correctness of every field in every record transferred to the new system.

Seven (7) years of service data should be in electronic storage and should be maintained and available for easy reporting and querying.

#### **4.7 Billing Component OPTION**

RTA does not have third-party service contracts at this time. However, the system should allow entry of one or more billing codes for each client for future use, indicating a third party to be billed for certain trip types. Billing will be finalized at RTA administrative office. The system should allow for locations to confirm trips. Future service expansion options include service contracts where RTA may allow to bill for No Shows or Late Cancellations. The system should allow for this requirement. The system shall provide pop-up windows or list boxes to permit multiple selections from among a list of pre-defined trip types and selection of billing codes and corresponding rates (fares) for each selected trip type. There are situations where rates need to be adjusted and the system should allow for this requirement. The Proposer is to provide a separate price for this option.

### **5.0 Trip Reservations/Requests**

System shall include user-defined field lists, including field lists with possible user-defined additions, fields requiring customization for additions or changes to the default list.

The system shall read and display fixed route schedule information from fixed route scheduling system, providing user access to fixed route service information to consider in trip planning. Proposers should discuss this capability in detail. RTA can provide schedule information in GTFS format from our Connexionz scheduling system.

#### **5.1 Real Time Trip Details Entry**

System shall permit trip booking while personnel are on the telephone with the client/customer. System must be capable of processing subscription trips (also referred as standing-order), next day trips, same day trips, and will call trips (i.e. as-soon-as possible trips) in this manner. System shall be capable of processing same day trip requests or will call trip requests.

System shall permit staff to access client records by entering client last name, telephone number, address, Medi-CAL number or other identification. Current protocols involve booking trips using first three alpha characters of client last name and first initial. However, sometimes due to common proper names, additional details must be available to the user in order to distinguish between customers with the same first and last name, and/or user option name.

Pop-up windows or list boxes shall be used to display lists of clients for easy access and selection. Once selected, pertinent data from the client database file shall be accessible to the reservation clerk, either through on-screen display or pop-up window.

#### **5.2 Default and Common Pick-Up Address**

System shall default to the client's home address as the pick-up location. System shall provide ability to enter alternative addresses through keystroke entry or through use of list boxes of alternative pick-up addresses associated with that client (e.g., common travel destinations of that specific customer).

#### **5.3 Client Trip Destinations**

System shall be capable of displaying, through pop-up window, list box, or similar alternative, a list of most frequent client travel destinations and/or recent destinations of travel for easy insertion into the destination field. User should be able to select destination from these fields and populate trip destination fields through this selection process.

#### **5.4 Pick-Up Time and Allowances**

System shall be capable of incorporating a user-specified policy on pick-up time negotiation with the client. System must be capable of incorporating multiple policies.

#### **5.5 Advance Reservations/Requests**

System shall be capable of accepting trip reservations for an open-ended period of time in advance of the requested trip date. Most trips entered are no more than 1 day in advance. The ability to enter trips up to 30 days in advance for planning and staff scheduling purposes without disrupting ADA capacity is highly desirable.

#### **5.6 Subscription Trip Entry and Management**

System shall be capable of accepting subscription trips. System shall permit day of the week type travel dates and monthly calendar based travel date, example (e.g., first and third Wednesday of each month or no end date) (Monday, Wednesday, Friday or daily).

System shall be capable of setting finite limits on the length of subscription trip requests. Systems shall permit RTA personnel to turn off/on on a temporary basis, a client's subscription trip request. System shall permit entry of both a start date and end date of the time period when the client will not take the subscription trip request. System shall be capable of incorporating all of RTA's rules of managing subscription trips. System shall incorporate pop-up alarms on active trips that violate rules to alert staff before permitting the trip to be dispatched to driving personnel.

Subscription service is available for trips made on an ongoing basis at the same time and to and from the same origins and destinations at least once a week. These trips are currently issued on a schedule permitted basis, and expire semi-annually on June 30th or December 31st.

Passengers are permitted to renew their subscriptions so long as the passenger did not have more than a user-specified combined subscription No-Show/Late Cancellation rate during the previous term.

If a passenger with a subscription No Show/Late Cancellation rate in excess of this rate wishes to re-new their subscription, they will be allowed to renew on a quarterly basis for the first renewal only. Failure to improve the No-Show/Late Cancellation rate during two consecutive quarters may result in RTA revoking subscription privileges for the passenger for a period not to exceed two quarters. Customers who proactively put their subscriptions on hold are not subject to the No Show/Late Cancellation rules.

Should circumstances develop that require material changes to scheduled subscription trips more than a specified number of times within a 30 day period, RTA reserves the right to cancel that subscription. A material change is when the passenger requests that the trip be changed in either or both time and location at one or both ends of a subscription trip. That passenger will be required to schedule his/her trips on a weekly basis.

Quarterly subscriptions expire March 31st, June 30th, September 30th and December 31st. Subscription passengers are not charged additional fare.

#### **5.7 Go and Return Trip Entry**

System shall be capable of scheduling both go and return trips with ease. All information on the client's origin and destination are reversed for the return trip.

#### **5.8 Duplicate Trip Option/Companion Trip Details**

System shall be capable of duplicating trips so that user can schedule multiple passengers from one address (i.e. enter one passenger's trip and duplicate for additional passengers.) This duplication should be available for go and return trips. Schedule must reflect a trip for each passenger.

System shall be capable of adjusting fares from standard to a reduced fare if certain volumes are met to motivate passengers to share trips to destinations, such as grocery shopping.

## **5.9 Trip Reservation Editing**

System shall provide means for a customer service representative to easily and quickly access existing trip reservations for the client in order to edit travel destination, trip dates, and/or travel times. System shall maintain a log of changes including identifying who made the change.

System shall permit cancellation of any trip in the system in advance consistent with RTA policies on trip cancellations. System shall maintain a cancellation record, by client, to facilitate management of cancellation and No Show policies.

## **5.10 Suspended Service**

System shall be capable of temporarily suspending a client's eligibility for service. System shall permit entry of both a start date and end date of the time period when the client's ridership privileges are suspended. During this period, system shall not permit trip booking, providing a pop-up alarm for the customer service representative.

## **5.11 Companions/ Personal Care Attendants**

System shall be capable, during the course of the reservation entry process, of allowing customer service representatives to add personal care attendants and companions to the trip request.

## **5.12 Fare Computation**

System, at the conclusion of trip booking, shall provide a confirmation of the booking with fare(s), if applicable, to be paid by the user(s), or companion. Ability to expand to serve contract trips highly desirable; in this example, a contract rate should be inserted in place of fare. System shall be capable of calculating fares for trips coordinated with other outside operators.

## **5.13 Electronic Fare Capability OPTION**

Proposer should describe any features in their system that can be used to promote electronic fare payments including information about how these features can be implemented at a later date, if RTA so chooses to do so.

This solution should be listed as an option on the cost proposal. The solution should include all additional system requirements that would be necessary including but not limited to the cost of additional software, service and system hardware required to operate and maintain the requested option.

## **6.0 Eligibility Management**

Proposer should discuss the system's features for tracking customer eligibility for funding agency programs without duplicate data entry.

Proposer should discuss the system's features that facilitate compliance with all functions required by RTA's policies for its ADA complementary paratransit services and Title 49 Part 37 of the Code of Federal Regulations. The eligibility categories are:

Category	Definition
1	Unable to use a fully accessible fixed route services
2	Able to use fixed route service but requires an accessible bus and one is not available on the needed route
3	Able to use the fixed route service but unable to get to or from a bus stop.

The conditions are:

Condition	Definition
1	Never able to use fixed route service
2	Unable to use fixed route service under certain conditions (i.e. cold weather)
3	Temporarily requires paratransit service.

Proposer should discuss its system's capability to integrate data from the current ADA Contractor who uses proprietary software to manage ADA application requests countywide. The ability to migrate to management and tracking of received applications, application response, eligibility type, and eligibility periods for RTA's ADA customers as required by Federal regulations within a singular database is highly desirable. The following minimum features are required:

- Tracking eligibility categories
- Conditional eligibility tracking and management. Proposer should address how the system addresses these conditions in trip scheduling
- Advance notification of eligibility expiration, via either a report or a flag attached to the client's file
- Fields for date the completed application was received, date it was processed, date of response, date of appeal, date of appeal hearing, and date of appeal determination
- Modifiable response form letter that is populated with approval or denial, reason for denial, approval category and conditions, and appeal process

## **7.0 Scheduling**

### **7.1 Automated Batch Scheduling**

System shall be capable of scheduling, in batch mode on a next-day basis, or as trips are added (up to one-hour prior to requested pick-up time) all reservations for a designated travel day. Scheduling should be based on turn-by-turn use of the actual street network in RTA service area (e.g., actual vehicle path of travel, not triangulation), parameters associated with network segments as established in the GIS system, physical barriers, speed parameters, time of day, and appropriate dwell times for the boarding and alighting of passengers. The system shall optimize schedules and routes, providing directions of most efficient travel to location, and options/solutions listing price, miles, and time.



## **7.2 Subscription Trips**

System shall permit the establishment of base runs or subscription templates based on existing standing orders. System shall be capable of evaluating base runs in order to optimize runs in terms of parameters determined by RTA. The parameters (such as least distance traveled, shortest travel time and least time on board for each passenger) will allow RTA to optimize its operations at a point that properly balances passenger per vehicle revenue hour productivity, efficiency and customer service.

## **7.3 Unscheduled Trips**

System shall permit trips/drivers/vehicles to be placed in the system schedule but remain unassigned to a specific run. This can be accomplished through a manual setting of the trip to unassigned, demand, "available for use" category or similar means.

## **7.4 Same Day Trip Requests**

System shall be capable of taking trip requests on a same day basis and dynamically scheduling the trip into existing schedules. System shall consider existing path of route travel, existing customer assigned trips, system policies on travel and pick up time windows in making the scheduling assignment. The system shall be capable of rapidly determining and accurately advising the customer service representative of best route to add the trip to allow for trip negotiation during the phone call. When a same day trip request is accepted and assigned to a run (or unassigned run is assigned to a run), it is imperative that the system be capable of dynamically updating and optimizing the remaining scheduled pick-ups and drop-offs without disruption to prior other committed pick-up windows on the run's schedule. This functionality is essential to RTA.

## **7.5 Schedules**

System shall be capable of producing schedules, by run, in chronological order, indicating projected arrival time of RTA vehicles at each origin and destination. System should be capable of assignment of vehicles, drivers and clients based out of specific locations due to driver and/or client imitations and/or preferences. System should allow for lunch/dinner and or breaks. Once generated, system shall be able to display all schedules for all runs on a given day. Display shall contain all pertinent run data and contain necessary menu and edit tools to provide manual adjustments, as necessary, to the scheduled runs.

## **7.6 Validation/Violations**

System shall have internal validation controls to insure that schedules do not violate labor laws and work rules. Additionally, system shall have functionality to evaluate overall travel time for individual passengers to insure that system travel time limitations are not exceeded. Multiple programs are provided on the RTA's vehicles. System travel limitations for transfer trip requests differ from those of ADA trip requests. ADA regulations require that passenger travel times do not exceed the comparable travel time if the trip had been provided on the existing fixed route service. System should be

capable of generating or identifying trips that violate system parameters so that staff can attempt to remedy the violation.

#### **7.7 Manual Override**

System shall provide the capability of RTA scheduling staff to manually move trips after schedule development. When such overrides are made, the system shall record and time stamp the override action in the trip record (or in an associated database) in order to establish a historical account of changes to the original (booked) reservation.

The system shall distinguish a minor performance variance and significant performance variance. Major performance variances shall alert the supervisor. If the manual override exceeds performance thresholds, the system will issue an audio alert and display an alert. The system shall provide the option to require supervisor's approval for manual overrides that cause major performance variances.

#### **7.8 Labor Rules/Third Party Contract Requirements**

System shall be capable of scheduling trips to establish runs taking into account third party Contractor(if applicable) labor rules on work hours, breaks, employee work hours, and contract performance requirements. Ability to manage multiple sets of labor rules highly desirable.

#### **7.9 Vehicle Assignment**

In assigning passengers to vehicles and/or vehicles to system runs, system shall be capable of recognizing the need for accessible vehicles, vehicle capacity, vehicle location and etc. in making said assignments.

#### **7.10 Editing Schedules**

System shall be capable of adding trips to a previously generated schedule or re-assigning trips from one run to another in dynamic fashion without serious disruption to prior other committed pick-up windows on the run's schedule. The system shall be capable of dynamically updating the remaining scheduled pickups and drop-offs on the run's schedule.

System shall be capable of evaluating individual trip parameters and select runs that best satisfy the requirements of the reservation and maintaining the integrity of existing reservations on the same run. If system generates a range of alternatives, system shall present alternatives in rank order with the highest ranked alternative indicating the —best selection.

#### **7.11 Dynamic Update of All Schedules**

The system shall be capable of updating the schedules and all impacted trips after the system updates and all previously scheduled trips must remain on time. Schedules should not violate travel time rules, performance thresholds, and etc.

#### **7.12 Unscheduled Trips**

The system shall provide the dispatcher with dynamic solutions and the best solution. The dispatcher should be able to select the desired solution and the system will assign the trip into an existing schedule.

If the system cannot schedule all requests for the day of travel being scheduled, the system shall be capable of displaying all such trips in its own dataset so that staff may consider manual overrides to the schedule and/or assignment of the trip(s).

#### **7.13 Optimizing**

System shall optimize schedule (batch, same-day, subscription and demand trips) using the GIS functionality and provide the user solutions based on time, price, distance, and other parameters (i.e. union rules, work rules, performance standards, etc.) and allow the user to select the best trip or override. Route turn-by-turn driving directions are highly desirable. Proposer shall explain all functions of the software in regards to route optimization.

#### **7.14 System Parameters**

System shall have capability for user specified settings that govern the scheduling process. For example, RTA typically operates at the posted speed limits. However, they may be operated at a lower speed for safety reasons (road conditions, pedestrians, bicyclists, weather conditions, etc).

Proposers should specify the range of parameters that can be user set and how the Proposer will assist RTA in the initial setting of these parameters to ensure maximum scheduling efficiency in daily operations.

### **8.0 Planning Tools**

Proposer should describe any planning tools in their system that can be used to analyze data and find operational efficiencies. These types of tools would allow RTA to plan for growth and service improvements by analyzing ridership, schedule adherence, location and origin-destination patterns, demographics, and perform demand forecasting. Other tools should include:

- Scheduling optimization experiments allowing “what if” scenarios that do not impact the actual schedule.
- The effect of service changes and other factors on the propensity of specific groups to travel.
- Candidates who may benefit from fixed route travel training based on trip patterns compared to fixed route availability.
- Historical paratransit usage for consideration in the design of new services.
- Origin and destination patterns and studies.

### **9.0 Dispatching**

System shall also provide a tabular display of the routes, runs, and trips that can be easily sorted and/or grouped by the user. System on-time performance statistics relating to the overall performance of the system must also be visually displayed. System must also provide real time information when prompted by users relative to specific customers and / or specific addresses.

Dispatchers must have the ability to determine the closest route to a specific address in real time for same day trip requests. All route information must be transmitted in real time to the proposed mobile data computing system. The intent is to seamlessly maintain a recently established paperless environment for all demand response drivers.

#### **9.1 Access to Dispatch Information**

System shall allow dispatcher's access to run itineraries based on run number, vehicle number, client number, location, or client name. System shall be capable of displaying the run number, number of passengers on the run, scheduled arrival time, estimated time of arrival and any special circumstances (i.e. late, off-route, etc.). Information displays should associate with the time of day (e.g., 10:00 A.M. events are displayed at the top of the list window when the dispatcher makes queries at 10:00 A.M.). System shall also display the location of each vehicle and color code based on their respective status.

#### **9.2 Cancellations/No-Shows**

System shall be capable of allowing dispatchers to process cancellations (cancellations received prior to system policy time), No Show/Late Cancellations (cancellations received after the system policy time) and Missed Trips. System shall maintain a cancellation record and a No Show record, by client, to facilitate management of Late Cancellation and No Show policies.

Ability of system to flag Missed Trips as defined under the ADA is highly desirable providing a pop-up alarm when the customer service representative or the dispatcher erroneously marks a Missed Trip as a No Show or Cancellation at the Door, etc. is highly desirable.

#### **9.3 Same Day Reservation Changes/Add-Ons**

System shall be capable of automatically displaying to the dispatcher/scheduler cancellations, same day reservations, and will-call return trips waiting for vehicle assignment (e.g., trip reservations made but not yet assigned/scheduled).

#### **9.4 Service Emergencies/Vehicle Breakdowns/Unexpected Illness**

System shall be capable of identifying runs when a vehicle is pulled from service due to an emergency, unexpected illness or vehicle breakdown. Dispatcher shall have the capability to dynamically re-schedule all trips impacted by this service emergency.

#### **9.5 Removal of Vehicles from Service**

If the dispatcher is advised that a vehicle is not fit for revenue service, system shall be capable of programming a vehicle substitution on the affected run(s).

### **10.0 Automated Call Feature & Interactive Voice Response System-OPTION**

RTA desires the OPTION of an automated call ahead system that integrates with the scheduling and dispatch data management system proposed. The automated call system should at a minimum assist with trip confirmations, trip reminders, and trip changes (in/out bound), and cancelations. Proposer should offer an automated call feature to call clients with pick up times the day or afternoon prior to the trip. The

system should have the capability to offer retry if the client is unavailable (e.g., the phone is busy.) The system should allow the client to confirm or cancel a trip by voice or key tone. The system shall meet all requirements set forth by the Americans with Disabilities Act.

The call back option shall feature the following capability:

	Automated Phone Call	E-mail
Confirm Reservation Immediately after hanging up with dispatcher	X	X
Remind client of trip the night before	X	X
Notify client van is waiting initiated by driver and MDC/Tablet	X	
Notify client of no-show and status	X	X
Notify client of delays and status	X	X
Acknowledge Cancellation	X	X

Please describe the proposed IVR system and any Vendors/Sub Contractors you would work with to install it. The following features should also be included/addressed:

- Customer accounts
- Reporting, including call volumes, caller requests, customer usage, recording of calls, etc.
- Possibility of phone and web-based trip booking, cancellations, etc.
- Speech recognition and touch tone usage, including features to address deaf and hard-of-hearing users as well as users with speech impediments

This solution should be listed as an option on the cost proposal. The solution should include phone system requirements and the cost of software, service and system hardware required to operate and maintain the system.

#### **11.0 Web Based Passenger Information System Feature - OPTION**

RTA desires the OPTION of a web based self-service passenger information system that would provide the passenger with the ability to access their trip details, know when their vehicle is expected to arrive and cancel requested trips. The preferred option would allow customers to review, confirm or cancel multiple trips at the same time. Ability of the customer to view trips on a map where he/she can see his/her vehicle along with precise estimates of when the vehicle would arrive is very desirable. The system shall meet all requirements set forth by the Americans with Disabilities Act.

This solution should be listed as an option on the cost proposal. The solution should include all additional system requirements that would be necessary including but not limited to the cost of additional software, service and system hardware required to operate and maintain the requested option.

#### **12.0 Reports**

##### **12.1 Standard Reports**

Software should be capable of generating a range of management and service reports necessary to permit sufficient oversight of the Demand Response service. Current reports required by RTA:

- Driver Manifests
- Trip Summary
- Cancellations & No Shows
- Fare Collections
- Daily Inactivity
- NTD S-10
- Operating Statistics
- Run Validation
- Schedule Validation
- Detailed Invoice
- On-Time Performance
- Passenger Per Hours
- Summary Invoice
- Break Validation
- Vehicle Productivity
- Vehicle Odometers
- Trip Count
- Client Count/Type
- Client Feedback
- Fare Collections
- Trip Productivity
- Route Productivity
- Driver Productivity
- ADA Trips

Other data to include:

- Revenue Vehicle Miles
- Revenue Vehicle Hours
- Total Vehicle Miles
- Total Vehicle Hours
- Total Clients Registered
- Subscription Trips
- Wheelchair Trips
- Demand Trips
- No Show Trips
- Vehicle Trips
- Shared Trips
- Trip Denials
- Scheduling Refusals
- Ineligible Clients
- Cancellations
- Passenger Miles
- Miles by Day Type

- Hours by Day Trip
- Revenue Passenger Trip
- Punch Pass
- Companion Trip
- Attendant
- Guest
- Ridership by Day Type

Each of these reports tallies at the bottom of the report the summary of each column, including number of trips in each category (completed, late, etc.), number of passengers in each customer code, total miles and passenger hours, number of in ADA service area and transfer trips, etc. Totals for categories should all correspond regardless of the report the total is found on.

## **12.2 Ad-Hoc Reports**

System shall be capable of permitting the user to create, format, and print user-defined reports based on any data element contained in the database.

## **12.3 Client Notification**

System shall have the capability of generating a report that lists the client's No-Show history with counts and percentage of trips scheduled, clients subject to suspension, and client in suspension with the effective and resume dates. The system shall have the capability of easily generating letters for USPS and/or email to warn clients of potential suspension. The system shall have capability of generating abbreviated information for USPS or email in post card formats, labels for envelopes, etc. In addition the system shall have the capability of generating letters for USPS and/or email informing clients of their effective suspension data and their resume date.

## **12.4 Importing, Exporting, and Reporting Functionality**

Reporting capabilities should be available and should be able to be output in print, fax, e-mail, or a form such as .pdf or Snapshot. System should also have data import and export capabilities to standard PC software in multiple formats including Word, Excel, Access, DBF, Text, and CSV. Please describe this functionality. The system should have the ability to copy information to a clipboard for use with Word or Outlook. The system reporting tools should allow for the display of reports on-screen or printed.

The system should contain a full report generating capability to produce custom reports and should be able to perform ad hoc reporting and data reports as required. The system should include an Open Database Connectivity (ODBC) - compliant reporting tool. All standard and custom reports delivered with the system should have been built by and should be editable via the reporting tool.

The list below indicates the minimum reporting capabilities that are required under this RFP. Proposers should include their complete listing of reports. Complete examples should be provided that clearly articulate the information provided.

Proposers should also discuss the process required for RTA staff to prepare the reports and whether or not programming is required. Ease of use is an important element in this procurement.

### **13.0 Hardware**

The Proposer shall specify the necessary hardware to effectively create an optimal computing environment and document additional hardware and software necessary for installation at our location. RTA is open to both vendor-hosted system.

#### **13.1 In-Vehicle Systems / User Interface**

RTA recently purchased Samsung Android tablets for all of its demand response vehicles which the agency strongly desires to utilize with the new system. RTA is not interested in proposals that include proprietary Mobile Data Terminals or storage components

The proposer shall provide necessary information to evaluate the need to procure new transit type Mobile Data Computers for all vehicles described in this RFP, if necessary. The recommended MDC shall serve as the interface between the Vehicle Operators and the brackets that are fitted for each type and variation of vehicle within the fleet. MDC should allow for wireless upgrades. The Mobile Data Terminal (MDC) component shall control the in-vehicle components, and provide a user interface for the vehicle operators. The following sections describe the various functions expected to be performed by the MDC.

The proposer shall provide a display that can display a minimum of 40 alphanumeric characters at a time. This display shall display messages received from the Dispatchers, error messages, prompts, status messages, time (in 24-hour format), and other text as required, and Vehicle Operator entries in real time. This display shall be designed to be readily readable by the Operators in lighting conditions ranging from bright sunlight to total darkness and by Operators wearing sunglasses including polarized, un-polarized, "blue-block" and other conventional types of sunglasses. The display units shall be designed to minimize reflective glare from the front surface of the display. Display controls for brightness and contrast shall be included. Adjustment of display brightness and contrast over the useful range of settings shall be possible but adjustment of display brightness and contrast to settings where the display is unreadable shall be prevented.

#### **13.2 Data Messaging**

The MDC should be user friendly and provide the Operators with the means to display, select and send pre-defined canned messages to the Dispatchers. Means shall be provided for displaying a particular message and for indexing forwards and backwards in the list of canned messages. The proposer-provided equipment shall support the definition and storage of at least 16 canned messages of 30 characters each. Convenient mechanisms shall be provided to allow RTA to change the definition of each canned message and to add new messages up to the maximum number of messages supported. The specific canned messages to be supported will be defined after contract award. The MDC shall store and support selective retrieval of messages received from the Dispatcher. Storage for at least 8 messages of 30 characters each shall be provided. The Operators shall be



able to selectively view, acknowledge, respond yes or no, save, and delete messages from the MDC. Means for scrolling a message when the message is longer than what can be displayed at once shall be provided. Means shall also be provided for indexing forward and backwards in the list of received messages.

### **13.3 Automatic Vehicle Location**

The proposer shall include a GPS receiver and antenna on the vehicles for providing location data to the MDC. The GPS Receiver shall be packaged in the MDC. The GPS Receiver / Logic Unit shall forward location data in real time to the fixed end via the data communications system. Location reports shall be based on time, distance and event. The Location shall use the Global Positioning System to determine the vehicle location, time, heading, and speed. It shall report the information over the mobile data communications network:

- At regularly scheduled intervals (programmable in seconds);
- When a vehicle has moved a predetermined distance (programmable in feet)
- On driver-initiated events (logon, logoff, arrive, depart, etc.).

The Proposer shall state the specified accuracy of the positioning system in the proposal.

### **13.4 Location Reports**

The system shall be capable of real time GPS tracking and generate a Location report consisting of the current GPS status and last known vehicle location, time, heading, and speed. The current GPS status (Good GPS or Lost Lock) shall reflect the latest condition of the GPS receiver when the Location report was generated. A Lost Lock status shall be used to identify that the GPS receiver was unable to detect the current vehicle location due to blockage of the satellite signals (vehicle is inside a garage or under an overpass, trees or parked next to a tall building). The last known good GPS location, time, heading, and speed shall always be included in the Location report even if the GPS status is reported as Lost Lock.

### **13.5 Rate of Location Report**

The system shall generate the Location reports at programmable intervals. RTA prefers to have the location report intervals be programmable as defined below. The vehicles shall initiate a Location report once every x seconds, where x is a programmable whole number programmed at system setup. Location reports shall be sent at least every 2 minutes. The vehicle shall also initiate a Location report once every y feet, where y is a programmable whole number. Location reports shall be sent at least every ½ mile. The vehicle shall also include a Location report with any driver-initiated events (logon, logoff, arrive, depart, etc.). Proposers shall describe in their proposal in detail the location reports that are generated (including the data that is in the report) and the intervals at which the reports are generated. If the interval rates differ from that defined above, the proposer shall describe why the interval rates provided are as good as or better than defined here.

### **13.6 AVL Communication Exceptions**

Proposers shall describe in their proposal what happens to location reports when the vehicle attempts to send a Location report while out of cellular coverage area.

### **13.7 Log On / Log Off**

The MDC shall provide a means for the operator to log on to the vehicle. This log on shall include the driver's ID, run that the driver will be operating, and the vehicles starting odometer reading. This log on information shall be sent to dispatch system over the mobile data communications network.

The MDC shall also provide a means for the operator to log off of the vehicle at the end of the operational period, with an ending odometer reading.

### **13.8 Mileage Tracking**

The MDC shall be capable of tracking and reporting the mileage traveled by the vehicle. Connecting the MDC to the vehicle odometer or through GPS may do this. Current odometer reading shall be included with driver-initiated events (logon, logoff, arrive, depart, etc.). The proposer shall in their proposal describe how mileage traveled is collected and reported as well as the accuracy of the mileage data.

### **13.9 Demand Response/Demand Response Functions**

The MDC shall interface to the Transportation Scheduling and Management Software via the interface and provide real time communications of trip manifest, trip status, text messages, and AVL location reports. The MDC shall provide simple to use interface to allow vehicle operators to register when the vehicle has arrived at the pick-up or drop-off location. In addition, the MDC working in concert with the cellular network and dispatching software shall perform the following functions:

- Log the vehicle operator in or out.
- Download a vehicle's work schedule/manifest at the start of a shift or throughout the day.
- Add, delete, or change pick-up and drop-off information throughout the day.
- Register the time and mileage when departing or arriving.
- Display in an easy to view large screen, detailed trip information.
- Signal the vehicle operator of incoming text messages
- Signal the dispatcher of the following conditions: arrival, departure, passenger late, no show, and passenger-canceled trip.
- Signal the dispatcher with canned text messages of RTA defined context.

Pre-Trip Inspection to include enhancements to the customized MDT screen for operator pre-trip inspection input is highly desirable feature. Ability to record vehicle diagnostic such as engine temperature, oil pressure as well as record speed, odometer, preventive maintenance alerts and any market added features available that can be transmitted back to record management is desirable. The system's design shall allow Operators to enter numeric data following the selection of specific function buttons in order to provide data pertaining to the specific function (ex: entering companion count when departing pickup).

### **13.10 Communications**

The proposer shall provide recommendations for long term economically feasible transmission of mobile data from scheduling system software to and from MDC. The proposer must specify and provide the required Application Programming Interface (API) and hardware if required, to utilize its data functionality to support the data transport requirements of the proposed solution.

Proposer must coordinate and work with the assigned RTA's Project Manager to successfully integrate their proposed solution and must test and optimize the data flow from system to mobile units as part of their implementation scope of work.

### **13.11 Covert Alarm & Microphone OPTION**

The covert alarm switch shall be mounted at a location approved by RTA. The covert alarm switch shall be of the normally open type, with (1) a small parallel resistance that creates a monitoring current with an open circuit and (2) a closed circuit when the switch is depressed by the driver.

The covert alarm switch circuit shall incorporate a fuse, so that a short circuit condition in the wiring shall result in blowing the fuse. The MDC shall detect if the circuit is closed for at least one (1) second and automatically send a covert alarm message to dispatch and place the MDC into the covert alarm mode. The MDC shall repeat sending the covert alarm message until it receives an acknowledgement message from dispatch. The MDC shall detect an open or short circuit due to a wiring fault, from the absence of the monitoring current, and automatically send a faulty covert alarm message to dispatch.

When the MDC is in the covert alarm mode, there shall be no indication on the display other than an unobtrusive symbol or icon approved by RTA. When the MDC is in the covert alarm mode, the MDC shall use a configurable alternate time between location reports. When the MDC is in the covert alarm mode, the MDC shall activate the covert microphone. Upon command from the dispatch software, the MDC shall send covert microphone audio over the transmit frequency of the existing vehicle voice radio, or stop sending covert microphone audio.

The MDC shall only revert from covert alarm mode upon command from Dispatch. Optionally, when a covert alarm is activated, a strobe red light is activated in the dispatch room.

Upon receiving a covert alarm message from an MDC, the system shall send an acknowledgement message to the MDC and provide a clear and noticeable indication to the dispatcher (e.g., a distinct flashing icon for that vehicle on the map display). The system shall be able to command the MDC to begin or end the sending of covert microphone audio over the transmit frequency of the existing voice radio. The system shall be able to command the MDC to revert from covert alarm mode.

This solution should be listed as an option on the cost proposal. The solution should include all requirements to maintain the option along with the cost of ongoing maintenance.

## **14.0 Products Offered**

### **14.1 Use of Existing Market Products**

RTA does not desire to purchase products that represent beta versions or products that have not been installed in other operational environments in other transit systems in the United States.

### **14.2 Current Version**

RTA requires the proposer to offer the latest, tested release version of each software product/module included in this proposal. Proposer shall include the estimated date of the next update to proposer's offered software.

## **15.0 Security and Administration**

Proposer shall describe administrative functions of the proposed system. Users should be able to easily administer and configure user and system security as well as all system parameters and variables. Proposer shall also describe the system's security features to prevent unauthorized or accidental disclosure, alteration, or destruction of data, including the following features:

- Authenticate on-site and remote users and prevent unauthorized users from tampering with data
- Manage user group privileges and other access control features
- Monitor user access of data and maintain an audit trail

System shall provide modules or components to manage the configuration and administration of the system. The system will provide a driver management module to easily create, edit, and maintain driver data. System shall also provide a vehicle management module to create, edit, and maintain vehicle related information. System shall be packaged with online help, training tools, and tutorials.

## **16.0 Care, Data Maintenance, Warranty**

Proposers should describe the care and maintenance of the proposed system including the general requirements for updating data. Discuss in detail the type of staff people necessary for this maintenance.

RTA requires Proposer to provide a one-year warranty service following final system acceptance. After the one-year warranty expires, the maintenance agreement should begin.

RTA requires Proposer to include pricing for a year-to-year maintenance plan up to five years. It is RTA's option to require additional purchases after Final Acceptance to be co-termed so there is one annual invoice and payment. RTA requires Proposer to provide RTA with hardware and software upgrades to ensure the most recent technology is being utilized as part of the maintenance plan.

Proposer is required to provide RTA with timely responses and solutions to software problems. If the problem is severe such as a system failure, Proposer shall assure RTA that they will respond immediately so that operations are not disrupted. If the potential Proposer provides multiple maintenance packages,

the Proposer shall share pricing for all packages; however, Proposer is required to recommend a maintenance plan.

The Proposer shall describe to RTA the help desk methodology and turnaround response time. Included should be how your organization prioritizes issue resolution. RTA requires twenty-four hours a day seven days week support. Specify if issue resolution includes remote access and if so what software is utilized. The Proposer shall provide details of their support and maintenance plan.

## **17.0 Documentation**

Database design documentation should be provided that completely describes both the logical and physical structure of the system database. The documentation should define and describe the individual elements (files, tables and fields) and the relationships between them. Portions of the database developed or modified specifically for RTA's system should be identified. Note that this requirement is for a complete and thorough description of the physical and logical database schema. This will permit RTA staff to develop and maintain interfaces between the system database and other applications subsequent to project completion, and will facilitate the development of custom reports. Complete administrator documentation for the database management system(s) shall also be supplied.

The Proposer will provide RTA with five (5) complete hardcopy sets and one electronic set of all documentation to support and operate the system. Electronic media must be compatible with Microsoft Office, which includes Word, Excel, and/or Adobe Acrobat PDF format.

In addition to the documentation specifically identified below, the Proposer should provide RTA with all documentation originally supplied with standard commercial equipment and software purchased from others.

### **17.1 System Documents**

Proposer shall provide a system document index identifying all documents to be provided with the system. This includes all documents supplied with OEM hardware/software and the Proposer's own documents. The index should describe each document and the document's purpose, to help the user locate the appropriate document in the set of all system documentation.

### **17.2 Hardware Documents**

Documentation for all supplied hardware should be provided to RTA. Proposer shall develop and maintain two hardware inventory lists:

- an inventory of all hardware, including the manufacturer, product, model number/version, serial number, name plate data, RTA identification tag number, quantity, purpose, and installed location.
- an inventory of all hardware documents, including product, version, document title, and RTA document number.

These lists should be maintained by the Proposer through final acceptance of the system and copies provided upon request of RTA Operations Manager.

OEM-provided installation, reference, and/or maintenance manuals should be provided for all hardware. These should include descriptions, specifications, installation information, theory of operation, drawings, back panel and assembly wiring diagrams, and other electrical, electronic, and mechanical hardware data. Proposer should include an attachment to each document outlining those portions of the document, if any, that do not apply to RTA hardware.

Instructions should be provided for preventive maintenance procedures. The manuals should provide guidelines for isolating the causes of hardware malfunctions and for localizing faults.

### **17.3 Software Documents**

Documentation for all supplied software should be provided to RTA. Proposer shall develop and maintain two software inventory lists:

1. an inventory of all software, including manufacturer, product, version, purpose, and installed location, and
2. an inventory of all software documents, including product, version, document title, and RTA document number.

These lists shall be maintained by the Proposer through final acceptance of the system and copies provided to RTA's Operations Manager with copy to the Projects Manager.

Installation, user, and reference documentation for standard Proposer and third party software should be provided for RTA review and approval. Standard software is defined as that which fully satisfies the requirements of this RFP without the need for modification. Typical examples include operating systems, database management systems, and software diagnostic programs.

In addition, RTA requires maintenance documentation necessary to sustain the software in the future. Information included in documentation must include, but not be limited to:

- Overview/description
- Installation guides
- Maintenance documentation
- Troubleshooting guides
- Diagnostic procedures
- Inspection procedures
- Detailed warranty/support coverage

### **17.4 User Documents**

User documents are those that describe the system hardware and software from an end-user's point of view. RTA will be provided with ten (10) printed copies and one (1) electronic copy of each user documentation, ideally both a User's Guide (tutorial format) and a Reference Guide.

User Manual documentation should be provided that contains detailed operating instructions to be used by RTA personnel and RTA's demand response Contractor. Information in the documentation should be presented in meaningful terms to non-technical personnel. The documentation should include a description of the operation of the system as it relates to the user's tasks.

The User Manual should describe each function and how it is to be used. The documentation will not be written as a programmer's document. Procedures should be explained step-by-step with an explanation of how each step is performed, which parameters can be adjusted, and the effects obtained by varying each parameter. All guidance and error messages should be described, along with the steps necessary to recover from errors.

Each system function and all other functions designed for RTA use should be included in this documentation. The documentation should also include a copy of each type of display used in the system along with a description of each data field.

Proposer should supply RTA with one electronic copy of user handbooks per workstation and in tablet.

#### **17.5 Document Review and Approval Rights**

Proposer should submit all documentation to RTA for review and approval during the implementation process.

RTA will respond with written comments to the Proposer, allowing lead time for multi-department review. The Proposer must resubmit to RTA for approval documents requiring correction as soon as possible. RTA will review the resubmitted documents. No implementation schedule relief is to be implied for documents requiring further correction and resubmission to RTA.

To help RTA manage the review and turnaround of documents during any given period, Proposer should stagger the release of documents over the time allocated in the project schedule for document review. The number and size of documents should be factored into the release schedule.

Any purchasing, manufacturing, or programming implementation initiated prior to written RTA approval of the relevant documents or drawings shall be performed at the Proposer's risk. Review and approval by RTA should not relieve the Proposer of its overall responsibilities to satisfy system functions and features in accordance with the specification.

#### **17.6 Custom Document Review**

Proposer's own and some third party hardware and software may need to be customized to fully conform to the requirements of this specification. RTA should have, in addition to the limited approval rights described above, full approval over the portions of the relevant document's content and format pertaining to the modified or custom hardware, software. The following conditions must be satisfied for this approval:

- Changes and modifications must be documented in a complete and clear manner in accordance with the Proposer's established documentation standards, and
- Features, equipment, and options pertaining to RTA must be clearly distinguished from those that do not pertain.
- RTA should retain full approval rights over the work plan, test documentation, and other documents produced under this effort.

To the extent that the user interface will be customized or tailored, RTA should have full approval rights over the format and content of the user interface.

## **18.0 Trip Integration with Fixed Route Service OPTION**

The system shall be able to read and display fixed route schedule information from the fixed route scheduling system, providing user access to fixed route service information to consider in trip planning. Proposers should discuss this capability in detail.

This solution should be listed as an option on the cost proposal. The solution should include all requirements to maintain the option along with the cost of on-going maintenance.

## **19.0 Technical Support and Customer Service**

Proposer shall describe in detail all technical support and customer service options and packages, and provide pricing. Features to address include, but are not limited to, upgrades and updates to the software and the impact of changes on customizations, support hours in Pacific Time (standard or daylight), toll-free telephone number, on-line, webinar, on-line chat, remote access, on-call, or other support methods used, and user groups.

After final acceptance of the system, Proposer shall provide continuing technical support. Please describe ongoing support options and pricing for a five (5) year period. Consultation with knowledgeable technical support personnel and trained field service personnel should be readily available to assist RTA in maintaining the system(s) in a timely manner. The Proposer should define all terms and conditions of the agreement including but not limited to hours of service, return policies, and software upgrades.

## **20.0 Training**

Proposer shall provide a comprehensive training program that prepares RTA personnel for effective operation and maintenance of the system, consisting of, at a minimum:

- Training for administrators providing the details of the operations of the system and the set-up of parameters and operational assumptions (average travel speeds, dwell times, wheelchair loading times, fleet characteristics etc.)
- Cross training, including scheduling, reservations, and dispatch
- System maintenance
- Management of client information and intake
- Call taking, reservation taking, trip screening
- Scheduling
- Dispatching
- Running system reports
- Creating and running additional reports



- Driver training
- Installation and maintenance training for maintenance personnel

## **20.1 Training Plan and Schedule**

Proposer should provide a detailed schedule of training during the implementation phase.

Proposer should be specific about the training that will be provided for each of the categories above including the number of days or hours, the materials to be covered, the level of competency that will be attained, and the point at which the training will occur during implementation. Proposer should identify any restrictions to the hours-of-the day and days-of-the week during which training can be conducted and the cost associated with training conducted outside of these hours.

Proposer must provide details about the staff person(s) who will conduct the training, including years of experience, area of transit expertise, and a complete list of locations where the staff person has conducted training. Upon completion of the training, RTA staff must have the skills and technical expertise to make full use of the system. Training should be hands-on and tailored to enhance the technical expertise and operating efficiency skills of RTA's staff.

Proposer should discuss, in detail, the plan to include RTA's staff in the initialization or calibration of the system. Proposer should also discuss the minimum computer training that a staff member should have prior to system training. Training will be done on site at RTA facility. User training should be conducted at RTA facilities. RTA will make available its conference room and computer equipment for the training. Proposer should describe any training that they would like to do off-site, including which RTA employees would need the training, where it would take place, the duration, and also explain why the training cannot be done at RTA.

RTA requires that all Paratransit Services Contractor, agency and management staff who will have access to the system including Customer Service staff and Planning staff, be fully trained on-site on the new system prior to system migration/installation in order to minimize service disruptions. In addition, RTA's Operations Manager must be trained on all aspects of installation, update, administration and maintenance of the system. Proposer will deem training complete and sufficient only when all users are competent and comfortable using the system in a production environment.

All training required for successful migration/installation to and operation of the new system must be provided as part of the package price. Proposers should also discuss and price any opportunities for post-installation training or skill development.

## **20.2 Training Documentation, Manuals, and Equipment**

Upon completion of the training, Proposer will provide RTA with five (5) hard copies and one (1 ) electronic copy of all training materials.

Proposer should prepare training manuals and submit them to RTA for review before the start of classroom instruction. The training manuals should be prepared specifically for

use as training aids; reference, maintenance, and user's manuals may be used as supplementary training material but not as the primary training manual. Principal documents used for training should be tailored to reflect all RTA hardware, software, and user requirements.

Upon completion of each course, instructor's manuals, training manuals, and training aids should be provided to RTA. RTA reserves the right to copy all training manuals and aids for use in RTA training courses.

Proposer should furnish for use during training courses all special tools, equipment, training aids, and any other materials required to train course participants. The number of special tools and other training equipment should be adequate for the number of participants attending the course.

Training and reference materials such as handbooks, operations procedures, etc. may need to be made available in accessible format, including Braille, large print, or audio tape. A complete electronic copy of all materials should also be provided.

#### **21.0 Data Ownership**

All data in the databases that is supplied by RTA or generated from RTA operations shall be solely owned by RTA. The Proposer shall have no ownership rights to this RTA supplied or RTA operations-generated data. There shall be no restrictions on RTA's rights or ability to access and use its data.

#### **22.0 Proof of Performance**

All materials furnished and all work performed under this Scope of Work should be inspected and tested. Should any inspections or tests indicate that specific software or documentation does not meet the Scope of Work requirements; the appropriate items should be replaced, upgraded, or added by the Proposer as necessary to correct the noted deficiencies. After correction of a deficiency, all necessary re-tests should be performed by Proposer to verify the effectiveness of the corrective action.

#### **23.0 Test Documentation**

Test Plans and Test Procedures covering both factory and field tests should be provided by Proposer to ensure that each factory and field test is sufficiently comprehensive to verify all the features and parameters of the functions to be tested.

Together, Test Plans and Test Procedures should provide a two-step description of each factory and field test. A high-level functional summary of the methods used for verifying each feature of the requirements being tested should be provided in the Test Plan; the step-by-step activities associated with each test should be listed in the Test Procedures.

#### **24.0 Factory Tests**

Factory tests should be conducted on all components of the system. The system components will not be released for shipment to RTA until all factory tests are completed satisfactorily or a waiver has been granted in writing by RTA.

#### **25.0 Software Licenses and Programs**

All software licenses should reside with RTA. All software licenses should identify RTA as the licensee and should be delivered before final acceptance. All original copies of programs provided should also be delivered before final acceptance.

## **26.0 Programming Hardware and Software**

Proposer should be responsible for procuring all specialized programming hardware and software needed for developing and testing the system. Proposer should describe what type of test environment will be provided to ensure that future upgrades can be tested by RTA's Information Technology Manager before going live with the system.

## **27.0 System Testing and Acceptance**

Proposer, with RTA input, should develop test plans and acceptance procedures to ensure the equipment is installed properly and accepted. This testing should encompass the full range of the functions and requirements required by this specification. All software provided should be tested to confirm that it is compliant with the current specifications, free from defects in design, material, workmanship, and is capable of sustained performance in the operating environment.

Testing should not begin until a sign off of the test plan and procedures by RTA. Test plans should be developed to ensure that the technologies are functioning as specified and reports are generated as required.

The system acceptance test should be conducted after all equipment is installed. RTA cannot accept the technologies until it has validated that Proposer has met all requirements stated in this RTA.

At the completion of the system acceptance test and the correction of any resulting variances, the system will be deemed operational.

On-site acceptance testing will include appropriate Proposer and RTA staff, and will occur at a time agreeable to both Proposer and RTA. System acceptance tests will exercise all system components according to the test plan section of the work plan, and will be designed to simulate RTA's production environment.

To accomplish this task, Proposer shall use RTA passenger and service provider vehicle and driver data, system parameters, and local maps. Acceptance tests cannot begin until data conversion and system configuration tasks are complete.

This will include the comprehensive testing of:

- Data conversion completeness and validity
- Functional requirements
- Reporting functions
- System requirements
- Software requirements
- Hardware
- Interfaces with external systems

The performance portion of the test will require the successful on-line and batch scheduling of this one week's worth of "past actual" RTA data. Proposer and RTA staff and/or designee should work together to fine-tune system parameters until both the on-line and batch scheduling approaches consistently produce schedules which are at least as efficient as those produced by the current system with the same data as measured by:

- Realistic travel times as determined by service provider representative familiar with local geography, drivers' ability, and traffic conditions;
- Trip assignments that are as productive (measured in terms of passengers/hour); and
- Amounts of idle time, vehicle runs, miles, and hours.

Tests conducted by Proposer may not prevent the operation of existing systems or cause system interruptions unless previously approved by RTA. RTA will maintain complete records of all test results. The records should be keyed to the steps enumerated in the test procedures.

A variance report should be prepared by either RTA or Proposer personnel each time a deviation from specification requirements or the Proposer's design is detected. Variance reports should be collected and maintained by the Proposer's Project Manager.

Proposer should document actions taken to correct variances. Sufficient information should be provided to enable a RTA representative to determine the need for retesting the function, for testing interaction with any previously tested function, and for updating appropriate documentation.

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**MARCH 5, 2025**

**STAFF REPORT**

**AGENDA ITEM:** B-1

**TOPIC:** Executive Director's Report

**PRESENTED BY:** Geoff Straw, Executive Director

**STAFF RECOMMENDATION:** Receive and File

**BACKGROUND/DISCUSSION:**

**Morro Bay Transit & Atascadero DAR Consolidation into the RTA:**

The Agreement to consolidate Morro Bay Transit into the RTA has been fully executed by all three parties. Staff from the City and RTA meet regularly to update the *MBT Action Item List* to ensure the transition is fully implemented by the June 1<sup>st</sup> deadline.

The Atascadero City Council authorized an Agreement to consolidate its Dial-A-Ride program into the RTA at its February 25<sup>th</sup> meeting. Staff is seeking the RTA Board's authority to execute the Agreement; see Agenda Item C-2 for details. As noted in the Agreement, the consolidation would be implemented on June 22<sup>nd</sup>. Staff has developed an *ADAR Action Item List* that includes milestones and deadlines that help guide staff's efforts.

**Operations:**

The Operations team is busily working towards consolidation of Morro Bay Transit services into the RTA. The Operations Supervisor and the Training groups recently completed a "field trip" by driving the Morro Bay Transit fixed-route and Trolley routes. We also moved the two Morro Bay trolleys to our Bus Maintenance Facility so that vehicle inspections and training modules can be refined. We completed preliminary inspections on the cutaway van and have issued purchase orders to modify the van for RTA's equipment (AVL/APC, on-board camera system, Genfare farebox, electronic headsign, etc.) so that our combined fleet can be utilized across local and regional routes.

Since the previous Board meeting in January, one Bus Operator (Erin) began training and should begin operating in revenue service by mid-March. Six candidates are in the permitting / background check phase, and they should begin training before the end of March. In total, we have three open Bus Operator bids – two full-time, and one part-time. The bus runs in those open shifts continue to be covered by Bus Operators who chose Extra-Board shifts, as well as by Casual employees and other employees who choose to work overtime. The Maintenance department hired two Utility Workers (Jared and Rafael) in mid-January and two Mechanics (Gerardo and Joshua) in the beginning of February to fill open positions.

I am happy to announce that Bus Operator Madison B. was chosen by her peers as the Employee of the Quarter. In addition, Mechanic Luis T. and Bus Operator Stephanie W. were recognized for an Outstanding Achievement Award.



### **Maintenance & Facilities:**

The Maintenance team continues to closely monitor the performance of the two battery-electric buses (BEBs) that were placed into revenue service in July 2024. A detailed report of finding through the first six months of operations compared to results from similar-sized diesel-powered buses is provided in Agenda Item B-3.

Maintenance Manager Andy Wyly is leading the procurement of design/build services for two Bus Maintenance Facility improvement projects recently authorized by the Board: Phase 2 Electric Vehicle Servicing Equipment (budget \$960k) and Photovoltaic & Energy Storage System (budget \$1.36M). Both procurements are two-stage, which include a pre-qualification phase, followed by interviews that outline the design/build team's proposed approach, and then a request for pricing. At the February 21<sup>st</sup> deadline, we received one statement of qualifications for the EVSE project, and three for the PV/ESS project. We are currently scheduling interviews of the short-listed firms and will be seeking price proposals in time to award the two contracts at the May 5<sup>th</sup> RTA Board meeting.

We are still working with California Energy Commission staff to secure a grant of \$1.7M to implement five in-ground contactless inductive chargers. This funding will be matched with SB125 funding to fully-fund opportunity charging at four in-service bus layover sites. As part of this effort, Agenda Item C-4 addresses environmental documentation needed to move these EVSE projects forward.

### **Marketing & Communications:**

Since we last reported at the RTA Board meeting in January, our recent marketing initiatives include:

- Staff has developed all new Morro Bay Transit rider communication materials, as follows:
  - All MBT bus stops have been assigned a unique ITS number so that riders can start using the real-time arrival information available through our Transit Tracker program as soon as the Connexionz vendor installs the on-bus equipment. New Transit Tracker and printed schedule signage will be posted at the MB bus stops as the transition date nears.
  - As authorized at the January RTA Board meeting, staff is finalizing the amendment to the SRTP agreement so that an update to the City's "stale" SRTP can be conducted over the next nine or so months. The RTA will operate the MBT system on the current schedule using the same bus stops, while also collecting boarding/alighting data that will help the consultant validate and guide City decisions on any possible future changes.
  - A new schedule is being finalized, in both electronic and paper formats. The schedule will be more consistent with other RTA marketing materials and will include information about transfer and other coordination opportunities.
  - Currently working on artwork and other materials to integrate MBT into our website.

- The current social media Bus Operator recruitment campaign is complete. Staff is interviewing candidates that have recently applied through the County's website.
- Working with the vendor that designed our first two BEB exteriors on the designs for the next five BEBs.
- We staffed information booths at the Cuesta College North, Cuesta SLO, and Allan Hancock College resource fairs. Students are the biggest users of our Trip Planning service.
- Published the latest company newsletter, which is attached to the end of this staff report.

RTA staff continues to work with our SLOCOG, Caltrans, SLO Transit and Morro Bay Transit partners to implement the Cal-ITP contactless fare-capping payment system that was mentioned at previous Board meetings. This project will provide the backend infrastructure, payment methods, on-bus equipment, and operating costs for the first five-year period. A total of \$2.6M of SB125 funds is identified for this important regional project. Our marketing resources are focused on providing messaging related to implementation of the planned system, including integration of Token Transit mobile ticketing. The goal is to have a system in place by Fall 2025. See Agenda Item A-6 for a revised cooperative agreement outlining each agency's roles and responsibilities.

### **Finance and Administration:**

Staff has submitted grant applications for the four BEBs authorized at the January 2025 Board meeting. In January 2025, we submitted a combined application including \$2,280,400 in FTA Section 5307 Urbanized Area Formula funds and \$2,572,88 in discretionary Section 5339(b) Bus and Bus Facilities funds. The 5339(b) grant is the award to accelerate our transition to BEBs that we announced in July 2024. FTA Region 9 staff has confirmed that both of these grant applications have met their local office review requirements, and were forwarded to the Department of Labor for the next-step review. We have also submitted a State of Good Repair grant application totaling \$514,406 to SLOCOG; we anticipate award announcements in the coming weeks. Other funding assumptions include \$552,000 in HVIP credits, \$570,000 in TDS funds, and \$652,000 in SB125 funds.

A summary of our unaudited operating results for the first seven months of FY24-25 is provided below. Graphs showing ridership trends are provided at the end of this report.

- RTA core fixed-route annual ridership totaled 272,691 year-to-date in FY24-25, which is an increase of 6.7% over last year (255,500) but still 34% lower than the pre-pandemic total of 413,074. These results are in line with the experience of many intercity fixed-route operators across the globe, where the ridership of local fixed-route operators has essentially recovered while longer/regional routes continue to lag behind.



- When looking at non-core local fixed-route services operated by the RTA, the Paso Express ridership is actually up 25.2% in comparison to pre-pandemic levels (78,487 vs. 62,713). Ridership is also up 13.3% the first seven months of FY24-25 in comparison to FY23-24 (69,291). A large part of the increase is due to boardings by K-12 students, whose yellow school bus travel options have dwindled in recent years.
- South County ridership is still 20.1% below pre-pandemic levels (102,739 vs. 128,609), and is down 5.5% compared to FY23-24 ridership (108,770). Some of this decline in ridership can be attributed to a high degree of roadway construction in the Five Cities Area, which required bus route detours and likely made some riders avoid using transit.
- Runabout ridership totaled 16,816 through the first seven months in FY24-25, which is an 7.0% increase compared to FY23-24 (15,713). The pre-pandemic total was 23,310, which is 27.9% higher than in FY24-25.
- Trends over the past five years for ridership and productivity, which is defined as the average number of passenger-boardings per service hour, are shown in graphs at the end of this report. The graphs illustrate growing ridership year over year for all RTA core fixed-route and Runabout services. We will keep a close eye on Runabout ridership, which does not follow the same relatively predictive seasonal patterns experienced on the fixed-routes.

In terms of year-to-date FY24-25 financial results, staff works hard to ensure operating and capital costs are within budget in light of the recovering ridership and other financial challenges. The tables at the end of this report depict results for the first seven months of the fiscal year. Some important takeaways include:

- In terms of overall non-capital expenses, we expended 54.3% of the annual Administration budget and 51.2% of the annual Operations budget through 58.3% of the fiscal year. Overall, non-capital expenses are at 51.5%.
- Not surprisingly, the farebox recovery ratio (FRR) for core RTA fixed-route services continues to suffer due to lower ridership compared to pre-pandemic periods at only 8.7%. The FRR was 16.7% for Paso Robles local fixed-route services, and 5.2% for South County fixed-route services. Runabout's FRR remains low at 3.1%. The results will remain below our standards until such time that recent high inflation abates and/or ridership fully recovers.
- The YTD subsidy per passenger-trip on RTA core fixed-route services is \$14.61, while the Runabout result so far is \$135.30. The subsidy per passenger-trip is \$5.84 for Paso Robles services and \$11.63 for South County services.

## **STAFF RECOMMENDATION**

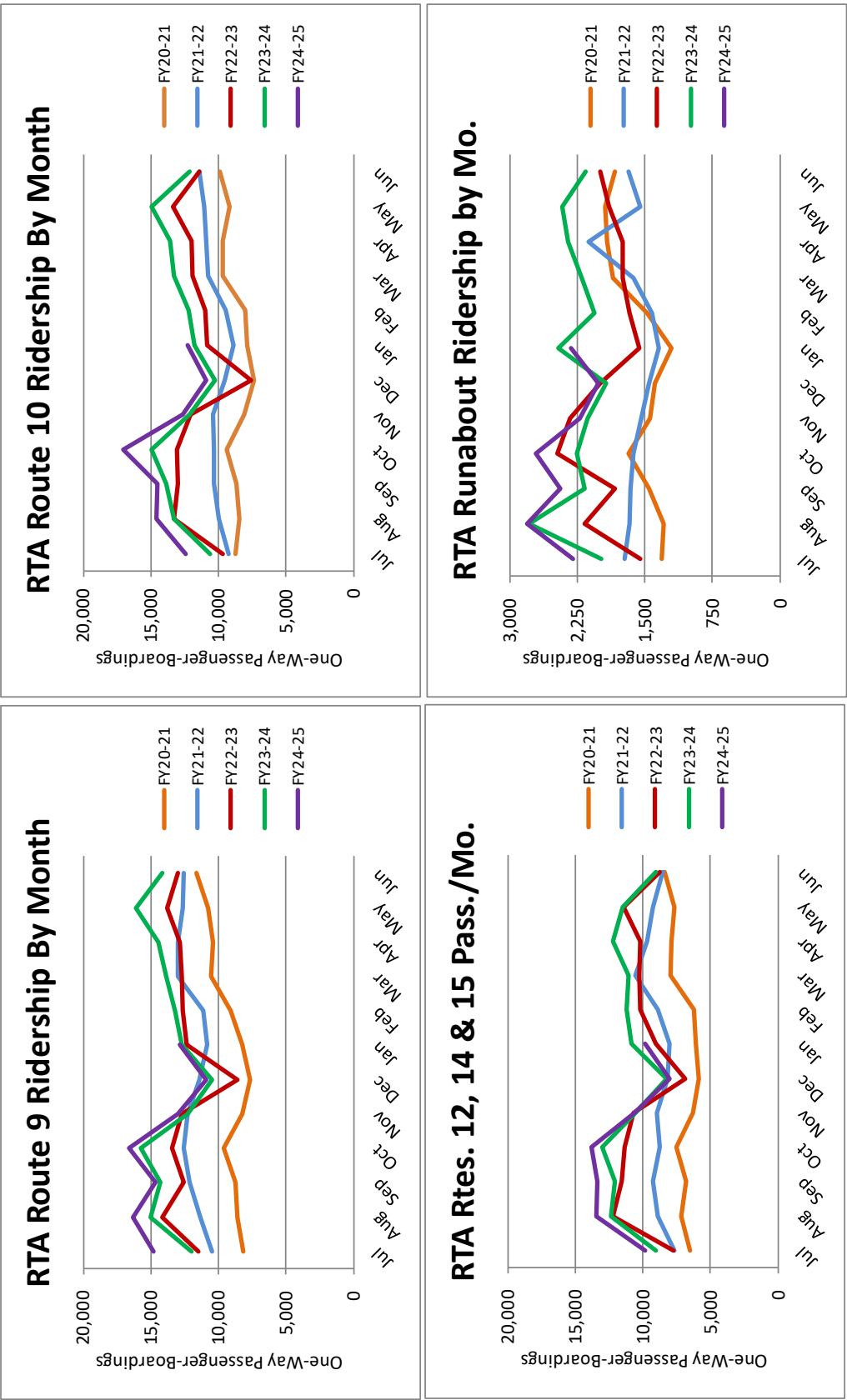
Accept this as an information item.

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**  
**YEAR TO DATE THRU JANUARY 31, 2025**  
**CURRENT FISCAL YEAR - 2024/2025**

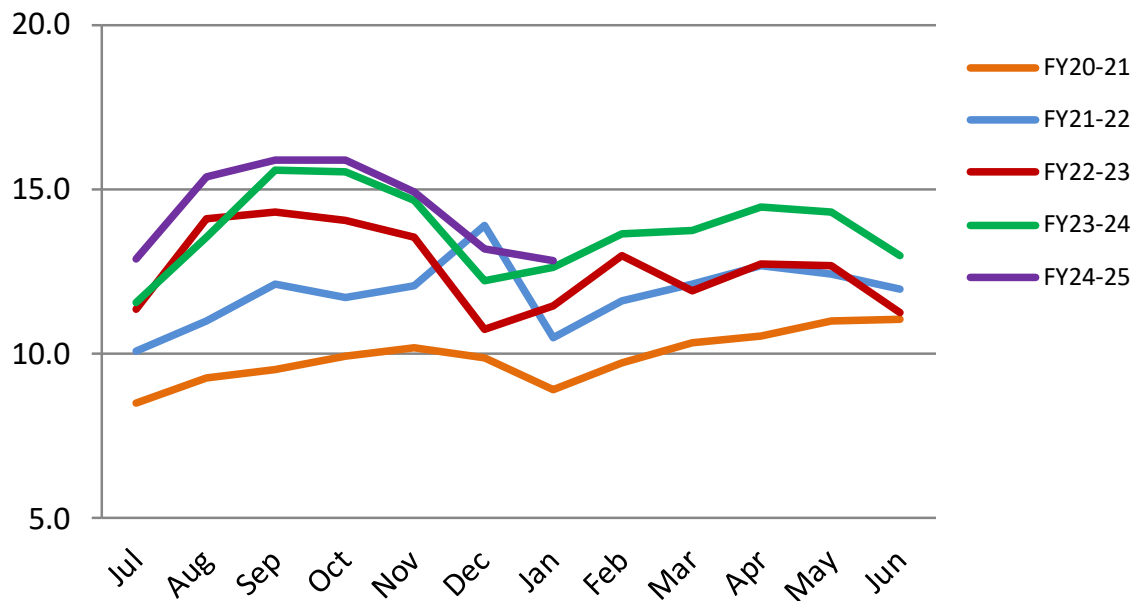
	RT 9 P.R., TEMP., ATAS., S.M., CAL POLY, S.L.O.	RT 10 S.M., NIPOMO, A.G., S.L.O.	RT 12 MORRO BAY, CUESTA, SAN LUIS	RT 14 CUESTA, SAN LUIS TRIPPER	RT 15 SAN SIM., CAMBRIA, CAYUCOS, M.B.	TOTAL RTA CORE SERVICES	RUNABOUT	SERVICES PROVIDED FOR THE CITY OF PASO ROBLES	SERVICES PROVIDED FOR SOUTH COUNTY TRANSIT	SERVICES PROVIDED FOR THE COUNTY OF SLO	SYSTEM TOTAL
<b>REVENUES:</b>											
FARES	\$ 148,736	\$ 148,735	\$ 74,915	\$ 0	\$ 8,645	\$ 381,030	\$ 73,537	\$ 93,236	\$ 65,851	\$ 13,492	\$ 627,146
<b>TOTAL ROUTE REVENUES</b>	\$ 148,736	\$ 148,735	\$ 74,915	\$ 0	\$ 8,645	\$ 381,030	\$ 73,537	\$ 93,236	\$ 65,851	\$ 13,492	\$ 627,146
<b>EXPENDITURES:</b>											
ADMINISTRATION	\$ 275,286	\$ 228,642	\$ 161,162	\$ 1,194	\$ 82,134	\$ 748,419	\$ 506,314	\$ 34,435	\$ 82,343	\$ 67,810	\$ 1,439,320
MARKETING	17,764	14,933	10,583	75	5,249	48,604	-	-	-	-	48,604
OPERATIONS/CONTINGENCY	990,399	882,558	591,981	4,666	314,165	2,783,769	1,614,065	460,143	990,144	260,664	6,108,785
FUEL	151,579	154,230	92,714	856	53,805	453,183	100,714	32,387	114,269	20,040	720,592
INSURANCE	110,865	112,872	67,874	623	39,641	331,875	127,703	31,835	74,170	12,524	578,107
<b>TOTAL EXPENDITURES</b>	\$ 1,545,893	\$ 1,393,236	\$ 924,314	\$ 7,414	\$ 494,994	\$ 4,365,851	\$ 2,348,796	\$ 558,799	\$ 1,260,926	\$ 361,038	\$ 8,895,409
<b>FAREBOX RATIO</b>	9.6%	10.7%	8.1%	0.0%	1.7%	8.7%	3.1%	16.7%	5.2%	3.7%	7.1%
<b>SERVICE MILES</b>	172,642.0	175,796.3	105,675.7	975.4	61,202.7	516,292.1	198,591.0	49,611.3	115,319.7	19,758.0	899,572.1
<b>SERVICE HOURS</b>	6,927.2	5,767.7	4,088.6	30.0	2,054.6	18,868.1	12,856.0	3,912.5	8,143.7	2,367.4	46,147.7
<b>RIDERSHIP (Automatic Counters)</b>	99,291	94,443	71,144	503	7,310	272,691	16,816	79,779	102,739	8,867	480,892
<b>RIDERS PER MILE</b>	0.58	0.54	0.67	0.52	0.12	0.53	0.08	1.61	0.89	0.45	0.53
<b>RIDERS PER HOUR</b>	14.3	16.4	17.4	16.8	3.6	14.5	1.3	20.4	12.6	3.7	10.4
<b>COST PER PASSENGER</b>	\$ 15.57	\$ 14.75	\$ 12.99	\$ 14.74	\$ 67.71	\$ 16.01	\$ 139.68	\$ 7.00	\$ 12.27	\$ 40.72	\$ 18.50
<b>SUBSIDY PER PASSENGER</b>	\$ 14.07	\$ 13.18	\$ 11.94	\$ 14.74	\$ 66.53	\$ 14.61	\$ 135.30	\$ 5.84	\$ 11.63	\$ 39.20	\$ 17.19

## RTA Budget vs. Actual Expenses (through November 2024)

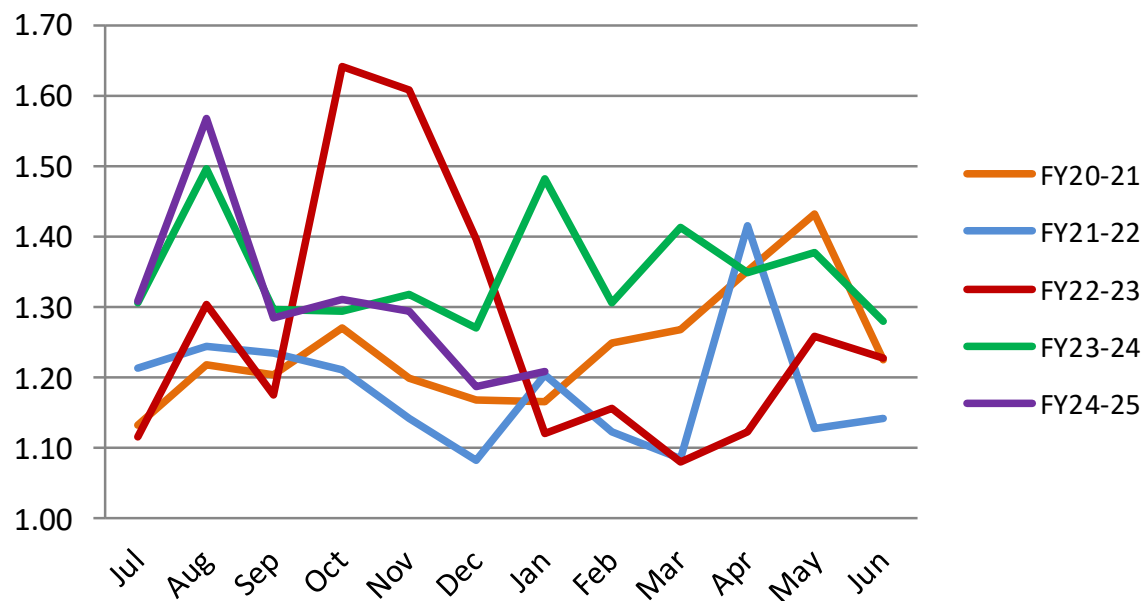
		Adopted Budget FY 2024-25	Year to Date FY 2024-25	Percent of Total Budget FY 2024-25
	Hours	79,390	43,780	55.1%
	Miles	1,851,210	879,814	47.5%
<b>Administration:</b>				
Labor	operations cost	1,334,260	787,897	59.1%
Labor - Administration Workers Comp	operations cost	47,560	29,519	62.1%
Office Space Rental	operations cost	59,770	33,055	55.3%
Property Insurance	operations cost	283,570	208,045	73.4%
Professional Technical Services	operations cost	320,550	119,860	37.4%
Professional Development	operations cost	97,340	25,431	26.1%
Operating Expense	operations cost	419,320	228,374	54.5%
Marketing and Reproduction	hourly	141,300	48,604	34.4%
North County Management Contract	operations cost	(59,030)	(34,434)	58.3%
County Management Contract	operations cost	(121,670)	(70,974)	58.3%
SCT Management Contract	operations cost	(141,160)	(82,343)	58.3%
<b>Total Administration</b>		<b>2,381,810</b>	<b>1,293,034</b>	<b>54.3%</b>
<b>Service Delivery:</b>				
Labor - Operations - Bus Operators	hourly	5,581,200	2,855,527	51.2%
Labor - Operations - Training Staff	hourly	422,910	241,768	57.2%
Labor - Operations - Operations Supervisors/Schedulers	hourly	1,551,600	831,338	53.6%
Labor - Operations - Ops Mgt./Oversight	hourly	448,750	272,826	60.8%
Labor - Operations Workers Comp	hourly	360,680	223,861	62.1%
Labor - Maintenance	miles	1,998,840	996,258	49.8%
Labor - Maintenance Workers Comp	miles	98,760	61,297	62.1%
Fuel	miles	1,565,280	720,590	46.0%
Insurance	miles	1,010,430	578,109	57.2%
Special Transportation (for SLOCAT)	n/a	33,500	13,465	40.2%
Maintenance (parts, supplies, materials)	miles	1,059,720	425,493	40.2%
Maintenance Contract Costs	miles	156,120	96,405	61.8%
<b>Total Operations</b>		<b>14,287,790</b>	<b>7,316,936</b>	<b>51.2%</b>
<b>Capital/Studies:</b>				
Computer System Maintenance/Upgrades		393,260	8,674	2.2%
Miscellaneous Capital				
Maintenance Equipment		218,760	2,233	1.0%
Vehicle ITS/Camera System		18,030	16,694	92.6%
Bus Stop Improvements		324,930	95,219	29.3%
Large Capital Repairs		402,760	76	0.0%
Vehicles				
Support Vehicles		45,600	-	0.0%
Fixed Route Vehicles		320,650	100,049	31.2%
Trolley Vehicles		293,200	-	0.0%
Cutaway and Dial A Ride Vehicles		154,810	155,068	100.2%
Runabout Vehicles		1,125,260	277,382	0.0%
<b>Total Capital Outlay</b>		<b>3,297,260</b>	<b>655,396</b>	<b>19.9%</b>
<b>Contingency</b>	hourly	<b>200,040</b>	<b>-</b>	<b>0.0%</b>
<b>PERS Buyout</b>		<b>178,310</b>	<b>104,013</b>	<b>58.3%</b>
<b>Loan Repayments</b>		<b>472,140</b>	<b>47,578</b>	<b>10.1%</b>
<b>Short Range Transit Plan</b>		<b>92,030</b>	<b>84,718</b>	<b>92.1%</b>
<b>Elks Lane Projects</b>		<b>2,379,560</b>	<b>47,354</b>	<b>2.0%</b>
<b>Management Contracts</b>		<b>321,860</b>	<b>187,752</b>	<b>58.3%</b>
<b>TOTAL FUNDING USES</b>		<b>23,610,800</b>	<b>9,736,781</b>	<b>41.2%</b>
<b>TOTAL NON-CAPITAL EXPENDITURES</b>		<b>17,369,810</b>	<b>8,949,313</b>	<b>51.5%</b>



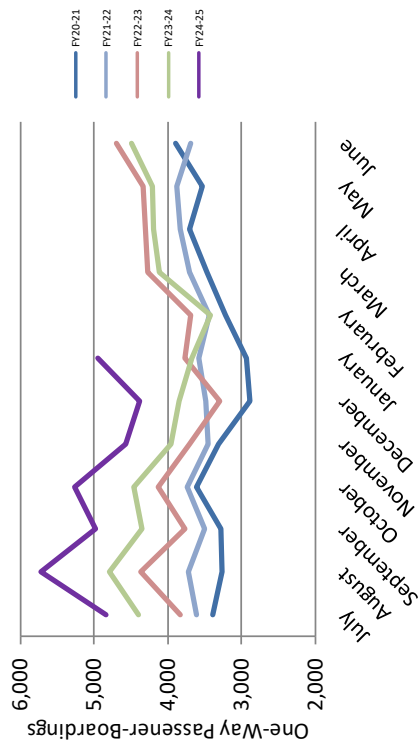
## RTA Fixed Route Productivity



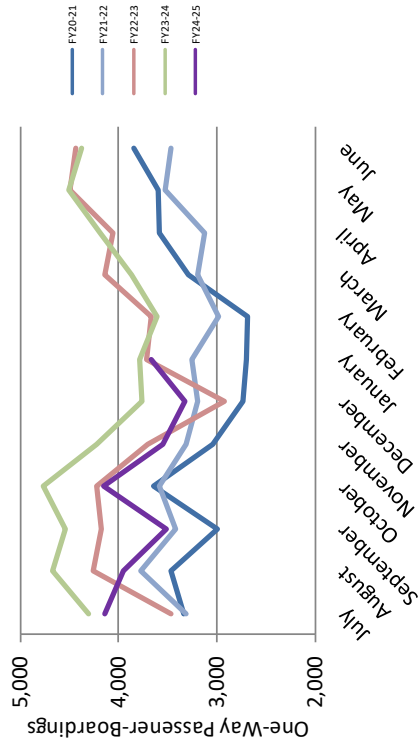
## RTA Runabout Productivity



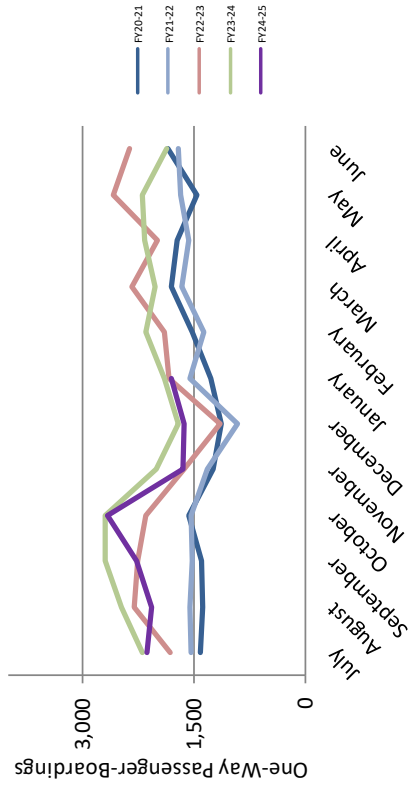
### Route 21 Ridership By Month



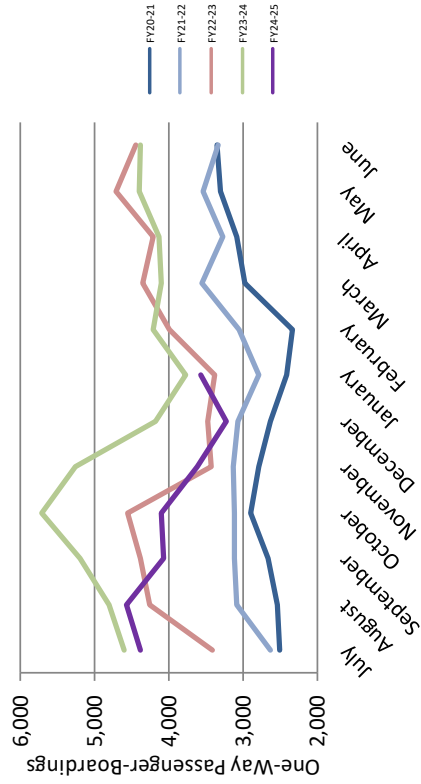
### Route 24 Ridership By Month

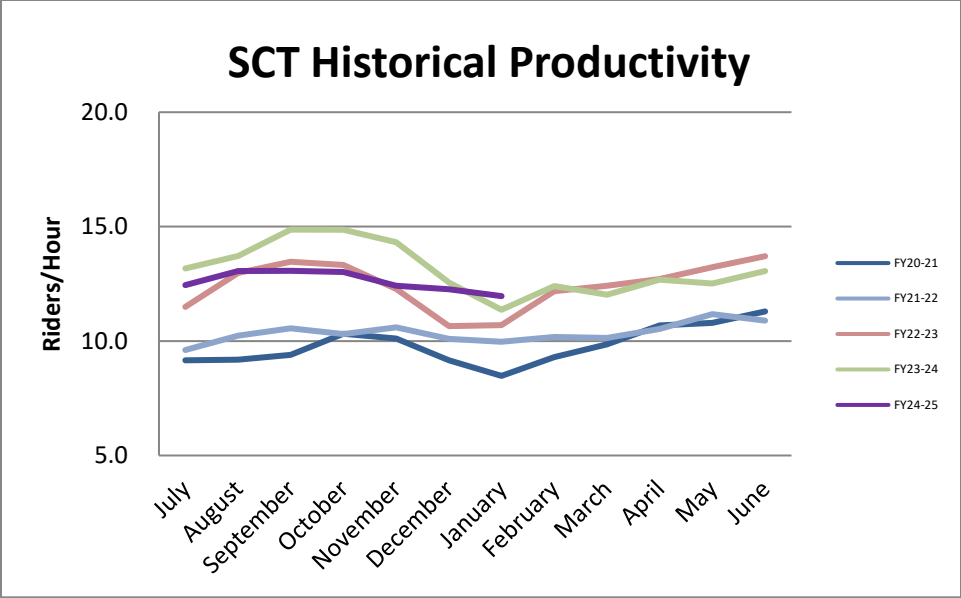


### Route 27 Ridership By Month



### Route 28 Ridership By Month





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# RTA

Winter  
Newsletter  
2025



*Here's a glimpse of Jose working his magic in the middle of another championship Roadeo run.*

## Geoff's Company Update

**Welcoming Morro Bay and Atascadero transit into the RTA family:** the RTA is working with the cities of Morro Bay and Atascadero to assume management and operation of their local transit systems. Since transit is the only thing we do, these cities recognize that we provide more efficient and higher-quality service to riders as part of our overall range of services. The Morro Bay Transit services (one Monday-Friday deviated fix route, and seasonal weekend Trolley services) would be based out of the RTA's facility in SLO, while the Atascadero Dial-A-Ride services (Monday-Friday only) would be based out of our Paso Robles bus park-out yard. We plan to begin interviewing their employees in March to help us meet our long-term staffing needs. As noted in the CBA, any MV Transportation employees that we bring on board would have first dibs on those local bids for one year; the bids would take place as part of our normal May bid. We expect to begin operating the Morro Bay services on June 1<sup>st</sup>, and the Atascadero services on or about July 1<sup>st</sup>.

**Update on the Short-Range Transit Plan (SRTP):** The SRTP process requires about 18 months to complete, and we've been talking about it for over a year now. During this time, we have published seven of the working papers on our website, with three more to go in the next month (find them on our website at About/Agency Reports). The report that sparks the imagination for many of us transit nerds is Working Paper #4, Service Alternatives. In this paper, the consultants examine our current system, and make recommendations and suggest possible changes. Some recommendations are small, like a little schedule change so that we can make better connection times. But, while most of the bigger changes would require funding that we do not have, they still provide a path of possible options that we like to try to achieve in the future.

**RTA Board of Directors:** All major decisions about running and funding the RTA must be presented to and approved of by our Board of Directors, comprised of an elected official from each of the seven cities in our county, as well as all five County Supervisors. Each new year, a new Board President is elected and this year it will be County Supervisor Jimmy Paulding. He is an avid transit supporter – as was outgoing SLO City Council member Andy Pease – and I look forward to working closely with him throughout 2025.

The next couple months look to be busy ones for the RTA in every department. I'm looking forward to the progress and changes, and I thank you for all you do to make the RTA a great place to work.

# Understanding our friend, the GFI

Why all the different “Free” keys on the GFI when they are all just “free”?



We don't just like a making more work, or the feel of pushing buttons, there is a reason for all that tracking! Each “Free” group has someone who is tracking that rider, and some are paid for by outside agencies. For example, we know there are agreements with Cuesta to provide rides to students, but did you know there is an agreement with an agency to provide free rides to those transferring from Amtrak? We are able to use the data for ADA riders in determining what the impact would be if those riders had taken that trip with Runabout. We also look at trends for Youth Ride Free to determine if the program is successful year over year. And although it isn't a free key – using the K-12 will help us when we look to try and determine how much a program that would offer free rides to K-12 might cost.

All the pieces aren't exact, but getting the information in as close to the right category as possible helps “key” us in as to the transit needs of the community!

-Tania

## Lots of projects for RTA!

### RTA BOARD ADOPTS NEW BUS STOP IMPROVEMENT PLAN (BSIP)



Your BSIP team Andy (Maint), Mary (Marketing), Melissa (Grants) & Stephanie (Maint)) have been hard at work updating the Plan to include some much-needed

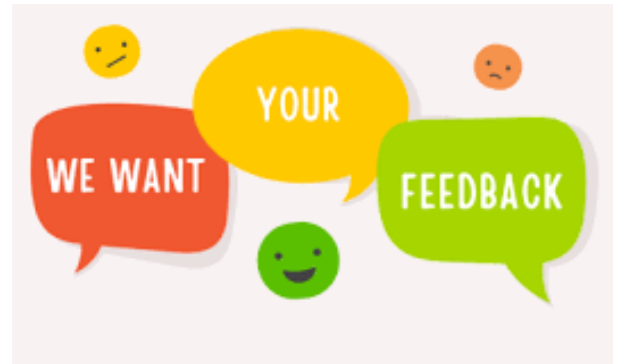
bus stop improvements to some of the 327 RTA Bus Stops throughout the County! The BSIP update included information on bus stop conditions from a survey completed early 2024 and used passenger activity by bus stop gleaned from the Automated Passenger Counter (APC) system to help serve as our road map & prioritize improvements.



# We Need to Hear From You!

RTA DEPENDS UPON YOU to tell us when you see a bus stop in need of some TLC. SEE A NEEDED REPAIR? HAVE AN IDEA TO IMPROVE A BUS STOP? – Tell the BSIP Team!

(email [mgardner@slorta.org](mailto:mgardner@slorta.org), call (805) 781-2706 or stop by our offices).



## EMERGENCY REPAIR WORK

Recently some bus shelter locations experienced some vandalism and needed immediate repairs. Our goal is to get these repairs done!

### Los Osos (Bench Replacement)



### Pismo Beach (Glass Replacement)



### Atascadero (Glass Replacement)





# The Best People Already Work Here!



There's something so great about promoting from within the company. RTA gets the absolute best person, who already knows our systems, knows the staff, and knows how to do the job at hand. We celebrate four recent promotions and while we're excited about your career at RTA, we're just thrilled that you're here and making RTA as good as we can be.



Triss:  
Operations Supervisor



Jovon:  
Operations Supervisor



James:  
Maintenance Assistant Manager



Brian:  
Customer Service



# Training & Safety Update

The Training Department has had a very full schedule and we've been conducting lots of trainings! But first, let's talk about upcoming trainings.

## **February 5 & 6: Cal Tip De-Escalation Training**

This training is designed to provide transit drivers, and other personnel who have direct exposure to the general public, techniques that can be utilized to de-escalate and reduce the risks that lead to unwanted or aggressive interactions with transit customers.

## **March 15, April 4, April 9 & May 31: VTT (Verification of Transit Training) 2025**

"Your Safety and Mine, Our Shared Responsibility". Please bring a lunch and attend in uniform.

## **Safety Resource Committee is Working for You!**

RTA employees continue to demonstrate attentiveness and communication in mitigating hazards and engage in improving the quality of our work environment. The Safety Resource Committee continues to address difficult locations on fixed route services by working with the cities to ensure bus stops are easily accessible.

We also address difficult locations for the Demand Response service which involves navigating around or away from hazards at customer pick-up/drop-off locations.

- In FY23-24 we received 27 items to work through. Half way through FY 24/25 the committee received 21 items. The committee has closed 19 items, has 3 open item and assisted with 15 items routed to the safety committee.



# Marketing Update



The marketing department has been busy! Let's catch up on some of the projects that are happening.

- New Bus Operator social media recruitment campaign: These ads are running now on Facebook and Instagram and I hope you've seen some of them by now. This campaign features photos of our own bus operators and quotes for why they like working at RTA. The response to the ads has been great...must be all of those cute faces.
- The "Find Out if Transit Works for You" campaign with personal trip plans ran with a strong response as well. People LOVE the personal trip plans.
- We are partnering with Cuesta College on a Professional Commercial Drivers course that they will start to offer through their Community Programs this year. The course prepares students to take the permit test and all students who complete the course get an interview with RTA, hopefully providing us with more bus operators.
- It is time! The South County routes are no longer a separate transit agency that we operate, and they are now completely part of the RTA. We are phasing out the SoCo Transit brand and will integrate those routes into the RTA brand. We will still use the word SoCo but remove the word Transit and stop using the logo with the bird and will use the RTA logo instead.



*This logo will be replaced with the RTA logo*

- RTA is working on purchasing a new fare collection system called the **Cal-ITP contactless fare-capping payment system**. This system allows you to be able to use your bank card with a chip to simply tap a card-reader to pay your fare, just like you do at the supermarket. So easy and fast! We are partnering with SLOCOG, Caltrans, SLO Transit, and MB Transit on this project and hope to start using it in Fall 2025. It will not replace our current systems but we hope to start the process of moving away from them with this new process. More info about this will be published as we get closer to launch.

-Mary



## \$1,000 Referral Bonus for Recommending a Bus Operator is Still in Place



Incase you haven't thought about this lately, RTA continues to offer the Referral Bonus to any current employee that refers a Bus Operator to RTA that we hire, train and they start driving. Its the perfect simbiotic relationship: We would love to have a new Bus Operator and you would love to have the money! The bonus is paid out over time as your referred person goes through the hiring and training process. If you'd like to get more info about the details of this program, please come and see me.

*Shelby*

## Transit Agencies Can Have Friends

In September, RTA attended a Transit Summit where we exchanged info and ideas with some of our neighboring transit agencies that included Monterey Salinas Transit, Santa Cruz Transit, Santa Barbara and San Benito Transit.



# E-Bus Efficiency



We measure the electric bus vehicle efficiency by looking at the amount of energy (kw) it takes to go one mile, we call this Kilowatts per mile or kw/mi for short. **Lots of factors can change the efficiency of an e-bus such as climate, average miles/hour, passenger load, and driving style.**

After each shift, I record some basic information so we can track vehicle performance. This data helps us learn how much juice it takes for our fleet to run on a variety of different routes in the many different climates on our County throughout the year. Analyzing this data will help us determine what bus configuration we should buy in the future. For instance, battery packs in an e-bus are about \$60,000 and weigh about 2,000 pounds each. Reducing batteries not only helps save on cost but also reduces weight, a lighter bus is more efficient. Our current two buses and our next five on order have seven battery packs. The RTA is looking at different configuration options for future purchases. Using data collected on route helps us make sure we are making the proper purchases for our agency.

Efficiency Champions: We are all on a learning curve with these vehicles, but here are some of our success stories so far:

## **Most miles driven on one charge**

- Jean Wyly 296 Miles on 12/14 on the 110. Averaged 1.93 kw/mi.

## **Most efficient shift**

- Robert (Bob Schwartz) 1.56 kw/mi on 12/6 on the 124

## **Of the top 10 most efficient shifts:**

- Robert has 8, Jean has 1, Madison has 1

## **Of the top 50 most efficient shifts:**

- Robert has 42 shifts, avg 1.7kw/m
- Jean has 2, avg 1.69kw/m
- Steven has 2, avg 1.72kw/m
- Will P has 2, avg 1.7kw/m
- Madison 1, 1.67kw/m
- Kevin R 1, 1.74kw/m



Congratulations to those drivers that have had a chance to drive these e-buses in service. Next we hope to collect some data in some cold weather (Paso) and on some slower average mile per hour routes. Stay tuned!

-Andy



# Employee of the Quarter!

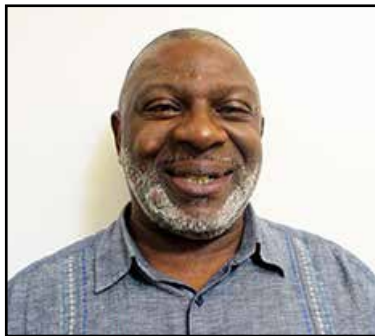


Congratulations to **Cindy Herrera** and **Chris Stelloh** for winning Employee of the Quarter! Both bus operators received enthusiastic, loving and compelling nominations. All you gotta do to win is be great at your job. Congrats also go out to our Outstanding Achievement award winners **Damon Blalark, Hubert Clark, John Guyton and Floyd Bland.**

## New Employees!



Deanna



Dionne



Craig



Steven



Salvadore



Jared

# Roadeo 2024!



The Competitors! We are grateful to all of the drivers who are willing to take the most important part of the Roadeo. They compete! They take a chance and risk their egos for the benefit of the rest of us. But there ain't no Roadeo without drivers and we **thank you** for stepping up.



The winners! Jose in 1<sup>st</sup>, Hubert in 2<sup>nd</sup> and a new winner on the podium, Derrick in 3<sup>rd</sup>. Congratulations to all the winners!









# How well do you know your co-workers version 2.0

Match a name to the fun fact. The person with the most correct answers wins a

## \$50 CASH PRIZE!



Jay



DW



Anthony



Eric



Luis



BC



Madison



Michelle



Riley



Floyd



Tony



Wendi



Will



Shelby



Andy



Triss

# THE FACTS!

*Write in your best guess to each fact below. Featured employees can play, but I will take one point off of your final score since you know your own fact. Bring your answer sheet to Mary in Admin or give it to a Supervisor and they will get it to me.*

1. Surfed behind their parent's boat long before wake-boards were invented. A little bitter that they didn't invent the dang wake-board: \_\_\_\_\_
2. Is a State-Certified HIV test counselor. Search the photos for the co-worker with kindness in their eyes: \_\_\_\_\_
3. Got to talk on the radio for their 11<sup>th</sup> birthday! Search the photos for the person that can remember their 11<sup>th</sup> birthday: \_\_\_\_\_
4. Collects all things wolves. Wolf pictures, statues, yard décor, coffee mugs & more. Ah-Rooooo! \_\_\_\_\_
5. Pierced their own tongue. Terrifying but true: \_\_\_\_\_
6. Their first real job was as a long-distance phone operator for Pacific Bell. I'm sure that there's a whole group of you that don't even know what the heck that is: \_\_\_\_\_
7. Likes to fix up old cars including a sweet, cherry-red 1966 VW Beetle: \_\_\_\_\_
8. Jumped off a three-story building into a pool: \_\_\_\_\_
9. Propagates tropical plants like a rare variegated Monstera. Those things are money! And yes, they're beautiful too: \_\_\_\_\_
10. Spent many months when they were 12 living as their alter ego, Sonny Crockett from Miami Vice. White suit, white shoes, the shades and a fake cigarette. All of it. There's no one cooler: \_\_\_\_\_
11. Tried out for The Voice! \_\_\_\_\_
12. Bought their first house at 24 years old: \_\_\_\_\_
13. While driving on a racetrack, they lost control of the Ferrari and spun out. And that's where their race-car driving dream ends: \_\_\_\_\_
14. Has performed at Carnegie Hall. But how do you get to Carnegie Hall? Practice, practice, I'm sorry, I couldn't stop myself: \_\_\_\_\_
15. Was the host at a karaoke bar. Favorite song to perform? The Jose Cuervo song: \_\_\_\_\_
16. Their ancestors include a Samurai warrior and they own their own Samurai suit of armor: \_\_\_\_\_
17. Bonus question: List ANOTHER co-worker in the photos that has also played an instrument at Carnegie Hall. Can you believe we have two? \_\_\_\_\_

**Tell me your name so that if you win, I know where to send the money:** \_\_\_\_\_

***Answer sheets are due to Mary by  
Friday February 14!***

# 15 Years of Service



Patty



Michael



Roy



Scott



Marisela



Donna



Shelly



Jay



Rey



David



Bill



James



Matt



Lupe



Michelle



# 10 Years of Service



Gisela



Humberto



Eric



Mary



Jason



Jose

Very cool photo courtesy of Craig Kaplan



# Upcoming Events



More super fun events have been planned for you. All you have to do is sign up and show up. These are a great way to spend time with your RTA friends and one of the best way to make new friends here. Don't miss out! If you want more info on any of these, please check with Shelly.



May 16, 17, 18: [Camping at Lake Lopez](#). Sign up now because spaces fill up fast! We are booking in the Hawk site. If you can't camp, come on by during the day! We will have a great time together and let's hope for great weather.



May 23-July 27 [SLO Blues Baseball](#) - Free tickets to home games! And we will plan for an RTA meet-up at a game, more info on that will come later.



Let's go to the [Melodrama](#)! We're looking at a Spring show this year. More info on that to come.



June 29: [Golf Tournament](#) at Sea Pines golf course. Kevin Cooksley is the planner for this awesome annual event. Find your foursome and sign up. This tournament is for all ages and all skill levels. You don't have to know how to play great golf to have a great time golfing.



October 12: [The ROADEO!](#) Every year this event gets better and better. Mark your calendar to save the date.

More events are being planned! We will make announcements as we go along.





**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY  
MARCH 5, 2025  
STAFF REPORT**

**AGENDA ITEM:** B-2

**TOPIC:** BEB Operational Results

**ACTION:** Review and Comment

**PRESENTED BY:** Geoff Straw, Executive Director

**STAFF RECOMMENDATION:** Receive and File Battery-Electric Bus Operational Results

**BACKGROUND/DISCUSSION:**

The RTA began planning for the transition to battery-electric buses (BEBs) in 2017 as part of the master planning for the new purpose-built Bus Maintenance Facility that was completed in January 2022. The *Bus Electrification Readiness Plan* was accepted by the RTA Board in early 2018. Over that five-year period, our planning efforts were further refined as a result of a key regulatory requirement – the California Air Resources Board’s Innovation Clean Transit fleet rule in December 2018. The ICT fleet rule requires public transit agencies to begin buying zero-emission buses in 2026, and stipulates that no internal combustion engine-powered buses can be purchased after January 1, 2029. The RTA Board adopted the RTA’s *Zero Emission Bus Rollout Plan* on March 1, 2023 as required under the ICT fleet rule, and our Rollout Plan provides a roadmap meet the ICT fleet rule.

For at least the past three decades, the RTA has purchased heavy-duty buses primarily from the GILLIG Corporation. We ordered our first two BEBs from GILLIG in May 2022 at a cost of \$1,040,660 each. These buses have the largest battery capacity of any bus on the market (686kWh), promising the greatest range possible. Those two BEBs were delivered<sup>1</sup> in March 2024 and assigned fleet numbers 2301 and 2302. At roughly the same time, we ordered one diesel-powered bus in essentially the same configuration at a cost of \$670,021. That bus was also delivered in March 2024, and it was placed into revenue service in June 2024.

As presented in the table below, we currently operate GILLIG diesel-powered buses that were delivered beginning in 2013 all the way through 2024, with “slug-loads” of ten buses in 2013 and another nine in 2015. Smaller subfleets were delivered in 2018, 2019, 2021 and the single bus in 2024. It is important for evaluation purposes to separate the diesel-powered buses into subfleets because as buses get older and accumulate more miles, the buses become more labor-intensive to maintain and the

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<sup>1</sup> The buses were originally scheduled for a late 2023 delivery and thus were assigned a model year 2023 designation – which is shown in our tables below. However, supply chain issues delayed delivery until March 2024.

parts costs tend to elevate as major component wear out. It is also important to note that the parts and labor costs are much lower during their initial three- to five-year warranty period (warranty periods vary depending on each major component category).

The table above shows the number of buses in each subfleet, as well as total operating costs by category and total mileage, for August 1, 2024 through January 31, 2025.

<b>Fleet Type</b>	<b># in Subfleet</b>	<b>Parts Cost (no tires)</b>	<b>Labor Hours</b>	<b>Labor Cost</b>	<b>Fuel Qty (gallons or kWh)</b>	<b>Fuel Cost</b>	<b>Total Miles</b>
2013 Diesels	10	\$37,677.79	601.62	\$40,934.38	31,908.67	\$126,927.55	158,058
2015 Diesels	9	\$45,488.00	609.00	\$39,480.13	31,166.92	\$122,909.77	161,770
2018 Diesels	3	\$20,772.19	255.75	\$17,660.30	11,157.25	\$44,405.17	60,915
2019 Diesels	3	\$11,962.48	214.05	\$13,946.56	8,906.23	\$35,115.82	49,501
2021 Diesels	2	\$4,509.79	133.00	\$8,102.86	8,912.15	\$35,235.03	51,928
2024 Diesel	1	\$1,740.99	74.50	\$4,540.85	4,787.82	\$19,043.00	27,115
<b>Diesel Subtotals</b>	<b>28</b>	<b>\$122,151.24</b>	<b>1,887.92</b>	<b>\$124,665.08</b>	<b>96,839.04</b>	<b>\$383,636.34</b>	<b>509,287</b>
2023 BEBs	2	\$431.24	143.00	\$8,715.93	84,813.63	\$40,582.01	43,451
<b>Overall Totals</b>	<b>30</b>	<b>\$122,582.48</b>	<b>\$2,030.92</b>	<b>\$133,381.01</b>	<b>\$181,652.67</b>	<b>\$424,218.35</b>	<b>\$552,738.00</b>

Remember that we contract with Easy Fuel for wet-hose fueling services (a truck with a tank trailer fuels each bus overnight), and we paid approximately \$11,330 over this six-month period for these on-site services. We also pay ChargePoint approximately \$18,000/year for maintenance agreements for the Electric Vehicle Servicing Equipment (EVSE) we use to re-charge the BEBs. Neither the Easy Fuel nor ChargePoint costs are included in the table above because those services are spread across too many vehicles to effectively determine the cost by subfleet or vehicle.

The table below depicts the cost by category for each subfleet. As shown, the overall cost per mile for all diesel-powered vehicles is \$1.24/mile, while the cost per mile for BEBs is \$1.23. However, a more apt comparison is to look at the 2021 and 2024 Diesel subfleets vs. the two BEBs, since they are all still under warranty, and thus labor and parts cost/mile are far lower than older diesel-powered buses. As shown, the 2021 and 2024 diesel buses cost between \$0.92 and \$0.93 per mile, which is far less than the two BEBs at \$1.14 per mile, or roughly 19% lower.

Some other findings to note are the “fuel” cost/mile, which provides another stark difference when looking within the diesel subfleets and diesel vs. electricity. The model year 2013 and 2015 buses achieve the lowest miles per gallon of fuel, because the later year vehicles’ engine management system is more efficient. Also, the cost per kilowatt/hour (kWh) of electricity is highly dependent upon peak vs. non-peak hours, as well as very costly “demand charges.” Because I have instructed our Operations and Maintenance staff to operate the BEBs to the fullest-extent possible, we end up charging the buses between driver shifts (midday) to maximize the miles operated during the warranty period and to gain valuable operating efficiency data. We have also incurred demand charges that can be up to four times the per kWh paid during even

<b>Fleet Type</b>	<b># in Subfleet</b>	<b>Fuel Cost/ Mile</b>	<b>Miles/ Fuel Unit</b> (gallons or kWh)	<b>Total Cost/Mile</b> (no tires)	<b>Annual Per Bus Maint. Cost</b> (assume 50k miles, including tires)	<b>Annualized Miles per Bus</b>
2013 Diesels	10	\$0.80	4.95	\$1.30	\$68,196.12	31,612
2015 Diesels	9	\$0.76	5.19	\$1.29	\$67,426.83	35,949
2018 Diesels	3	\$0.73	5.46	\$1.36	\$71,170.24	40,610
2019 Diesels	3	\$0.71	5.56	\$1.23	\$64,815.80	33,001
2021 Diesels	2	\$0.68	5.83	\$0.92	\$49,246.95	51,928
2024 Diesel	1	\$0.70	5.66	\$0.93	\$49,874.72	54,230
<b>Diesel Subtotals</b>	<b>28</b>	<b>\$0.75</b>	<b>5.26</b>	<b>\$1.24</b>	<b>\$370,730.65</b>	<b>36,378</b>
2023 BEBs	2	\$0.93	0.51	\$1.14	\$66,363.22	43,451
<b>Overall Totals</b>	<b>30</b>	<b>\$1.69</b>	<b>N/A</b>	<b>\$1.23</b>	<b>\$437,093.87</b>	

peak hours. Demand charges are incurred when we exceed our maximum electrical usage in any 15-minute period. Once we complete our data gathering this winter season, our staff will begin limiting peak and maximum charging in any 15-minute period to avoid demand charges.

The bottom line is that the per mile cost of operating the BEBs is somewhat inflated, but the “miles/fuel unit” of 0.51 miles per kWh (or inversely, 1.88 kWh/mile) is far better than we identified when we completed the *Bus Electrification Readiness Plan* in 2018. That plan assumed an average of 2.5 kWh/mile.

In terms of reliability, the BEBs have proven to be as reliable as our latest model year buses. The Bus Operators and riders almost universally desire the BEBs over the louder diesel-powered buses. Anecdotal information suggests that BEBs can maintain schedule better than their slower-accelerating diesel-powered counterparts, too.

### **Staff Recommendation**

Receive and file battery-electric bus operational results.

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**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY  
MARCH 5, 2025  
STAFF REPORT**

**AGENDA ITEM:** B-3

**TOPIC:** RTA Short-Range Transit Plan

**ACTION:** Review and Comment

**PRESENTED BY:** Geoff Straw, Executive Director

**STAFF RECOMMENDATION:** Review and Comment on Draft SRTP Findings/Recommendations

**BACKGROUND/DISCUSSION:**

The Joint Short-Range Transit Plan (SRTP) study was conducted in partnership with the City of San Luis Obispo. This joint effort is intended to ensure that service, capital, management and financial elements are coordinated between the RTA's transit services and the City of San Luis Obispo's local fixed-route service over the next five to seven years. The study was led by LSC Transportation Consultants, which provided seven "working papers" over the past 15 months to help guide RTA and SLO Transit in conducting this study. LSC Principal Genevieve Evans will present the SRTP findings and recommendations at the Board meeting; a copy of that PowerPoint presentation has been posted on the RTA website.

Administrative Draft copies of each working paper were shared with SLO Transit Mass Transportation Committee and RTA Regional Transit Advisory Committee (RTAC) members throughout the process. Following the incorporation of MTC, RTAC and staff comments, the Public Draft working papers were published on the SLO Transit and RTA websites for public review. I also provided updates on the Joint SRTP process at each RTA Board meeting. This Joint SRTP study effort culminated in a series of recommendations that are summarized below.

Previous SRTP Results

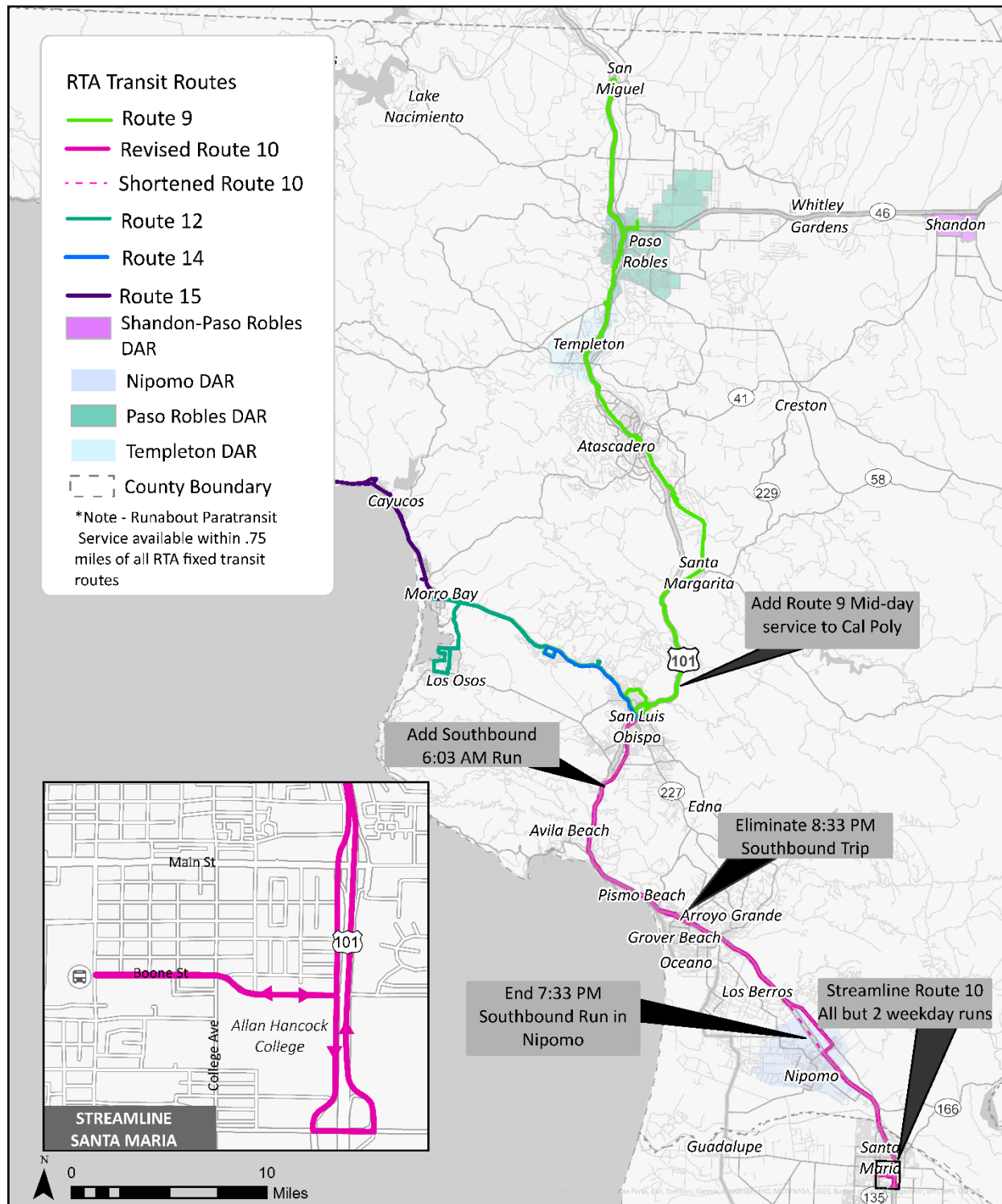
The RTA has implemented the majority of the recommendations included in the previous SRTP, which was adopted in July 2016. The two major SRTP-recommended changes included the consolidation of South County Transit services into the RTA (completed in January 2021) and completion of the purpose-built Bus Maintenance Facility (completed in January 2022). The RTA also constructed the long-term Paso Robles bus park-out yard in 2017 and improvements at the SLO Government Center passenger facility in 2018. Other relatively significant changes are related to the California Air Resources Board's *Innovative Clean Transit* fleet rule, which precipitated our transition to zero-emission buses beginning in 2019.

Unfortunately, transit agencies across the globe faced unprecedented challenges associated with the COVID-19 pandemic, which suspended efforts to implement the other incremental service expansions and fare program changes recommended in the previous SRTTP. The pandemic reduced ridership significantly (which had been declining year over year across the country since 2015), and it drastically changed our approach to employee retention and recruitment. On the plus side, ridership has been steadily growing since the major restrictions imposed in 2020 were lifted in 2021, but our boardings are still roughly 30 percent lower than in FY18-19.

Plan Elements Over the Next 5-7 Years:

Since the core RTA intercity fixed-route and Runabout services are relatively mature, and the transit services consolidated into the RTA over the past dozen years have been fully incorporated into our organizational culture and operations, no significant service changes are proposed over the next five to seven years. The following relatively straightforward Service Plan elements are depicted in the graphic on the next page and are recommended for implementation beginning in FY25-26:

1. **Route 10 Service Changes Due to Cessation of Santa Maria Funding** – in April 2024, the City of Santa Maria City Council decided to cease the pass-through of FTA Section 5307 to partially pay for Route 10 services. Due to this loss in funding, the following Route 10 changes are recommended:
  - a. **Streamline Route 10 in Santa Maria – All But 2 Weekday Runs** – essentially skipping the loop near Marian Medical Center. The two weekday runs would continue to serve Santa Maria riders on a morning northbound run and an evening southbound run. This change reduces the annual operating subsidy by \$27,000.
  - b. **Reduce Evening Service into Santa Maria** – under this Service Plan element, the 7:33 PM southbound departure from the SLO Government Center would end service in Nipomo, and the 8:33 PM departure would be eliminated. This would reduce the annual operating subsidy by \$84,000.
  - c. **Provide Route 10 Southbound 6:03 AM Run** – the first southbound Route 10 bus departs SLO Government Center at 6:33 AM, arriving at the Santa Maria Transit Center (SMTTC) at 7:43 AM – which does not allow enough time for riders to transfer to a SMRT bus and make most 8:00 AM work start times. Under this Service Plan element the RTA bus that currently “deadheads” from SLO to begin the 7:14 AM departure from the SMTTC would instead provide “open door” service, arriving at the SMTTC at approximately 7:13 AM. This would increase the annual operating subsidy by \$19,700.
2. **Route 9 Mid-Day Service to the Cal Poly** – the current Route 9 service only directly serves the campus during the peak morning and afternoon travel periods. This Service Plan element would increase the annual subsidy by \$1,700.



3. **Add School Tripper Services in Paso Robles and Arroyo Grande** during the academic year. The annual subsidy for these new services (\$19,700 and \$26,100, respectively) will require separate financial commitments from the City of Paso Robles and the South County Transit Committee.

4. **Add Saturday Paso Robles Route A Service**, which would also require a financial commitment from the City of Paso Robles of \$49,800 annually.

The Capital Plan focuses on replacing buses as they reach the end of their economically useful lives, requiring approximately \$39 million during the 7-year Plan period. It also identifies the need to continue to implement back-end electric vehicle recharging infrastructure to allow the mandated transition to zero-emission buses. A fiscally unconstrained yet important capital project is the need for a consolidated SLO Transit / RTA downtown transit center in San Luis Obispo. The Capital Plan also suggests further discussions about a consolidated transfer point between all four local South County fixed-routes and RTA Route 10 to enhance transfers for Routes 27/28 riders who currently are not provided timed-transfers.

Lastly, the Financial Plan includes two changes to the fare/pass program: **Implement Cal-ITP Open-Loop Contactless Fare-Capping System**, and **Implement a Discount Fare Verification Process**. As part of the **Implement Cal-ITP Open-Loop Contactless Fare-Capping System** element, the consultant is also recommending flat fare on RTA intercity fixed-routes. Under this scenario, a rider would either pay a cash fare each time they boards an intercity RTA fixed-route, while a passenger using a contactless option would “beep” their electronic-enabled device each time they board and would only be charged an additional fare if they beeped on another intercity bus after 60 minutes. A \$2.00 general public / \$1.00 discounted flat fare is much simpler to enforce in comparison to our current zone fare program, it speeds the passenger boarding process, and is much simpler to explain to riders. It results in a fare increase for current single-zone riders (\$1.75 vs. \$2.00) but an overall lower fare for multi-zone riders. However, it was the RTA’s intent in 2020 to increase the base single-zone to \$2.00 (and \$2.25 for two-zone, \$2.75 for three-zone, and \$3.50 for four-zone), but we suspended that effort due to the pandemic. Local fixed-route fares would remain at \$1.50/\$0.75 on South County, Paso Robles and Morro Bay fixed-routes; the other local fixed-route operator in the region (SLO Transit) has also indicated its intent to remain at \$1.50/\$0.75.

It should be noted that Runabout fares are twice the applicable fixed-route fare, with a maximum limit of \$11.00 per boarding. As noted in previous Board meetings, the majority of Runabout riders board and/or alight in San Luis Obispo – so those riders would not experience a fare increase. Under the \$2.00 RTA flat fare proposal, a relatively small number of longer-than-average intercity Runabout fares would be reduced.

Finally, the **Implement a Discount Fare Verification Process** would require additional staff resources – particularly to launch the program and to issue identification cards. This could be addressed by either hiring a new employee or by contracting with a third-party. The Financial Plan identifies a placeholder annual cost of \$100,000.



### Next Steps

Staff is proposing that – in addition to “daylighting” the Plan at today’s Board meeting – the Draft RTA SRTP be shared with the public in a series of steps identified in Agenda Item C-4 to solicit input on the recommended fare and service changes. Staff will summarize the comments received and present them to the RTAC at its next regularly scheduled meeting on April 10<sup>th</sup>. Consolidated comments from the RTAC and public will be included in staff’s presentation for SRTP adoption by the RTA Board at its May 7, 2025 meeting.

### **Staff Recommendation**

Review and comment on draft SRTP findings/recommendations.

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## Chapter 12

# SHORT RANGE TRANSIT PLAN

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This Short Range Transit Plan for SLO RTA is the result of extensive analysis, outreach, and discussion with the RTA staff, stakeholders, and the public. As shown in the following tables, operating expenses for the base case scenario will increase by 19 percent over the seven-year planning period. With limited additional transit operating revenue available, this short range transit plan does not include any major service expansions. Some of the plan elements will reduce overall operating costs through gains in efficiency. Other proposed plan elements represent reinstating services which were suspended during the COVID-19 pandemic. Although it is anticipated that ridership will continue to recover, it is not likely that RTA will reach pre-pandemic levels during this planning period.

The following service plan recommendations are divided into two categories: Financially constrained and financially unconstrained. Unconstrained plan recommendations should be considered if additional funding becomes available or as warranted through the SLOCOG unmet transit needs process.

In summary, the nine service changes presented in the financially constrained service plan will increase ridership by one percent over the planning period with a small annual operating cost increase. This plan will improve mobility for residents of San Luis Obispo County through increased frequency and school tripper service, as well as changes to the Regional Routes fare program.

### PLAN ASSUMPTIONS

- Forecasts of annual operating and administrative costs were developed as presented in Table 57. “Base case” or “status quo” operating and administrative cost forecasts were estimated based on the projected RTA 2025-26 Budget. An annual inflation escalator of three percent was applied to project operating costs for each following year of the planning period. The Plan also presumes that Express trips operated prior to the pandemic will be restored as overcrowding on the regular hourly routes is encountered.
- Ridership and corresponding fare revenue for each SRTTP element was estimated as presented in Tables 58 and 59. Ridership is assumed to grow at a rate of 2 percent annually between FY 2025-26 and FY 2027-28. This reflects both the projected population growth rate of 0.7 percent annually and a continued post-COVID increase in ridership. Ridership growth is assumed to slow to a growth rate of 1 percent annually after FY 2027-28.
- All fiscally constrained plan elements are recommended for implementation in FY 2025-26.

### FINANCIALLY CONSTRAINED SERVICE PLAN

Operating costs, ridership, and fare revenue estimates for RTA service plan elements are shown in Tables 57, 58, and 59 described below. The reader is encouraged to review Chapter 7: RTA Service Alternatives for more detailed information on how each plan element was developed. Figures 31-33 present all plan elements graphically.

**Table 57: RTA Short Range Transit Development Plan Operating Costs**

Plan Element	FY 25-26	FY 26-27	FY 27-28	FY 28-29	FY 2029-30	FY 30-31	FY 31-32
<b>Base Case Operating Cost<sup>1</sup></b>							
Marginal Systemwide Operating Costs	\$10,247,580	\$10,555,000	\$10,871,700	\$11,197,900	\$11,533,800	\$11,879,800	\$12,236,200
Fixed Costs	\$4,748,780	\$4,891,200	\$5,037,900	\$5,189,000	\$5,344,700	\$5,505,000	\$5,670,200
RTA Administration and Contingency Costs	\$3,256,200	\$3,353,900	\$3,454,500	\$3,558,100	\$3,664,800	\$3,774,700	\$3,887,900
<b>Total</b>	<b>\$18,252,560</b>	<b>\$18,800,100</b>	<b>\$19,364,100</b>	<b>\$19,945,000</b>	<b>\$20,543,300</b>	<b>\$21,159,500</b>	<b>\$21,794,300</b>
<b>Financially Constrained Plan Costs</b>							
Streamline Route 10 in Santa Maria - All but 2 weekday runs	-\$27,000	-\$27,800	-\$28,600	-\$29,500	-\$30,400	-\$31,300	-\$32,200
Provide Route 10 Southbound 6:03 AM Run	\$19,700	\$20,300	\$20,900	\$21,500	\$22,100	\$22,800	\$23,500
End 7:33 PM Run at Nipomo and Eliminate Route 10 8:33 PM Southbound Trip	-\$84,000	-\$86,500	-\$89,100	-\$91,800	-\$94,600	-\$97,400	-\$100,300
Route 9 Mid-Day Service to Cal Poly	\$1,700	\$1,800	\$1,900	\$2,000	\$2,100	\$2,200	\$2,300
Paso Robles High School and Daniel Lewis Middle School Tripper	\$19,700	\$20,300	\$20,900	\$21,500	\$22,100	\$22,800	\$23,500
Add Saturday Paso Robles Route A Service, 7:45 AM to 6 PM	\$49,800	\$51,300	\$52,800	\$54,400	\$56,000	\$57,700	\$59,400
Arroyo Grande Tripper	\$26,100	\$26,900	\$27,700	\$28,500	\$29,400	\$30,300	\$31,200
Fare Structure Changes - Discount Fare Verification	\$100,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000
<b>Financially Unconstrained Plan Costs</b>							
Paso Robles Route B Sunday Service, 8:30 AM to 5:30 PM	\$39,700	\$40,900	\$42,100	\$43,400	\$44,700	\$46,000	\$47,400
Rt 9 - Add 1 Roundtrip on Saturday	\$21,200	\$21,800	\$22,500	\$23,200	\$23,900	\$24,600	\$25,300
Rt 10 - Add 1 RT on Saturday	\$22,500	\$23,200	\$23,900	\$24,600	\$25,300	\$26,100	\$26,900
Rt 27- Add Saturday Service 7:30 AM to 8:15 PM	\$46,400	\$47,800	\$49,200	\$50,700	\$52,200	\$53,800	\$55,400
<b>Total Financially Constrained Marginal Service Plan Costs</b>	<b>\$106,000</b>	<b>\$56,300</b>	<b>\$56,500</b>	<b>\$56,600</b>	<b>\$56,700</b>	<b>\$57,100</b>	<b>\$57,400</b>
<b>Total Financially Unconstrained Marginal Operating Costs</b>	<b>\$129,800</b>	<b>\$133,700</b>	<b>\$137,700</b>	<b>\$141,900</b>	<b>\$146,100</b>	<b>\$150,500</b>	<b>\$155,000</b>
<b>Total Operating Cost for Constrained Plan</b>	<b>\$18,358,560</b>	<b>\$18,856,400</b>	<b>\$19,420,600</b>	<b>\$20,001,600</b>	<b>\$20,600,000</b>	<b>\$21,216,600</b>	<b>\$21,851,700</b>
Note 1: Base Case (status quo) costs based upon FY 2025-26 RTA Budget. Assumes 3% annual inflation rate for the planning period. Source: LSC Transportation Consultants, Inc.							

**Table 58: RTA Short Range Transit Plan Ridership Projections**

	FY 25-26	FY 26-27	FY 27-28	FY 28-29	FY 2029-30	FY 30-31	FY 31-32
<b>Annual Ridership</b>							
Base Case	793,100	809,000	825,100	833,400	841,700	850,100	858,600
<b><u>Financially Constrained Service Plan Elements</u></b>							
Streamline Route 10 in Santa Maria - All but 2 weekday runs	-1,700	-1,700	-1,800	-1,900	-2,000	-2,100	-2,300
Provide Route 10 Southbound 6:03 AM Run	3,600	3,700	3,800	4,000	4,200	4,500	4,900
End 7:33 PM Run at Nipomo and Eliminate Route 10 8:33 PM Southbound Trip	-5,100	-5,200	-5,400	-5,700	-6,000	-6,400	-6,900
Route 9 Mid-Day Service to Cal Poly	400	410	430	450	480	510	550
Paso Robles High School and Daniel Lewis Middle School Tripper	2,300	2,350	2,440	2,560	2,720	2,920	3,160
Add Saturday Paso Robles Route A Service, 7:45 AM to 6 PM	5,700	5,800	6,000	6,300	6,700	7,200	7,800
Arroyo Grande Tripper	1,100	1,100	1,100	1,200	1,300	1,400	1,500
Impact of Fare Structure Changes (Flat Fare)	2,700	2,800	2,800	2,800	2,900	2,900	2,900
<b><u>Subtotal Impact of Constrained Plan Service Elements</u></b>	<b>9,000</b>	<b>9,260</b>	<b>9,370</b>	<b>9,710</b>	<b>10,300</b>	<b>10,930</b>	<b>11,610</b>
<b><u>Financially Unconstrained Service Plan Elements</u></b>							
Paso Robles Route B Sunday Service, 8:15 AM to 5:15 PM	4,400	4,500	4,700	4,900	5,200	5,600	6,100
Rt 9 - Add 1 Roundtrip on Saturday	1,700	1,700	1,800	1,900	2,000	2,100	2,300
Rt 10 - Add 1 RT on Saturday	1,700	1,700	1,800	1,900	2,000	2,100	2,300
Rt 27- Add Saturday Service 7:30 AM to 8:15 PM	4,200	4,300	4,500	4,700	5,000	5,400	5,800
<b><u>Subtotal Impact of Unconstrained Plan Service Elements</u></b>	<b>12,000</b>	<b>12,200</b>	<b>12,800</b>	<b>13,400</b>	<b>14,200</b>	<b>15,200</b>	<b>16,500</b>
<b>Total Ridership with Constrained Service Plan</b>	<b>802,100</b>	<b>818,260</b>	<b>834,470</b>	<b>843,110</b>	<b>852,000</b>	<b>861,030</b>	<b>870,210</b>
<b>Total Ridership with Unconstrained Service Plan</b>	<b>814,100</b>	<b>830,460</b>	<b>847,270</b>	<b>856,510</b>	<b>866,200</b>	<b>876,230</b>	<b>886,710</b>

**Table 59: RTA Short Range Transit Plan Fare Revenue Impacts**

	FY 25-26	FY 26-27	FY 27-28	FY 28-29	FY 2029-30	FY 30-31	FY 31-32
<b>Fare Revenues (Passenger Revenues)</b>							
Base Case	\$1,124,050	\$1,146,500	\$1,169,500	\$1,181,200	\$1,193,000	\$1,204,900	\$1,216,900
<b><u>Financially Constrained Service Plan Elements</u></b>							
Streamline Route 10 in Santa Maria - All but 2 weekday runs	-\$2,700	-2,800	-2,900	-3,000	-3,200	-3,400	-3,700
Provide Route 10 Southbound 6:03 AM Run	\$5,600	\$5,700	\$5,900	\$6,200	\$6,600	\$7,100	\$7,700
End 7:33 PM Run at Nipomo and Eliminate Route 10 8:33 PM Southbound Trip	-\$8,000	-\$8,200	-\$8,500	-\$8,900	-\$9,400	-\$10,100	-\$10,900
Route 9 Mid-Day Service to Cal Poly	\$500	\$510	\$530	\$560	\$590	\$630	\$680
Paso Robles High School and Daniel Lewis Middle School Tripper	\$2,400	\$2,400	\$2,500	\$2,600	\$2,800	\$3,000	\$3,200
Add Saturday Paso Robles Route A Service, 7:45 AM to 6 PM	\$6,000	\$6,100	\$6,300	\$6,600	\$7,000	\$7,500	\$8,100
Arroyo Grande Tripper	\$900	\$900	\$900	\$900	\$1,000	\$1,100	\$1,200
Impact of Fare Structure Changes (Flat Fare)	-\$9,000	-\$9,200	-\$9,600	-\$10,100	-\$10,700	-\$11,500	-\$12,500
<b>Subtotal Fare Impact of Plan Service Elements</b>	<b>-\$4,300</b>	<b>-\$4,590</b>	<b>-\$4,870</b>	<b>-\$5,140</b>	<b>-\$5,310</b>	<b>-\$5,670</b>	<b>-\$6,220</b>
<b><u>Financially Unconstrained Service Plan Elements</u></b>							
Paso Robles Route B Sunday Service, 8:30 AM to 5:30 PM	\$4,600	\$4,700	\$4,900	\$5,100	\$5,400	\$5,800	\$6,300
Rt 9 - Add 1 Roundtrip on Saturday	\$2,200	\$2,200	\$2,300	\$2,400	\$2,500	\$2,700	\$2,900
Rt 10 - Add 1 RT on Saturday	\$2,200	\$2,200	\$2,300	\$2,400	\$2,500	\$2,700	\$2,900
Rt 27- Add Saturday Service 7:30 AM to 8:15 PM	\$3,400	\$3,500	\$3,600	\$3,800	\$4,000	\$4,300	\$4,700
<b>Subtotal Impact of Unconstrained Plan Service Elements</b>	<b>\$12,400</b>	<b>\$12,600</b>	<b>\$13,100</b>	<b>\$13,700</b>	<b>\$14,400</b>	<b>\$15,500</b>	<b>\$16,800</b>
<b>Total Fare Revenue with Constrained Service Plan</b>	<b>\$1,119,750</b>	<b>\$1,141,910</b>	<b>\$1,164,630</b>	<b>\$1,176,060</b>	<b>\$1,187,690</b>	<b>\$1,199,230</b>	<b>\$1,210,680</b>
<b>Total Fare Revenue with Unconstrained Service Plan</b>	<b>\$1,132,150</b>	<b>\$1,154,510</b>	<b>\$1,177,730</b>	<b>\$1,189,760</b>	<b>\$1,202,090</b>	<b>\$1,214,730</b>	<b>\$1,227,480</b>

Source: LSC Transportation Consultants, Inc.

**Figure 31**  
**RTA Regional Plan**

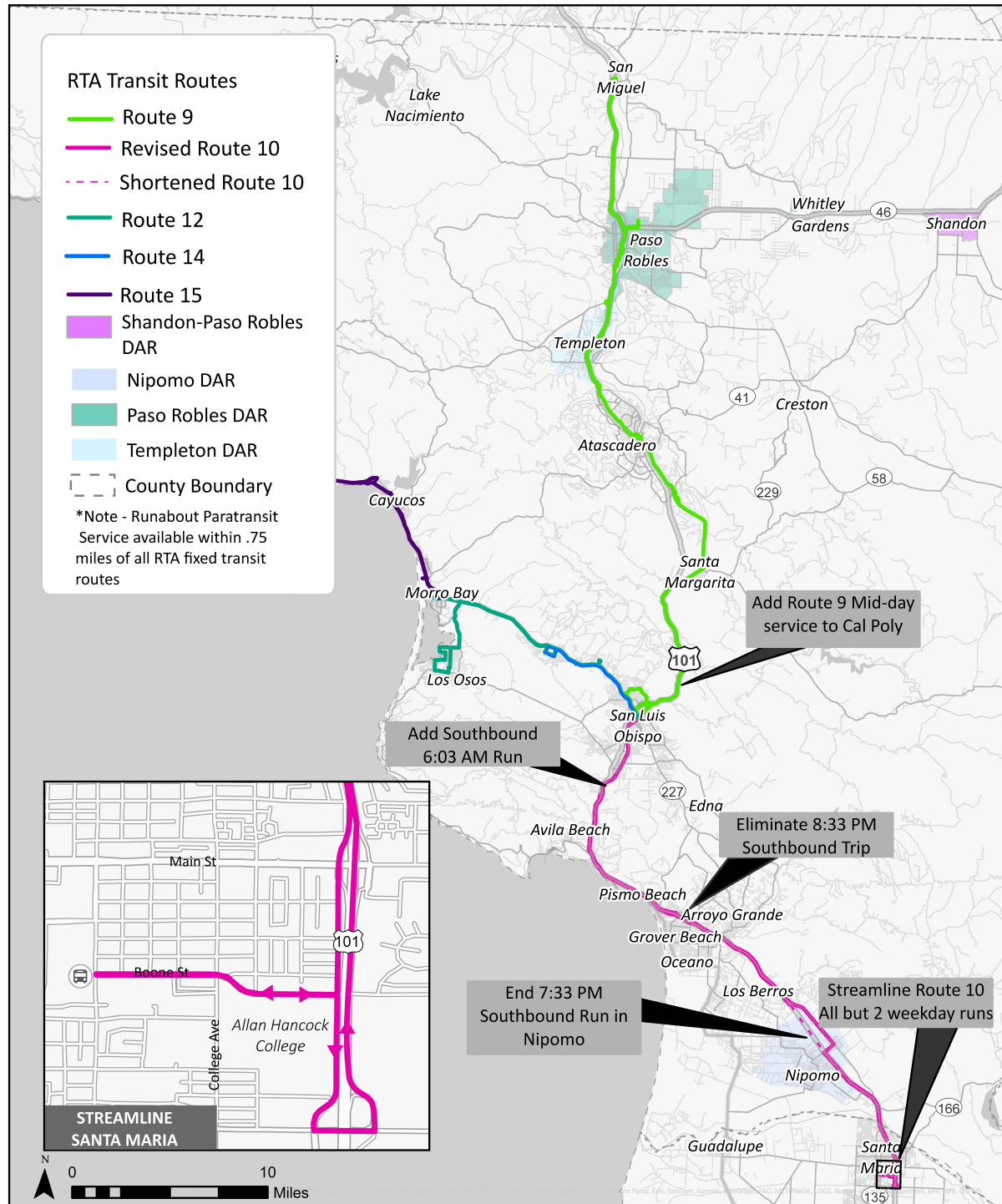






Figure 32  
RTA Paso Robles Routes

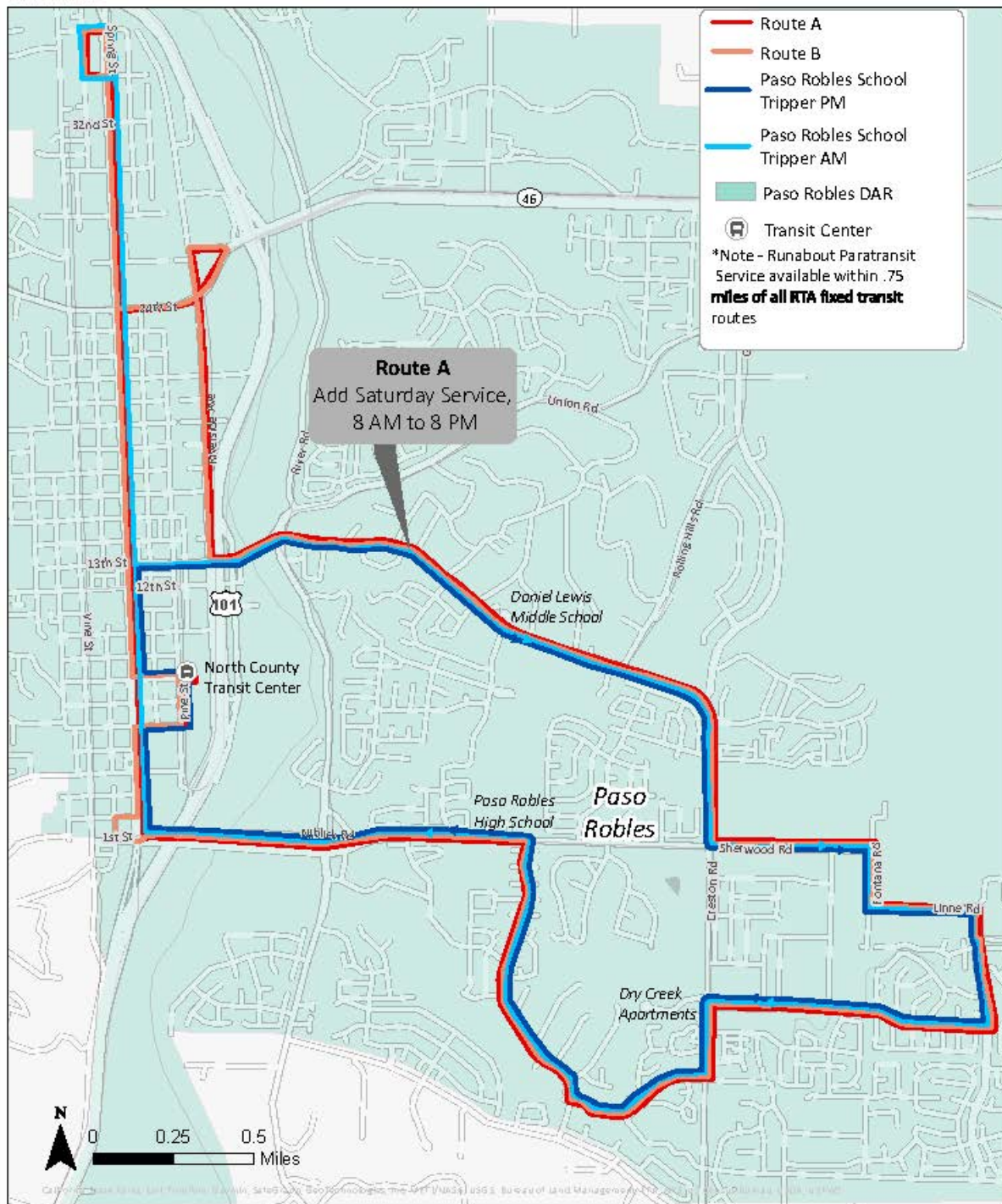
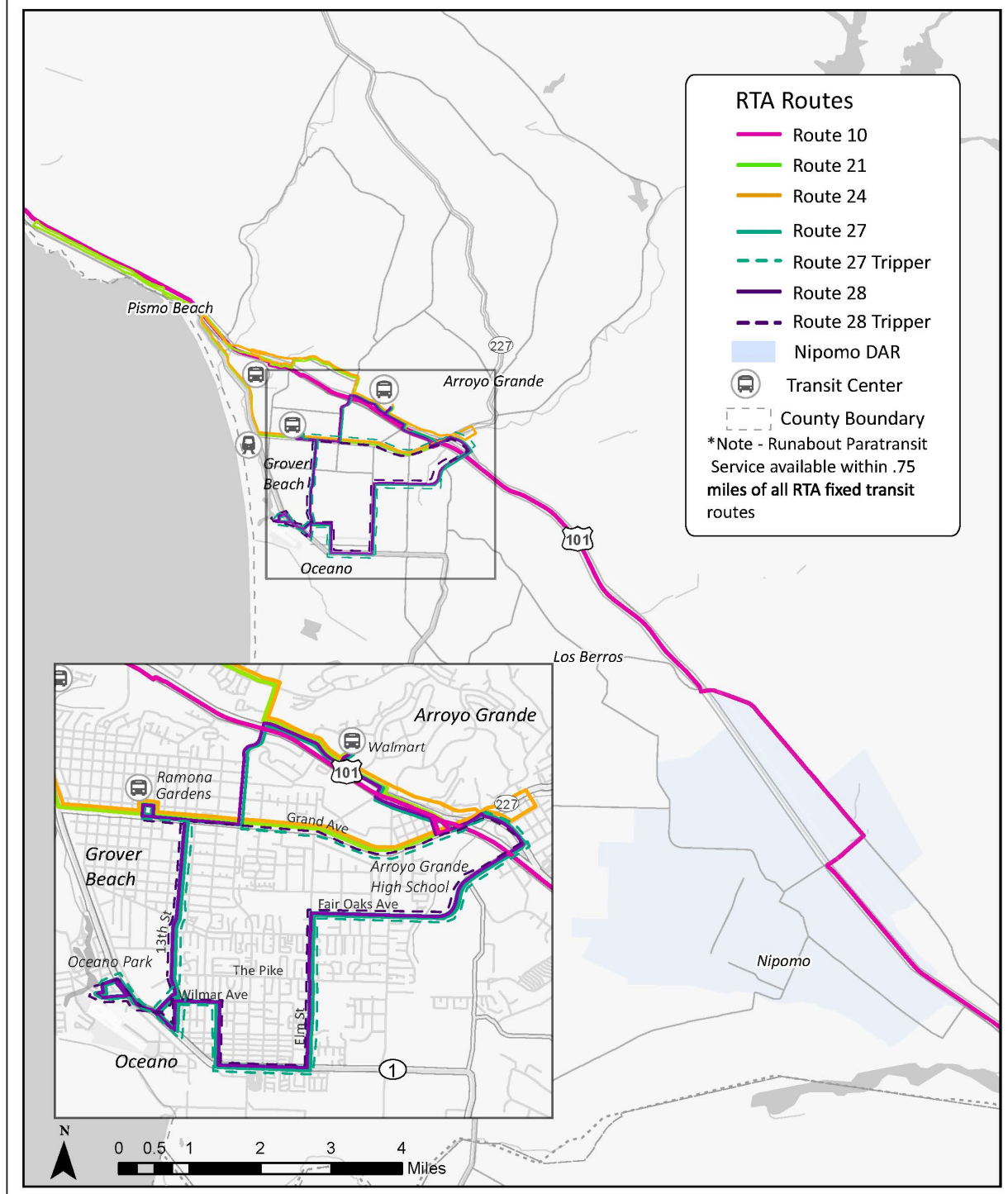




Figure 33  
RTA South County Transit Services Plan



### **Streamline Route 10 in Santa Maria – All but 2 weekday runs**

Historically, the City of Santa Maria has helped subsidize Route 10 service with (FTA) Section 5307 funds. The Santa Maria City Council voted in April 2024 to stop providing funds for Route 10 operations and instead directed staff to operate SMRT services between the cities of Santa Maria and San Luis Obispo. In order to mitigate the loss of revenue for Route 10, it is recommended that Route 10 streamline service in Santa Maria for all but two weekday runs. The revised route would eliminate the Marian Medical Center, and the Amtrak bus stop except for the southbound run departing Santa Maria northbound at 8:14 AM and the southbound run departing San Luis Obispo at 5:33 PM. By leaving these two runs in place, there still remains a connection to Route 10 for residents of the neighborhoods near the Marian Medical Center. It is estimated that this plan element will reduce annual operating costs by \$27,000 annually (FY 2025-26) and lose around 1,700 passenger-trips annually.

### **Provide Route 10 Southbound 6:03 AM Run**

The first daily weekday southbound Route 10 run under the current schedule departs San Luis Obispo at 6:33 AM and arrives at the Santa Maria Transit Center at 7:43 AM. While this may be early enough for San Luis Obispo County residents reporting to work at 8:00 AM in downtown Santa Maria, it does not serve earlier work start times in downtown or access 8:00 AM start times for those needing to transfer to SMRT routes to reach other work locations. As part of this plan element, the Route 10 bus which operates the second northbound run, currently “deadheads” to Santa Maria. Instead, this bus would begin passenger service to Santa Maria from the SLO Government Center at 6:03 AM. This run would serve all Route 10 stops, including service to Arroyo Grande at 6:36 AM and Nipomo at 6:49 AM, before arriving at the Santa Maria Transit Center at 7:13 AM.

Opening the doors for one southbound Route 10 run is anticipated to increase ridership by 3,600 passenger-trips over base-case while increasing operating costs by \$19,700 annually.

### **End 7:33 PM Run at Nipomo and Eliminate Route 10 8:33 PM Southbound Trip**

This service plan element is recommended to address both the loss of funding from Santa Maria as well as low ridership during the evening hours on Route 10. The final two southbound departures (7:33 PM and 8:33 PM) do not arrive at the Santa Maria Transit Center until 8:43 PM and 9:43 PM, well after SMRT fixed route operations have ceased for the day. Thus, making it impossible for passengers who rely on SMRT to get to their final destinations. Ridership is much lower on the Route 10 8:33 PM southbound trip than on the prior runs. If the 7:33 PM run terminates in Nipomo and the final Route 10 southbound trip (8:33 PM departure from the Government Center) is eliminated, approximately \$84,000 in annual operating costs could be saved while losing around 5,100 passenger-trips per year.

### **Route 9 Mid-Day Service to Cal Poly**

Direct RTA service to the Cal Poly campus from North County is currently limited: southbound service is provided to Cal Poly on three morning runs (arriving at 7:12 AM, 7:18 AM, and 8:12 AM) and on four afternoon runs (arriving at 2:17 PM, 3:17 PM, 4:17 PM, and 6:17 PM). These runs all serve Cal Poly before continuing to the Government Center. In the northbound direction, only one run (the last run of the day) serves Cal Poly, departing the Government Center at 8:33 PM and serving Cal Poly at 8:40 PM. Other than this last run, passengers departing Cal Poly and traveling north to Atascadero and Paso Robles must catch

the previous southbound RTA run at the campus before heading northbound. This adds 14 minutes of travel time that would be avoided if more direct Route 9 northbound service was provided to the campus. After a review of driver schedules and timed connections with other routes, it is recommended to add a stop on Route 9 at the Cal Poly campus in the southbound direction at 12:17 PM. This would provide mid-day service between the 8:12 AM service time and the 2:17 PM service time. This service plan element will increase annual operating costs by \$1,700 and increase ridership by 400 trips annually.

### **Paso Robles High School and Daniel Lewis Middle School Tripper**

Ridership on Paso Robles Routes A and B drastically increased after the City suspended school bus service in 2021. Schools start and end at specific times, therefore most student ridership is concentrated on the trips that occur right before and after the school day.

To alleviate overcrowding concerns and to better serve both student and non-student passengers alike, RTA should implement a supplemental tripper service to Paso Robles High School and Daniel Lewis Middle School with one morning and one afternoon run. This plan element is anticipated to increase ridership by 2,300 passenger-trips and increase annual operating costs by \$19,700. An additional vehicle would be needed for peak service.

### **Arroyo Grande Tripper**

It is recommended that RTA reinstate the tripper runs during the school year to serve Arroyo Grande High School (AGHS) at the regular bell times. This will consist of one morning run of Route 28 and one afternoon run of Route 27. With this plan element, RTA would serve an additional 1,100 passenger-trips and cost around \$25,200 in marginal operating subsidy.

### **Add Saturday Paso Robles Route A Service 7:45 AM to 6:00 PM**

Given the recent positive ridership growth trends on the Paso Robles Routes, it is recommended that RTA reinstate Route A Saturday Service from 7:45 AM to 6:00 PM, as funding and drivers become available. Currently, only Route B (counterclockwise one-direction loop) is operated on Saturdays, which makes for long travel times for some passengers. Adding Route A will allow for travel in either direction around the loop. The Saturday Route A schedule should follow the pre-pandemic schedule to maintain good connections with Route 9 Northbound. The service plan element would increase ridership by 5,700 trips annually and increase operating costs by \$49,800. An additional bus/driver would be needed for peak Saturday service.

Another option would be to instead implement Route B service on Sunday from 8:15 AM to 5:15 PM. This would have the benefit of seven-day/week local service in Paso Robles, along with connections to Route 9 on Sundays. Annual operating costs of this option would be less than the Saturday Route A Service element (\$39,700) but would yield a lower ridership increase (4,400 trips). With this service span, passengers would have a good connection with the 12:10 Route 9 departure to San Luis Obispo with a return trip arriving at Pine and 8<sup>th</sup> at 4:10 PM. Prior to increasing weekend service in Paso Robles, it is recommended that RTA conduct public outreach to determine if Sunday service is preferable to the additional Saturday service.

## **FINANCIALLY UNCONSTRAINED SERVICE PLAN**

### **Increase Saturday Service on Route 9**

RTA currently provides limited weekend regional service; in general, five roundtrips are offered on Saturdays and three on Sundays. Additional weekend service was one of the top requested service improvements during public outreach and was the most requested improvement by regional passengers who participated in the onboard survey. Current Route 9 Saturday service consists of five daily roundtrips operated every two to three hours. If one additional round trip were provided, service would be closer to every two hours. This would increase ridership by 1,700 trips annually and increase operating costs by \$21,200. One additional vehicle/driver would be required for peak Saturday service. This financially unconstrained plan element should be considered as part of the SLOCOG unmet transit needs process. In developing this element, serving Cal Poly on at least one round trip on Saturday should be considered.

### **Increase Saturday Service on Route 10**

Similarly, increasing Route 10 Saturday service by adding one round trip would increase ridership by 1,700 trips and operating costs by \$22,500. One additional vehicle/driver would be required. This financially unconstrained plan element should be considered as part of the SLOCOG unmet transit needs process.

### **Add Saturday Service on Route 27 – 7:30 AM to 8:15 PM**

In the South County region, Routes 21, 24, and 28 currently operate seven days per week, whereas Route 27 only operates Monday through Friday. Through the annual unmet transit needs process, the region should consider Saturday Route 27 service during similar hours as Route 28. This would have the impact of increasing annual operating costs by \$46,400 and annual ridership by 4,200. One additional vehicle/driver would be required. Prior to implementing this service option, RTA should monitor ridership trends on Routes 21 and 24 to see if bi-directional Saturday service in the South County region is necessary to meet mobility needs.

## **CAPITAL IMPROVEMENTS**

Transit services require ongoing capital investment in facilities and vehicles. Capital investments in both vehicles and passenger facilities can attract additional riders while improving the quality of service and safety of existing riders. Of note, California's Innovative Clean Transit regulation will go into effect during the plan period, requiring RTA to transition to zero-emission buses (ZEBs).

### **Fleet Replacement**

Transit vehicles must be regularly replaced to maintain a safe and reliable fleet. The RTA Transit Asset Management Plan sets a target to allow no more than 40% of the revenue vehicle fixed route fleet to exceed the FTA-defined useful life. As the vehicle procurement process can take multiple years, transit agencies must identify their vehicle needs well in advance. A detailed fleet replacement table is presented in Chapter 8. The vehicle replacement schedule is shown by year of purchase order, not year of actual expenditure. In summary, RTA will need to replace 28 fixed-route and 40 demand response/cutaway vehicles during the planning period. Fifteen of the fixed-route vehicles will be 40-foot battery electric buses (BEB), which cost on the order of \$1.4 million each, while 20 of the demand

response/cutaway fleet replacement vehicles will be EVs. Fleet replacement will cost on the order of \$39 million during the seven-year planning period.

### **Fleet Additions**

The plan elements described above will require two more fixed route vehicles to be in service on weekdays (the Paso Robles Tripper and the Arroyo Grande Tripper). Additionally, four more vehicles will be required for peak Saturday service with the implementation of all financially unconstrained plan elements. Currently, 41 vehicles are needed for maximum service. The RTA fleet consists of 68 fixed route and demand response vehicles. Even with the addition of two more vehicles for maximum service on weekdays, RTA will be able to maintain a 25 percent spare ratio. Therefore, expansion of the fixed route fleet will not be required to implement fiscally constrained SRTP elements.

### **Other Capital Improvements**

Table 41 in Chapter 8 presents a seven-year capital improvement plan for all items outside of revenue fleet replacement. This includes support vehicles, maintenance equipment, bus stop improvements, and EV charging infrastructure. This seven-year capital improvement program totals \$15 million.

### ***Long-Term Plan for Relocated Transit Center***

As noted in this report, there are deficiencies with the Government Center Transfer Point. There is inadequate space for all RTA buses at peak times, resulting in buses that park around the corner on Palm Street. Transferring between the SLO Transit and RTA systems requires walking across two streets. The number of bays available for SLO Transit limits the ability to schedule services to maximize direct bus-to-bus transfers. In 2012, the Coordinated Downtown San Luis Obispo Transit Center Study recommended a facility consisting of up to 16 bus bays, indoor/outdoor passenger waiting areas, driver break areas, restrooms, and a transit information counter. The larger transit center would allow for more buses to be able to pulse in and out of the transit center, which would enable enhanced route timing coordination. In 2017 the SLO City Council adopted the Downtown Concept Plan which also envisions a relocated transit center on Higuera Street between Santa Rosa Street and Toro Street. In November of 2023, the SLO City Council approved the purchase of a property on this block on the northwest corner of Higuera Street and Toro Street (1166 Higuera Street). This is the same property identified in the 2012 Coordinated Downtown San Luis Obispo Transit Center Study as the preferred alternative to advance into environmental review (Alternative 6). Initially, this site is envisioned for parking. A transit center would require using the northern part of Higuera Street which is currently striped for parking and a bike lane and was previously one of three one-way travel lanes and parking.

Project development for a relocated transit center would need to involve close coordination between the City of SLO and RTA along with SLOCOG. This would include the development of joint funding applications, environmental clearance, design, project phasing, and construction. A key feature not fully envisioned in the 2012 study is the addition of bus charging at bus bays. This will be important to support the transition to a BEB fleet by both SLO Transit and RTA. A placeholder for the planning and construction of a new transit center in Downtown San Luis Obispo is included in the RTA financial plan below.

### ***New South County Transfer Point***

Currently, all four South County Transit fixed-routes meet at the Ramona Garden Transfer Point at around 30 minutes past the hour, allowing for timed connections. It is possible to transfer between Routes 10, 21, and 24 at the Premium Outlets but Routes 27 and 28 do not stop there. Stakeholders have expressed interest in shifting the Ramona Gardens transfer point to another location. Ideally, this location should serve all four South County Routes, as well as Route 10. The alternatives analysis reviewed two options for a potential new South County Transfer Point: Grover Beach Train Station and Walmart. The analysis showed that moving the transfer point to the Grover Beach Train Station would increase operating costs and reduce ridership. Additionally, it is not efficient to use a regional route to divert Route 10 off of the main 101 corridor to serve the Grover Beach station.

If Walmart becomes the new transfer point, time would need to be added into the Route 10 schedule, along with schedule adjustments for the South County Routes. For the Pismo Outlets to serve as a transfer point, Routes 27 and 28 would need to be realigned. Regardless of the location, capital improvements (bus bays, passenger amenities) will be required for a new South County Transfer Point. The financial plan for this SRTF includes a placeholder for New South County Transfer Point improvements.

### **FARE CHANGES**

A fare peer review in Chapter 4 showed that RTA's fixed-route and Runabout fares are below the peer average. Additionally, RTA fares have not increased since 2017. Several fare alternatives to increase fares and change the fare structure were reviewed in earlier chapters. However, there is a trend among some regions to eliminate fares for all passengers or certain categories of passengers who may be disadvantaged, as a method of encouraging ridership. Eliminating fares for RTA could have significant impacts on vehicle capacity. The additional demand on the Runabout system could lead to large operating cost increases. Passenger fares represent roughly 11 percent of marginal operating costs. In light of all these factors, it is recommended that further study be conducted to determine a fare structure which is appropriate and financially responsible for RTA.

### ***Implement Cal-ITP Open-Loop Contactless Fare-Capping System***

As noted in Chapter 10 Fare Alternatives, the California Integrated Travel Project (Cal-ITP), and the California Department of General Services have collaborated to simplify the process for transit providers to implement a contactless fare-capping system. Cal-ITP has also negotiated lower-cost credit card processing fees than would be possible by individual agencies.

Transit fare capping is a fare payment model that sets a maximum amount a rider pays for fares over a specific period, such as a day, week, or longer. Once this cap is reached, the rider does not pay for additional trips taken during that period. The rider is also charged as you go, eliminating the need to pay for the full cost of a 31-Day Pass in advance. One final advantage for RTA and SLO Transit is that, over the long term, the transit operators could curtail or even discontinue the use of the electronic Genfare validating fareboxes. Some transit agencies that have implemented the Cal-ITP program have set a goal of a fully cashless fare system, including Monterey-Salinas Transit (2027). RTA staff has expressed a desire to



follow M-ST's example since this would reduce the staff time needed for the fare counting process as well as the increasing cost of maintenance for the complicated and occasionally unreliable Genfare fareboxes.

In 2024, SLOCOG led an effort to establish and fund the Cal-ITP system on all countywide fixed-routes using SB125 funds. This project will fund the upfront costs – including the purchase and installation of contactless payment hardware and related software – as well as fees for the first five years of operation. The RTA and SLO Transit began the contracting phase to implement the Cal-ITP system in early 2025. It is anticipated that the system will be fully operational by the end of the calendar year 2025. No operating cost or capital cost is reflected in this Plan, although relatively minor processing fees and maintenance costs will be incurred in years 6 and 7 of the Plan period.

In order to offer a fare payment option for unbanked or underbanked passengers, in the short-term the RTA will promote *BankOn* certified financial institutions in SLO County so that riders can obtain a contactless EMV chipped bank card through a low-fee and easy-entry bank account. *BankOn* is an initiative by the Cities for Financial Empowerment (CFE) Fund that works to ensure everyone has access to safe and affordable banking accounts using national account standards for low-fee banking accounts. When banks and credit unions offer accounts that meet these standards, they can receive *BankOn* certification. There are over 350 certified accounts available with 46,000 branches nationwide. Longer term, the RTA will investigate partnerships with a third party to offer a prepaid card that can be reloaded at RTA pass outlets and possibly other organizations. The target to launch a prepaid card is FY26-27.

### ***Implement a Discount Fare Verification Process***

When RTA passengers purchase a multi-ride pass on Token Transit or at pass outlets throughout the County, the passenger has the option to choose which fare category they fall under, general public or discount. Similarly, bus operators are instructed to avoid fare-related conflicts and generally to accept the word of cash-paying riders. RTA staff have observed general public passengers paying the discounted cash fare when there is no obvious reason the person qualifies for the discounted fare. As such there is likely some abuse of the fare system.

In an effort to reduce fare evasion, the RTA will implement a program to distribute a discount fare verification card in conjunction with the launch of the Cal-ITP system and the re-establishment of in-person ADA eligibility verification. Passengers can sign up in person at a pre-arranged location (possibly revolving around the county at existing pass outlets) or through an online portal, which will reduce the potential burden for qualifying passengers who may face mobility challenges. This new program will require an increase in staff resources – especially at the outset of the validation and subsequent enforcement process. The RTA should explore directly hiring a staff person or contracting with a third-party organization that has close ties to the elderly and/or disabled community. Token Transit and the Cal-ITP system allow agencies to restrict the ability of users to purchase discounted fares by providing a “good list” of passengers who qualify for discounted fares, and persons buying a discounted pass at a pass outlet would be required to show their eligibility card during purchase. Qualified applicants could submit their documentation via an online portal or in person at an office to be added to the “good list”. As shown in Table 57, a total cost of \$100,000 is shown in year 1 of the Plan period to launch the discount fare verification program, and \$50,000 per year thereafter beginning in year 2.

### ***Implement Flat Fare Over a 2-hour Boarding Period***

With the advent of advanced “tap on” fare technologies (see Cal-ITP discussion above), public transit systems operating intercity/regional routes are increasingly converting to a time-period-based fare structure. Passengers using a card or their phone to tap on can board additional buses within a set period (typically two hours) without additional charges. A good example is Monterey-Salinas Transit which converted in 2022 to a fare structure providing boardings within a 2-hour period for \$2 general public / \$1 for discount-eligible passengers.

On the RTA Regional Routes, this approach would replace the current zone fare structure. With a \$2 time-based fare for the general public and \$1 for discount passengers, this would result in an effective fare increase for those riding within a single zone, but an effective decrease for those riding in multiple zones – particularly for those traveling through 4 zones, such as from San Luis Obispo to Paso Robles. For cash-paying riders, the \$2 general public / \$1 discount fare would be paid each time the passenger boards a Regional Route.

An evaluation of the impact of this change in fares on ridership currently paying cash fares was provided in Table 52 of Chapter 10. As shown, the overall existing fare per passenger varies between the various routes, but the overall average fare per passenger is not far above the time-based fares, at \$2.24 for full-fare passengers and \$1.06 for discount passengers. The impact of the fare changes on ridership levels was analyzed using an elasticity analysis, indicating a small net increase in ridership of 2,700 passenger boardings per year (3.1 percent). The overall impact on fare revenue (including both the change in fares and the change in ridership) is estimated to be a relatively modest reduction of \$8,930 per year (6.1 percent).

Another factor to consider when making changes to the RTA fare structure is the impact on Runabout. Per ADA law, Runabout fares can not be more than twice the comparable fixed route fare. Under the flat fare model, the Runabout fare would not be increased for local trips. However, for longer trips Runabout passengers could effectively have a significant fare discount to the current fare structure under the time-based flat fare model. As the majority of Runabout trips begin and end with the City of San Luis Obispo area, the flat fare proposal would not have a significant impact on Runabout fares and corresponding demand for services.

The actual impact on fare revenues would depend on the potential for this fare change to increase revenue by reducing fare evasion, specifically, those passengers paying a cash fare for a single zone but then riding into additional zones. There is no data available on the extent of this pattern, but it is thought to be insignificant. By requiring all passengers on regional routes (not using a pass or eligible for another fare reduction) to pay \$2 general public / \$1 discount, this strategy may well result in a net increase in fare revenues, while also speeding the boarding process because passengers would no longer need to feed coins into the farebox. It also has the benefit of significantly simplifying the fare structure, reducing the stress on drivers of having to handle fare issues, and reducing the administrative costs of tracking so many fare categories.

Considering the large service area for both RTA regional routes and Runabout, it is recommended that RTA adopt a time-based flat fare structure of \$2 for 1 hour instead of \$2 for 2 hours (as discussed in Chapter 10). This would limit the loss of fare revenue, limit induced demand for long-distance Runabout



trips while still providing a more cost effective and simpler fare structure. It should be noted that the \$1.50 general public / \$0.75 discount fares on the local fixed-routes in South County, Paso Robles, Morro Bay, and San Luis Obispo would remain unchanged under this Plan element. This new fare program will require the RTA to seek public input using its established public participation process. The new fare program would be implemented along with the Cal-ITP launch in late 2025.

## **FINANCIAL PLAN**

Table 60 presents the 5-Year Operating and Capital Financial Plan for RTA. The RTA service operating plan is fiscally constrained for the planning period with recurring operating funding sources.

As shown in the table, sufficient revenue is available for planned capital projects including vehicle replacement and other capital costs. Funding for a New Downtown Transit Center and New South County Transfer Point has not yet been secured. As these two projects are still in the visionary phase, competitive grants and partnerships with other agencies will need to be obtained. One of the recommendations in the Marketing Plan (Appendix I) was to limit or eliminate ad sales on transit vehicles going forward. Ad Sales are not a significant source of revenue for RTA and make the vehicles look less appealing.

**Table 60: RTA Short Range Transit Development Plan Financial Plan**

	FY 25-26	FY 26-27	FY 27-28	FY 28-29	FY 29-30	FY 30-31	FY 31-32
<b>Operating Revenues</b>							
TDA LTF Allocation <sup>(1)</sup>	\$9,467,830	\$10,314,110	\$10,812,390	\$11,274,460	\$11,740,330	\$12,224,390	\$12,704,040
Passenger Fares Base Case <sup>(2)</sup>	\$1,124,050	\$1,146,500	\$1,192,800	\$1,253,400	\$1,330,200	\$1,425,900	\$1,543,700
SoCo Management Contract <sup>(3)</sup>	\$149,210	\$153,700	\$158,300	\$163,000	\$167,900	\$172,900	\$178,100
County Management Contract <sup>(3)</sup>	\$128,610	\$132,500	\$136,500	\$140,600	\$144,800	\$149,100	\$153,600
North County Management Contract <sup>(3)</sup>	\$62,400	\$64,300	\$66,200	\$68,200	\$70,200	\$72,300	\$74,500
Interest <sup>(4)</sup>	\$60,000	\$61,200	\$62,400	\$63,600	\$64,900	\$66,200	\$67,500
State Transit Assistance (STA) Including SB 1 <sup>(5)</sup>	\$1,497,060	\$1,497,100	\$1,497,100	\$1,497,100	\$1,497,100	\$1,497,100	\$1,497,100
Rural Transit Fund (Administration)	\$30,000	\$30,000	\$30,000	\$30,000	\$30,000	\$30,000	\$30,000
Rural Transit Fund (Operating Funds) <sup>(6)</sup>	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Federal Transit ADM (FTA) (Section 5311) - Operating <sup>(6)</sup>	\$816,700	\$837,200	\$837,200	\$844,700	\$850,400	\$853,000	\$855,600
Total Federal Transit Administration (FTA) 5307 <sup>(7)</sup>	\$4,376,300	\$4,311,000	\$4,311,000	\$4,341,700	\$4,371,000	\$4,384,000	\$4,397,100
Cuesta Contribution for Route 12 and 14 <sup>(3)</sup>	\$155,060	\$159,700	\$164,500	\$169,400	\$174,500	\$179,700	\$185,100
Cuesta Contribution North County	\$40,580	\$40,580	\$40,580	\$40,580	\$40,580	\$40,580	\$40,580
Special Events/Revenue Other <sup>(3)</sup>	\$110,000	\$113,300	\$116,700	\$120,200	\$123,800	\$127,500	\$131,300
<i>Subtotal</i>	<i>\$18,017,800</i>	<i>\$18,861,190</i>	<i>\$19,425,670</i>	<i>\$20,006,940</i>	<i>\$20,605,710</i>	<i>\$21,222,670</i>	<i>\$21,858,220</i>
Fund Balance	\$345,060	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Operating Revenue</b>	<b>\$18,362,860</b>	<b>\$18,861,190</b>	<b>\$19,425,670</b>	<b>\$20,006,940</b>	<b>\$20,605,710</b>	<b>\$21,222,670</b>	<b>\$21,858,220</b>
<b>Status Quo Operating Expenditures</b>							
SRTP Plan Elements Operating Costs	\$106,000	\$56,300	\$56,500	\$56,600	\$56,700	\$57,100	\$57,400
SRTP Plan Elements Fare Revenue	-\$4,300	-\$4,590	-\$4,870	-\$5,140	-\$5,310	-\$5,670	-\$6,220
<i>Balance</i>	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>
<b>Total Capital Revenue Available</b>							
<i>Fleet Replacement Costs</i>	<i>\$6,358,300</i>	<i>\$5,501,400</i>	<i>\$4,586,700</i>	<i>\$4,635,200</i>	<i>\$3,911,800</i>	<i>\$1,456,700</i>	<i>\$6,117,900</i>
<i>Other Capital Costs</i>	<i>\$5,974,830</i>	<i>\$4,812,210</i>	<i>\$781,470</i>	<i>\$833,010</i>	<i>\$815,100</i>	<i>\$971,330</i>	<i>\$825,830</i>
<i>New Downtown Transit Center</i>	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>	<i>\$20,000,000</i>	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>
<i>New South County Transfer Point</i>	<i>\$0</i>	<i>\$0</i>	<i>\$10,000,000</i>	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>
<b>Total Capital Project Costs</b>	<b>\$12,333,130</b>	<b>\$10,313,610</b>	<b>\$15,368,170</b>	<b>\$25,468,210</b>	<b>\$4,726,900</b>	<b>\$2,428,030</b>	<b>\$6,943,730</b>
<i>Balance</i>	<i>\$0</i>	<i>\$0</i>	<i>-\$10,000,000</i>	<i>-\$20,000,000</i>	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>
Source: RTA FY 2024-25 budget.							
Note 1: TDA LTF revenue based on budgeted need for FY 25-26 . LTF revenue available for transit operations varies each year and is dependent on the level of funding from other sources.							
Note 2: Passenger fares escalated at projected ridership increase of 2% annually through FY 2027-28 to account for small population increase and rebound from the pandemic. Passenger fares and ridership escalated by 1% annually for the remainder of the planning period.							
Note 3: FY 2025-26 budgeted revenues projected at the assumed rate of inflation, 3% annually.							
Note 4: Interest escalated at 2% annually.							
Note 5: STA revenue growth based on SLOCOG projections of flat growth							
Note 6: Based on SLOCOG FTA 5311 revenue projections (-.05% to 3%).							
Note 7: Based on SLOCOG FTA 5307 revenue projections (-.05% to 3%).							

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**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**MARCH 5, 2025**

**STAFF REPORT**

**AGENDA ITEM:** C-1

**TOPIC:** Fiscal Year 2025-26 Budget Assumptions

**ACTION:** Approve FY25-26 Budget Assumptions

**PRESENTED BY:** Tania Arnold, Deputy Director/CFO

**STAFF RECOMMENDATION:** Approve the Budget Assumptions and Budget Calendar to the Board So That a Detailed Work Plan and Budget May Be Developed

**EXECUTIVE COMMITTEE  
RECOMMENDATION:** No quorum

**BACKGROUND/DISCUSSION:**

The following report outlines staff's recommended budget assumptions for the RTA's Fiscal Year 2025-26 Operating and Capital Budget, and it is the first step in the development of our operating budget and capital program. It should be noted that the RTA is again developing a two-year operating budget and five-year capital budget. As in past years, only the first year would be financially constrained, while the out-years should be considered advisory. Upon the Board's guidance and approval, staff will prepare a detailed report along with preliminary budget numbers for presentation to the Executive Committee at their April 2<sup>nd</sup> meeting and the Regional Transit Advisory Committee (RTAC) at their April 10<sup>th</sup> meeting prior to the final draft budget presentation to the full Board on May 7<sup>th</sup>.

**KEY ISSUES**

1. Address the uncertainties the agency currently faces, including state and federal funding uncertainty. Impacts of these uncertainties include:
  - a. Impacts of the pending construction on US-101 in the Pismo Beach area, including supporting congestion mitigation efforts.
  - b. Liability costs, which have recently stabilized due to the RTA's good safety record, but the market continues to be extremely volatile due to the increasing number of catastrophic events globally – including the deadly January 2025 wildfires in Los Angeles.
  - c. Continuing to focus on containment of Runabout subsidies, especially as ridership continues to increase.

- d. Address staffing and retention, particularly in the Bus Operator classification.
2. Negotiate a new Collective Bargaining Agreement with Teamsters Local 986, which represents Bus Operator, Mechanic, Parts Clerk, and Utility employees. The current CBA expires December 31, 2025.
3. Continue efforts to implement Zero-Emission Bus technologies, including adding five battery-electric buses (BEBs) in late 2025 and expansion of recharging infrastructure for planned additional BEBs in the coming years.
4. State Transit Assistance (STA) funds are projected to be down in the region compared to the original FY24-25 allocation.
5. Local Transportation Funds (LTF), which are used primarily for operating purposes, are also projected to be down in the region. The RTA will continue to maximize all other funding sources first before determining the need for LTF.
6. Federal Transit Administration (FTA) formula funds (Sections 5307, 5339 and 5311) for Federal Fiscal Year 2025 are projected to be in line with the amount projected for FY25-26 when the FY24-25 budget was adopted in May 2024. However, recent actions at the federal level suggest that changes in both the scale of project funding and scope of the projects that remain eligible will be changed during the fiscal year and beyond.
7. Implementation of the RTA's Joint Short-Range Transit Plan (SRTP) constrained recommendations, including fare structure adjustments and enforcement of the discounted fare policy. The latter will require a slight increase in operating staff resources, either through direct employment or through a temporary employment agency agreement, equivalent to one full-time equivalent position.
8. Assist SLOCOG officials in addressing Senior-WAV service levels in the County.
9. Fully incorporate Morro Bay Transit and Atascadero Dial-A-Ride services that will be consolidated into the RTA in June 2025.

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## Mission Statement

As a reminder, the Mission of the RTA is to provide safe, reliable and efficient transportation services that improve and enhance the quality of life for the citizens of and visitors to San Luis Obispo County.

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## Objectives and Revenue Impacts

- 1) Maintain existing service levels and hours of service and, as feasible, increase service, including recommendations from the SRTP and other regional plans, that meet the standards of productivity and demand of our customers and communities through the effective and efficient delivery of RTA Fixed-Route and Runabout core<sup>1</sup> services:
  - a) The RTA originally received \$647,631 in STA funding in FY24-25 for RTA core services. Staff will work with SLOCOG staff to determine a realistic estimate for FY25-26.
  - b) Implement the contactless fare payment program through the California Integrated Travel Project (Cal-ITP) to make travel simpler and more cost-effective for all, including the discount eligibility verification process. The last system-wide fare change was implemented on December 31, 2017, both on RTA Fixed-Route and Runabout services.
  - c) The FY24-25 budget adopted in May 2024 included \$6,403,750 in LTF operating revenues. Also at the May 2024 Board meeting, the advisory FY25-26 LTF projection was \$7,784,800. Staff is still developing an updated annual FY24-25 revenue and expense projection, which impacts the carryover amount that could reasonably be identified for the FY25-26 budget.
  - d) FTA Sections 5307, 5311 and 5339 operating funding and capital funding for FY25-26 will be based on feedback received as staff works with SLOCOG and the other transit operators through the programming of projects process. Monies for FTA-funded projects are reimbursed either as progress payments or as full payment at the end of the project and/or fiscal year, which requires focused care by staff to ensure adequate cash flow.

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<sup>1</sup> Core services are defined as:

1. Hourly weekday services on RTA Routes 9, 10 and 12;
2. Five trips/day on Saturdays for Routes 9, 10, 12, and Monday-Saturday on Route 15;
3. Three trips/day on Sundays for Routes 9, 10, 12 and 15;
4. Peak period weekday service on Route 14 during open session of Cuesta College;
5. Peak period commuter Express services on Routes 9, 10 and 12; and
6. Runabout service that matches the fixed-route service days operated in each community.

- e) Detailed miles/hours and span of service for each RTA core Fixed-Route and for Runabout will be provided with the draft budget. For context, detailed budgets based on miles/hours and span of service will also be provided separately for SLO County Services, South County Services, Paso Robles Local Services, Morro Bay Local Services, and Atascadero Local Services.
  - i) The budget will have summary pages that include revenue and expenditure information for each service.
  - f) Productivity of each RTA-operated Fixed-Route service during lower-demand holiday periods, specifically associated with the service provided during the weeks of Thanksgiving, Christmas and New Years, will be reviewed to determine appropriate service levels.
  - g) Staff will continue to research and evaluate new revenue sources should any potential shortfall in operating revenues arise. If we are unable to secure funding, staff would recommend that the Board consider adjusting service levels and/or the TDA allocation from the RTA jurisdictions, if time and budgetary authority permits.
- 2) Work with SLOCOG and our transit agency partners in the region to evaluate region-wide service efficiencies:
- a) The RTA will work with SLOCOG staff and other transit providers to evaluate efficiencies in the provision of service throughout the county through both the SLOCOG Social Services Transportation Advisory Committee and through the RTAC.
  - b) Staff will use the SRTP to update the *2018-20 RTA Strategic Business Plan*, and to evaluate potential efficiencies. With Board concurrence, staff will develop a timeline to implement efficiencies as appropriate. Additionally, the RTA will address the Zero Emission Bus requirements of our Innovative Clean Transit (ICT) Rollout Plan. The ICT Rollout Plan was adopted at the March 2023 Board meeting.
- 3) Evaluate options and provide analysis on the 5-year capital improvement program and methods to fund these needs:
- a) Staff will work with SLOCOG to prioritize SB125 funded capital projects, particularly those related to depot and opportunity charging of battery-electric buses. The RTA is currently in the procurement phase for three of the twelve SB125 projects awarded by the SLOCOG Board at its December 2023 meeting. These three projects include:
    - i) RTA-1 – funding gap for five BEB replacement buses (\$1,778k in FY23-24 SB125 funds), which will be delivered in Q4 of 2025;

- ii) RTA-2 – second phase of BEB DC fast-charging system (\$500k in FY23-24 SB125 funds), which will be completed in mid-FY25-26; and
    - iii) RTA-3 – bus charging and infrastructure study (\$200k in FY23-24 SB125 funds), which will be completed in Q4 of 2025/
  - b) Staff will also continue to work with SLOCOG to prioritize capital projects using the STA State of Good Repair (SGR) portion of SB-1 funds. These SB-1 funds are an important source of revenues for the RTA and the other transit operators in our region. It directly impacts the RTA's need for LTF to fund operations and the local match for capital projects by reducing local match needed for federal funds, and interest when financing for capital projects is needed.
  - c) Other potential capital funds intended to support our transition to zero-emission buses include AB617 Clean Air Program, Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP), and LCTOP. Staff will continue to leverage all grant funds to the greatest extent possible in order to conserve local funds.
- 4) Address projected changes in demand for Runabout service:
- a) Runabout service hours and miles are slightly lower than were originally projected for FY24-25, and staff is closely monitoring service needs to determine when service will return to pre-pandemic levels. Staff will seek the Board's direction as demand is anticipated to increase over time.
  - b) Staff suspended in-person Runabout service eligibility assessments during the pandemic, and we have continued focusing training staff resources on training newly hired Bus Operator candidates. Staff plans to reinstitute this Runabout eligibility assessments program to ensure that only those persons truly eligible for Runabout service are initially registered or re-registered as part of the Runabout application process. This will be done by new staff resources that will be added during FY25-26 who will also be supporting the discount eligibility process. Staff will also provide mobility training for disabled persons who are able to occasionally use Fixed-Route services for some or all of their travel needs.

### **Expenses Impacts**

- 1) Fuel prices continue to be extremely volatile; fuel will be budgeted at \$5.00 per gallon in FY25-26. Included in the Fuel line-item will be diesel exhaust fluid (DEF), which is used to lower diesel exhaust emissions on model year 2015 and newer Fixed-Route vehicles. And although prices have stabilized as a result of the agreement for fuel services with Easy Fuel approved in May 2024, should fuel prices substantially increase or decrease to such a degree that it would have a profound effect on the overall budget, staff will address the change in a budget amendment.
- 2) Related, as we implement BEBs in revenue service in July 2024, we are getting a better handle on per-mile operational costs, as noted in Agenda Item B-2 during this



meeting. However, since only two BEBs are being operated, the overall impact is relatively small but will increase notably in FY25-26 with the arrival of five additional BEBs in Q4 2025.

### 3) Insurance Expenses:

- a) Staff worked with an actuarial to complete a review of the self-insured retentions for the various lines of insurance. Although staff is not recommending a change to the self-insured retentions at this time, staff is reviewing options to fund a reserve increase to fund the self-insured retentions for the general liability policy and a reserve for the employment practices policy, respectively.
- b) A review of the pooled reinsurance programs that the RTA participates in was conducted in conjunction with our insurance broker, and the RTA is confident that the policies continue to be well placed in the pooled reinsurance market.
- c) CalTIP liability reinsurance premiums are projected to increase. The exact amount is not known at this time, as CalTIP actuaries are still finalizing the May 1, 2025 through April 30, 2026 rates. Although the experience modification factor of RTA is in line with the statewide pool average, the RTA did experience large claims in February 2019 and January 2021, which continue to impact current and future premiums.
- d) CalTIP vehicle physical damage will increase due to the added asset value of newer vehicles, which have risen dramatically in recent years and with the additional cost of electric vehicles. In addition, recent property damage claims seen in the market, namely the recent Los Angeles wildfires and the increasing number of other disasters across the globe.
- e) Our annual Employment Risk Management Authority premium is estimated at \$50,000, with a \$50,000 self-insured retention. This self-insured retention does not currently have a reserve in place to cover it should a loss develop.
- f) Workers compensation premiums charged by our carrier (Public Risk Innovation, Solutions, and Management, or PRISM) are projected to increase, with the realization that workers compensation for transit services is especially challenging statewide as loss development trends in the state are not favorable. We continue to work with our employee Safety Committee, which evaluates workplace safety and initiates proactive programs to address the number of claims and severity of the claims. Although premiums are expected to rise, a significant portion of that increase is attributable to the increase in wages identified in the collective bargaining agreement.
- g) Property insurance will increase due to the significant losses in the property insurance market. Additionally, we are required to maintain flood insurance for our new Bus Maintenance Facility because its construction was federally funded.

- h) For budget-making purposes, staff is assuming a 7% annual increase for healthcare costs for each of the next two fiscal years. This will include the paid family leave program that was implemented in July 2022, which brought the leave benefits closer to those offered under the state disability insurance program.

#### 4) Staffing Expenses:

- a) In May 2023 the Board approved a 3-year Collective Bargaining Agreement (CBA) that will expire on December 31, 2025. Staff notes the fiscal uncertainty that the expiration has on the FY25-26 information that will be included in the budget presentation.
- b) Staff will be working on a third-party study of the RTA organization structure and succession planning program beginning in May 2025. As noted above, the Short-Range Transit Plan recommends that additional staff resources (equivalent to one full-time equivalent) be secured to more effectively enforce the discount fare program and help roll-out the new Cal-ITP contactless fare-capping system. Should additional adjustments – beyond the one FTE mentioned above – to the number of FY25-26 budgeted FTE positions be recommended or needed, staff will bring that proposal to the Board along with any new or revised job descriptions, if applicable.
- c) An annual inflationary wage adjustment based on December 2023 to December 2024 Consumer Price Index (CPI) of 3.4% will be implemented in July 2025 for those employees not covered by the collective bargaining agreement. Employees within the salary range for their position will be eligible for a step merit increase subject to performance assessments and budgetary authority.
- d) The RTA Board of Directors took action at its September 4, 2024 meeting to implement the increase in contribution percentage of 1.61% for the retirement plan with San Luis Obispo County Pension Trust (SLOCPT) in July 2025 rather than January 2025, and the RTA will assume the 1.61% pickup. This is related to management, administration and confidential employees, and does not include the employees who are covered by the CBA with Teamsters Local 986.

#### **Proposed Budget Calendar**

- |             |  |
|-------------|--|
| February 12 | Detailed budget assumptions and revenue forecast to Executive Committee.     |
| March 5     | Obtain Board concurrence on proposed draft budget assumptions.               |
| March 31    | Based on feedback from Executive Committee draft FY26 Budget Draft complete. |

April 2        Draft FY26 Budget presentation to Executive Committee

April 10      Formal FY26 Budget presentation to RTAC

May 7        Final Board Budget presentation; Board adoption of FY26 Budget

**Staff Recommendation for Executive Committee:**

Recommend staff provide the FY25-26 budget assumptions and budget calendar to the Board for approval at the March 5<sup>th</sup> Board meeting, so that a detailed work plan and budget may be developed.

*No meeting held due to lack of quorum.*

**Staff Recommendation for the Board:**

Approve the budget assumptions and budget calendar so that a detailed work plan and budget may be developed.

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY  
MARCH 5, 2025  
STAFF REPORT**

**AGENDA ITEM:** C-2

**TOPIC:** Agreement to Operate Atascadero Dial-A-Ride Services

**PRESENTED BY:** Geoff Straw  
Executive Director

**STAFF RECOMMENDATION:** Authorize the RTA Executive Director and/or Board President to execute the Agreement to Operate and Administer Atascadero Dial-A-Ride Services

**BACKGROUND/DISCUSSION:**

This staff report and the attached Agreement focus on the consolidation of Atascadero Dial-A-Ride services into the RTA. The primary benefit of this consolidation is the City of Atascadero would realize reduced demands on City staff resources for ever more complex transit operations. Riders benefit by their ability to transfer across local and intercity/regional services more seamlessly. The RTA and the San Luis Obispo Council of Governments (SLOCOG) benefit due to reduced federal and state grant oversight responsibilities, as well as shared spare vehicle and other resources the North County area.

Attached is the final draft Agreement that would become effective on Sunday June 22, 2025. Under the Agreement, the RTA would assume full operation, management, vehicle maintenance, and administration of Atascadero local transit services. The RTA would also serve as the direct TDA recipient. The Agreement also stipulates that the City will continue to fully fund local transit services; none of the costs would be borne by the other jurisdictions that fund RTA core operations. The City of Atascadero ratified the agreement at its February 25, 2025 City Council meeting. Staff is seeking the Board's authorization for the RTA Executive Director and RTA Board President to execute the final Agreement once ratified by SLOCOG. Any final changes to the Agreement that have insubstantial impacts on RTA would be reported back to the RTA Board as an information item; any substantial changes would require reconsideration by the full Board. The SLOCOG Board will consider the Agreement at its April 2, 2025 meeting.

Next Steps

RTA maintenance staff has conducted a preliminary inspection of existing Atascadero Dial-A-Ride vehicles. The cutaway vans are similar to the ones used on RTA Runabout and on Nipomo Dial-A-Ride services. We will work with City officials to complete a full

inspection of all vehicles following full Agreement ratification to record any wear/tear or any deferred maintenance conditions and determine a schedule for any needed repairs.

RTA staff has been working closely with Atascadero and SLOCOG staff to plan for this consolidation. We intend to begin scheduling vendors to implement on-site modifications to the existing Atascadero Dial-A-Ride vehicles, including installation of RTA-specified two-way radios. We also intend to begin interviewing incumbent MV Transportation employees in late March 2025, and to finalize training modules and begin training Bus Operators and Supervisors in in April 2025 in preparation for a Sunday June 22, 2025 assumption of services date.

**STAFF RECOMMENDATION**

Authorize the RTA Executive Director and/or Board President to execute the Agreement to operate and administer Atascadero Dial-A-Ride services.

**AGREEMENT FOR  
CONSOLIDATION OF ATASCADERO TRANSIT SERVICES INTO SAN LUIS  
OBISPO REGIONAL TRANSIT AUTHORITY**

**THIS AGREEMENT** is entered into this \_\_\_\_\_ day of \_\_\_\_\_, by and between the CITY OF ATASCADERO, (hereinafter referred to as “CITY”) and the SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY, (hereinafter referred to as “RTA”).

**WITNESSETH:**

**WHEREAS**, CITY has been responsible for local transit and other local transportation services within and immediately adjacent to the incorporated areas of the City not considered part of the regional transportation system; and

**WHEREAS**, CITY is the direct recipient of Transportation Development Act (TDA) funds, which is comprised of Local Transportation Funds (LTF) and State Transit Assistance (STA) funds; and

**WHEREAS**, CITY is projected to receive a total of \$1,745,645 in LTF funds in fiscal year 2024-25; and

**WHEREAS**, CITY is projected to receive a total of \$200,943 in STA funds in fiscal year 2024-25; and

**WHEREAS**, in fiscal year 2024-25, CITY budgeted \$650,590 of its LTF allocation for local public transit services and \$ 697,940 of its LTF allocation for regional RTA transit services. The remaining LTF funds are available to meet local bicycle, pedestrian and streets/roads needs; and

**WHEREAS**, CITY desires consolidation of its local public transit services into RTA to take advantage of efficiencies and cost-savings that result from such consolidation; and

**WHEREAS**, RTA is responsible for regional transit and other regional transportation services, and is deemed trained, experienced, expert and competent to perform such services on behalf of CITY; and

**WHEREAS**, RTA is presently providing similar coordinated/consolidated services to South County Transit, the cities of Paso Robles, Morro Bay, and to the County of San Luis Obispo; and

**WHEREAS**, said agreements have been beneficial to RTA, South County Transit, the cities of Paso Robles, Morro Bay, and the County of San Luis Obispo; and

**WHEREAS**, CITY desires to cease direct management of local public transit services in CITY limits.

**NOW THEREFORE**, the parties do mutually agree as follows:

1. Transfer of All Future Transit Obligations. CITY hereby transfers all obligations to provide local public transit services to RTA. RTA will operate all local public transit services in CITY.
2. Scope of Services. Pursuant to this Agreement, RTA shall provide to CITY the services identified in Attachment "A" attached hereto as if entirely set forth herein.
3. Compensation. CITY shall permit RTA to directly submit an annual TDA claim to SLOCOG for local public transit services, a sum not to exceed RTA's actual cost of operating said services. Said compensation will be developed in the following manner: RTA shall annually submit to the City Public Works Director by March 1 a detailed proposal to provide the services identified in Attachment "A" and an associated amount of compensation for providing those services for the subsequent fiscal year. The City Public Works Director shall annually provide written consent to the proposal, including the service level and amount of compensation by April 1 unless the proposal is determined to be unreasonable. Any annual proposal the Public Works Director determines to be unreasonable will be placed on a City Council agenda and an RTA Board of Directors agenda so that it may be considered and mutually agreed upon by these respective boards prior to May 1. CITY shall provide written direction to SLOCOG that the agreed upon amount of compensation should be allocated to the RTA directly from the share of TDA monies allocated to the CITY through the SLOCOG allocation process. RTA will be responsible for submitting a claim for these monies to SLOCOG during the subsequent fiscal year for deposit directly into RTA's account. RTA shall account for CITY monies separately from all other monies received.
4. Transfer of Funds. Any fully-funded but not yet completed CITY transit projects that remain as of June 22<sup>nd</sup>, 2025, will be transferred by CITY to the RTA. The CITY will provide technical assistance as appropriate. CITY shall transfer all non-committed monies remaining in its transit fund to RTA by the effective date of this Agreement. RTA will use these monies to fund CITY transportation services and will account for these monies separately. This is a one-time transfer.
5. Transfer of Vehicles and Equipment. CITY shall transfer ownership of and responsibility for all vehicles and transit vehicle-specific equipment by the effective date of this Agreement to RTA. A list of these vehicles and equipment is included in Attachment "B". Both CITY and RTA agree that the fair market value of the vehicles and equipment is \$109,840.86 (the "Vehicle and Equipment Transfer Value").

6. Term of Agreement. This Agreement shall commence effective June 22<sup>nd</sup>, 2025, and shall continue, until and unless terminated earlier as provided herein. RTA will furnish sufficient personnel to complete all phases of the tasks.
7. Termination of Agreement for Convenience of Either Party. Either party may terminate this Agreement at any time by giving to the other party One Hundred Eighty (180) days written notice of such termination. Termination shall have no effect upon the rights and obligations of the parties arising out of the transaction occurring prior to the effective date of such termination. RTA shall use budgeted funds to pay for all work satisfactorily completed prior to the effective date of such termination.

In the event that this Agreement is terminated for convenience pursuant to this Section 7, RTA and CITY shall jointly cause to have the vehicles and equipment that were transferred to RTA pursuant to Section 5 above appraised (the "Updated Appraisal"). In the event any vehicles or equipment have been replaced or used, then any replacement vehicle or equipment shall be substituted for the equipment identified in Attachment "B" for such appraisal. If any of the vehicles in Attachment B have been "surplused" and RTA does not replace that vehicle with a new vehicle, then that vehicle will not be included in the updated appraisal. Once the Updated Appraisal is complete, the Updated Appraisal shall be compared with the Vehicle Transfer Value to determine whether an equalizing payment is needed by either RTA to CITY or from CITY to RTA. By way of example, if the Vehicle Transfer Value is \$150,000 and the Updated Appraisal equals \$100,000, then a payment of \$50,000 shall be made from RTA to CITY. RTA and CITY may agree on other arrangements in lieu of an equalizing payment.

8. Termination of Agreement for Cause. If, through any cause within its control, either party fails to fulfill in a timely and professional manner its obligations under this Agreement, or if either party violates any of the terms or provisions of this Agreement, either party shall have the right to terminate this Agreement. Upon receiving a written notice for termination, the breaching party shall have thirty (30) days to cure the violation, or if the violation cannot be cured within such timeframe, the breaching party shall have commenced to cure said breach in a manner that is acceptable to the non-breaching party, in the non-breaching party's reasonable discretion. Termination shall have no effect upon the rights and obligations of the parties arising out of any transaction occurring prior to the effective date of such termination. RTA shall use budgeted funds to pay for all work satisfactorily complete prior to the effective date of such termination.
9. Modification. This Agreement, together with Attachment "A," (Scope of Work) and Attachment "B" (Vehicles and Equipment) constitutes the entire understanding of the parties hereto and no changes, amendments, or alterations shall be effective unless in writing and signed by both parties.



10. Non-Assignment of Agreement. Inasmuch as this Agreement is intended to transfer all local public transit services to RTA, RTA shall not assign, transfer, delegate, or sublet this Agreement or any interest herein, or the assets transferred by City to RTA, without the prior written consent of the CITY Public Works Director, and any such assignment, transfer, delegation, or sublet without CITY's prior written consent shall be considered null and void.
11. Covenant. The validity, enforceability and interpretation of any of the clauses of this Agreement shall be determined and governed by the laws of the State of California.
12. Enforceability. The invalidity and unenforceability of any terms or provisions hereof shall in no way affect the validity or enforceability of any other terms or provisions.
13. Employment Status. RTA shall, during the entire term of the Agreement, be construed to be an independent agency, and shall in no event be construed to be an employee of CITY. RTA understands and agrees that its employees are not, and will not, be eligible for membership in or any benefits from any CITY group plan for hospital, surgical or medical insurance, or for membership in any CITY retirement program, or for paid vacation, paid sick leave, or other leave, with or without pay, or for any other benefit which accrues to a CITY employee.
14. Warranty of RTA. RTA warrants that it is properly certified and licensed under the laws and regulations of the State of California to provide the services herein agreed to.
15. Conflicts of Interest. No officer, employee, director or agent of CITY shall participate in any decision relating to this Agreement which affects his personal interest or the interest of any corporation, partnership, or association in which he is directly or indirectly interested; nor shall any such person have any interest, direct or indirect, in this Agreement or the provisions thereof.
16. Indemnification. RTA shall defend, indemnify and hold harmless CITY, its elected officials, officers and employees from all claims, demands, damages, costs, expenses, judgments, attorney fees, or other losses that may be asserted by any person or entity, including RTA, either alleged or that arise out of, or are related to any act or omission of RTA relating to and in the performance under this Agreement. The obligation to indemnify shall be effective and shall extend to all such claims or losses in their entirety. However, this indemnity will not extend to any claims or losses arising out of the sole negligence or willful misconduct of the CITY, its elected officials, officers and employees.
17. Insurance Requirements. RTA, at its sole cost, shall purchase and maintain the insurance policies set forth below on all of its operations under this Agreement. All of the insurance companies providing insurance for RTA shall have, and

provide evidence of, an A.M. Best & Co. rating of A:VII or above, unless exception is granted by CITY's Public Works Director. Further, all policies shall be maintained for the full term of this Agreement.

A. Scope and Limits of Required Insurance Policies

1) Commercial General Liability

Policy shall include coverage at least as broad as set forth in Insurance Services Office Commercial General Liability Coverage (CG 00 01) with policy limits of not less than \$5 (five) million dollars combined single limit per occurrence, \$5 (five) million general aggregate, and \$5 (five) million products and completed operations aggregate. Policy shall be endorsed with the following specific language or contain equivalent language in the policy:

- a) The CITY, its elected officials, officers, employees, agents and volunteers, are named as an additional insured for all liability arising out of the operations by or on behalf of the named insured in the performance of this Agreement.
- b) The insurance provided herein shall be considered and endorsed as primary coverage to the CITY with respect to any insurance or self-insured retention maintained by the CITY. Further, the CITY's insurance shall be considered excess insurance only and shall not be called upon to contribute to this insurance.
- c) The policy shall not be cancelled or materially changed without first giving thirty days prior written notice to the CITY Public Works Director. If a carrier will not provide the required notice of cancellation, the RTA shall provide written notice to the CITY of a cancellation no later than ten (10) business days before cancellation.

2) Business Automobile Policy

Policy shall include coverage at least as broad as set forth in the liability section of Insurance Services Office Business Auto Coverage (CA 00 01) with policy limits of no less than \$5 (five) million dollars combined single limit for each occurrence. Said insurance shall include coverage for owned, non-owned, and hired vehicles. Policy shall be endorsed with the following specific language or contain equivalent language in the policy:

- a) The CITY, its elected officials, officers, employees, agents and volunteers, are named as an additional insured for all liability arising out of the operations by or on behalf of the named insured in the performance of this Agreement.
- b) The policy shall not be cancelled or materially changed without first giving thirty days prior written notice to the CITY Public Works Director. If a carrier will not provide the required notice of cancellation, the RTA shall provide written notice to the City of a cancellation no later than ten (10) business days before cancellation.

3) Worker's Compensation / Employer's Liability Insurance

- a) Worker's Compensation: policy shall provide statutory limits as required by State of California. Policy shall allow and be endorsed with the following specific language:
  - i. RTA and its insurer shall waive all rights of subrogation against the CITY, its elected officials, officers, employees, volunteers and agents for workers' compensation losses arising out of this Agreement.
  - ii. The policy shall not be cancelled or materially changed without first giving thirty (30) days prior written notice to the CITY Public Works Director. If a carrier will not provide the required notice of cancellation, the RTA shall provide written notice to the City of a cancellation no later than ten (10) business days before cancellation.
- b) Employer's Liability: policy shall provide \$1 million dollars per accident for bodily injury or disease.

B. Deductibles and Self-Insurance Retentions

All deductibles and/or self-insured retentions which apply to the insurance policies required herein will be declared in writing and approved by CITY prior to commencement of this Agreement.

C. Documentation

Prior to commencement of work and annually thereafter, upon renewal or change, for the term of this Agreement, RTA will provide the CITY Public Works Director properly executed certificates of insurance clearly evidencing the coverage, limits, and endorsements specified in this Agreement. Further, at the CITY's request, the RTA shall provide certified copies of the insurance policies within thirty days of request.

D. Absence of Insurance Coverage

CITY may direct RTA to immediately cease all activities with respect to this Agreement if it determines that RTA fails to carry, in full force and effect, all insurance policies with coverage levels at or above the limits specified in this Agreement. Any delays or expense caused due to stopping of work and change of insurance shall be considered RTA's delay and expense.

18. Notices. Any notice required to be given pursuant to the terms and provisions hereof shall be in writing, and shall be sent by certified or registered mail to:

CITY:

City of Atascadero  
Public Works Department  
6500 Palma Ave,  
Atascadero, CA 93422

RTA:

SLO Regional Transit Authority  
253 Elks Lane  
San Luis Obispo, California 93401

19. Progress Reports. RTA shall submit brief progress reports to the CITY accompanied by invoices that shall describe the work performed, plus any problems anticipated in performing said work in future. Said reports shall be optional upon written approval by the CITY Public Works Director.
20. Copyright. Any reports, maps, documents or other materials produced in whole or part under this Agreement shall be the property of CITY and shall not be subject to any application for copyright by or on behalf of the RTA.
21. Findings Confidential. Except as otherwise required by applicable law, no reports, maps, information, documents, or any other materials given to or prepared by RTA under this Agreement which CITY requests, in writing, to be kept confidential, shall be made available to any individual or organizations by RTA without the prior written approval of CITY Public Works Director. However,

RTA shall be free to disclose such data as is publicly available, already in its possession, or independently developed.

DRAFT

**IN WITNESS WHEREOF, this AGREEMENT has been executed by the parties hereto, upon the date first above written.**

CITY	RTA & SLOCOG
ATTEST:	ATTEST:
_____ City Clerk of The City of ATASCADERO	_____ Executive Director RTA
[SEAL]	_____ Executive Director SLOCOG
APPROVED AS TO FORM AND LEGAL EFFECT: <<NAME>> City of Atascadero Counsel	APPROVED AS TO FORM AND LEGAL EFFECT: RITA NEAL County Counsel
By: _____ City Attorney	By: _____ Assistant County Counsel
Date: _____	Date: _____
CITY	RTA & SLOCOG
_____ Mayor City of Atascadero	_____ President RTA & SLOCOG Board of Directors
Date: _____	Date: _____

## **ATTACHMENT “A” SCOPE OF WORK**

Transit services administered and operated by RTA and part of this agreement include local public transit services in the incorporated and adjacent areas of the City of Atascadero and not considered part of the RTA regional transportation system.

The intent of the agreement is for RTA to consolidate local public transit services into RTA. RTA will serve as the direct recipient of all transit-specific Transportation Development Act (TDA) funds apportioned to CITY and will seek available Federal Transit Administration (FTA) funds to partially fund local public transit services. The following list is not meant to be all inclusive:

### **RTA-PROVIDED TRANSIT VEHICLE, MANAGEMENT, ADMINISTRATIVE, FINANCIAL SERVICES**

1. Operate local public transit services.
2. Provide data collection, reconciling and monitoring of local public transit services to appropriate transportation monitoring agencies including, but not limited to the San Luis Obispo Council of Governments (SLOCOG), the FTA, the NTD and the State of California.
3. Provide route analysis for effectiveness and efficiency and report to CITY on an as-needed basis as requested by CITY.
4. Monitor system-wide on-time performance.
5. Assist SLOCOG in the development and implementation of future Short Range Transit Plans.
6. Attend meetings with CITY as needed to address local public transit issues as they arise.
7. Prepare annual budget for local public transit services.
8. Prepare and administer annual TDA claim.
9. Prepare and submit annual State Controller’s Report.
10. Coordinate and conduct all audits/reviews, including the annual TDA fiscal and compliance audit, the FTA Triennial Review, and the TDA Triennial Audit.
11. Develop and submit grant applications to fund local public transit services, including the purchase of vehicles and equipment that will be owned by RTA and used to provide local public transit services in the CITY.

12. All financial and budgetary reports outlined herein shall provide sufficient detail so as to report CITY transportation services separately from all other RTA regional transportation services.
13. Provide bus stop maintenance for local and regional transit bus stops in CITY.
14. The RTA will ensure compliance with all Federal, State and Local requirements including those associated with fare and service changes.

The CITY is agreeing to provide to RTA the following services for the CITY's actual cost of providing these services plus administrative overhead. The following list is not meant to be all inclusive:

#### CITY-PROVIDED ASSETS AND SERVICES

CITY may provide use of the existing radio transmission tower station sites if requested by RTA and approved by the City. RTA shall make written request to Public Works Director, who will review the request and reply in writing of approval or denial of RTA's request.



## ATTACHMENT "B"

### VEHICLES AND EQUIPMENT

The following list of CITY-owned vehicles and equipment will be transferred on an as-is, where-is basis on the effective date of this Agreement.

ATASCADERO TRANSIT VEHICLES & EQUIPMENT INVENTORY 01/10/2025							
AT#	LICENSE/VIN NUMBERS	MILEAGE 01/10/2025	YEAR	MAKE	Model	RETIREMENT YEAR (5 yrs or 150,000 miles)	Value
27	1424653 1FDFF4FSXEDB20055	83,008	2015	FORD	E-450 Class C Starcraft Bus	2020	\$0.00
28	1527157 1FDFF4FS3HDC33737	61,018	2017	FORD	E-450 Class C Starcraft Allstar	2023	\$0.00
29	1550141 1FDFF4FS1HDC78904	67,978	2018	FORD	E-450 Class C Starcraft Allstar	2024	\$0.00
30	1550142 1FDFF4FS5HDC78906	69,898	2018	FORD	E-450 Class C Starcraft Allstar	2024	\$0.00
31	1708527 1FDVU4X83RKA90030	68	2024	MOBILITYTRANS	Class V Transit Van	N/A	\$107,410.54
10	1480678 2C4RDGBGXDR787212	74,285	2013	DODGE	Grand Caravan	N/A	\$0.00

EQUIPMENT		
Asset Description	Date of Purchase	Value
Samsung Tablet S7 FE Android 11 64GB	8/8/2023	\$ 607.58
Samsung Tablet S7 FE Android 11 64GB	8/8/2023	\$ 607.58
Samsung Tablet S7 FE Android 11 64GB	8/8/2023	\$ 607.58
Samsung Tablet S7 FE Android 11 64GB	8/8/2023	\$ 607.58

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**MARCH 7, 2025**

**STAFF REPORT**

**AGENDA ITEM:** C-3

**TOPIC:** Environmental Documentation for Inductive Charging Stations

**ACTION:** Approve

**PRESENTED BY:** Geoff Straw, Executive Director

**STAFF RECOMMENDATION:** Accept the Notice of Exemption for the Inductive Charging Stations Project; Direct the Executive Director to File the Notice; and Proceed with Project Development

**BACKGROUND/DISCUSSION**

At its May 4, 2016 meeting, the RTA Board of Directors adopted the *Policies and Procedures for Environmental Evaluation of RTA Projects* document. The overall objective of the policy document is to provide the RTA with a means of orderly compliance with the requirements of the California Environmental Quality Act (CEQA), thereby furthering the protection of environmental quality in California.

Staff has been working with the California Energy Commission (CEC) to receive \$1.7 million in Clean Transportation Program grant funds (grant ARV-21-036) originally awarded to the Solano Transportation Authority for its *Innovative Wireless Charging for the Public Transit Project*. The project included construction of five inductive charging stations provided by InductEV (formerly known as Momentum Dynamics Corporation) at layover points in Solano and Contra Costa Counties.

The Solano Transportation Authority subsequently transitioned away from opportunity charging due to difficulties coming to agreement with Bay Area Rapid Transit officials for two of the five locations as well as the Solano Transportation Authority's subsequent transition to hydrogen fuel cell electric bus technologies instead of battery-electric. The CEC – through InductEV – approached RTA staff in October 2024 about implementing the project in San Luis Obispo County to help us meet the opportunity charging goals identified in our *ICT Zero Emission Bus Rollout Plan* adopted March 1, 2023.

The RTA Board authorized staff at its November 6, 2024 meeting to continue pursuing this CEC grant. The master planning and design of this *Innovative Wireless Charging for the Public Transit Project* is included of the SB125-funded “Bus Charging and Infrastructure Study” that is included as Agenda Item A-8. As noted in that separate Staff Report, the consultant will assist us in providing final layout for these five locations (and others) and design-bid documentation for all related projects. The CEC funding will

be augmented with SB-125 funds to complete the agency's near- and medium-term charging infrastructure.

### Project Locations

The ZEB Rollout Plan identified the following five locations for construction of up to nine in-ground contactless charges, which are included in this project proposal:

1. Paso Robles Transit Center,
2. SLO Government Center Passenger Facility (two charging pads),
3. Morro Bay Transit Center,
4. Santa Maria Transit Center<sup>1</sup>, and
5. SLO Bus Maintenance Facility overnight bus parking area (four charging pads).

### Description of Nature, Purpose, and Beneficiaries of Project

The project will implement shared inductive charging infrastructure at four regionally significant locations – Paso Robles Transit Center, SLO Government Center Passenger Facility, Morro Bay Transit Center, and the SLO Bus Maintenance Facility. These charging facilities will recharge battery-electric buses used by the RTA, but also be available to other transit agencies, including Monterey-Salinas Transit, SLO Transit, Morro Bay Transit, Paso Express, and sub-regional fixed-route services in the Five Cities Area. This project element will allow the sharing of electricity costs and seeking to reduce greenhouse gas emissions for all transit systems sharing the infrastructure.

### Exempt Status

Staff has determined that this project qualifies for a Class 1 – Existing Facility Modification (Sec. 21080(b)(9); 15301(c)) Categorical Exemption. This determination of applicability of CEQA exemption is permitted under subsection 3 in Section IV Guidelines of the *RTA Policy and Procedures for Environmental Evaluation of RTA Projects* document.

It should be noted that Solano Transportation Authority also determined that its original in-ground contactless chargers project was covered under a Class 1 Categorical Exemption, which was filed with the County of Solano on September 15, 2020. It should also be noted that this project could also likely be exempted for other reasons, including: 14 CCR 15303 New Construction of Small Structures; 14 CCR 15311 Accessory structures; and 14 CCR 15329 Cogeneration projects at existing facilities.

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<sup>1</sup> This location will require a CEQA evaluation by City of Santa Maria, since that facility is outside of the RTA's joint powers authority jurisdiction.

### Reasons Why Project is Exempt

The work that is being performed involves installation of inductive charging stations within the existing transit passenger facilities and the Bus Maintenance Facility parking site with negligible expansion of existing use.

A copy of the draft Notice of Exemption is attached.

### **Staff Recommendation**

1. Accept the Notice of Exemption for the Inductive Charging Stations Project,
2. Direct the Executive Director to file the Notice of Exemption with the San Luis Obispo Clerk to the Board of Supervisors, and
3. Direct to Executive Director to proceed with project development.

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# SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY

## NOTICE OF EXEMPTION

San Luis Obispo Regional Transit Authority  
253 Elks Lane  
San Luis Obispo, CA 94301

C-3-5

§ 15301. Existing Facilities.

Class 1 consists of the operation, repair, maintenance, permitting, leasing, licensing, or minor alteration of existing public or private structures, facilities, mechanical equipment, or topographical features, involving negligible or no expansion of existing or former use. The types of "existing facilities" itemized below are not intended to be all-inclusive of the types of projects which might fall within Class 1. The key consideration is whether the project involves negligible or no expansion of use.

Examples include but are not limited to:

- (a) Interior or exterior alterations involving such things as interior partitions, plumbing, and electrical conveyances.
- (b) Existing facilities of both investor and publicly-owned utilities used to provide electric power, natural gas, sewerage, or other public utility services;
- (c) Existing highways and streets, sidewalks, gutters, bicycle and pedestrian trails, and similar facilities (this includes road grading for the purpose of public safety, and other alterations such as the addition of bicycle facilities, including but not limited to bicycle parking, bicycle-share facilities and bicycle lanes, transit improvements such as bus lanes, pedestrian crossings, street trees, and other similar alterations that do not create additional automobile lanes).
- (d) Restoration or rehabilitation of deteriorated or damaged structures, facilities, or mechanical equipment to meet current standards of public health and safety, unless it is determined that the damage was substantial and resulted from an environmental hazard such as earthquake, landslide, or flood;
- (e) Additions to existing structures provided that the addition will not result in an increase of more than:
  - (1) 50 percent of the floor area of the structures before the addition, or 2,500 square feet, whichever is less; or
  - (2) 10,000 square feet if:
    - (A) The project is in an area where all public services and facilities are available to allow for maximum development permissible in the General Plan and
    - (B) The area in which the project is located is not environmentally sensitive.
- (f) Addition of safety or health protection devices for use during construction of or in conjunction with existing structures, facilities, or mechanical equipment, or topographical features including navigational devices;
- (g) New copy on existing on and off-premise signs;
- (h) Maintenance of existing landscaping, native growth, and water supply reservoirs (excluding the use of pesticides, as defined in Section 12753, Division 7, Chapter 2, Food and Agricultural Code);
- (i) Maintenance of fish screens, fish ladders, wildlife habitat areas, artificial wildlife waterway devices, streamflows, springs and waterholes, and stream channels (clearing of debris) to protect fish and wildlife resources;
- (j) Fish stocking by the California Department of Fish and Game;
- (k) Division of existing multiple family or single-family residences into common-interest ownership and subdivision of existing commercial or industrial buildings, where no physical changes occur which are not otherwise exempt;
- (l) Demolition and removal of individual small structures listed in this subdivision;

- (1) One single-family residence. In urbanized areas, up to three single-family residences may be demolished under this exemption.
- (2) A duplex or similar multifamily residential structure. In urbanized areas, this exemption applies to duplexes and similar structures where not more than six dwelling units will be demolished.
- (3) A store, motel, office, restaurant, and similar small commercial structure if designed for an occupant load of 30 persons or less. In urbanized areas, the exemption also applies to the demolition of up to three such commercial buildings on sites zoned for such use.
- (4) Accessory (appurtenant) structures including garages, carports, patios, swimming pools, and fences.
- (m) Minor repairs and alterations to existing dams and appurtenant structures under the supervision of the Department of Water Resources.
- (n) Conversion of a single family residence to office use.
- (o) Installation, in an existing facility occupied by a medical waste generator, of a steam sterilization unit for the treatment of medical waste generated by that facility provided that the unit is installed and operated in accordance with the Medical Waste Management Act (Section 117600, et seq., of the Health and Safety Code) and accepts no offsite waste.
- (p) Use of a single-family residence as a small family day care home, as defined in Section 1596.78 of the Health and Safety Code.

Note: Authority cited: Section 21083, Public Resources Code. Reference: Section 21084, Public Resources Code; North County Advocates v. City of Carlsbad (2015) 241 Cal.App.4th 94; Communities for a Better Environment v. South Coast Air Quality Management Dist. (2010) 48 Cal.4th 310; and Bloom v. McGurk (1994) 26 Cal.App.4th 1307.



**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**  
**INDUCTIVE CHARGING STATIONS AT VARIOUS LOCATIONS**  
Environmental Determination - 23 CFR 771

**Sec. 771.117 Categorical exclusions.**

(a) Categorical exclusions (CEs) are actions which meet the definition contained in 40 CFR 1508.4, and, based on past experience with similar actions, do not involve significant environmental impacts. They are actions which: do not induce significant impacts to planned growth or land use for the area, do not require the relocation of significant numbers of people; do not have a significant impact on any natural, cultural, recreational, historic or other resource; do not involve significant air, noise, or water quality impacts; do not have significant impacts on travel patterns; and do not otherwise, either individually or cumulatively, have any significant environmental impacts.

(b) Any action which normally would be classified as a CE but could involve unusual circumstances will require the Administration, in cooperation with the applicant, to conduct appropriate environmental studies to determine if the CE classification is proper. Such unusual circumstances include:

- (1) Significant environmental impacts;
- (2) Substantial controversy on environmental grounds;
- (3) Significant impact on properties protected by Section 4(f) of the DOT Act or section 106 of the National Historic Preservation Act; or
- (4) Inconsistencies with any Federal, State, or local law, requirement or administrative determination relating to the environmental aspects of the action.

(c) The following actions meet the criteria for CEs in the CEQ regulation (Section 1508.4) and Sec. 771.117(a) of this regulation and normally do not require any further NEPA approvals by the Administration:

- (1) Activities which do not involve or lead directly to construction, such as planning and technical studies; grants for training and research programs; research activities as defined in 23 U.S.C. 307; approval of a unified work program and any findings required in the planning process

pursuant to 23 U.S.C. 134; approval of statewide programs under 23 CFR part 630; approval of project concepts under 23 CFR part 476; engineering to define the elements of a proposed action or alternatives so that social, economic, and environmental effects can be assessed; and Federal-aid system revisions which establish classes of highways on the Federal-aid highway system.

(2) Approval of utility installations along or across a transportation facility.

(3) Construction of bicycle and pedestrian lanes, paths, and facilities.

(4) Activities included in the State's "highway safety plan" under 23 U.S.C. 402.

(5) Transfer of Federal lands pursuant to 23 U.S.C. 317 when the subsequent action is not an FHWA action.

(6) The installation of noise barriers or alterations to existing publicly owned buildings to provide for noise reduction.

(7) Landscaping.

(8) Installation of fencing, signs, pavement markings, small passenger shelters, traffic signals, and railroad warning devices where no substantial land acquisition or traffic disruption will occur.

(9) Emergency repairs under 23 U.S.C. 125.

(10) Acquisition of scenic easements.

(11) Determination of payback under 23 CFR part 480 for property previously acquired with Federal-aid participation.

(12) Improvements to existing rest areas and truck weigh stations.

(13) Ridesharing activities.

(14) Bus and rail car rehabilitation.

(15) Alterations to facilities or vehicles in order to make them accessible for elderly and handicapped persons.

(16) Program administration, technical assistance activities, and operating assistance to transit authorities to continue existing service or increase service to meet routine changes in demand.

(17) The purchase of vehicles by the applicant where the use of these vehicles can be accommodated by existing facilities or by new facilities which themselves are within a CE.

(18) Track and railbed maintenance and improvements when carried out within the existing right-of-way.

(19) Purchase and installation of operating or maintenance equipment to be located within the transit facility and with no significant impacts off the site.

(20) Promulgation of rules, regulations, and directives.

(d) Additional actions which meet the criteria for a CE in the CEQ regulations (40 CFR 1508.4) and paragraph (a) of this section may be designated as CEs only after Administration approval. The applicant shall submit documentation which demonstrates that the specific conditions or criteria for these CEs are satisfied and that significant environmental effects will not result. Examples of such actions include but are not limited to:

(1) Modernization of a highway by resurfacing, restoration, rehabilitation, reconstruction, adding shoulders, or adding auxiliary lanes (e.g., parking, weaving, turning, climbing).

(2) Highway safety or traffic operations improvement projects including the installation of ramp metering control devices and lighting.

(3) Bridge rehabilitation, reconstruction or replacement or the construction of grade separation to replace existing at-grade railroad crossings.

(4) Transportation corridor fringe parking facilities.

(5) Construction of new truck weigh stations or rest areas.

(6) Approvals for disposal of excess right-of-way or for joint or limited use of right-of-way, where the proposed use does not have significant adverse impacts.

(7) Approvals for changes in access control.

(8) Construction of new bus storage and maintenance facilities in areas used predominantly for industrial or transportation purposes where such construction is not inconsistent with existing zoning and located on or near a street with adequate capacity to handle anticipated bus and support vehicle traffic.

(9) Rehabilitation or reconstruction of existing rail and bus buildings and ancillary facilities where only minor amounts of additional land are required and there is not a substantial increase in the number of users.

(10) Construction of bus transfer facilities (an open area consisting of passenger shelters, boarding areas, kiosks and related street improvements) when located in a commercial area or other high activity center in which there is adequate street capacity for projected bus traffic.

(11) Construction of rail storage and maintenance facilities in areas used predominantly for industrial or transportation purposes where such construction is not inconsistent with existing zoning and where there is no significant noise impact on the surrounding community.

(12) Acquisition of land for hardship or protective purposes; advance land acquisition loans under section 3(b) of the UMT Act. Hardship acquisition is early acquisition of property by the applicant at the property owner's request to alleviate particular hardship to the owner, in contrast to others, because of an inability to sell his property. This is justified when the property owner can document on the basis of health, safety or financial reasons that remaining in the property poses an undue hardship compared to others. Hardship and protective buying will be permitted only for a particular parcel or a limited number of parcels. These types of land acquisition qualify for a CE only where the acquisition will not limit the evaluation of alternatives, including shifts in alignment for planned construction projects, which may be required in the NEPA process. No project development on such land may proceed until the NEPA process has been completed.

(e) Where a pattern emerges of granting CE status for a particular type of action, the Administration will initiate rulemaking proposing to add this type of action to the list of categorical exclusions in paragraph (c) or (d) of this section, as appropriate.

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**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY  
MARCH 5, 2025  
STAFF REPORT**

**AGENDA ITEM:** C-4

**TOPIC:** Proposed Fare and Service Changes

**ACTION:** Approve Public Participation Process

**PRESENTED BY:** Geoff Straw

**STAFF RECOMMENDATION:** Approve Public Participation Process for SRTP  
Recommended Fare and Service Changes

**SUMMARY:**

Staff is recommending the RTA Board of Directors approve a public participation process to solicit input on the recommendations included in the Draft Short-Range Transit Plan. Those recommended fare and service changes are presented in Agenda Item B-3.

The RTA Board updated the agency's *Policy and Procedures for Public Comment Regarding Fare or Service Changes* at its March 7, 2018 meeting to meet Federal Transit Administration requirements. In general, our Policy states that any fare change is considered a "major change" that requires solicitation of public comment, while service change definitions are more nuanced. For example, a service change is considered major when it affects at least 25% of existing route mileage or an increase in service headways, a decrease in daily operating hours or span of service. Several of the fare and service changes recommended in the draft SRTP would be considered major under our Policy and will require a public participation effort prior to consideration for implementation by the RTA Board in a public hearing.

It should be noted that the previous fare program change was adopted at the November 2017 Board meeting and went into effect on December 31, 2017. A scheduled 2020 fare increase was suspended due to the impact of the COVID-19 pandemic. Prior fare changes included those related to multi-ride fare media in 2013 and an overall change in 2010.

A public hearing was conducted on April 1, 2020 regarding the fiscal emergency due to the COVID-19 pandemic, as well as the resulting service and fare changes needed to address the safety of passengers/employees. The most recent regularly-scheduled public hearing regarding service changes occurred at the January 9, 2018 meeting and was focused on a change to the Runabout service area.

### Proposed Public Outreach Process for Fare and Schedule Changes

To ensure that a robust public engagement process is provided to consider the public's ideas and concerns, below is a list of outreach efforts that staff is proposing prior to the next regularly-scheduled RTA Board meeting on May 7, 2025:

- Staff will conduct public workshops around the county (San Luis Obispo, Paso Robles and Grover Beach) to present the proposed fare and service changes to seek comments.
- Staff will conduct “pop-up” meetings transit centers in Paso Robles, San Luis Obispo, Pismo Beach and Santa Maria. Staff will attempt to engage passengers when buses are arriving and/or departing.
- Staff will post information on social media and provide methods to engage users (comments on the post and an email address).
- Provide an email address for riders to submit comments using the on-bus LCD screens, the RTA website, and notices at the top 30 bus stops.
- Staff will solicit feedback from stakeholders, including organization the purchase passes on behalf of the clients.

All comments will be logged and summarized in a staff report that will be presented at a Public Hearing planned for the May 7<sup>th</sup> RTA Board meeting.

Staff is seeking authorization to conduct this public participation process. We are also seeking the Board's direction on areas of emphasis (if any) that staff should focus as we conduct the outreach. For example, the Board may believe the fare changes recommended in the SRTP require special outreach to one or more organizations, or further analysis on which community members may be most impacted.

### **Staff Recommendation**

Approve public participation process for SRTP recommended fare and service changes.