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www.slorta.org

RTA BOARD AGENDA

Wednesday, September 3, 2025 at 9:00 AM
BOARD OF SUPERVISORS' CHAMBERS
COUNTY GOVERNMENT CENTER
1055 Monterey Street, San Luis Obispo, California 93401

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: Hubert Clark
- Retirement of Safety & Training Manager: Patricia Grimes

A. CONSENT AGENDA:

- A-1 Draft RTA Executive Committee Meeting Minutes August 13, 2025 (Information)
- A-2 RTA Board Meeting Minutes of May 7, 2025 and June 4, 2025 (Approve)
- A-3 Draft RTAC Minutes of July 17, 2025 (Information)
- A-4 Procurement of Runabout Vehicles and Declare Vehicle Surplus (Approve)
- A-5 Authorize New SLOCPT Rate for July 2026 Implementation (Approve)

- A-6 FTA Transit Asset Management Plan Update (Receive)
- A-7 Public Transportation Agency Safety Plan Update (Approve)
- A-8 Strategic Business Plan Update (Approve)
- A-9 Purchase of Maintenance Equipment (Approve)
- A-10 PRISM Vision Program Memorandum of Understanding (Approve)
- A-11 Stormwater Conveyance System Agreement (Approve)

B. INFORMATION AGENDA:

- B-1 Executive Director's Report (Receive)
- B-2 Update on August 10th Service Changes (Receive)
- B-3 Update on SB125 Funded Capital Projects (Receive)

C. ACTION AGENDA:

- C-1 Authorize EngrllZE Program Grant Application (Approve)
- C-2 Emergency Services MOU (Approve)

D. CLOSED SESSION:

CONFERENCE WITH LABOR NEGOTIATORS (Gov. Code § 54957.6)
Agency designated representatives: Geoff Straw, Executive Director
Employee organization: Teamsters Local Union No. 986

BOARD MEMBER COMMENTS

The next regularly scheduled RTA Board meeting is scheduled for November 5, 2025



San Luis Obispo Regional Transit Authority

Executive Committee Meeting

Minutes 8/13/2025

A-1

- Members Present: Jimmy Paulding, District 4 Supervisor, **President**
Carla Wixom, City of Morro Bay, **Vice President** in at 10:01 a.m.
Fred Strong, City of Paso Robles, **Past President**
- Members Absent: None
- Staff Present: Geoff Straw, RTA Executive Director
Tania Arnold, RTA Deputy Director/CFO
Anthony Kalvans, RTA Administrative Assistant
Jenna Morton, RTA Counsel
Pete Rodgers SLOCOG Executive Director
Aida Nicklin SLOCOG Administrative Assistant
- Public Present: Eric Greening
1. **Call to Order and Roll Call: President Paulding** called the meeting to order at 10:00 a.m. and roll call was taken. A quorum was present.
 2. **Public Comment:**
Mr. Eric Greening opened his comment by observing that the implementation of the Short-Range Transportation Plan (S RTP) appears to be going smoothly. He then raised a concern regarding bus service through Downtown Atascadero and asked when the RTA will be restoring service through the area. **Mr. Straw** said that the RTA is currently in the process of training drivers on the route.
 3. **Closed Session:** None
 4. **Consent Items**
Executive Committee Meeting Minutes of April 2, 2025 (Approve)

Public Comment:
Mr. Greening said that the minutes looked good.

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

<u>BOARD MEMBER</u>	<u>YES</u>	<u>NO</u>	<u>ABSENT</u>
JIMMY PAULDING	X		
FRED STRONG	X		
CARLA WIXOM	X		

5. **Information Items:**

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

Mr. Straw started his report by reiterating the high standards that RTA has for its employees and noted that the RTA needs more Bus Operators. He said that the RTA has five open positions for Bus Operators and three open positions for Operations Supervisors. He also announced that long time Safety and Training Manager Patricia is retiring at the end of September.

Mr. Straw also noted that an LCTOP grant of just over \$17,000 is helping cover the operating cost of school tripper of \$35,000 that will start in San Miguel and run to Paso Robles High School. The grant is for the current school year.

Mr. Straw informed the Committee that the phase two of the design build for electric charging and installation of the solar panels will start in late September, which means that the annual bus rodeo will have to be cancelled.

Mr. Straw gave a report on various grants that the RTA is pursuing. He noted that while the RTA was awarded a CEC grant for opportunity charging, the organization is still waiting on a federal grant designated for the replacement of older buses. He mentioned that issues with the federal grant may delay the RTA from implementing its innovative clean transit rollout plan.

Public Comment:

Mr. Greening asked if the obstacles related to the federal grant are due to executive orders? **Mr. Strong** said yes.

B-2 Update on SB125 Funded Capital Projects (Receive)

Mr. Straw started his report by mentioning that the RTA staff is looking for the RTA Board to endorse project prioritization for specific projects that it is trying to complete. He said that his highest priority are the projects related to the park out yards in Paso Robles and Arroyo Grande. He also mentioned that he has concerns about cycle seven funding. Finally, he mentioned that SLO Transit has projects that would benefit both SLO Transit and RTA and those should be considered.

Mr. Pete Rodgers of SLOCOG notes that the RTA has not historically been asked about project prioritization because most everything is funded.

A discussion ensued about some of the SB125 projects and whether their funding is contingent or not.

Mr. Paulding asked what is on the short list of RTA priorities. **Mr. Straw** said buses.

Mr. Strong asked about contactless charging at the Paso Robles Transit Center. **Mr. Straw** said that part of their electrification study is looking at the feasibility of it and if the city will support it.

Public Comment:

Mr. Greening said he agrees with the priorities and hopes the RTA will be able to keep to the schedules for its projects.

Mr. Straw said that this item was for information only and no action is required at this time.

B-3 Verification of Discount Eligibility Program & Timeline (Receive)

Ms. Tania Arnold said that the RTA is currently looking at developing a verification program for discount bus rides. She noted that there will be some start up costs to implement the program but noted that the RTA currently has existing standards in place.

Mr. Paulding asked if the outreach could be conducted simultaneously with SLOCOGs mobility wallet program. **Ms. Arnold** said yes.

Ms. Wixom asked if fare evasion is a big problem for the network. **Mr. Straw** said yes and noted that the average fare is \$2.04 despite the fare to travel only one city over is \$2.25. **Ms. Wixom** said that she does not want those who are qualified to struggle to get verified.

Mr. Paulding asked for a return on investment in the staff report.

Public Comment:

Mr. Greening asked if there would be any new criteria for the discount fares. **Ms. Arnold** said that as of this time staff will be using the adopted criteria.

6. **Action Items:**

C-1 Authorize EnergIZE Program Grant Application (Approve)

Ms. Arnold presented the item and noted that this is related to the opportunity charging.

Public Comment:

Mr. Greening said he supported the action item.

Mr. Strong motioned to approve, seconded by **Mr. Paulding**. There was unanimous consensus of those present to approve Action Item C-1 as is.

<u>BOARD MEMBER</u>	<u>YES</u>	<u>NO</u>	<u>ABSENT</u>
JIMMY PAULDING	X		
FRED STRONG	X		
CARLA WIXOM	X		

September 3rd, 2025, Draft RTA Board Agenda

Mr. Straw presented the draft agenda and said that he is looking at adding a resolution to commend Patricia for her service, and a MOU with PRISM for the vision insurance program. He also noted that agenda item A-9, regarding the charter service rate, will be pushed to November. Finally, he mentioned that staff may add a vehicle maintenance equipment grant purchase to the consent agenda.

Public Comment:

Mr. Greening asked for clarification on item C-2. **Mr. Straw** said it was related to how the RTA communicates with the county in the event of an emergency.

Mr. Strong motioned to approve the draft agenda. Seconded by **Ms. Wixom**. The motion passed unanimously of those present.

<u>BOARD MEMBER</u>	<u>YES</u>	<u>NO</u>	<u>ABSENT</u>
JIMMY PAULDING	X		
FRED STRONG	X		
CARLA WIXOM	X		

7. **Adjournment**

The meeting was adjourned at 10:59 AM.

Next RTA Executive Committee Meeting: **October 8, 2025**

Respectfully Submitted,

Acknowledged by,

Anthony Kalvans
Administrative Assistant

Jimmy Paulding
RTA Board President 2025

DRAFT
SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
BOARD MEETING MINUTES OF MAY 7, 2025
A-2

BOARD MEMBERS PRESENT:

KASSI DEE, CITY OF GROVER BEACH
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
JIMMY PAULDING, FOURTH DISTRICT, COUNTY OF SAN LUIS OBISPO (President)
ERICA STEWART, CITY OF SAN LUIS OBISPO
FRED STRONG, CITY OF PASO ROBLES (Past President)
ED WAAGE, CITY OF PISMO BEACH
CARLA WIXOM, CITY OF MORRO BAY (Vice President)

BOARD MEMBERS ABSENT:

HEATHER MORENO, FIFTH DISTRICT, COUNTY OF SAN LUIS OBISPO
JOHN PESCHONG, FIRST DISTRICT, COUNTY OF SAN LUIS OBISPO

STAFF PRESENT:

GEOFF STRAW, EXECUTIVE DIRECTOR
TANIA ARNOLD, DEPUTY DIRECTOR/CFO
JENNA MORTON, SAN LUIS OBISPO COUNTY COUNSEL
OMAR MCPHERSON, OPERATIONS MANAGER
MARY GARDNER, MARKETING AND COMMUNITY RELATIONS MANAGER
ANDY WYLY, MAINTENANCE AND FACILITIES MANAGER
STEPHANIE FRAUSTO, FACILITIES ASSISTANT MANAGER
ANTHONY KALVANS, ADMINISTRATIVE ASSISTANT
TONY BURROWS, BUS OPERATOR
PETE RODGERS, SLOCOG EXECUTIVE DIRECTOR

CALL MEETING TO ORDER, ROLL CALL: President Jimmy Paulding called the meeting to order at 10:01 AM. Roll call was taken, and a quorum was present.

PUBLIC COMMENT:

Mr. Eric Greening expressed his concerns that the ongoing road construction in Downtown Atascadero is impacting bus service. He wanted to make sure that the public works departments are notifying the RTA in a timely manner as he worried that people might miss the bus due to last-minute stop closures.

Mr. Straw reassured Mr. Greening that the RTA does everything it can to lessen the impact on riders by keeping its website up to date with service alerts and posting notices at impacted stops.

EMPLOYEE RECOGNITION:

Mr. Straw announced that Bus Operator Tony Burrows was the Employee of the Quarter and praised his service to South County. He then turned the presentation over to RTA Operations Manager Omar McPherson. **Mr. Omar McPherson** highlighted that Mr. Burrows was nominated by a rider who really appreciates him on his South County Route. **Mr. Burrows** thanked everyone at the RTA and said he has great coworkers and riders. **Mr. Straw** added that Mr. Burrows is the first legacy employee of the RTA and that his father also drives for the RTA.

Board Members Kassi Dee and Dawn Ortiz Legg thanked Mr. Burrows for his service.

Public Comment:

There was no public comment received regarding this item.

A. CONSENT AGENDA:

- A-1 Draft RTA Executive Committee Meeting Minutes April 2, 2025 (Information)
- A-2 RTA Board Meeting Minutes of March 5, 2025 (Approve)
- A-3 RTAC Minutes of January 16, 2025 and Draft for April 10, 2025 (Information)
- A-4 Agreement for County Auditor/Controller Services (Approve)
- A-5 Updated RTA Title VI Policy and DBE Program (Approve)
- A-6 Contract Renewal – AGP Video Production of Board Meetings (Approve)
- A-7 RTAC Bylaws Revisions (Approve)
- A-8 Procure Trolley; Declare Four Vehicles Surplus (Approve)
- A-9 Agreement with Token Transit for Mobile Ticketing Services (Approve)
- A-10 Arroyo Grande Park-Out Facility Lease Extension (Approve)
- A-11 Vehicle Loan Agreement with ModelOne for e-Van (Approve)
- A-12 Procurement of Classification and Compensation/Benefits Study (Approve)
- A-13 Update to the RTA Drug and Alcohol Policy (Approve)
- A-14 Procure Phase 2 Electric Vehicle Servicing Equipment (Approve)

Public Comment:

Mr. Greening commented on A-5 saying that he supports the RTA's policy of having accessible public engagement. He also commented on A-7 saying that as a member of The Regional Transit Advisory Committee, he supported the bylaw revisions.

Board Member Dee made a motion to approve consent agenda item A-1 through A-14 with the, and **Board Member 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>
KASSI DEE	X		
BRUCE GIBSON	X		
AILEEN LOE	X		
HEATHER MORENO			X
HEATHER NEWSOM	X		
DAWN ORTIZ-LEGG	X		
JIMMY PAULDING (President)	X		
JOHN PESCHONG			X
ERICA STEWART	X		
FRED STRONG (Past President)	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. He touched on the positive progress made for consolidating Morro Bay Transit and the Atascadero Dial-A-Ride into the RTA. He also noted that there are five open bids with four of them being filled by operators in training, leaving the RTA with only one open bid left to fill.

Mr. Straw went over the ridership statistics. He highlighted the MST Line 84 agreement, touting its benefit for riders and that ridership from this agreement represented 4% of all Line 84 ridership. **Mr. Straw** specifically noted that ridership for RTA's Regional Routes is up 6.7% over last year, and Paso Robles' local fixed routes are up 25% over pre-pandemic numbers, while the South County Routes are down by about 6% compared to last year.

President Jimmy Paulding thanked Mr. Straw for the report and asked what is attributing to the lagging ridership in South County. **Mr. Straw** observed that construction on Grand Avenue has impacted South County service and that the Short-Range Transit Plan (S RTP) has some recommendations to support ridership growth on those routes.

Board Member Ortiz Legg thanked Mr. Straw for the report and asked if the MST fare sharing agreement could be presented as a case study to Santa Maria. **Mr. Straw** said that was a great idea and that the RTA can work with the San Luis Obispo Council of Governments (SLOCOG) to include that in discussions with Santa Maria.

Public Comment:

There was no public comment received regarding this item.

C. ACTION AGENDA:

C-1 PUBLIC HEARING – Adopt Short-Range Transit Plan, and Consider Proposed Fare and Service Changes (Approve)

Mr. Straw provided the background and findings from the S RTP and underscored that the plan was conducted jointly with the City of San Luis Obispo. He touched on the S RTP's original recommendations.

Mr. Straw highlighted RTA's outreach efforts regarding the proposed service changes. He remarked that staff met directly with riders, held several presentations across the region, and met with stakeholders at Cal Poly and the Marian Medical Center. The RTA received over 160 surveys with riders reporting that they want RTA to continue serving the Marian Medical Center.

Mr. Straw presented the modified recommendations to the RTA Board. He proposed continuing to serve the Marian Medical Center on all Northbound Route 10 trips and on the 5:33pm Southbound Route 10 Trip. He also proposed ending the 7:33pm and 8:33pm Southbound Route 10 trips at Nipomo, adding school tripper service for Paso Robles and South County, midday service stop at Cal Poly on an existing Route 9 trip, express buses, and restoring Route A Saturday service for Paso Robles. **Mr. Straw** also thanked SLOCOG for approving additional funding to make the recommendations happen.

President Paulding thanked staff for the report and expressed concerns about late night riders heading to Santa Maria falling through the cracks. **Mr. Straw** replied that our existing last three Southbound Route 10 trips don't make any connections in Santa Maria, because Santa Maria Transit stops running buses at 7pm.

Board Member Erica Stewart expressed her appreciation to Mr. Straw and RTA staff for their public outreach efforts, and close work with the City of San Luis Obispo on the SRTP.

Board Member Aileen Loe also thanked staff for their efforts and said that she wants RTA to work with Santa Maria on finding a solution.

Vice President Carla Wixom thanked staff for the report.

Public Comment:

Mr. Greening thanked Mr. Straw and the RTA staff for their hard work and said that he is glad the 8:33pm Southbound Route 10 trip will not be eliminated. He expressed his support for the flat fare system and noted that coins can slow the boarding process. Finally, **Mr. Greening** also thanked Board Member Stewart and her council for the joint efforts with the SRTP. He was excited that SLO Transit will plan to have B routes on the weekends, providing better transfers to the RTA system.

Vice President Wixom made a motion to approve action agenda item C-1 and **President Paulding** 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>
KASSI DEE	X		
BRUCE GIBSON	X		
AILEEN LOE	X		
HEATHER MORENO			X
HEATHER NEWSOM	X		
DAWN ORTIZ-LEGG	X		
JIMMY PAULDING (President)	X		
JOHN PESCHONG			X
ERICA STEWART	X		
FRED STRONG (Past President)	X		
ED WAAGE	X		
CARLA WIXOM (Vice President)	X		

C-2 Fiscal Year 2025-26 Operating and Capital Budget (Approve)

Ms. Tania Arnold excitedly presented the budget to the RTA Board. She gave an overview of the components of the budget which include the Fiscal Year 25-26 constrained Operating and Capital Budget, and the Fiscal Year 26-27 unconstrained Operating and Capital Budget. She noted that the approved changes from the SRTP have been reflected in the budget.

Ms. Arnold addressed key uncertainties in the budget specifically noting U.S. Highway 101 construction, liability costs, and efforts to contain Runabout expenses. She also noted some of the uncertainties regarding local, state, and federal funding sources.

Ms. Arnold noted that there are some increased costs facing the RTA. She specifically noted that service delivery costs are up 2%. She also highlighted the increase in administration costs associated with upcoming fare enforcement and passenger surveying.

Ms. Arnold highlighted the capital portion of the budget and noted that the capital budget is over 25 million dollars. She highlighted the efforts to implement zero emission technology and capital replacement costs for vehicles. She did note that some fully funded capital projects from the prior fiscal year will be brought over in a budget amendment.

Public Comment:

Mr. Greening thanked Ms. Arnold for her careful work and asked the RTA not to be hardnosed in labor negotiations.

Board Member Ortiz Legg brought up the uncertainties in the budget. She also asked about the replacement of mid-sized vehicles and their importance in RTA's service delivery, as well as the impact of the charging infrastructure needed. She asked for a report that could be brought back to the Board so it can be shared with the California Air Resources Board.

Board Member Ortiz Legg made a motion to approve action agenda item C-2 to approve the staff recommendation and that a report on vehicle needs and charging be included in the Executive Director's Report. **Board Member Fred Strong** 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>
KASSI DEE	X		
BRUCE GIBSON	X		
AILEEN LOE	X		
HEATHER MORENO			X
HEATHER NEWSOM	X		
DAWN ORTIZ-LEGG	X		
JIMMY PAULDING (President)	X		
JOHN PESCHONG			X
ERICA STEWART	X		
FRED STRONG (Past President)	X		
ED WAAGE	X		
CARLA WIXOM (Vice President)	X		

D. CLOSED SESSION ITEMS: CONFERENCE WITH LEGAL COUNSEL

CONFERENCE WITH LABOR NEGOTIATORS (Gov. Code § 54957.6)

Agency designated representatives: Geoff Straw, Executive Director

Employee organization: Teamsters Local Union No. 986

Public Comment:

Mr. Greening asked the RTA Board to negotiate in good faith.

The RTA Board went into closed session at 11:12 AM.

The RTA Board returned from closed session at 11:35 AM.

RTA Legal Counsel Jenna Morton said that there was no reportable action.

E. BOARD MEMBER COMMENTS:

President Paulding recognized new RTA Legal Counsel Jenna Morton, and that the RTA may piggyback on the SLOCOG June Meeting.

Several Board Members thanked RTA staff for pushing back the meeting start time as they attended bike to school day.

The meeting was adjourned at 11:37 AM.

Next regularly scheduled RTA Board meeting is **July 9, 2025**.

Respectfully Submitted,

Acknowledged by,

Anthony Kalvans, Administrative Assistant

Jimmy Paulding, RTA President 2025

DRAFT
SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
BOARD MEETING MINUTES OF JUNE 4, 2025
A-2

BOARD MEMBERS PRESENT:

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

BOARD MEMBERS ABSENT:

BRUCE GIBSON, SECOND DISTRICT, COUNTY OF SAN LUIS OBISPO
HEATHER MORENO, FIFTH DISTRICT, COUNTY OF SAN LUIS OBISPO
JOHN PESCHONG, FIRST DISTRICT, COUNTY OF SAN LUIS OBISPO

STAFF PRESENT:

GEOFF STRAW, EXECUTIVE DIRECTOR
JENNA MORTON, SAN LUIS OBISPO COUNTY COUNSEL
ANDY WYLY, MAINTENANCE AND FACILITIES MANAGER
ANTHONY KALVANS, ADMINISTRATIVE ASSISTANT

CALL MEETING TO ORDER, ROLL CALL: President Jimmy Paulding called the meeting to order at 12:08 PM. Roll call was taken, and a quorum was present.

PUBLIC COMMENT:

Mr. Eric Greening thanked the RTA staff for their amazing service. He commented on the upcoming Juneteenth events and notes that the Juneteenth event in Paso Robles is easily accessible by RTA Buses.

A. CONSENT AGENDA:

There were no items on the consent agenda for the Board to consider.

B. INFORMATION AGENDA:

There were no informational items for the Board to review.

C. ACTION AGENDA:

C-1 Resolution Awarding the Contract for the Design-Build of the Renewable Energy Project to the Successful Bidder (Approve)

Mr. Straw provided the background for the renewable energy project and noted that the RTA bus maintenance facility was originally constructed with this improvement in mind. He noted that while three companies submitted statements of qualifications, only two companies submitted proposals and prices.

Mr. Straw noted that there was an additional bid alternate for a battery energy storage system, however neither final bidder could provide a storage system that was compliant with the Buy America Act.

Mr. Straw announced that Electricraft of San Luis Obispo, was the lowest most responsive bidder. Their bid of \$682,268 is lower than the original budgeted amount of \$1,359,700. He proposed an amended budgeted amount of \$843,540.

Vice President Carla Wixom asked for clarification on the difference between the bid amount and the amended budget amount requested. **Mr. Straw** replied that the higher budget amount includes things like building permits, construction contingency, and a future piece for a Battery Storage System.

Vice President Wixom made a motion to approve action agenda item C-1 and **Board Member Dawn Ortiz-Legg** 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>
CHARLES BOURBEAU	X		
KASSI DEE	X		
EMILY FRANCIS	X		
BRUCE GIBSON			X
AILEEN LOE	X		
HEATHER MORENO			X
DAWN ORTIZ-LEGG	X		
JIMMY PAULDING (President)	X		
JOHN PESCHONG			X
FRED STRONG (Past President)	X		
ED WAAGE	X		
CARLA WIXOM (Vice President)	X		

C-2 Resolution Awarding the Contract for the Design-Build of the Phase 2 Electric Vehicle Servicing Equipment Project to the Successful Bidder (Approve)

Mr. Straw provided the background for the Phase 2 Electric Vehicle Servicing Equipment Project and noted that the RTA bus maintenance facility was constructed with this project in mind. He noted that this new system will help the RTA manage electricity usage and will be critical for charging the five new electric buses that the RTA is set to receive.

Mr. Straw announced that Electricraft of San Luis Obispo, was the lowest most responsive bidder. Their bid of \$1,005,234 was slightly higher than the original budgeted amount of \$959,320. He requested an amended budget amount of \$1,100,500.

Board Member Ortiz Legg asked for verification that the upcoming electric buses are going to be delivered on time. She mentioned that PG&E is having challenges regarding electric vehicle charging.

Mr. Straw noted that the RTA works closely with PG&E to ensure reliable power to RTA facilities.

Board Member Ed Waage said that he thinks Electricraft is a reputable company.

Board Member Charles Bourbeau asked about the uncertainties around federal funding and if it can be relied on. **Mr. Straw** said that all funding except for a \$400,000 grant has been secured and that the money being used for this project is leftover from when the bus maintenance facility was first constructed.

Board Member Waage made a motion to approve action agenda item C-2. **Board Member Kassi Dee** 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>
CHARLES BOURBEAU	X		
KASSI DEE	X		
EMILY FRANCIS	X		
BRUCE GIBSON			X
AILEEN LOE	X		
HEATHER MORENO			X
DAWN ORTIZ-LEGG	X		
JIMMY PAULDING (President)	X		
JOHN PESCHONG			X
FRED STRONG (Past President)	X		
ED WAAGE	X		
CARLA WIXOM (Vice President)	X		

D. CLOSED SESSION ITEMS: CONFERENCE WITH LEGAL COUNSEL

There were no items on the closed session agenda for the Board to review.

E. BOARD MEMBER COMMENTS:

President Paulding thanked staff and board members for sticking through both the SLOCOG and RTA meetings.

The meeting was adjourned at 12:24 PM.

Next regularly scheduled RTA Board meeting is **July 9, 2025**.

Respectfully Submitted,

Acknowledged by,

Anthony Kalvans, Administrative Assistant

Jimmy Paulding, RTA President 2025

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SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
REGIONAL TRANSIT ADVISORY COMMITTEE
JULY 17, 2025
DRAFT MINUTES
C-1

Members Present:

Janeen Burlingame	City of Morro Bay
Eric Greening	Fixed Route User,
Alex Fuchs (<i>Vice Chair</i>)	City of San Luis Obispo
Omar McPherson (<i>Chair</i>)	Fixed Route Service in South County
Christopher Mutshnick	Cuesta College
Lance Okuno	SLOCOG
Collin Pollington	Cal Poly (arrived at 2:06 p.m.)
Darcy Price	City of Atascadero

Members Absent:

Ryan Cornell	City of Paso Robles
Mark Dariz	Paratransit User
Anna Montgomery	County of San Luis Obispo

Staff Present:

Geoff Straw	RTA
Tania Arnold	RTA
Anthony Kalvans	RTA

1. **CALL MEETING TO ORDER, ROLL CALL:** Chair Omar McPherson called the meeting to order at 2:01 p.m.. Roll call was taken, and a quorum was established.
2. **PUBLIC COMMENTS:**
There were no public comments given for items not on the agenda.
3. A. INFORMATION AGENDA ITEMS:

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

Mr. Geoff Straw introduced his report and gave an overview of the upcoming projects that are designed to support the RTA's transition to an electric fleet. It was noted that the RTA will soon have nine light duty vehicles and seven buses in its electric fleet.

Mr. Straw mentioned that the RTA will be starting union negotiations. **Mr. Eric Greening** said that both the RTA's unionized and nonunionized employees are amazing.

Mr. Straw touched on the completed consolidation with both the Atascadero Dial-A-Ride and Morro Bay Transit. **Mr. McPherson** added that initial feedback has been mostly positive but there have been some complaints about the stops themselves.

A-2 Member Comments / Reports from Jurisdictions (Receive)

Mr. Greening attended the ribbon cutting for the El Camino Real improvement projects but expressed his concerns about the Route 9 bus making it through the improved corridor. **Mr. Greening** also highlighted a report about LA Metro seeing a decrease in ridership in the wake of federal immigration activity. **Mr. Straw** said that he was aware of the report, and the RTA is always monitoring ridership data and trends.

Ms. Darcy Price said that the El Camino Real improvement project is two-thirds complete. A discussion ensued about the turning radius of buses and the ability to make it to the Atascadero Transit Center. **Mr. McPherson** said that once the improvement project is complete, the RTA will be testing buses down the corridor before restoring service. **Mr. Straw** thanked Ms. Price for her frequent communication with RTA regarding road closures and impacts.

Mr. Colin Pollington said that the California Blvd roadway closure will be in effect until August 8th and there will be a separate, shorter closure of North Perimeter Road during the night for underground work. A brief discussion ensued regarding the impacts the night closure will have on bus service.

Ms. Janeen Burlingame said that the consolidation has gone smoothly, and onboard surveying is happening for the Short-Range Transit Plan.

Mr. Lance Okuno mentioned that Santa Maria Regional Transit is still working on its route. He also mentioned that the San Luis Obispo Council of Governments (SLOCOG) is working on several efforts including a mobility wallet, discounted fares on Pacific Surfliner service in SLO County, and finding solutions in the wake of the sudden closure of Wilshire Community Services. **Mr. Straw** raised concerns that without a viable alternative, Wilshire's clients will likely shift to Runabout services.

Mr. Christopher Mutshnick said that he was promoted, and Aaron Borgeson will be taking over as Cuesta College's representative to the RTAC Committee. He also mentioned that construction of the new administration building will not be finished until October. Concerns were raised at how this would impact the grand opening of the RTA's new bus stop at Cuesta College, and if it was possible to have the stop open before the admin building.

Mr. Alex Fuchs reported that while there is some talk about future budget cuts, there are no expected cuts to SLO Transit's operations. He also mentioned that SLO Transit will be expanding its electric bus fleet from two to eight vehicles. Finally, **Mr. Fuchs** talked about the MOU between Santa Maria Regional Transit and SLOCOG. He mentioned that their goal is to have the service start in September with a pilot route between Orcutt and Downtown San Luis Obispo, and no direct stops to Cal Poly. He also noted that the pilot route will be part of the Regional Pass system that currently operates between all fixed route operators who serve the County of San Luis Obispo.

A-3 Discuss Planned Service & Fare Changes (Verbal)

Mr. McPherson introduced the item and went over a list of all the planned changes to the RTA services. Mr. Straw distributed a summary sheet to the RTAC Committee.

Mr. Greening asked about the proposed fare changes and when those will be implemented. **Ms. Tania Arnold** said that the RTA will be going from its intercity zone system to a flat \$2 per ride. She noted that this is in line with the current average fare of \$2.04 per rider. However, **Ms. Arnold** also noted that the proposed fare changes will not go into effect until the contactless payment system is ready to go. **Ms.**

Arnold also said that the price of the bus passes will not increase, except for the stored value card which will hold \$16 instead of the current \$15.

A discussion ensued about the upcoming new verification system for discounted fares.

Mr. Okuno asked if local service will be having a fare increase to the flat \$2. **Ms. Arnold** said that the local routes would stay at their current lower prices.

Mr. Straw mentioned that MST is going to a cashless system by the end of 2026. A discussion ensued about cash, coins, and unbanked riders.

B. ACTION AGENDA ITEMS:

There were no action items for the RTAC to consider.

C. CONSENT AGENDA ITEMS:

C-1 RTAC Minutes of April 10, 2025 (Approve)

Mr. Greening made a motion to approve the minutes; **Ms. Burlingame** seconded the motion. A voice vote was taken, and the motion was approved by unanimous consent of those present.

D. ADJOURNMENT AND COMMITTEE COMMENTS:

Mr. McPherson adjourned the meeting at 3:11 p.m.

Next Regular Meeting: October 16, 2025

Future Regular Meeting Dates: January 15, 2026, April 9, 2026, and July 16, 2026

Respectfully Submitted,

Acknowledged by,

Anthony Kalvans
Administrative Assistant

Omar McPherson
RTAC Chairperson 2025

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SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 3, 2025
STAFF REPORT

AGENDA ITEM: A-4

TOPIC: Procurement of Runabout Vehicles and
Declare Vehicle Surplus

PRESENTED BY: Geoff Straw, Executive Director

STAFF RECOMMENDATION:

1) Authorize Executive Director to Issue a Purchase Order with Model 1 Commercial Vehicles to Procure Four Gasoline-Powered Cutaway Vehicles for Runabout Services at a cost of \$617,443.74

2) Declare Vehicles Surplus

BACKGROUND/DISCUSSION:

The RTA secured \$642,000 in FY2023 Federal Transit Administration (FTA) Section 5307 Urbanized Area (UZA) Formula Program to replace Demand-Response Runabout service vehicles. These grant funds will support the replacement of four (4) total light-duty mid-sized vehicles for the Runabout program. All Demand-Response Runabout vehicles are wheelchair-accessible and will be purchased from the California Association for Coordinated Transportation (CalACT) procurement list approved by FTA and Caltrans. Manufacturing and delivery are expected to take approximately ten months following the issuance of the purchase order.

The total project cost to replace four Demand-Response Runabout vehicles is \$617,443.74 ,and will be funded 85% (\$524,827) with FTA Section 5307 funds and the 15% required local match of \$92,616.74 will be funded with FY25/26 Rural Transit Funds (RTF) and State Transit Assistance (STA) funds. There is sufficient funding budgeted to support these vehicle replacements.

These vehicles will be purchased from the FTA approved CalACT MBTA Bid Vehicle Purchasing Cooperative (Contract No. 20-01) at secured 2025 pricing rates, which expire on September 8, 2025. The RTA will ensure that it complies with all Buy America and applicable FTA procurement and regulations and will be compliant with American Disability Act (ADA) and Clean Air Act (CAA) standards. FTA guidelines call for light-duty mid-sized transit vehicles to be replaced after five years or 150,000 miles. By this criteria, these vehicles have surpassed their FTA useful life in both years and miles at the expected time of replacement in early 2026.

ID#	Mileage	Make	Model	Seating	Year	VIN	License
1901	142,595	Ford E450	Starcraft Allstar	8+2 WC	2019	1FDFE4FS5KDC21600	1451157
1902	146,369	Ford E450	Starcraft Allstar	8+2 WC	2019	1FDFE4FS7KDC26300	1451312
1905 ¹	132,200	Ford E450	Starcraft Allstar	8+2 WC	2019	1FDFE4FS2KDC26303	1451173
1907	144,885	Ford E450	Starcraft Allstar	8+2 WC	2019	1FDFE4FS6KDC26305	1451314

**Mileage as of 06/30/2025*

¹ Vehicle #1905 out-of-revenue-service with a blown engine

Declaration of Surplus

Staff has determined that the RTA currently would have no practical, efficient or appropriate use for the replaced Runabout vehicles, nor will it have such use for these vehicles in the near future. Due to the advanced age and/or mileage, the above vehicles are regularly experiencing mechanical failures and the higher-cost repairs do not make it economically prudent to keep these vehicles as part of the active fleet.

The RTA Purchasing Policy requires staff to determine if surplus vehicles or equipment have a per-unit fair market value greater than \$10,000. Should the vehicles have a value greater than \$10,000 at time of disposal and were originally purchased using FTA funds, staff is required to return any remaining federal interest back to the FTA. Based on discussions with used bus vendors, these four vehicles have a value of no more than \$7,000 each.

Staff recommends that the vehicles be transferred to another transportation agency or educational institution should there be a need per our existing Procurement Policy. If area specialized transportation providers not be interested, then the vehicles should be disposed of through an existing contract with JJ Kane Auctions. Staff will seek letters of interest from area specialized transportation providers in the coming months and seek the Board's authority to transfer based on the order received.

Staff Recommendation

- 1) Authorize Executive Director to issue a purchase order with Model 1 Commercial Vehicles to procure four gasoline-powered cutaway vehicles for Runabout services at a cost of \$617,443.74.
- 2) Declare vehicles surplus.

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 3, 2025
STAFF REPORT**

AGENDA ITEM: A-5

TOPIC: Authorize New SLOCPT Rates for July 2026 Implementation

PRESENTED BY: Tania Arnold, Deputy Director/CFO

STAFF RECOMMENDATION: Implement Rate Increase in July 2026

BACKGROUND:

As previously authorized by the RTA Board of Directors, the RTA joined the San Luis Obispo County Pension Trust in January of 2020.

Based on the County Pension Trust's 2024 actuarial study completed in June 2025, a pension contribution rate increase for miscellaneous employees (under which the eligible RTA employees fall) is required to achieve desired funding levels for the plan. The County of San Luis Obispo Board of Supervisors is expected to approve an amendment to the Pension Trust Retirement Plan adopting rate increases for the County and participating agencies, by the end of calendar year 2025. To meet our required funding obligation to the Pension Trust, the RTA must determine if the implementation date should be January 2026 or July 2026. A January 2026 implementation date would result in a 0.96% increase in rates, and a July 2026 implementation date would result in a 1.00% increase in rates.

Although the July 2026 rate increase (1.00%) is higher than the January 2026 rate (0.96%), staff is recommending this July implementation date to coordinate with the timeline of when pay rate and benefit changes are traditionally implemented as part of the annual budget-making process.

Additionally, the Board may also determine how the increase should be implemented. Traditionally, the RTA allocation method remains in line with how the County treats increases for unrepresented employees and would be included in the budget assumptions for the Board's consideration in March 2026. 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.

Staff Recommendation

Approve the implementation date of July 2026 at a rate of 1.00%.

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SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 3, 2025
STAFF REPORT

AGENDA ITEM: **A-6**

TOPIC: Transit Asset Management (TAM) Plan

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

STAFF RECOMMENDATION: Receive and File Update to the FY2025 TAM Plan

BACKGROUND/DISCUSSION:

In accordance with Federal Transit Administration (FTA) regulations, every transit agency must develop a performance-based Transit Asset Management (TAM) plan if it owns, operates, or manages capital assets used to provide public transportation and receives federal financial assistance under 49 U.S.C. Chapter 53 as a recipient or subrecipient. The RTA falls under the FTA's Tier II designation, and is a group sponsor for its subrecipient of federal funds (the City of Atascadero). As a Tier II agency, the RTA must meet the following four elements:

1. An inventory of assets – A register of capital assets and information about those assets.
2. A condition assessment of inventoried assets – A rating of the assets' physical state; to be completed for assets an agency has direct capital responsibility for; should be at a level of detail sufficient to monitor and predict performance of inventoried assets.
3. Description of a decision support tool – An analytic process or tool that (1) assists in capital asset investment prioritization and/or (2) estimates capital needs over time *does not necessarily mean software*.
4. A prioritized list of investments – A prioritized list of projects or programs to manage or improve the State of Good Repair (SGR) of capital assets.

This staff report, along with the attached updated performance results, shall constitute an update to the TAM Plan for FY2025.

Transit Asset Management Plan

The RTA's Strategic Business Plan and 2025 TAM Performance goals were set for all revenue vehicles to allow no more than **31.3%** of Heavy Duty Buses, **10%** Cutaways and **13.3%** ADA Minivans to exceed the FTA-defined useful life standard in terms of years or miles. Revenue vehicles remain top priority for replacement over non-revenue support vehicles as these vehicles typically incur fewer annual miles or usage and

therefore their useful life can be extended until funding is made available. Replacement targets for non-revenue vehicles and equipment are based on current age and when the replacement is tentatively scheduled to take place. The non-revenue support vehicle replacement goal was set at **8.3%**, with maintenance trucks and equipment set at **40.0%**.

In January 2022 construction was substantially completed on the new Bus Maintenance Facility (BMF) located at 253 Elks Lane in San Luis Obispo. This facility supports maintenance, operations and administrative functions for the RTA. As the BMF building is still so new, the RTA's facility condition assessment goal remains set at **0.0%**, meaning no facility assets are expected to come into a state of needing repairs, or receiving a condition rating of (2) marginal or (1) poor. In accordance with federal requirements, a formal facility condition assessment of the BMF shall be reported to the National Transit Database (NTD) every four (4) years. The next NTD facility condition assessment will be due in 2026.

While not all performance measures were met in FY2025, the RTA remains largely on target to meet or exceed the recommended vehicle replacements with several vehicle procurements currently in progress and scheduled for deliveries in the upcoming fiscal year. Performance details are reported annually to the NTD and are summarized below in Table 1.

		FY2025 Target (%)	Total Vehicles Allowed to Exceed State of Good Repair	ACTUAL FY2025 Performance (%)	ACTUAL Vehicles Exceeding State of Good Repair in FY2025
Vehicle Type					
REVENUE SERVICE VEHICLES	Heavy Duty Bus (30)	31.30%	9	33.33%	10
	Description: The RTA will replace five (5) heavy-duty diesel-powered buses with zero-emission electric buses to be delivered in the Fall 2025. The RTA was awarded a discretionary grant to fund the replacement of four (4) more 2013 heavy-duty diesel-powered buses and anticipates issuing this purchase order in FY26 following the FTA's obligation of these grant funds with delivery anticipated in FY2028. The RTA is on schedule to issue a purchase requisition to replace three (3) 2013 heavy-duty diesel-powered buses with zero-emission electric buses with SB125 funds (SLOCOG Project-4) in 2026.				
	Cutaways (21) & Trolleys (2)	10.00%	2	26.09%	6

	Description: The City of Atascadero (subrecipient) replaced one(1) ADA transit cutaway with a Mobility Transit Van in FY25. The RTA issued a purchase order to replace one (1) cutaway vehicle for the Nipomo Dial-A-Ride which is scheduled for delivery in the Fall 2025. The RTA issued a purchase order to replace one (1) seasonal-service Trolley for the County which is scheduled for delivery in 2026. The RTA anticipates issuing a purchase order to replace eight (8) Demand-Response vehicles in FY2026.				
	<i>PROGRAM CONSOLIDATION NOTE FOR FY2026: The City of Morro Bay program consolidation into the RTA will add two (2) Cutaways and two (2) Trolleys to the RTA Fleet. The Atascadero Dial-A-Ride program consolidation into the RTA will add three vehicles (2 Cutaways and 1 Mobility Transit Van) to the RTA Fleet. The vehicles acquired from program consolidation will be reported in the RTA's FY2026 TAM Plan performance measures for the period of July 1, 2025 - June 30, 2026.</i>				
	ADA Accessible Minivans (15)	13.30%	2	60.00%	9
	Description: The RTA replaced three (3) ADA minivans in FY25. The RTA is on schedule to issue a purchase order to replace seven (7) ADA minivans in 2026 and two (2) in 2027.				
NON-REVENUE SUPPORT VEHICLES & EQUIPMENT	(Non-Revenue) Automobiles (10)	8.30%	1	20.00%	2
	Description: Revenue vehicles remain top priority for replacement over non-revenue support vehicles as support vehicles typically acquire less miles and therefore the vehicles' useful life can be extended until funding is made available. The RTA anticipates issuing purchase orders to replace two (2) support vehicles (sedans) with fully electric support vehicles in FY26.				
	(Non-Revenue) Maintenance Trucks and Equipment (5)	40.00%	2	40.00%	2
	Description: Revenue vehicles remain top priority for replacement over non-revenue support maintenance trucks and equipment (forklifts, etc.) as support maintenance vehicles and equipment acquire less miles/hours and therefore truck or equipment's useful life can be extended until funding is made available. The RTA has issued purchase orders to replace two (2) maintenance/utility service trucks, scheduled for delivery in FY26.				

FACILITIES	Facilities (1) Bus Maintenance Facility (BMF) located at 253 Elks Lane, SLO	0.00%	0	0.00%	0
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	Vehicle Type	FY2025 Target (%)	Total Vehicles Allowed to Exceed State of Good Repair	ACTUAL FY2025 Performance (%)	ACTUAL Vehicles Exceeding State of Good Repair in FY2025	Target Met / Unmet
REVENUE SERVICE VEHICLES	Heavy Duty Bus (30)	31.30%	9	33.33%	10	<i>unmet</i>
	Description: The RTA will replace five (5) heavy-duty diesel-powered buses with zero-emission electric buses to be delivered in the Fall 2025. The RTA was awarded a discretionary grant to fund the replacement of four (4) more 2013 heavy-duty diesel-powered buses and anticipates issuing this purchase order in FY26 following the FTA's obligation of these grant funds with delivery anticipated in FY2028. The RTA is on schedule to issue a purchase requisition to replace three (3) 2013 heavy-duty diesel-powered buses with zero-emission electric buses with SB125 funds (SLOCOG Project-4) in 2026.					
	Cutaways (21) & Trolleys (2)	10.00%	2	26.09%	6	<i>unmet</i>
	Description: The Cit og Atascaero (subrecipient) replaced one(1) ADA transit cutaway with a Mobility Transit Van in FY25. The RTa issued a purchase order to replace one (1) cutaway vehicle for the Nipomo Dial-A-Ride which is scheduled for delivery in the Fall 2025. The RTA issued a purchase order to replace one (1) seasonal-service Trolley for the County which is scheduled for delivery in 2026. The RTA anticipates issuing a purchase order to replace eight (8) Demand-Response vehicles in FY2026.					

		FY2025 Target (%)	Total Vehicles Allowed to Exceed State of Good Repair	ACTUAL FY2025 Performance (%)	ACTUAL Vehicles Exceeding State of Good Repair in FY2025	Target Met / Unmet
Vehicle Type						
REVENUE SERVICE VEHICLES	<p><i>PROGRAM CONSOLIDATION NOTE FOR FY2026 : The City of Morro Bay program consolidation into the RTA will add two (2) Cutaways and two (2) Trolleys to the RTA Fleet. The Atascadero Dial-A-Ride program consolidation into the RTA will add three vehicles (2 Cutaways and 1 Mobility Transit Van) to the RTA Fleet. The vehicles acquired from program consolidation will be reported in the RTA's FY2026 TAM Plan performance measures for the period of July 1, 2025 - June 30, 2026.</i></p>					
	ADA Accessible Minivans (15)	13.30%	2	60.00%	9	unmet
	<p>Description: The RTA replaced three (3) ADA minivans in FY25. The RTA is on schedule to issue a purchase order to replace seven (7) ADA minivans in 2026 and two (2) in 2027.</p>					
NON-REVENUE SUPPORT VEHICLES & EQUIPMENT	(Non-Revenue) Automobiles (10)	8.30%	1	20.00%	2	unmet
	<p>Description: Revenue vehicles remain top priority for replacement over non-revenue support vehicles as support vehicles typically acquire less miles and therefore the vehicles' useful life can be extended until funding is made available. The RTA anticipates issuing purchase orders to replace two (2) support vehicles (sedans) with fully electric support vehicles in FY26.</p>					
	(Non-Revenue) Maintenance Trucks and Equipment (5)	40.00%	2	40.00%	2	Met
	<p>Description: Revenue vehicles remain top priority for replacement over non-revenue support maintenance trucks and equipment (forklifts, etc.) as support maintenance vehicles and equipment acquire less miles/hours and therefore truck or equipment's useful life can be extended until funding is made available. The RTA has issued purchase orders to replace two (2) maintenance/utility service trucks, scheduled for delivery in FY26.</p>					
FACILITIES	Facilities (1) Bus Maintenance Facility (BMF) located at 253 Elks Lane, SLO	0.00%	0	0.00%	0	Met
	<p>Description: Construction of the BMF was completed in January 2022. The facility condition assessment rates the facility as a "5 - Excellent Condition" with no visible defects, in new condition and under warranty. The RTA's facility condition assessment standard is to repair facility assets that receive a condition rating of marginal (2) or poor (1) at a rate that will allow for no more than 40% of the total facility assets beyond the NTD and FTA-defined condition five-point scale.</p>					

Staff recommendation

Receive and file the FY2025 update to the TAM Plan.

San Luis Obispo Regional Transit Authority Transit Asset Management Plan

Geoff Straw, Accountable Executive

Last modified by Melissa C. Mudgett on 23 Jul 25 at 10:20

Introduction

The RTA is a Joint Powers Authority that was formed in 1989 that serves to connect various communities within San Luis Obispo County and nearby cities. Regional fixed-route and paratransit services throughout the region (including paratransit within the City of San Luis Obispo) are managed by the RTA. In addition, the RTA is contracted by the County of San Luis Obispo to operate community-based services in unincorporated areas (primarily in Nipomo, Shandon and Templeton), and by the City of Paso Robles to operate the Paso Express fixed-route services and the Paso Robles Dial-A-Ride service. The RTA also provides administrative oversight of the South County Transit's (SCT) fixed-route services in the Five Cities area.

The RTA Board of Directors consists of a representative from all of the cities in which transportation services are provided, as well as all five San Luis Obispo County Supervisors. The Regional Transportation Advisory Committee (RTAC) meets quarterly and provides advice to the RTA Board. Services have been directly operated by the RTA employees since 2009, when the previously contracted services were brought in-house.

This is a Tier II Group Plan that also includes the City of Atascadero as a Subrecipient to the RTA. The City of Atascadero provides only Dial-A-Ride services to their community.

- The RTA's fleet performance measurement standard for Rolling Stock is to not allow more than 25% of revenue-service vehicles to exceed its FTA-defined useful life standard in terms of years or miles.
- The RTA's fleet performance measurement standard for Rolling Stock (Trolley) is to not allow more than 50% of revenue-service Trolley's to exceed its FTA-defined useful life standard in terms of years or miles. (Only two (2) Trolleys in inventory).
- The RTA's fleet performance measurement standard for Equipment (non-revenue support automobile, truck or equipment) is to not allow more than 30% of non-revenue vehicles/equipment to exceed its FTA-defined useful life standard in terms of years or miles.
- The RTA's facility performance measurement standard for Facilities is to not allow more than 40% of its facilities to exceed a Condition Assessment of 3.0 or below. (Bus Maintenance Facility).

Performance Targets & Measures

Asset Category - Performance Measure	Asset Class	2026 Target	2027 Target	2028 Target	2029 Target	2030 Target
REVENUE VEHICLES						
Age - % of revenue vehicles within a particular asset class that have met or exceeded their Useful Life Benchmark (ULB)	AB - Articulated Bus	N/A				
	AO - Automobile	N/A				
	BR - Over-the-road Bus	N/A				
	BU - Bus	28%	25%	25%	25%	25%
	CU - Cutaway Bus	11%	25%	25%	25%	25%
	DB - Double Decked Bus	N/A				
	FB - Ferryboat	N/A				
	MB - Mini-bus	N/A				
	MV - Mini-van	13%	25%	25%	25%	25%
	RT - Rubber-tire Vintage Trolley	50%			50%	
	SB - School Bus	N/A				
	SV - Sport Utility Vehicle	N/A				
	TB - Trolleybus	N/A				
	VN - Van	N/A				
	Custom 1	N/A				
	Custom 2	N/A				
	Custom 3	N/A				
EQUIPMENT						
Age - % of vehicles that have met or exceeded their Useful Life Benchmark (ULB)	Non Revenue/Service Automobile	20%	30%	30%	30%	30%
	Steel Wheel Vehicles	N/A				
	Trucks and other Rubber Tire Vehicles	20%			30%	
	Forklift	20%			100%	
	Custom 2	N/A				
	Custom 3	N/A				
FACILITIES						
Condition - % of facilities with a condition rating below 3.0 on the FTA Transit Economic Requirements Model (TERM) Scale	Administration	N/A				
	Maintenance	1%				
	Parking Structures	N/A				
	Passenger Facilities	N/A				
	Custom 1	N/A				
	Custom 2	N/A				
	Custom 3	N/A				

Target Setting Methodology

Based on the RTA's Strategic Business Plan, the goal for all revenue vehicles (excluding Trolleys) is to not exceed more than 25% beyond the FTA-defined useful life standard in terms of years or miles. The Performance Target for Trolleys is set at 50% as there is only two (2) Trolley's in the RTA's fleet inventory. The equipment goal (non-revenue support vehicles, trucks and equipment) is set at 30% and based on the current age and when the replacement is tentatively scheduled to take place. The Bus Maintenance Facility (BMF) is the RTA's only facility included in its Facility Performance Standard. The BMF performance measurement standard is to not allow more than 40% of its facility Condition Assessment to be rated 3.0 or below.

Capital Asset Inventory

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

Asset Inventory Summary

Asset Category	Total Number	Avg Age	Avg Mileage	Avg Value
Revenue Vehicles	68	6.8	237,532	\$645,808.82
<i>AB - Articulated Bus</i>	0	-	-	-
<i>AO - Automobile</i>	0	-	-	-
<i>BR - Over-the-road Bus</i>	0	-	-	-
<i>BU - Bus</i>	30	8.7	422,140	\$1,262,000.00
<i>CU - Cutaway Bus</i>	21	5.5	107,956	\$187,142.86
<i>DB - Double Decked Bus</i>	0	-	-	-
<i>FB - Ferryboat</i>	0	-	-	-
<i>MB - Mini-bus</i>	0	-	-	-
<i>MV - Mini-van</i>	15	4.3	69,104	\$85,000.00
<i>RT - Rubber-tire Vintage Trolley</i>	2	11.5	92,187	\$425,000.00
<i>SB - School Bus</i>	0	-	-	-
<i>SV - Sport Utility Vehicle</i>	0	-	-	-
<i>TB - Trolleybus</i>	0	-	-	-
<i>VN - Van</i>	0	-	-	-
<i>Custom 1</i>	0	-	-	-
<i>Custom 2</i>	0	-	-	-
<i>Custom 3</i>	0	-	-	-
Equipment	15	5.2	49,669	\$68,400.00
<i>Non Revenue/Service Automobile</i>	10	3.4	37,268	\$58,600.00
<i>Steel Wheel Vehicles</i>	0	-	-	-
<i>Trucks and other Rubber Tire Vehicles</i>	4	8.8	93,003	\$91,250.00
<i>Forklift</i>	1	9.0	343	\$75,000.00
<i>Custom 2</i>	0	-	-	-
<i>Custom 3</i>	0	-	-	-
Facilities	1	4.0	N/A	\$24,000,000.00
<i>Administration</i>	0	-	N/A	-
<i>Maintenance</i>	1	4.0	N/A	\$24,000,000.00
<i>Parking Structures</i>	0	-	N/A	-
<i>Passenger Facilities</i>	0	-	N/A	-
<i>Custom 1</i>	0	-	N/A	-
<i>Custom 2</i>	0	-	N/A	-
<i>Custom 3</i>	0	-	N/A	-

Condition Assessment

Please see Appendix B (Asset Condition Data) for individual asset condition listing.

Asset Condition Summary

Asset Category	Total Number	Avg Age	Avg Mileage	Avg TERM Condition	Avg Value	% At or Past ULB
Revenue Vehicles	68	6.8	237,532	N/A	\$645,808.82	37%
<i>AB - Articulated Bus</i>	0	-	-	N/A	-	-
<i>AO - Automobile</i>	0	-	-	N/A	-	-
<i>BR - Over-the-road Bus</i>	0	-	-	N/A	-	-
<i>BU - Bus</i>	30	8.7	422,140	N/A	\$1,262,000.00	33%
<i>CU - Cutaway Bus</i>	21	5.5	107,956	N/A	\$187,142.86	24%
<i>DB - Double Decked Bus</i>	0	-	-	N/A	-	-
<i>FB - Ferryboat</i>	0	-	-	N/A	-	-
<i>MB - Mini-bus</i>	0	-	-	N/A	-	-
<i>MV - Mini-van</i>	15	4.3	69,104	N/A	\$85,000.00	60%
<i>RT - Rubber-tire Vintage Trolley</i>	2	11.5	92,187	N/A	\$425,000.00	50%
<i>SB - School Bus</i>	0	-	-	N/A	-	-
<i>SV - Sport Utility Vehicle</i>	0	-	-	N/A	-	-
<i>TB - Trolleybus</i>	0	-	-	N/A	-	-
<i>VN - Van</i>	0	-	-	N/A	-	-
<i>Custom 1</i>	0	-	-	N/A	-	-
<i>Custom 2</i>	0	-	-	N/A	-	-
<i>Custom 3</i>	0	-	-	N/A	-	-
Equipment	15	5.2	49,669	N/A	\$68,400.00	27%
<i>Non Revenue/Service Automobile</i>	10	3.4	37,268	N/A	\$58,600.00	20%
<i>Steel Wheel Vehicles</i>	0	-	-	N/A	-	-
<i>Trucks and other Rubber Tire Vehicles</i>	4	8.8	93,003	N/A	\$91,250.00	50%
<i>Forklift</i>	1	9.0	343	N/A	\$75,000.00	0%
<i>Custom 2</i>	0	-	-	N/A	-	-
<i>Custom 3</i>	0	-	-	N/A	-	-
Facilities	1	4.0	N/A	5.0	\$24,000,000.00	N/A
<i>Administration</i>	0	-	N/A	-	-	N/A
<i>Maintenance</i>	1	4.0	N/A	5.0	\$24,000,000.00	N/A
<i>Parking Structures</i>	0	-	N/A	-	-	N/A
<i>Passenger Facilities</i>	0	-	N/A	-	-	N/A
<i>Custom 1</i>	0	-	N/A	-	-	N/A
<i>Custom 2</i>	0	-	N/A	-	-	N/A
<i>Custom 3</i>	0	-	N/A	-	-	N/A

Decision Support

Investment Prioritization

The RTA uses the Fleet Replacement Module to identify replacements and to justify the investment priority process.

- The RTA uses the Facility Condition Assessment to identify repairs to the facility and to justify investment priorities.
- The RTA uses the ICT Zero-Emission Bus Roll-Out Plan to support investment decision-making and prioritization for the RTA, SCT and Paso Robles services.
- The City of Atascadero (Subrecipient to the RTA) uses its adopted ICT Zero-Emission Bus Roll-Out Plan to support investment decision-making and prioritization for the Atascadero Dial-A-Ride service.
- All Fleet Replacement Projects and Costs are reflective of the region's FY25-FY27 FTIP, adopted August 2024.

Decision Support Tools

The following tools are used in making investment decisions:

Process/Tool	Brief Description
Fleet Replacement Module	Fleet replacement module was used to generate the projected replacement of the fleet based on thier useful life and condition of the fleet over the next five years (2023-2028). The RTA Fleet Software system uses asset inventory and condition information to support the fleet replacement schedule. The "Project Year" and "Costs" identified in Appendix C - Project List are reflective of the adopted FY25-FY27 FTIP fleet replacement projects and funding levels known as of June 2025.
RTA Facility Condition Assessment	The RTA will complete a Condition Assessment for the Bus Maintenance Facility located at 253 Elks Lane in San Luis Obispo. This Condition Assessment uses the NTD and FTA 5-point assessment rating scale for all assets related to the facility. The Condition Assessment will be conducted every 4 years and reported to the NTD and FTA.
RTA Innovative Clean Transit (ICT) Fleet Roll-Out Plan	The RTA ICT Zero-Emission Bus Roll-Out Plan was adopted in March 2023. This Plan projects the replacement year & cost for vehicles with a Gross Vehicle Weight (GVW)greater than 14,000 lbs to 2040. The RTA will use this plan to support investment decision-making and prioritization.

Atascadero (Subrecipient) Innovative Clean Transit (ICT) Fleet Roll-Out Plan	Atascadero (Subrecipient) ICT Zero-Emission Plan was adopted in June 2023. Atacadero will use this plan to support investment decision-making and prioritization for the Atascadero Dial-A-Ride service.
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Investment Prioritization

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

Appendices

Appendix A	Asset Register
Appendix B1	Revenue Vehicle (Rolling Stock) Condition Data
Appendix B2	Equipment Condition Data
Appendix B3	Facilities Condition Data
Appendix C	Proposed Investment Project List
Appendix D	Fleet Replacement Module Output

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Appendix A: Asset Register

Asset Category	Asset Class	Asset Name	Make	Model	Count	ID/Serial No.	Asset Owner	Acquisition Year	Vehicle Mileage	Replacement Cost/Value
Equipment	Forklift	523	Toyota	forklift	1	67498	SLO RTA	2016	343	\$75,000.00
Equipment	Non Revenue/Service Automobile	520	FORD	ESCAPE	1	1FMCU0F72FUA82168	SLO RTA	2015	64,009	\$52,000.00
Equipment	Non Revenue/Service Automobile	521	FORD	ESCAPE	1	1FMCU0F71HUB03417	SLO RTA	2017	160,709	\$52,000.00
Equipment	Non Revenue/Service Automobile	525	CHEVROLET	EUV E-Bolt	1	1G1FY6S07P4139265	SLO RTA	2023	35,186	\$52,000.00
Equipment	Non Revenue/Service Automobile	528	CHEVROLET	E-BOLT	1	1G1FY6S01P4189353	SLO RTA	2023	21,545	\$52,000.00
Equipment	Non Revenue/Service Automobile	529	CHEVROLET	E-BOLT	1	1G1FY6S06P4189428	SLO RTA	2023	26,356	\$52,000.00
Equipment	Non Revenue/Service Automobile	530	CHEVROLET	E-BOLT	1	1G1FY6S02P4193962	SLO RTA	2023	20,891	\$85,000.00
Equipment	Non Revenue/Service Automobile	531	CHEVROLET	E-BOLT	1	1GYFY6S05P4193969	SLO RTA	2023	10,203	\$85,000.00
Equipment	Non Revenue/Service Automobile	532	CHEVROLET	E-BOLT	1	1G1FY6S08P4195408	SLO RTA	2023	10,628	\$52,000.00
Equipment	Non Revenue/Service Automobile	533	CHEVROLET	E-BOLT	1	1GYFY6S08P4187292	SLO RTA	2023	9,808	\$52,000.00
Equipment	Non Revenue/Service Automobile	534	CHEVROLET	E-BOLT	1	1G1FY6S03P4193937	SLO RTA	2023	13,349	\$52,000.00
Equipment	Trucks and other Rubber Tire Vehicles	511	FORD	F-250	1	1FT7X2A60EEB27771	SLO RTA	2014	119,193	\$85,000.00
Equipment	Trucks and other Rubber Tire Vehicles	512	FORD	F-250	1	1FD7X2A62EEB27850	SLO RTA	2014	72,549	\$100,000.00
Equipment	Trucks and other Rubber Tire Vehicles	522	FORD	F-250	1	1FD7X2A66GED42246	SLO RTA	2016	114,567	\$80,000.00
Equipment	Trucks and other Rubber Tire Vehicles	524	FORD	F-250	1	1FTFX1C50MKD87727	SLO RTA	2021	65,703	\$100,000.00
Facilities	Maintenance	Bus Maintenance Facility (BMF) 253 Elks Lane, SLO 93401			1	253 Elks Lane, San Luis Obispo, CA 93401	SLO RTA	2021		\$24,000,000.00
RevenueVehicles	BU - Bus	1301	GILLIG	LOW FLOOR	1	15GGD2714D1182291	SLO RTA	2013	590,076	\$1,300,000.00
RevenueVehicles	BU - Bus	1302	GILLIG	LOW FLOOR	1	15GGD2716D1182292	SLO RTA	2013	527,863	\$1,300,000.00
RevenueVehicles	BU - Bus	1303	GILLIG	LOW FLOOR	1	15GGD2718D1182293	SLO RTA	2013	614,825	\$1,300,000.00
RevenueVehicles	BU - Bus	1304	GILLIG	LOW FLOOR	1	15GGD271XD1182294	SLO RTA	2013	592,681	\$1,300,000.00
RevenueVehicles	BU - Bus	1305	GILLIG	LOW FLOOR	1	15GGD2711D1182295	SLO RTA	2013	558,186	\$1,300,000.00
RevenueVehicles	BU - Bus	1306	GILLIG	LOW FLOOR	1	15GGD2713D1182296	SLO RTA	2013	590,111	\$1,300,000.00
RevenueVehicles	BU - Bus	1307	GILLIG	LOW FLOOR	1	15GGD2715D1182297	SLO RTA	2013	613,256	\$1,300,000.00
RevenueVehicles	BU - Bus	1308	GILLIG	LOW FLOOR	1	15GGB271XD1182298	SCT	2013	521,324	\$1,300,000.00
RevenueVehicles	BU - Bus	1309	GILLIG	LOW FLOOR	1	15GGB2711D1182299	SCT	2013	523,534	\$1,300,000.00
RevenueVehicles	BU - Bus	1310	GILLIG	LOW FLOOR	1	15GGB2714D1182300	SCT	2013	529,928	\$1,300,000.00
RevenueVehicles	BU - Bus	1501	GILLIG	LOW FLOOR	1	15GGD2719F1184847	SLO RTA	2015	558,951	\$1,300,000.00
RevenueVehicles	BU - Bus	1502	GILLIG	LOW FLOOR	1	15GGD2710F1184848	SLO RTA	2015	525,448	\$1,300,000.00
RevenueVehicles	BU - Bus	1503	GILLIG	LOW FLOOR	1	15GGD2712F1184849	SLO RTA	2015	521,723	\$1,300,000.00
RevenueVehicles	BU - Bus	1504	GILLIG	LOW FLOOR	1	15GGD2719F1184850	SLO RTA	2015	533,404	\$1,300,000.00
RevenueVehicles	BU - Bus	1505	GILLIG	LOW FLOOR	1	15GGD2710F1184851	SLO RTA	2015	497,379	\$1,300,000.00
RevenueVehicles	BU - Bus	1506	GILLIG	LOW FLOOR	1	15GGD2712F1184852	SLO RTA	2015	460,493	\$1,300,000.00
RevenueVehicles	BU - Bus	1507	GILLIG	LOW FLOOR	1	15GGD2714F1184853	SLO RTA	2015	459,655	\$1,300,000.00
RevenueVehicles	BU - Bus	1508	GILLIG	LOW FLOOR	1	15GGD2716F1184854	SLO RTA	2015	546,131	\$1,300,000.00
RevenueVehicles	BU - Bus	1509	GILLIG	LOW FLOOR	1	15GGB2710F1184855	SCT	2015	442,154	\$1,300,000.00
RevenueVehicles	BU - Bus	1801	GILLIG	LOW FLOOR	1	15GGD2715J3190447	SLO RTA	2018	358,540	\$1,300,000.00
RevenueVehicles	BU - Bus	1802	GILLIG	LOW FLOOR	1	15GGD2717J3190448	SLO RTA	2018	354,450	\$1,300,000.00
RevenueVehicles	BU - Bus	1803	GILLIG	LOW FLOOR	1	15GGD2719J3190449	SLO RTA	2018	333,525	\$1,300,000.00
RevenueVehicles	BU - Bus	1910	GILLIG	LOW FLOOR	1	15GGD2710K3191300	SLO RTA	2019	318,433	\$1,300,000.00
RevenueVehicles	BU - Bus	1911	GILLIG	LOW FLOOR	1	15GGD2712K3191301	SLO RTA	2019	296,370	\$1,300,000.00
RevenueVehicles	BU - Bus	1912	GILLIG	LOW FLOOR	1	15GGD2714K3191302	SLO RTA	2019	324,110	\$1,300,000.00
RevenueVehicles	BU - Bus	2101	GILLIG	LOW FLOOR	1	15GGD2711M3197061	SLO RTA	2021	161,223	\$1,300,000.00

Asset Category	Asset Class	Asset Name	Make	Model	Count	ID/Serial No.	Asset Owner	Acquisition Year	Vehicle Mileage	Replacement Cost/Value
RevenueVehicles	BU - Bus	2102	GILLIG	LOW FLOOR	1	15GGD2713M3197062	SLO RTA	2021	159,166	\$1,300,000.00
RevenueVehicles	BU - Bus	2301	GILLIG	ELECTRIC BUS	1	15GGD281XR3198795	SLO RTA	2024	46,816	\$1,060,000.00
RevenueVehicles	BU - Bus	2302	GILLIG	ELECTRIC BUS	1	15GGD2811R3198796	SLO RTA	2024	39,310	\$1,060,000.00
RevenueVehicles	BU - Bus	2401	GILLIG	LOW FLOOR	1	15GGD2713R3200338	SLO RTA	2024	65,140	\$640,000.00
RevenueVehicles	CU - Cutaway Bus	1511	FORD	STARCRAFT E450	1	1FDDE4F54GDC09025	SLO RTA	2015	196,440	\$180,000.00
RevenueVehicles	CU - Cutaway Bus	1901	FORD	STARCRAFT E450	1	1FDDE4F55KDC21600	SLO RTA	2019	142,595	\$180,000.00
RevenueVehicles	CU - Cutaway Bus	1902	FORD	STARCRAFT E450	1	1FDDE4F57KDC26300	SLO RTA	2019	146,369	\$180,000.00
RevenueVehicles	CU - Cutaway Bus	1903	FORD	STARCRAFT E450	1	1FDDE4F59KDC26301	SLO RTA	2019	155,923	\$180,000.00
RevenueVehicles	CU - Cutaway Bus	1904	FORD	STARCRAFT E450	1	1FDDE4F59KDC26302	SLO RTA	2019	151,497	\$180,000.00
RevenueVehicles	CU - Cutaway Bus	1905	FORD	STARCRAFT E450	1	1FDDE4F59KDC26303	SLO RTA	2019	132,200	\$180,000.00
RevenueVehicles	CU - Cutaway Bus	1906	FORD	STARCRAFT E450	1	1FDDE4F59KDC26304	SLO RTA	2019	142,861	\$180,000.00
RevenueVehicles	CU - Cutaway Bus	1907	FORD	STARCRAFT E450	1	1FDDE4F59KDC26305	SLO RTA	2019	144,885	\$180,000.00
RevenueVehicles	CU - Cutaway Bus	1908	FORD	STARCRAFT E450	1	1FDDE4F59KDC26306	SLO RTA	2019	142,749	\$180,000.00
RevenueVehicles	CU - Cutaway Bus	1909	FORD	STARCRAFT E450	1	1FDDE4F59KDC26299	SCT	2019	108,077	\$180,000.00
RevenueVehicles	CU - Cutaway Bus	2031	FORD	STARCRAFT E450	1	1FDDE4FN6MDC15074	SLO RTA	2019	83,168	\$180,000.00
RevenueVehicles	CU - Cutaway Bus	2331	CHEVROLET	ARBOC	1	1HA6GUB78NN011454	SLO RTA	2022	35,327	\$230,000.00
RevenueVehicles	CU - Cutaway Bus	2332	CHEVROLET	ARBOC	1	1HA6GUB77NN011459	SLO RTA	2022	39,412	\$230,000.00
RevenueVehicles	CU - Cutaway Bus	2333	CHEVROLET	ARBOC	1	1HA6GUB70NN011464	SLO RTA	2022	37,351	\$230,000.00
RevenueVehicles	CU - Cutaway Bus	2334	FORD	STARCRAFT E450	1	1FDDE4FN1PDD37488	SLO RTA	2023	126,051	\$180,000.00
RevenueVehicles	CU - Cutaway Bus	2335	FORD	STARCRAFT E450	1	1FDDE4FN1PDD37474	SLO RTA	2023	119,056	\$180,000.00
RevenueVehicles	CU - Cutaway Bus	2431	FORD	STARCRAFT E450	1	1FDDE4FN6RDD43192	SLO RTA	2024	18,149	\$180,000.00
RevenueVehicles	CU - Cutaway Bus	A-27	FORD	STARCRAFT E450	1	1FDDE4FSXEDB20055	ATASCADERO	2015	84,150	\$180,000.00
RevenueVehicles	CU - Cutaway Bus	A-28	FORD	STARCRAFT E450	1	1FDDE4FS3HDC33737	ATASCADERO	2017	79,840	\$180,000.00
RevenueVehicles	CU - Cutaway Bus	A-29	FORD	STARCRAFT E450	1	1FDDE4FS1HDC78904	ATASCADERO	2018	90,794	\$180,000.00
RevenueVehicles	CU - Cutaway Bus	A-30	FORD	STARCRAFT E450	1	1FDDE4FS5HDC78906	ATASCADERO	2018	90,179	\$180,000.00
RevenueVehicles	MV - Mini-van	2051	DODGE	BRAUN ENTRAVAN	1	2C7WDGBG0KR798819	SLO RTA	2019	71,994	\$85,000.00
RevenueVehicles	MV - Mini-van	2052	DODGE	BRAUN ENTRAVAN	1	2C7WDGBG9KR798818	SLO RTA	2019	68,670	\$85,000.00
RevenueVehicles	MV - Mini-van	2053	DODGE	BRAUN ENTRAVAN	1	2C7WDGBG9KR798835	SLO RTA	2019	70,618	\$85,000.00
RevenueVehicles	MV - Mini-van	2054	DODGE	BRAUN ENTRAVAN	1	2C7WDGBG9KR801121	SLO RTA	2019	75,334	\$85,000.00
RevenueVehicles	MV - Mini-van	2055	DODGE	BRAUN ENTRAVAN	1	2C7WDGBG0KR799394	SLO RTA	2019	72,823	\$85,000.00
RevenueVehicles	MV - Mini-van	2056	DODGE	BRAUN ENTRAVAN	1	2C7WDGBG0KR801077	SLO RTA	2019	71,650	\$85,000.00
RevenueVehicles	MV - Mini-van	2057	DODGE	BRAUN ENTRAVAN	1	2C7WDGBG1KR808323	SLO RTA	2019	75,256	\$85,000.00
RevenueVehicles	MV - Mini-van	2151	DODGE	BRAUN ENTRAVAN	1	2C7WDGBG7KR800808	Paso DAR	2020	41,151	\$85,000.00
RevenueVehicles	MV - Mini-van	2152	DODGE	BRAUN ENTRAVAN	1	2C7WDGBG3KR800918	Paso DAR	2020	44,807	\$85,000.00
RevenueVehicles	MV - Mini-van	2351	CHRYSLER	VOYAGER	1	2C4RC1CG3NR163073	SLO RTA	2022	52,683	\$85,000.00
RevenueVehicles	MV - Mini-van	2352	CHRYSLER	VOYAGER	1	2C4RC1CG3NR171738	SLO RTA	2022	37,031	\$85,000.00
RevenueVehicles	MV - Mini-van	2353	CHRYSLER	VOYAGER	1	2C4RC1CG3NR171741	SLO RTA	2022	27,464	\$85,000.00
RevenueVehicles	MV - Mini-van	2451	CHRYSLER	VOYAGER	1	2C4RC1CG3NR224230	SLO RTA	2024	117,801	\$85,000.00
RevenueVehicles	MV - Mini-van	2452	CHRYSLER	VOYAGER	1	2C4RC1CG3NR212143	SLO RTA	2024	113,609	\$85,000.00
RevenueVehicles	MV - Mini-van	2453	CHRYSLER	VOYAGER	1	2C4RC1CG6NR212170	SLO RTA	2024	95,666	\$85,000.00
RevenueVehicles	RT - Rubber-tire Vintage Trolley	1013	DOUBLE K	VILLAGER	1	1F66F5DY7B0A04333	SLO RTA	2010	112,029	\$425,000.00
RevenueVehicles	RT - Rubber-tire Vintage Trolley	1707	DOUBLE K	VILLAGER	1	1F66F5DY0H0A10659	SLO RTA	2017	72,345	\$425,000.00

Appendix B: Asset Condition Data

B1: Revenue Vehicle Assets

Asset Category	Asset Class	Asset Name	Count	ID/Serial No.	Age (Yrs)	Vehicle Mileage	Replacement Cost/Value	Useful Life Benchmark (Yrs)	Past Useful Life Benchmark
RevenueVehicles	BU - Bus	1301	1	15GGD2714D1182291	12	590,076	\$1,300,000.00	12	Yes
RevenueVehicles	BU - Bus	1302	1	15GGD2716D1182292	12	527,863	\$1,300,000.00	12	Yes
RevenueVehicles	BU - Bus	1303	1	15GGD2718D1182293	12	614,825	\$1,300,000.00	12	Yes
RevenueVehicles	BU - Bus	1304	1	15GGD271XD1182294	12	592,681	\$1,300,000.00	12	Yes
RevenueVehicles	BU - Bus	1305	1	15GGD2711D1182295	12	558,186	\$1,300,000.00	12	Yes
RevenueVehicles	BU - Bus	1306	1	15GGD2713D1182296	12	590,111	\$1,300,000.00	12	Yes
RevenueVehicles	BU - Bus	1307	1	15GGD2715D1182297	12	613,256	\$1,300,000.00	12	Yes
RevenueVehicles	BU - Bus	1308	1	15GGB271XD1182298	12	521,324	\$1,300,000.00	12	Yes
RevenueVehicles	BU - Bus	1309	1	15GGB2711D1182299	12	523,534	\$1,300,000.00	12	Yes
RevenueVehicles	BU - Bus	1310	1	15GGB2714D1182300	12	529,928	\$1,300,000.00	12	Yes
RevenueVehicles	BU - Bus	1501	1	15GGD2719F1184847	10	558,951	\$1,300,000.00	12	No
RevenueVehicles	BU - Bus	1502	1	15GGD2710F1184848	10	525,448	\$1,300,000.00	12	No
RevenueVehicles	BU - Bus	1503	1	15GGD2712F1184849	10	521,723	\$1,300,000.00	12	No
RevenueVehicles	BU - Bus	1504	1	15GGD2719F1184850	10	533,404	\$1,300,000.00	12	No
RevenueVehicles	BU - Bus	1505	1	15GGD2710F1184851	10	497,379	\$1,300,000.00	12	No
RevenueVehicles	BU - Bus	1506	1	15GGD2712F1184852	10	460,493	\$1,300,000.00	12	No
RevenueVehicles	BU - Bus	1507	1	15GGD2714F1184853	10	459,655	\$1,300,000.00	12	No
RevenueVehicles	BU - Bus	1508	1	15GGD2716F1184854	10	546,131	\$1,300,000.00	12	No
RevenueVehicles	BU - Bus	1509	1	15GGB2710F1184855	10	442,154	\$1,300,000.00	12	No

Asset Category	Asset Class	Asset Name	Count	ID/Serial No.	Age (Yrs)	Vehicle Mileage	Replacement Cost/Value	Useful Life Benchmark (Yrs)	Past Useful Life Benchmark
RevenueVehicles	BU - Bus	1801	1	15GGD2715J3190447	7	358,540	\$1,300,000.00	12	No
RevenueVehicles	BU - Bus	1802	1	15GGD2717J3190448	7	354,450	\$1,300,000.00	12	No
RevenueVehicles	BU - Bus	1803	1	15GGD2719J3190449	7	333,525	\$1,300,000.00	12	No
RevenueVehicles	BU - Bus	1910	1	15GGD2710K3191300	6	318,433	\$1,300,000.00	12	No
RevenueVehicles	BU - Bus	1911	1	15GGD2712K3191301	6	296,370	\$1,300,000.00	12	No
RevenueVehicles	BU - Bus	1912	1	15GGD2714K3191302	6	324,110	\$1,300,000.00	12	No
RevenueVehicles	BU - Bus	2101	1	15GGD2711M3197061	4	161,223	\$1,300,000.00	12	No
RevenueVehicles	BU - Bus	2102	1	15GGD2713M3197062	4	159,166	\$1,300,000.00	12	No
RevenueVehicles	BU - Bus	2301	1	15GGD281XR3198795	1	46,816	\$1,060,000.00	12	No
RevenueVehicles	BU - Bus	2302	1	15GGD2811R3198796	1	39,310	\$1,060,000.00	12	No
RevenueVehicles	BU - Bus	2401	1	15GGD2713R3200338	1	65,140	\$640,000.00	12	No
RevenueVehicles	CU - Cutaway Bus	1511	1	1FDFE4FS4GDC09025	10	196,440	\$180,000.00	7	Yes
RevenueVehicles	CU - Cutaway Bus	1901	1	1FDFE4FS5KDC21600	6	142,595	\$180,000.00	7	No
RevenueVehicles	CU - Cutaway Bus	1902	1	1FDFE4FS7KDC26300	6	146,369	\$180,000.00	7	No
RevenueVehicles	CU - Cutaway Bus	1903	1	1FDFE4FS9KDC26301	6	155,923	\$180,000.00	7	No
RevenueVehicles	CU - Cutaway Bus	1904	1	1FDFE4FS9KDC26302	6	151,497	\$180,000.00	7	No
RevenueVehicles	CU - Cutaway Bus	1905	1	1FDFE4FS9KDC26303	6	132,200	\$180,000.00	7	No
RevenueVehicles	CU - Cutaway Bus	1906	1	1FDFE4FS9KDC26304	6	142,861	\$180,000.00	7	No
RevenueVehicles	CU - Cutaway Bus	1907	1	1FDFE4FS9KDC26305	6	144,885	\$180,000.00	7	No
RevenueVehicles	CU - Cutaway Bus	1908	1	1FDFE4FS9KDC26306	6	142,749	\$180,000.00	7	No
RevenueVehicles	CU - Cutaway Bus	1909	1	1FDFE4FS9KDC26299	6	108,077	\$180,000.00	7	No
RevenueVehicles	CU - Cutaway Bus	2031	1	1FDFE4FN6MDC15074	6	83,168	\$180,000.00	7	No
RevenueVehicles	CU - Cutaway Bus	2331	1	1HA6GUB78NN011454	3	35,327	\$230,000.00	10	No
RevenueVehicles	CU - Cutaway Bus	2332	1	1HA6GUB77NN011459	3	39,412	\$230,000.00	10	No
RevenueVehicles	CU - Cutaway Bus	2333	1	1HA6GUB70NN011464	3	37,351	\$230,000.00	10	No
RevenueVehicles	CU - Cutaway Bus	2334	1	1FDFE4FN1PDD37488	2	126,051	\$180,000.00	7	No

Asset Category	Asset Class	Asset Name	Count	ID/Serial No.	Age (Yrs)	Vehicle Mileage	Replacement Cost/Value	Useful Life Benchmark (Yrs)	Past Useful Life Benchmark
RevenueVehicles	CU - Cutaway Bus	2335	1	1FD FE4FN1PDD37474	2	119,056	\$180,000.00	7	No
RevenueVehicles	CU - Cutaway Bus	2431	1	1FD FE4FN6RDD43192	1	18,149	\$180,000.00	7	No
RevenueVehicles	CU - Cutaway Bus	A-27	1	1FD FE4FSXEDB20055	10	84,150	\$180,000.00	7	Yes
RevenueVehicles	CU - Cutaway Bus	A-28	1	1FD FE4FS3HDC33737	8	79,840	\$180,000.00	7	Yes
RevenueVehicles	CU - Cutaway Bus	A-29	1	1FD FE4FS1HDC78904	7	90,794	\$180,000.00	7	Yes
RevenueVehicles	CU - Cutaway Bus	A-30	1	1FD FE4FS5HDC78906	7	90,179	\$180,000.00	7	Yes
RevenueVehicles	MV - Mini-van	2051	1	2C7WDGBG0KR798819	6	71,994	\$85,000.00	5	Yes
RevenueVehicles	MV - Mini-van	2052	1	2C7WDGBG9KR798818	6	68,670	\$85,000.00	5	Yes
RevenueVehicles	MV - Mini-van	2053	1	2C7WDGBG9KR798835	6	70,618	\$85,000.00	5	Yes
RevenueVehicles	MV - Mini-van	2054	1	2C7WDGBG9KR801121	6	75,334	\$85,000.00	5	Yes
RevenueVehicles	MV - Mini-van	2055	1	2C7WDGBGXKR799394	6	72,823	\$85,000.00	5	Yes
RevenueVehicles	MV - Mini-van	2056	1	2C7WDGBGXKR801077	6	71,650	\$85,000.00	5	Yes
RevenueVehicles	MV - Mini-van	2057	1	2C7WDGBG1KR808323	6	75,256	\$85,000.00	5	Yes
RevenueVehicles	MV - Mini-van	2151	1	2C7WDGBG7KR800808	5	41,151	\$85,000.00	5	Yes
RevenueVehicles	MV - Mini-van	2152	1	2C7WDGBG3KR800918	5	44,807	\$85,000.00	5	Yes
RevenueVehicles	MV - Mini-van	2351	1	2C4RC1CG3NR163073	3	52,683	\$85,000.00	5	No
RevenueVehicles	MV - Mini-van	2352	1	2C4RC1CG3NR171738	3	37,031	\$85,000.00	5	No
RevenueVehicles	MV - Mini-van	2353	1	2C4RC1CG3NR171741	3	27,464	\$85,000.00	5	No
RevenueVehicles	MV - Mini-van	2451	1	2C4RC1CG3NR224230	1	117,801	\$85,000.00	5	No
RevenueVehicles	MV - Mini-van	2452	1	2C4RC1CG3NR212143	1	113,609	\$85,000.00	5	No
RevenueVehicles	MV - Mini-van	2453	1	2C4RC1CG6NR212170	1	95,666	\$85,000.00	5	No
RevenueVehicles	RT - Rubber-tire Vintage Trolley	1013	1	1F66F5DY7B0A04333	15	112,029	\$425,000.00	12	Yes
RevenueVehicles	RT - Rubber-tire Vintage Trolley	1707	1	1F66F5DY0H0A10659	8	72,345	\$425,000.00	12	No

Appendix B: Asset Condition Data

B2: Equipment Assets

Asset Category	Asset Class	Asset Name	Count	ID/Serial No.	Age (Yrs)	Vehicle Mileage	Replacement Cost/Value	Useful Life Benchmark (Yrs)	Past Useful Life Benchmark
Equipment	Forklift	523	1	67498	9	343	\$75,000.00	14	No
Equipment	Non Revenue/Service Automobile	520	1	1FMCU0F72FUA82168	10	64,009	\$52,000.00	8	Yes
Equipment	Non Revenue/Service Automobile	521	1	1FMCU0F71HUB03417	8	160,709	\$52,000.00	8	Yes
Equipment	Non Revenue/Service Automobile	525	1	1G1FY6S07P4139265	2	35,186	\$52,000.00	8	No
Equipment	Non Revenue/Service Automobile	528	1	1G1FY6S01P4189353	2	21,545	\$52,000.00	8	No
Equipment	Non Revenue/Service Automobile	529	1	1G1FY6S06P4189428	2	26,356	\$52,000.00	8	No
Equipment	Non Revenue/Service Automobile	530	1	1G1FY6S02P4193962	2	20,891	\$85,000.00	8	No
Equipment	Non Revenue/Service Automobile	531	1	1GYFY6S05P4193969	2	10,203	\$85,000.00	8	No
Equipment	Non Revenue/Service Automobile	532	1	1G1FY6S08P4195408	2	10,628	\$52,000.00	8	No
Equipment	Non Revenue/Service Automobile	533	1	1GYFY6S08P4187292	2	9,808	\$52,000.00	8	No
Equipment	Non Revenue/Service Automobile	534	1	1G1FY6S03P4193937	2	13,349	\$52,000.00	8	No
Equipment	Trucks and other Rubber Tire Vehicles	511	1	1FT7X2A60EEB27771	11	119,193	\$85,000.00	8	Yes
Equipment	Trucks and other Rubber Tire Vehicles	512	1	1FD7X2A62EEB27850	11	72,549	\$100,000.00	8	Yes
Equipment	Trucks and other Rubber Tire Vehicles	522	1	1FD7X2A66GED42246	9	114,567	\$80,000.00	10	No
Equipment	Trucks and other Rubber Tire Vehicles	524	1	1FTFX1C50MKD87727	4	65,703	\$100,000.00	10	No

Appendix B: Asset Condition Data

B3: Facilities Assets

Asset Category	Asset Class	Asset Name	Count	ID/Serial No.	Age (Yrs)	TERM Scale Condition	Replacement Cost/Value
Facilities	Maintenance	Bus Maintenance Facility (BMF) 253 Elks Lane, SLO 93401	1	253 Elks Lane, San Luis Obispo, CA 93401	4	5	\$24,000,000.00

Appendix C: Proposed Investment Project List

Project Year	Project Name	Asset/Asset Class	Cost	Priority
2025	Replace - 40ft Transit Buses - Electric (5)	RevenueVehicles	\$6,853,300.00	High
2025	Replace - Cutaway Medium Duty (1) - gasoline (#1909 NDAR)	RevenueVehicles	\$230,000.00	High
2026	Replace - Trolley Bus (County funded) (#1013)	RevenueVehicles	\$280,400.00	High
2026	Replace - 40ft Transit Buses - Electric (4) with 5339b Funds(#1305, #1308, #1309 & #1310)	RevenueVehicles	\$5,937,988.00	High
2026	Replace - Support Vehicle (non-revenue) - Maintenance Trucks (2) (#511 & #512)	Equipment	\$170,000.00	High
2026	Replace - Cutaway Medium Duty (4) - gasoline (#1901-1904)	RevenueVehicles	\$617,500.00	High
2026	Replace - Support Vehicle (non-revenue) - electric (1) (#521)	Equipment	\$45,600.00	High
2026	Replace - Cutaway Medium Duty (3) - gasoline (#1905-#1907)	RevenueVehicles	\$397,000.00	Medium
2026	Replace - Cutaway Medium Duty (1) - electric (#1908)	RevenueVehicles	\$130,000.00	Medium
2026	Replace - ADA Runabout Minivans (7) - (#2051-#2057)	RevenueVehicles	\$609,000.00	Medium
2026	Replace - Support Vehicle (non-revenue) - electric (1) (#520)	Equipment	\$46,600.00	Medium
2026	Replace - 40ft Transit Buses - Electric (3) with TIRCP/SB125 Funds (#1301, #1302, #1304)	RevenueVehicles	\$4,675,000.00	High
2027	Replace - ADA Runabout Minivans (2) - (#2151 & #2152)	RevenueVehicles	\$185,200.00	Medium
2027	Replace - Support Vehicle/Truck (non-revenue) - (1) (#522)	Equipment	\$76,900.00	Medium
2027	Replace - 40ft Transit Buses - Electric (2) (#1501 & #1502)	RevenueVehicles	\$3,149,500.00	Medium
2027	Replace - 40ft Transit Buses - Diesel (3) (#1503 & #1504 & #1505)	RevenueVehicles	\$2,212,100.00	Medium
2028	Replace - 40ft Transit Buses - Electric (1) (#1506)	RevenueVehicles	\$1,602,000.00	Medium
2028	Replace - 40ft Transit Buses - Diesel (3) (#1507 & #1508 & #1509)	RevenueVehicles	\$2,328,800.00	Medium

Project Year	Project Name	Asset/Asset Class	Cost	Priority
2028	Replace - Cutaway Medium Duty (2) - gasoline - Rte 15 (#2334 & #2335)	RevenueVehicles	\$466,200.00	Low
2028	Replace - Support Equipment (non-revenue) - Forklift (1) (#523)	Equipment	\$37,800.00	Low
2029	Replace - 40ft Transit Buses - Electric (1) (#1801)	RevenueVehicles	\$1,695,300.00	Low
2029	Replace - 40ft Transit Buses - Diesel (3) (#1802, #1803 & #1910)	RevenueVehicles	\$2,396,600.00	Low
2029	Replace - Trolley Bus (County funded) (#1707)	RevenueVehicles	\$350,000.00	Low

Appendix D: Fleet Replacement Module Output

Total in Current Year \$	\$23,475,000.00		\$540,000.00		\$3,110,000.00		\$0.00		\$785,000.00	
Total in Year of Expenditure \$	\$23,944,500.00		\$550,800.00		\$3,172,200.00		\$0.00		\$800,700.00	
	2026		2027		2028		2029		2030	
Fleet Type (Year/Make/Model)	Number	Cost in 2025 \$	Number	Cost in 2025 \$	Number	Cost in 2025 \$	Number	Cost in 2025 \$	Number	Cost in 2025 \$
2010 DOUBLE K VILLAGER	2	\$850,000.00								
2017 DOUBLE K VILLAGER	1	\$425,000.00							1	\$425,000.00
2010 THOR EZ RIDER										
2011 EL DORADO BRT					1					
2013 GILLIG LOW FLOOR										
2015 GILLIG LOW FLOOR					2	\$2,600,000.00				
2015 FORD STARCRAFT E450									2	\$360,000.00
2018 GILLIG LOW FLOOR	7	\$9,100,000.00								
2019 GILLIG LOW FLOOR	6	\$7,800,000.00								
2019 FORD STARCRAFT E450			3	\$540,000.00						
2017 FORD STARCRAFT E450										
2018 FORD STARCRAFT E450	3	\$540,000.00								
2019 DODGE BRAUN ENTRAVAN	2	\$170,000.00								
2020 DODGE BRAUN ENTRAVAN	2	\$170,000.00								
2021 GILLIG LOW FLOOR										
2022 CHRYSLER VOYAGER					6	\$510,000.00				
2024 GILLIG ELECTRIC	4	\$4,240,000.00								
2022 CHEVROLET ARBOC										
2023 FORD STARCRAFT E450	1	\$180,000.00								
2024 GILLIG LOW FLOOR	8									

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 3, 2025
STAFF REPORT**

AGENDA ITEM: A-7

TOPIC: RTA Public Transportation Agency Safety Plan (PTASP)

ACTION: Approve Plan Updates

PRESENTED BY: Omar McPherson, Operations Manager

STAFF RECOMMENDATION: Approve Updates to the Public Transportation Agency Safety Plan as Presented

BACKGROUND/DISCUSSION:

The *Moving Ahead for Progress in the 21st Century Act* (MAP-21) of 2012 granted the Federal Transit Administration (FTA) the authority to establish and enforce a comprehensive framework to oversee the safety of public transportation throughout the United States. That authority was reimplemented in subsequent transportation law (the *Fixing America's Surface Transportation Act* of 2015, and the *Bipartisan Infrastructure Law* of 2021).

As a component of this safety oversight framework, federal law requires recipients of FTA funding to develop and implement a Public Transit Agency Safety Plan (PTASP) that addresses performance measures, strategies, and staff training opportunities. MAP-21 expanded the regulatory authority of FTA to oversee safety, providing an opportunity for FTA to assist transit agencies in moving towards a more holistic, performance-based approach in *Safety Management Systems (SMS)*. SMS is an integrated collection of policies, processes and behaviors that ensures a formalized, proactive and data-driven approach to safety risk management. The aim of SMS is to increase the safety of transit systems by proactively identifying, assessing and controlling safety risks.

The FTA and the California Department of Transportation (Caltrans) provides guidance that strengthens the use of safety data to support management decisions, improves the commitment of transit leadership to safety, and fosters a culture of safety that promotes awareness and responsiveness to safety risks. The approach is flexible and scalable, so that transit agencies of all types and sizes can efficiently meet the basic requirements of MAP-21 and subsequent federal transportation law. In March 2020, to maintain local control and to ensure meaningful data is appropriately used, the RTA Board approved opting-out of the Caltrans statewide Agency Safety Plan and authorized the RTA Executive Director, serving as the designated PTASP Accountable

Executive, to draft and certify our own PTASP. The RTA has drafted our own PTASP consistent with and in support of an SMS approach to safety risk management.

At its May 2020 meeting, the RTA Board of Directors approved the inaugural PTASP to guide RTA's decisions through regular and comprehensive analysis of key safety indicators. Subsequently, the FTA issued revised guidance, and staff updated the PTASP to address the new requirements. The RTA Board approved the revised PTASP at its January 2024 meeting and then approved the annual changes that reflect whether or not RTA meeting the targets set for FY23-24 at its September 2024 meeting.

The currently proposed updates reflect what we learned for FY24-25 as to whether we are meeting the 2025 targets and if changes should be considered for 2026. This will be an annual process, as required by the FTA. The currently proposed amendments to the original PTASP can be considered ministerial and are listed as Appendix B of the attached document.

Staff Recommendation

Approve updates to the Public Transportation Agency Safety Plan as presented.



Public Transportation Agency Safety Plan (PTASP)

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY

A Small Public Transportation Provided

September 3, 2025

Revisions Dates:

May 6, 2020

January 11, 2023

September 6, 2023

August 25, 2025

¹ A small public transportation provider is a recipient or subrecipient of Federal financial assistance under 49 U.S.C. § 5307 that has one hundred (100) or fewer vehicles in peak revenue service and does not operate a rail fixed guideway public transportation system. 49 C.F.R. § 673.5.



Public Transportation Agency Safety Plan Revisions 2024-2025

Plan Development, Approval, and Updates

Development

The San Luis Obispo Regional Transit Authority drafted this plan. By signature below, the Accountable Executive confirms the development of this plan.

Accountable Executive/Geoff Straw

Date Signed

Approval

The San Luis Obispo Regional Transit Authority Board of Directors approved this plan as so indicated by the signature of the Board of Directors' Chair on the date noted below and as specified in Plan Approval and Self Certification of Compliance Signatures. [Appendix A](#) can be located on the RTA internal computer network; "G Drive", and on the employee "ADP" computer Network and the public website labelled "PTASP - RTA OPT-out letter" executed **September 3, 2025 Board Meeting**, website: www.slorta.org

San Luis Obispo Regional Transit Authority Board of Chair

Date Signed

Self-Certification

Public Transportation Agency Safety Plan (PTASP)
Plan Approval and Self-Certification of Compliance Signatures

The San Luis Obispo Regional Transit Authority PTASP was certified by the Accountable Executive, Geoff Straw, RTA Executive Director, on **September 3, 2025**, as is attested to by Public Transportation Agency Safety Plan (PTASP), which can be viewed and maintained at RTA Cross Street facility on the internal computer network, "G Drive", internal employee website, "ADP" and the public website: www.slorta.org.

Certification of Compliance on an annual basis	Public Transportation Agency Safety Plan (PTASP) Plan Approval	Date of Certification September 3, 2025
	Regional Transit Authority, Geoff Straw, Executive Director/PTASP Accountable Executive and San Luis Obispo Board of Directors	
	Relevant Documentation Appendix A	



Public Transportation Agency Safety Plan Revisions 2024-2025

Record of Revisions

Annual Review and Update of the Public Transportation Agency Safety Plan. A table that records the history of revisions made to the Agency's PTASP is contained in Appendix B of this document. The history of the changes was placed in the appendix to help preserve the page numbering to the extent possible.

Annual Review and Update of the Public Transportation Agency Safety Plan (PTASP)

The PTASP Committee will review RTA's PTASP:

- Annually, each year in July.
- During the Annual Review or during the year when identified the PTASP Committee will:
 - Determine if its approach to mitigating safety deficiencies is effective;
 - Makes significant changes to service delivery as necessary;
 - Introduce new processes or procedures that may impact safety;
 - Change or re-prioritize resources available to support Safety Management Systems (SMS); and/or
 - Significantly change its organizational structure.

Revisions will be submitted to the Board annually at their September Board Meeting in which the revision will be voted upon for approval. Amendments to the PTASP will be published to the employees and the public at large in accordance with RTA's standard communication process. The RTA internal computer network; "G Drive", and on the employee "ADP" computer Network and the public website: www.slorta.org : Board Meetings.

The RTA's PTASP Committee will consist of the Accountable Executive/Chief Safety Officer, Maintenance Manager, Operations Manager, Chief Financial Officer, Safety & Training Manager, Human Resources Administrator and a Vehicle Operator.

Safety Performance Targets

RTA developed safety performance targets that are reviewed monthly, bi-monthly or quarterly and updated annually. The specific performance targets are based on the safety performance measures established under the *National Public Transportation Safety Plan* and additional performance goals set by RTA outline in RTA's Strategic Business Plan.



Public Transportation Agency Safety Plan Revisions 2024-2025

Safety Performance Targets

The safety performance targets will be evaluated over a fiscal year period with a baseline year of Fiscal Year 2024-2025

Rates for the safety performance targets are calculated per 100,000 vehicle revenue miles.

VRM=Vehicle Revenue Miles

Mode of Transit Service	Fatalities (total)	Fatalities (per 100,000 VRM) Rate	Injuries (total)	Injuries (per 100,000 VRM) Rate	Safety Events (total)	Safety Events (per 100,000 VRM) Rate	System Reliability (VRM / failures)
Fixed Route Bus	0	0	0	0	18	1.51	40,978
ADA / Paratransit	0	0	0	0	1	.27	366,959

RTA has set additional safety performance measures with specify numerical targets and are based on the safety performance measures established by FTA in the National Public Transportation Safety Plan. These are listed in an Excel Spreadsheet under tab labeled, **#1 “Safety Hazard Identification”** and attached as Appendix C to help preserve the page numbering to the extent possible.

Safety Performance Target Coordination

Safety Performance Target Coordination

The San Luis Obispo Council of Governments (SLOCOG) is an association of local governments in the San Luis Obispo County region. ... SLOCOG is the designated regional transportation planning agency, metropolitan planning organization (MPO), regional census data affiliate and service authority for freeways and expressways. SLOCOG works in coordination with other regional agencies that include San Luis Obispo Regional Transit Authority, the Air Pollution Control District and the California Department of Transportation.

Targets Transmitted to the State	California Department of Transportation (Cal-Trans)	
Annually – November 2025 & November of each year, thereafter	Brian Travis Senior Transportation Planner RTAP and Legislative Management Caltrans Division of Rail and Mass Transportation PO Box 942874 Sacramento, CA 94274-0001 brian_travis@dot.ca.gov (916) 654-9842	Date Targets Transmitted
Targets Transmitted to the Metropolitan Planning Organization (s)	Metropolitan Planning Organization(s) Name San Luis Obispo Council of Governments (SLOCOG) Annually – November 2025 for 2024-25 changes & November of each year, thereafter	Date Targets Transmitted

San Luis Obispo Regional Transit Authority

SAFETY HAZARD IDENTIFICATION MATRIX FYI 2024-2025

[Hazard Identification.xlsx](#)

Tab #1	The Safety Performance Matrix allows Regional Transit Authority RTA to organize, monitor and evaluate identified safety goals and objectives/outcomes.				
	Completed by: Patricia Grimes	Last Updated: August 22, 2025	49C.F.R. §673.25(C)(1)	§673.11(a)(3)	
	OBJECTIVE/OUTCOME Develop a corrective action plan and mitigation strategies to address identified hazards	METRICS Percent of corrective action strategies completed per specified period of time	BASELINES Identify Baseline A baseline is a point in time measure of a known performance level used as reference for subsequent measurements. A minimum or starting point used for comparison.	SAFETY PERFORMANCE TARGETS A level of performance we are aiming to reach in the future.	Met/Not Met
SMS Goal	GOAL 1: SMS TO REDUCE CASUALTIES/OCCURRENCES RTA/SoCo/Paso will utilize a safety management systems framework to identify safety hazards, mitigate risk and reduce casualties and occurrences resulting from transit operations.				
1	Safety Officer, and Safety & Training Manager	3 years of Transit Safety and Training experience, Transit Safety and Security Program (TSSP) certification. Within three years. Bus Curriculum FTA Office of Safety and Oversight Recommendation • Transit Bus System Safety Certification Training Program website <input type="checkbox"/> Fundamentals of Bus Collision Investigation <input type="checkbox"/> SMS Awareness Transportation Safety Institute (TSI) <input type="checkbox"/> SMS Safety Assurance <input type="checkbox"/> SMS Principles for Transit	FY 2023-2024 Achieved Performance Target 2023 - One RTA Employee: TSSP Certification • High school diploma or equivalent, required. • TSI Safety Certification required.	Transit professional that successfully completes the four (4) required courses within a consecutive three (3) year timeframe is eligible.	
2	Fatality of any person when related to the movement of a transit vehicle. The total number of injuries and fatalities is the total number of reportable injuries and fatalities per total vehicle revenue miles. The total number (includes non-preventable incidents)	RTA 1,352,742 revenue miles per year	FY 2023-2024 RTA 0 – Zero Fatalities Achieved Performance Target (0)	Zero fatalities 15 year period	
3	Reduce the number Third Party Injuries- such as; collision, bike, pedestrian	Measured by annual claims rate. Third Party Injuries- such as; collision, bike, pedestrian	FY 2023-2024 zero third party injury claims (1)	NO more than 2 annually	
4	Reduce the number of Passenger transit related injuries	Measured by annual Accident/Incident Reports or claims rate and severity Review Quarterly	FY 2023-2024 3 injures reported	Reduce by 50% or no more than 10 injuries	
5	Reduce the number of Operator related injuries	All work comp claims are reported to RTA carrier and investigated immediately. Measured Worker Comp claims rate and severity. Review Quarterly with Strategic Business Plan.	FY 2023-2024 4 Driver Injury Claims filed. Severity is Marginal (5)	No more 5 injuries - Severity is Marginal	
6	Reduce the number of Mechanic/Utility related injuries	All work comp claims are reported to RTA carrier and investigated immediately. Measured Worker Comp claims rate and severity. Review Quarterly with Strategic Business Plan.	FY 2023-2024: 0 Mechanic/Utility Achieved Performance Target (0)	Not to exceed 1 - annually	
7	Reduce the number of Administrative Employee injuries	All claims are reported to RTA carrier and investigated immediately. Review Quarterly with Strategic Business Plan.	FY 2023-2024: Zero Injury Claims Filed Performance Target (3)	Not to exceed 1 - annually	
8	All Employee (Preventable) workers compensation lost-time claims	All work comp claims are reported to RTA carrier and investigated immediately. Measured Worker Comp claims rate and severity.	FY 2023-2024: 7 Preventable lost time claims Severity is Marginal (8)	No more than 6- Preventable lost time claims, annually - Severity is Marginal FY 2021-2022	
9	All Employee (Preventable) incident-only claims	All work comp claims are reported to RTA carrier and investigated immediately. Measured Worker Comp claims rate and severity.	FY 2023-2024- 8 Preventable (9) first aid only /incidents/medical only. Severity is Marginal	No More than 5 - Preventable medical only, annually - Severity is Marginal - First Aid only	

	OBJECTIVE/OUTCOME Develop a corrective action plan and mitigation strategies to address identified hazards	METRICS Percent of corrective action strategies completed per specified period of time	BASELINES Identify Baseline A baseline is a point in time measure of a known performance level used as reference for subsequent measurements. A minimum or starting point used for comparison.	SAFETY PERFORMANCE TARGETS A level of performance we are aiming to reach in the future.	Met/Not Met
SMS Goal	GOAL 2: Safety Events	The total number of reportable events and rate per total in service revenue vehicle miles by all modes of service (fixed route and paratransit, Dial-A-Ride). (Typically reported safety violations, customer safety related complaints, employee close call / near miss reporting, etc.)			
10	Fixed Route Preventable vehicle collisions.	Rate of preventable vehicle collisions will not exceed 1.0 per 100,000 revenue service miles Review Monthly	FY 2023-2024: 12 incidents .77% Rate of preventable vehicle collisions will not exceed 1.0 per 100,000 miles.	Reduce by 50% or 1 incident 2023-2024=12 incidents .77%	
11	Demand Response Preventable vehicle collisions	Measured by monthly Preventable collision Reports and revenue service miles annually	FY 2023-2024 4.35% = 1 incident	Reduce by 50% or 1 incident	
12	Backing Transit Vehicles related to the movement of a transit vehicle	Measured by monthly Preventable collision Reports and revenue service miles annually	FY 2023-2024: 26.09%, Total of 6 preventable collisions 2023-2024 Fixed Route 0 Demand Response =2	NO more than 1 annually/reduce by 50%	
13	Fixed Objects related to the movement of a transit vehicle	Measured by monthly Preventable collision Reports, and revenue service miles annually	FY 2023-2024 5 incidents 21.47--74%	2023-2024 5 incidents 21.47--74%	
14	Safety Resource Committee Reports	Address all safety hazards identified by the Safety Resource Committee. Monitored and tracked agenda items are completed- closed-out. Meets Every other month, on the first Tuesday of the month. Bi-Monthly	FY 2023-2024 Achieved Performance Target 4 open action items remaining on the agenda at the end of the fiscal year	No more than 10 open action items on the agenda at the end of each fiscal year. Complete items as soon as reported or in a timely manner.	
15	Service Delivery rate for all regularly-scheduled / year-round services	Scheduled fixed route bus trip is delivered ahead of the next scheduled bus trip, then service is considered "delivered". Review Quarterly	2023-2024- RTA missed a total of 49 trips for FY24, which is a 99% delivery rate.	99% or greater Reviewed quarterly by Operations. Reported bi-annually by the Executive Director to the Board.	
16	On-Time Performance Fixed Route	On-time" is defined as no later than six minutes from any time point in the published schedule. Review Quarterly	2023-2024- 85% Average	85% or greater on time performance fixed route and Route deviation services 70% or greater	
17	On-Time Performance Paratransit	on-time if the van arrives within 30 minutes of the appointed pick-up time. Review Quarterly	FY 2023-2024 99% Average	Runabout and other demand response services shall be 95% or greater.	
18	Annual fiscal and compliance audit findings. and 2026 FTA Triennial Audit	Finance and Administration will report any negative audit findings to the RTA Board.	FY 2023-2024 Achieved Performance Target	No significant annual fiscal and compliance audit findings.	
19	Customer and community perception of system safety	Due to COVID unable to conduct customer survey	Calendar Year 2024 Short Range Transit Plan Delayed 2024	Based on Community Perception Survey At least 90% overall Rating system safety.	
20	Total risk management costs	Reported monthly in financials and YTD budget. Reported bimonthly to the RTA Board meetings.	FY 2023-2024 9.7% of total operating cost.	Not exceed 10% of total annual operating cost	
21	Recruit, promote and retain highly qualified employees to achieve our service standards. Increase employee safety training opportunities and attendance	Provide continuous development of skills and capabilities through ongoing training and development programs. Ongoing Department Heads develop training plans as part of annual budget-making process, according the following minimum standards: Strategic Business Plan	FY 2023-2024 Achieved Performance Target	A. Maintenance: 30 Hours per technician annually. B. Operations Supervisors: 24 Hours annually. C. Finance and Administration: 16 Hours per employee annually.	
22	Bus Operator Training	Training Manual and Content based on policies, procedures, state and federal laws and regulations. Completed all mandated for employees annually. Six-week training program for all newly hired bus operators.	FY 2022-2023: Achieved Performance Target	A. State-mandated minimum of 8 hours of Verification of Transit Training annually. B. Six-month refresher for new Bus Operators. C. Focused and customized training designed specifically for Bus Operators at second anniversary. D. Retraining as requested	

	OBJECTIVE/OUTCOME Develop a corrective action plan and mitigation strategies to address identified hazards	METRICS Percent of corrective action strategies completed per specified period of time	BASELINES Identify Baseline A baseline is a point in time measure of a known performance level used as reference for subsequent measurements. A minimum or starting point used for comparison.	SAFETY PERFORMANCE TARGETS A level of performance we are aiming to reach in the future.	Met/Not Met
23	Fatigue Awareness	Fatigue is the state of feeling very tired, weary or sleepy resulting from insufficient sleep, prolonged mental or physical work, or extended periods of stress or anxiety. Boring or repetitive tasks can intensify feelings of fatigue. Fatigue can be described as either acute or chronic.	FY 2023-2024: Achieved Performance Target	Continue with training, awareness and current programs. Maintain effective procedures to ensure employee fitness for duty and medical qualification. Employee Health Incentives, Outside Employment Tracking, Comply with state and federal laws, hours of service, Employee Assistance Hotline. Pre-employment, for cause, random, drug testing, and pass DOT physical examination.	
24	Assault Prevention	We continually stress the tenets of Verbal Defense and Influence. Employee Health Incentives, Outside Employment Tracking, Comply with state and federal laws, hours of service, Employee Assistance Hotline. Pre-employment, for cause, random, drug testing, and pass DOT physical examination. Focused how to communicate more effectively with each other and our customers – particularly in difficult or threatening situations. Training drivers and staff regarding Mental Health and Human Trafficking Situations	FY 2023-2024: Achieved Performance Target	Review and train as needed. Discussions during Monthly Operations Staff Meetings, Maintenance Meetings, and Department Heads meetings	
25	Employee Performance	Grading measurement of attainment of department objectives developed during the budget process and achievement of RTA's Standards and RTA's KPIs	FY 2023-2024: Achieved Performance Target	Employees will be evaluated annually. Goals and Objectives established previous year	
26	Bus Operators Evaluations	On Board, Follow Behind and Yard Check Evaluations to ensure the public's safety.	FY 2023-2024: Achieved Performance Target Based on Collective Bargaining Agreement (CBA) and Both Technicians and Bus Operators are evaluated as part of the RTA Safety Awards program. Bus Operator Driver matrix	Conduct individual evaluations annually. Safety Award on anniversary dates. Must meet RTA/SoCo performance standards. Employee retraining as needed.	
27	Fixed Route Fleet Road Calls - System Reliability	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. 5.0 per 1000,000 miles is Industry Standards-The RTA uses the same definition of a road call as used in the National Transit Database. Strategic Business Plan. Review Quarterly	FY 2022-2023: 4.83	Road calls will not exceed Standard 5.0 per 100,000 vehicle service miles. Reasonable measures are based on past and present performance data and trends. Tracked and reported by the Maintenance Department, and reported bi-annually to the RTA Board. Strategic Business Plan	
28	Demand Response Fleet Road Calls - System Reliability	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. 5.0 per 1000,000 miles is Industry Standards-The RTA uses the same definition of a road call as used in the National Transit Database. Strategic Business Plan. Review Quarterly	FY 2023-2024: 1.67	Road calls will not exceed Standard 5.0 per 100,000 vehicle service miles. Reasonable measures are based on past and present performance data and trends. Tracked and reported by the Maintenance Department, and reported bi-annually to the RTA Board. Strategic Business Plan	
29	Achieve all federal and state-mandated maintenance minimums, as well as vendor recommended maintenance schedules, for our fleet and facilities.	Preventative maintenance schedules for all equipment shall be done on a timely basis (3,000 mile intervals or as mandated by equipment OEM vendor).	FY 2023-2024: Achieved Performance Target No significant findings in area for all listed categories	No significant findings during the CHP Annual Terminal Inspection. FYI: 2025-2026 FTA Triennial Review or TDA Triennial Performance Audit findings. Reported annually to the RTA Board.	

	OBJECTIVE/OUTCOME Develop a corrective action plan and mitigation strategies to address identified hazards	METRICS Percent of corrective action strategies completed per specified period of time	BASELINES Identify Baseline A baseline is a point in time measure of a known performance level used as reference for subsequent measurements. A minimum or starting point used for comparison.	SAFETY PERFORMANCE TARGETS A level of performance we are aiming to reach in the future.	Met/Not Met
SMS Goal	GOAL 3: CULTURE				
	TRANSIT AGENCY will foster agency-wide support for transit safety by establishing a culture where management is held accountable for safety and everyone in the organization takes an active role in securing transit safety.				
30	Hazards	Building Design walkway employee parking through bus yard to operations building.	FY 2023-2024 Achieved Performance Target Placed Speed Limit Sign in yard and directional arrows. Stops Signs in employee parking lot	Review annually for hazards	
31	Establish regular transit safety meetings comprised of staff at varying levels, including executives, officers, managers, operators and maintenance personnel	Safety Committee/Employee Suggestion Report Meetings and Collision Prevention Team/PTASP meetings	FY 2023-2024 Achieved Performance Target Meetings are held the second Tuesday every other month. Collision Prevention Team/PTASP meetings are held the third Wednesday of every month	Assigned tasks to appropriate department member, follow up, agenda items monitored and tracked and completed.	
32	Develop and promote a Non-Punitive Reporting Policy	100% of staff receiving Non-Punitive Reporting Policy - Safety Suggestion Forms	FY 2023-2024 Achieved Performance Target Non-Punitive with the exception of violating Drug & Alcohol Policy (positive testing results), Violation of Sexual Harassment or Policy Against Violence in the Workplace or false accusations of any policy listed above.	Encourage all employees to participate in Reporting, follow up agendas printed for all employees at all locations after meetings.	
33	Increase the reporting of near miss occurrences and incidents that would otherwise go unreported	Number of near miss occurrences. Incidents reported or per specified period of time	FY 2023-2024 Total # (5) reported Achieved Performance Target	No more than 10 reported incidents, safety issues or customer service valid complaints.	
34	Increase safety material distributed amongst employees and the general public	Manuals, brochures, posters or Safety Campaign Posters, distributed (monthly, bi-monthly, quarterly, annually). Operations Supervisor/Dispatcher Monthly Meetings, Administrative Monthly Meetings, Mechanic Monthly Meetings, Utilities Monthly Meetings, Facility Inspection Checklists (monthly, bi-monthly, quarterly, annually) Onboard Bus Car Cards, ADP Website for employees, Public Website	FY 2023-2024 Achieved Performance Target New Fleet, Cal-Tip Training, Safety Posters-	Training New Fleet to all drivers, Monthly Safety Posters, Two Full Day Cal-Tip Training Classes annually Maintain current information on Collision electronic board and bulletin boards	
SMS Goal	GOAL 4: SYSTEMS/EQUIPMENT:				
	TRANSIT AGENCY will provide a safe and efficient transit operation by ensuring that all vehicles, equipment and facilities are regularly inspected, maintained and serviced as needed.				
35	Scheduled preventative maintenance	Monthly, Semi- annually and annually preventative maintenance inspections are completed and per specified period of time or specified vehicle mileage	FY 2023-2024 - Achieved Performance Target There were no significant findings;TDA Triennial Performance Audit nor in the last FTA Triennial Review. Preventable maintenance has been completed on a timely basis, with no significant CHP findings. All inspections are documented and filed	FY 2025-2026 Next TDA Triennial Performance Audit and FTA Triennial Review. No significant findings or the annual CHP audits.	
	Facility/Property Damage				



Appendix B

Annual Review and Update of the Public Transportation Agency Safety Plan

Described below are the process and timeline for conducting an annual review and update of the Public Transportation Agency Safety Plan.

Regional Transit Authority management will review the PTASP annually, update the document as necessary, and implement the changes within a timeframe that will allow the agency to timely submit the annual self-certification of compliance to the California Department of Transportation (CA DOT), Federal Transit Administration (FTA). Annual self-certification will consist of the Executive Director signing and dating page 1 of this document and submitting to CA DOT for review. RTA as part of the PTASP review will conduct the annual review of the PTASP in **July** of each fiscal year. Necessary updates outside the annual update window will be handled as PTASP addendums, which will be incorporated in the body of the PTASP. Reviews of the PTASP by the local agency, any subsequent updates and addendums, adoption, and distribution activities will be documented in the PTASP Document Activity Log included at the beginning of this document.

Record of Revisions

A table that records the history of revisions made to the agency's PTASP is contained in the table that follows. The history of the changes was placed in this appendix to help preserve the page numbering to the extent possible.

Version Number and Updates Record the complete history of successive versions of this plan			
Version Number	Section/Pages Affected	Activity- Reason for Change (Review/Update/Addendum/Adoption/Distribution)	Date Issued
5	Cover Page	Current Revision Date – Month and Year	08/25/2025
5	Appendix B	Annual Review of the PTASP in July of each Fiscal Year	08/25/2025
5	Page 3	Revisions will be submitted to the Board annually at their September Board Meeting	08/25/2025
5	Page 3	Update Safety Performance Targets to Baseline Year	08/25/2025
5	Page 9	Hazard Identification (Tab #1) Appendix C	08/25/2025
5	Page 3	Appendix C #24 added "Assault Awareness"	12/2024
5	Page 1	Appendix C #8, #9 added the word "Preventable"	12/2024
4	Cover Page	Current Revision Date – Month and Year	08/26/2024
4	Appendix B	Annual Review of the PTASP in July of each Fiscal Year	08/26/2024



Appendix B

Annual Review and Update of the Public Transportation Agency Safety Plan

4	Page 3	Revisions will be submitted to the Board annually at their November Board Meeting	09/04/2024
4	Page 3	Update Safety Performance Targets to Baseline Year	08/26/2024
4	Page 7	Safety Management Policy Communication Insert data dates 2024/2025	09/04/2024
4	Page 7	Board to Adopt September 4, 2024 and publishing to the public and all RTA employees at large in accordance with RTA's standard communication process.	09/04/2024
4	Page 7	RTA Organizational Chart Appendix E	08/26/2024
4	Page 8	Safety Resource Committee Suggestion Form update Contact Information Appendix H	08/26/2024
3	Page 9	Hazard Identification (Tab #1) Appendix C	08/26/2024
3	Page 10	Risk Log (Tab #2) Appendix C	08/23/2024
3	Page 10	Updated Annually Monitored Monthly (Tab #3) Appendix C	08/23/2024
3	Appendix B	End of Fiscal Year all Statistics Compiled	08/26/2024
3	Appendix C	Plan Updated Annually Monitored Monthly (Tab #3)	08/23/2024
3	Appendix E	RTA Organizational Chart	08/26/2024
3	Appendix F	Prioritize Safety Risk Log	08/23/2024
3	Appendix H	Employee Suggestion Form Contact person change	08/26/2024

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 3, 2025
STAFF REPORT

AGENDA ITEM: A-8

TOPIC: Strategic Business Plan Results

PRESENTED BY: Geoff Straw

STAFF RECOMMENDATION: Receive and File the SBP Results through June 2025

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.

With the adoption of the Short-Range Transit Plan (SRTP) at the May 7, 2025 Board meeting, staff reviewed the recommended revised performance standards that we can use to measure progress. In addition to incorporating the recommendations included in the SRTP, staff streamlined the references to the various services the RTA operates. Below is a summary of the recommended updates:

Standards of Excellence Section 1: Service Quality and Efficiency

1. Standard 1 – updated the productivity standards to peer average

Standards of Excellence Section 2: Revenue and Resources

1. Add Standard 5 – the cost-per-passenger for all regularly scheduled/year-round services

The SRTTP peer agencies did not have this information broken up by service type other than Runabout so the standard was added based on current performance.

2. Add Standard 6 – the cost-per-vehicle revenue hour for all regularly scheduled/year-round services

The SRTTP peer agencies did not have this information broken up by service type other than Runabout so the standard was added based on current performance.

It should be noted that with the update to the Service Quality and Efficiency Standard 1, the services the RTA operates are now more in line with peer averages. Previously the standards were established based on overly ambitious staff goals, especially after the impacts on ridership caused by the COVID-19 pandemic.

Staff also worked with the fiscal auditor on the farebox recovery ratio calculation. Previously it was noted the RTA struggled to meet the standard. Due to the global pandemic, the California legislature passed AB 149 which authorizes transit operators to include federal operating grant funds as local funds for the purpose of computing farebox recovery ratios. In FY23-24 and FY24-25 the RTA noted the federal 5307 operating funds as part of the other local support for the farebox calculation. This has resulted in the farebox recovery ratio for all regularly scheduled/year-round services being greater than the minimum standard required by SLOCOG to meet TDA requirements.

Staff Recommendation:

Receive and file the SBP results through June 2025.

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 10 or greater.
- B. Route deviation services (such as RTA Route 15) will be 2 or greater.
- C. Local fixed-route (Paso Robles Routes A & B, and South County Routes 21, 24, 27 & 28) shall be 10 or greater.
- D. Runabout and other demand response services will be 2 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 Robles	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
South County	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	14	14.8	14.8	15.9	15.7	14.2	15.49
Route Deviation	3.1	4.4	3.3	3.8	3.7	3.3	3.4	3	3.4	3.3	2.9	3.7	3.4
Paso Express	18.8	23.7	28	27.5	24.5	25.4	24.4	22.7	24.1	23.6	28	21.7	24.4
SCT Fixed	12.5	13.1	13.1	13	12.4	12.3	12	11.4	12.4	13.1	12.8	12.2	12.5
Runabout	1.3	1.6	1.3	1.3	1.3	1.2	1.2	1.2	1.2	1.2	1.1	1.2	1.3
Paso DAR	1.7	1.7	2	2	1.7	1.6	1.7	1.7	1.4	1.7	1.7	1.4	1.7
Nipomo DAR	1.8	2.4	3	2.9	2.8	2.6	2.3	2.4	2.5	2.2	2.9	1.8	2.5

The tables above show that we did not meet the standards for Runabout for FY24. However, RTA intercity fixed-routes, Route 15 deviated fixed-route, Paso Robles local fixed-routes, Nipomo DAR and Paso DAR met the standards. In comparing FY25 to FY24,

the difference is that we didn't meet the standard for Runabout and Paso DAR. Overall ridership is modestly trending upwards, and staff will continue to evaluate 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 FY24-25, RTA missed 24 trips and Paso Robles local fixed-routes missed 17 trips and South County local fixed-routes missed 11, resulting in an overall 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%
South County	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%	87%	90%	91%	86%	88%	87%	86%
Paso	90%	88%	87%	92%	89%	89%	89%	93%	94%	94%	93%	95%	91%
Route 15	84%	83%	84%	87%	85%	88%	87%	93%	92%	91%	94%	94%	88%
SCT	85%	83%	83%	85%	86%	89%	89%	86%	90%	89%	87%	89%	87%

For FY24, RTA intercity and Paso Robles local fixed-route services did not meet standards, but the Route 15 and South County local fixed-routes met the standard with a result of 85%. For FY25 all standards were met. Although all standards were met, 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, with a 99% on-time average. Staff will continue to monitor Runabout's OTP to ensure we continue to achieve 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 and FY24-25, 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 local Route A in the afternoon due to the large number of high school and junior high students riding. 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 92.0% of the adopted budget (net of depreciation and pension expense/GASB 68 adjustment) **(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 16% greater than the minimum standard required by SLOCOG to meet TDA requirements.

Measurement: Objective.

- Tracked monthly and reported bimonthly to the RTA Board.

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

FY20-21 Result: 3.5% (including Paso Robles local routes and South County local routes from January 1 – June 30, 2021) – COVID-19 pandemic limited fare period

FY21-22 Result: 8.2% (including Paso Robles local routes and South County local routes)

FY22-23 Result: 8.7% *(including Paso Robles local routes and South County local routes)*
(net of depreciation and pension expense/GASB 68 adjustment)

FY23-24 Result: 8.9% *(including Paso Robles local routes and South County local routes)*
(net of depreciation and pension expense/GASB 68 adjustment) – 44.2% after
factoring in FTA 5307 operating funds

FY24-25 Result: 9.1% *(including Paso Robles local routes and South County local routes)* ,
(net of depreciation and pension expense/GASB 68 adjustment) unaudited, –
38.8% after factoring in FTA 5307 operating funds

In recent years, the RTA has struggled to meet this standard. Due to the global pandemic, the California legislature passed AB149 which authorized transit operators to include federal grant funds as local funds for the purpose of computing fare revenue ratios. In FY23-24 and FY24-25 the RTA noted the FTA 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.

Standard 5: The cost-per-passenger for all regularly scheduled / year-round services shall be:

- A. Regional intercity fixed-route (RTA Routes 9, 10, 12 & 14) services shall be \$16 or less.
- B. Route deviation services (such as RTA Route 15) will be \$80 or less.
- C. Local fixed-route (Paso Robles Routes A & B, and South County Routes 21, 24, 27 & 28) shall be \$12 or less.
- D. Runabout and other demand response services will be \$140 or less.

Measurement: Objective.

- Tracked monthly and reported bimonthly to the RTA Board.

Cost-Per-Passenger		
Service	FY23-24	FY24-25
RTA Fixed	15.20	15.07
Route Deviation	63.13	71.26
Paso Robles	7.01	5.97
South County	12.51	12.38
Runabout	138.73	145.15
Paso DAR	71.87	75.98
Nipomo DAR	67.26	57.00

Standard 6: The cost-per-vehicle revenue hour for all regularly scheduled / year-round services shall be:

- Regional intercity fixed-route (RTA Routes 9, 10, 12 & 14) services shall be \$225 or less.
- Route deviation services (such as RTA Route 15) will be \$235 or less.
- Local fixed-route (Paso Routes A & B, and South County Routes 21, 24, 27 & 28) shall be \$165 or less.
- Runabout and other demand response services will be \$185 or less.

Measurement: Objective.

- Tracked monthly and reported bimonthly to the RTA Board.

Cost-Per-Vehicle Revenue Hour		
Service	FY23-24	FY24-25
RTA Fixed	225.53	233.45
Route Deviation	235.76	244.94
Paso Robles	157.17	145.60
South County	164.20	154.91
Runabout	187.38	181.97
Paso DAR	140.64	129.59
Nipomo DAR	158.69	141.98

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/South County

FY22-23 Result: 1.75 Combined

FY23-24 Result: 0.77 Combined

FY24-25 Result: 1.22 Combined

Bus Operators are held to a higher safety standard than general public drivers. Staff continues to track this KPI closely. We have assembled an internal 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, the Safety Resource Committee closed 37 action items, with 13 open action items and two recurring items remaining. The action-items included:

1. Installation of dimmer switches on the ARBOC vehicles to reduce glare on windshield,
2. Reprogramming the kneeler switches on the ARBOCs so drivers can kneel the vehicle before opening the doors to reduce the risk of passengers tripping while stepping into vehicle.
3. Installation of big mirrors at the bus exit gate so drivers can check brake and reverse lights.
4. New red tape for 44" height limit allowing kids per paying adult to ride free were placed in fixed route vehicles.
5. 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.
6. A few bus stop lights were fixed so passengers are visible during hours of darkness.
7. RTA employees continue to demonstrate attentiveness and communication in mitigating hazards and engage in improving the quality of our work environment.
8. The Committee continues to address difficult locations on fixed-route services by working with the jurisdictions to ensure bus stops are easily accessible.
9. 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 (one is open as of July 31, 2025), 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 July 31, 2025), and 8 first aid/incidents/medical-only (they are all closed)

FY23-24 Result: 9 lost-time claims (two are open as of July 31, 2025) and 9 first aid/incidents/medical-only (they are all closed)

FY24-25 Result: 7 lost-time claim (four are open as of July 31, 2025) and 12 first aid/incidents/medical-only (they are all closed)

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. A follow up survey is anticipated to be completed in the spring of 2026.

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: 10.7% of total operating costs (net of depreciation and pension expense/GASB 68 adjustment) **(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 closely monitors 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%
2025 – 6%

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 to 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, our Mechanics averaged 29.25 hours per person, including training for Lift-U, Thermo-King, Allison HUB, Electric Vehicle HVAC, CHP Inspection, CARB Compliance, and Rules of the Road.

In FY23-24, our Mechanics averaged 20 annual 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, the average was 32 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),
 - DMV Examiner Training, and
 - Customer service skills training
- Bus Operator training: Besides the required 8 hours of annual Verification of Transit Training, Bus Operators have received a combined total of 355 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,
 - Ten Bus Operators completed new hire training through June, 2025,
 - 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,
 - Eight applicants attended DMV Permit Study Classes with the Training staff, and
 - Forty-five Bus Operators attended CalTIP de-escalation training

- 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, NTD Understanding GTFS Data Requirements, LCTOP Allocation Request Workshops, CSFMO lunch and learn, Insight Studio Workshop - Celebrating Inclusive Business Practices, 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 with 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.

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. The RTA also completes formal annual evaluations for administration and management staff not covered by the CBA.

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 June 30, 2025 the average age of our 30 fixed-route vehicles is 9 years with an average of 422,106 miles per vehicle. The average age of our 40 demand-response vehicles (including Runabout and other Dial-A-Ride vans) is 5 years with an average of 77,051 miles. We are currently within the RTA’s vehicle life standards.

Staff worked closely with our Short-Range Transit Plan consultants and partner agencies to update the SRTP, which was adopted in May 2025. 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.

We experienced 10 major mechanical system failures and 19 other mechanical system failures in FY24-25. This equates to 2.44 failures per 100,000 vehicle revenue miles for fixed-route buses and .27 for demand response vans.

As a comparison, we experienced 18 major mechanical system failures and 25 other mechanical system failures in FY23-24. This equated 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%. A follow up survey is anticipated to be completed in the spring of 2026.

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 SRTP passenger survey conducted in October 2023, 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.

Bus stop location was also included in the October 2023 SRTP survey, and we achieved a ranking of 4 out of 5, which equates to 80%.

A follow up survey is anticipated to be completed in the spring of 2026.

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 carried out 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 August 2025 (still awaiting final report). 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 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 full fare-sharing

agreement (only usable on SMRT's proposed new Route 210 Express buses) 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 consolidated local transit services into the RTA in June 2025, demonstrating 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 have embarked 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
SEPTEMBER 3, 2025
STAFF REPORT

AGENDA ITEM: A-9

TOPIC: Procurement of Heavy-Duty Alignment Machine for the Bus Maintenance Facility

PRESENTED BY: Geoff Straw, Executive Director

STAFF RECOMMENDATION: Authorize Executive Director to Issue a Purchase Order with Mohawk Lifts, LLC to Procure a Heavy-Duty Alignment Machine at a cost not-to-exceed \$58,765

BACKGROUND/DISCUSSION:

The RTA has been awarded grant funding to purchase vehicle maintenance equipment for the Bus Maintenance Facility. This equipment includes a heavy-duty alignment machine to perform quick and accurate diagnosis of tire wear conditions and multi-axle bus alignments for RTA vehicles.

This equipment was competitively bid and awarded through a Cooperative Purchasing Contract with Sourcewell to ensure the best government pricing available. The maximum federal share of 80% (\$47,008) for capital expenditures will be funded with Federal Transit Administration (FTA) Section 5307 formula grant funding apportioned in FY19-20 and FY20-21. The RTA will use State Transit Assistance (STA) funding of \$11,755 as the required local match. There is sufficient funding available for this request. No budget amendment is necessary.

The vehicle maintenance equipment listed above will assist staff in properly maintaining transit vehicles and equipment and will be purchased in accordance with FTA approved procurement regulations. Once the purchase order is issued, staff estimates it will take approximately 3 months for delivery.

Staff Recommendation

Staff is recommending the Board authorize the Executive Director to issue purchase order with Mohawk Lifts, LLC to procure one Heavy-Duty Alignment Machine at a cost not-to-exceed the available FTA grant and local match funding amount of **\$58,765**.

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SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY

SEPTEMBER 3, 2025

STAFF REPORT

AGENDA ITEM: A-10

TOPIC: PRISM Vision Program Memorandum of Understanding

PRESENTED BY: Tania Arnold, Deputy Director/CFO

STAFF RECOMMENDATION: Adopt the MOU, and Authorize the Executive Director to Sign the MOU

BACKGROUND/DISCUSSION:

Effective July 1, 2025, the PRISM VSP Vision fully insured block transitioned to self-funded for administration purposes only. This also means, the VSP fixed rate block became a PRISM Major Program. The VSP Vision Program Members that were fully-insured, continue to have fixed, guaranteed rates— this is simply just a change that will convert how they are funded, behind the scenes. No rates will change effective July 1, 2025.

As required by the PRISM JPA agreement, all PRISM Major programs must be governed by a Memorandum of Understanding (MOU) to formalize the program structure and obligations under the new classification. The Vision Program MOU outlines the specific responsibilities of all parties, including program participation and risk-sharing obligations. It also details the PRISM governance structure and provides a framework for managing potential surpluses or deficits. Staff believes the MOU protects both the PRISM risk pool and the RTA (as a pool member) and seeking the Board's authority to execute the MOU.

Staff Recommendation for the Board:

Adopt the PRISM Vision Program Memorandum of Understanding and authorize the Executive Director to sign the MOU.

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MEMORANDUM OF UNDERSTANDING VISION PROGRAM

This Memorandum of Understanding (hereinafter “Memorandum”) is entered into by and between the Public Risk Innovation, Solutions, and Management (hereinafter “PRISM”) and the participating members of the Vision Program (hereafter “Members”), that are signatories to this Memorandum.

1. **CREATION OF THE PROGRAM.** This Memorandum hereby establishes the PRISM Vision Program (hereafter referred to as the “Program”). The Program is designed to bring together California Public Agencies in a risk-sharing pool to provide vision coverage for eligible employees, as designated by the Program Members.
2. **JOINT POWERS AGREEMENT.** Except as otherwise provided herein, all terms used herein shall be as defined in Article 1 of the Joint Powers Agreement creating PRISM (hereafter “Agreement”), and all other provisions of the Agreement not in conflict with this Memorandum shall be applicable.
3. **PROGRAM COVERAGE SEGMENTS.** The Program is formed for the purpose of establishing vision coverage under the following coverage segments:
 - a. Fixed-Rate Pooled Segment
 - b. Self-Insured Segment
4. **PROGRAM PARTICIPATION.** Adoption of this Memorandum by a Member allows for participation in the Program. A Member shall be entitled to participate in the Program until they have withdrawn in accordance with the provisions of paragraph 15 of this Memorandum.
5. **MEMBERSHIP.** Membership in the Program consists of participation in one or more of the following:
 - a. A “Fixed-Rate” Member is defined as a Member who joins the Program and is part of the self-insured Fixed-Rate pool.
 - b. “Self-Insured” Member is defined as a Member who participates in the Program for administrative services only and is fully responsible for their own vision program.
6. **NEW MEMBER APPLICATION.** Any public agency wishing to become a Member of the Program shall make an application to the Program underwriters in a manner prescribed by the Committee. The Committee has developed underwriting guidelines that outline specific criteria for accepting new Members. Program underwriting guidelines are available by request to PRISM and posted publicly on the PRISM website.

7. **PROGRAM COMMITTEE.** The Employee Benefits Committee of PRISM (hereinafter "Committee") shall, except as otherwise provided herein, have full authority to determine all matters affecting the Program and its Members, including but not limited to premium/rate review, the addition of new Program services, claims experience review, and amending the Memorandum. A majority of the members of the Committee shall constitute a quorum for the transaction of business. All actions of the Committee shall require the affirmative vote of a majority of the members of the Committee.

Except as otherwise provided herein, the Committee shall be authorized to do such acts as are reasonably necessary to further the purposes of this Memorandum and implement its provisions. The Committee may delegate any or all of this authority, as deemed appropriate.

The Committee, when necessary to fulfill the purposes of this Memorandum, shall meet at the call of the Chair of the Committee as provided in Article 12 of the Agreement and Article VI of the Bylaws of PRISM (hereinafter referred to as the "Bylaws"). Any meeting of the Committee shall be subject to the applicable provisions of Government Code §54950 et seq., commonly known as the "Brown Act."

8. **PREMIUM.** Participating Member rates/premiums shall be established by the Program underwriters. The participating Members, in accordance with the Program premium provisions of Article 14 of the Agreement, shall be assessed an annual rate for the purpose of funding the Program in which they participate. Premiums may vary based on the Member's benefit plan coverage, the designated employees covered, claims experience, and adjustments, if any, for the surplus or deficit from all Program policy periods.
9. **RENEWALS.** The Program will be reviewed annually on a calendar year basis for consideration of multi-year rate adjustment. All Program rate adjustment action will be prepared by Program underwriters for approval by the Committee.
10. **ADMINISTRATION COSTS.** PRISM shall be entitled to assess annual administration costs associated with the Program. Administrative costs for the Program shall be determined through PRISM's budget process and reviewed by the Committee.
11. **BILLINGS AND LATE PAYMENTS.** Billing dates, payment due dates, and any late fees and/or penalties will be set by the Committee. All Members will receive separate notification of any changes in due dates and/or penalty fees at least thirty (30) days prior to the effective date of any such change. Notwithstanding any other provisions to the contrary regarding late payment of invoices or cancellation from the Program, at the discretion of the Committee, any Member that fails to pay an invoice when due and as billed may be given a ten (10) day written notice of cancellation.

12. **DIVIDENDS AND ASSESSMENTS.** Should the Program not be adequately funded for any reason, pro-rata assessments to the Members may be utilized to ensure the approved funding level for applicable policy periods. Any assessments, which are deemed necessary to ensure approved funding levels, shall be made upon the approval of the Committee in accordance with the following:
 - a. Any dividends or assessments shall be based on each Member's proportional share of premium paid.
 - b. Any assessment shall be spread to all Pool Members who participated in the Program year being assessed; whether or not they are participating in the Program at the time of the assessment.
 - c. Members must be current Program participants to receive a dividend, except upon termination of the Program and distribution of assets.
 - d. Fund equity will be assessed based on the overall financial performance of the Program as a whole, rather than evaluating each program year independently.
13. **COVERAGE DOCUMENTS.** Coverage documents shall be issued by the Program carrier(s) to each Program Member. Except as otherwise provided herein, coverage documents are controlling with respect to Member-specific coverage and benefits.
14. **CLAIMS ADMINISTRATION.** Claims administration services shall be provided by the insurance carrier(s) and/or their assignee. The Committee shall, when applicable, approve the retention of additional vendors to provide services for the Program.
15. **WITHDRAWAL and/or CANCELLATION.** Withdrawal of a Member from the Program shall be in accordance with the provisions of Article 20 or 21 of the Agreement.
16. **LIASION WITH THE AUTHORITY.** Each Member shall maintain staff to act as a liaison with PRISM, their Consultant and the Program carriers, consultants and service vendors.
17. **RESOLUTION OF DISPUTES.** The Committee shall first determine any question or dispute with respect to the rights and obligations of the parties to this Memorandum; however, all final determinations shall be in accordance with Article 31 of the Agreement.
18. **COMPLETE AGREEMENT.** Except as otherwise provided herein, this Memorandum constitutes the full and complete agreement of the Members.

19. **SEVERABILITY.** Should any provision of this Memorandum be judicially determined to be void or unenforceable, such determination shall not affect any remaining provision.
20. **AMENDMENT OF MEMORANDUM.** This Memorandum may be amended by a majority vote of the Committee and the signature on the Memorandum by the Member's designated representative, or alternate, who shall have the authority to execute this Memorandum. Should a Member of the Program fail to execute any amendment to this Memorandum within the time period provided by the Committee, the Member will be deemed to have withdrawn from the Program on the next annual renewal date.
21. **EFFECTIVE DATE OF AGREEMENT.** This Memorandum shall become effective on the first effective date of coverage for the Member and upon the signing of this Agreement by the Member and the Chief Executive Officer of PRISM.
22. **EXECUTION IN COUNTERPARTS.** This Memorandum may be executed in several counterparts, each of which shall be an original, all of which shall constitute but one and the same instrument.

IN WITNESS WHEREOF, the undersigned have executed the Memorandum as of the date set forth below.

Dated: 5/30/2025



Public Risk Innovation, Solutions, and Management
Gina Dean, Chief Executive Officer

Dated: _____

Name (printed)

Signature

Member Entity

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 3, 2025
STAFF REPORT

AGENDA ITEM: A-11

TOPIC: Stormwater Conveyance System

PRESENTED BY: Geoff Straw, Executive Director

STAFF RECOMMENDATION: Authorize the Executive Director to Complete and Execute the Attached City of San Luis Obispo Standard Private Stormwater Conveyance System Management and Maintenance Agreement.

BACKGROUND/DISCUSSION:

The RTA substantially completed construction of the Bus Maintenance Facility (BMF) in January 2022, and was issued a Temporary Certificate of Occupancy on January 14, 2022. The City of San Luis Obispo informed staff in June 2025 that the RTA needed to take action to complete final inspection in order to obtain a final Certificate of Occupancy. This staff report provides information on the four outstanding items, and seeks the RTA Board's authority to execute a maintenance agreement for the stormwater conveyance system.

In its June 2025 inquiry, the City identified the following four outstanding items:

1. Recording the Offer of Dedication for the realigned Elks Lane,
2. Covenant agreement to install the deferred public street improvements,
3. FEMA flood zone compliance documentation, and
4. Maintenance agreement for the stormwater conveyance system.

Items 1 and 2 relate to the "temporary" Elks Lane extension that we constructed as part of the BMF project and the funding that we already provided to the City for the eventual final realignment of Elks Lane as part of the Prado Road Overpass Project. We are working with City officials to record documents with pertinent departments.

Item 3 is a newly raised issue related to the existing Phase 1 electric vehicle servicing equipment (EVSE) and possible safety issues during a flood, and we are working with City officials toward resolving it. Our original design/engineering consultants are developing new drawings and specifications for a shunt-trip system that will shut off power to our EVSE utility yard in the event of a flood. RTA staff and City officials have agreed that this new shunt-trip system can be installed as part of our in-progress Phase 2 EVSE project. Our design/engineering consultants will provide these drawings/specs by the second week of September, which we will use to amend our Phase EVSE building permit request that has been submitted by our design/build contractor (Electricraft, Inc.).

Regarding item 4 and our stormwater conveyance system, the post construction stormwater system was endorsed and inspected by the City, and RTA staff has completed and submitted the required annual inspections. In addition, the Operation and Maintenance Manual is on file with the City. However, we never submitted the required maintenance agreement. To complete the maintenance agreement, RTA staff will need to include a legal description from the deed and a notarized signature from an authorized RTA representative.

Staff Recommendation

Authorize the Executive Director to complete and execute the attached City of San Luis Obispo Standard Private Stormwater Conveyance System Management and Maintenance Agreement.

RECORDING REQUESTED BY:

City of San Luis Obispo

WHEN RECORDED, PLEASE RETURN TO

City of San Luis Obispo

Community Development,

Engineering Development Review Division

919 Palm Street

San Luis Obispo, CA 93401

No fee pursuant to Government Code § 6103
No Documentary Transfer Tax per R&T Code § 11922
No Recording Fee per Government Code § 27383

**City of San Luis Obispo
Standard Private Stormwater Conveyance System
Management and Maintenance Agreement**

Property Description: Site Address: 253 Elks Lane, San Luis Obispo, CA

Site APN: 053-041-071

Permit No. BLDG-4941-2019

Project: New Bus Maintenance/Operations Facility; Vehicle Parking, and Site Work
(hereinafter referred to as "PROJECT")

Legal Description: Refer to Exhibit A, attached hereto

This Agreement is made and entered into in San Luis Obispo, California, this ____ day of _____, 20____, by and between _____ (hereinafter referred to as "OWNER") and the City of San Luis Obispo, a municipal corporation, located in the County of San Luis Obispo, State of California, (hereinafter referred to as "CITY"). This Agreement is made in accordance with existing codes and regulations and in accordance with the approved PROJECT plans and specifications on file at the CITY (hereinafter collectively referred to as "PLANS") with respect to the following recitals:

RECITALS:

The undersigned OWNER of the real property referenced above, hereby covenants with CITY to utilize on-site stormwater management systems (i.e. structural and/or non-structural) to minimize runoff and pollutants in runoff and to provide permanent storm drainage maintenance to control, manage, retain, treat, infiltrate and dispose of (1) on-site storm drainage for the PROJECT and (2) ancillary street and site drainage from the adjoining street and sites, as stipulated in the PLANS and in the Private Stormwater Operations and Maintenance Manual on file at the CITY (hereinafter referred to as "MANUAL"). The storm drainage improvements shown and described in the PLANS are hereinafter referred to as the "SYSTEM".

OWNER is solely responsible for adhering to the requirements set forth in the PLANS and MANUAL and agrees to the following conditions in compliance with all local, state, federal laws and regulations and according to the PLAN and MANUAL:

1. **MAINTENANCE:** OWNER shall maintain the SYSTEM as required in the PLANS and MANUAL.
2. **MONITORING:** OWNER shall **monitor** the SYSTEM as required in the PLANS and MANUAL.
3. **INSPECTIONS:** OWNER shall **routinely** inspect the SYSTEM as required in the PLANS and MANUAL.
4. **CLEANINGS:** OWNER shall **routinely** clean the SYSTEM as required in the PLANS and MANUAL.
5. **REPAIRS:** OWNER shall repair the **SYSTEM** as required in the PLANS and MANUAL.

6. **DOCUMENT & REPORT:** OWNER shall document all maintenance, monitoring, inspections, cleanings and repairs made to the SYSTEM in the annual report submitted to CITY by June 15th of each year in a format approved by CITY as detailed in the PLANS and MANUAL.
7. **CITY'S RIGHTS & AUTHORITY:** Pursuant to San Luis Obispo Municipal Code section 12.08.220, CITY has the right and authority to inspect the SYSTEM to determine compliance with this agreement (i.e. maintenance, monitoring, inspections, cleanings, repairs, documentation and reporting) which may result in enforcement activities and/or abatement if necessary pursuant to applicable laws and regulations. OWNER hereby consents to CITY conducting said inspections between the hours of 8:00 a.m. through 5:00 p.m., Mondays through Fridays. This Agreement shall not be construed as precluding CITY from conducting inspections, which may be necessary due to an emergency.
8. **FAILURE TO MAINTAIN, CLEAN AND/OR REPAIR SYSTEM:** Failure to maintain, monitor, inspect, clean, repair or document **and** report as required herein shall constitute a public nuisance. CITY may remedy such public nuisance through any of the applicable procedures as set forth in the San Luis Obispo Municipal Code, including but not limited to Chapter 1.24 and/or Chapter 12.08, and/or may pursue any other legal or equitable remedies to abate such public nuisance.
9. **INDEMNIFICATION:** OWNER further agrees to defend, indemnify, protect and hold CITY and its agents, officers and employees harmless from and against any and all claims asserted or liability established for damages or injuries to any person or property, including to OWNER's tenants, guests, invitees, agents or employees, which arise from or are connected with or caused or claimed to be caused by the acts or omissions of OWNER, and its agents, employees or contractors, in performing the obligations specified herein, and all expenses of investigating and defending against same; provided, however, that OWNER's duty to indemnify and hold harmless shall not include any claims or liability arising from the established sole negligence or willful misconduct of the CITY, its agents, officers or employees.
10. **BINDING ON FUTURE OWNERS:** This covenant shall run with the land and shall be binding upon the undersigned owners, their heirs, executors, administrators, assigns and successors in interest.
11. **NOTICES:** Any notice, demand, request, consent, approval or communication to OWNER under this Agreement (hereinafter collectively referred to as "Notices") shall be in writing and either served personally or sent by prepaid, first-class mail to the person and address set forth below. Alternately, OWNER may elect to have Notices sent by e-mail if indicated below and an e-mail address is provided. OWNER shall notify CITY of any change in address, e-mail, or transfer of ownership. Any notice shall be deemed to be effective five calendar days after the date mailed or, if applicable, on the same date the notice was e-mailed.

Name _____
Company _____
Address _____
City/State _____

I agree to receive Notices by e-mail: Yes _____ No _____
E-mail address: _____

OWNER:

[Put name of business entity here, if applicable. Otherwise leave blank.]

Print Name and Title: _____

CITY OF SAN LUIS OBISPO:

Gabe Munoz, Supervising Civil Engineer
Engineering Development Review Division
Community Development Department

A Notary Public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached and not the truthfulness, accuracy, or validity of that document.

State of California }
County of San Luis Obispo }

On _____, before me, _____, NOTARY PUBLIC,
Date Name and Title of the Officer

personally appeared, _____
Name of Signer(s)

who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

Signature _____
Signature of Notary Public

Place Notary Seal Above

A Notary Public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached and not the truthfulness, accuracy, or validity of that document.

State of California }
County of San Luis Obispo }

On _____, before me, _____, NOTARY PUBLIC,
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Name of Signer(s)

who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

Signature _____
Signature of Notary Public

Place Notary Seal Above

Exhibit A
Legal Description in Full

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 3, 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 Consolidations into the RTA:

We successfully consolidated the Morro Bay Transit and Atascadero Dial-A-Ride programs into the RTA in June. We continue to meet regularly with staff from both cities to complete end of year reporting requirements, and to ensure any issues that arise are satisfactorily addressed. My staff reports that passengers are pleased with the transition and the quality of services provided.

Operations:

I am happy to announce that Bus Operator Hubert C. was chosen by his peers as the Employee of the Quarter. Hubert currently operates the Route 10 SLO – Santa Maria, while also serving as a Route Trainer for new Bus Operator candidates. He is scheduled to join us at the September 3rd RTA Board meeting. In addition, Utility employee Jared W. and Operations Supervisor Sean C. were nominated by their peers for Outstanding Achievement Awards.

Since the previous Board meeting in May, four of the five Bus Operators that were in training (Patrick, Victor, Abdi, Jordan) have begun operating in revenue service. Two Bus Operator candidates are currently completing training (Eli and Javien). With the consolidation of Atascadero services, one Bus Operator (Joseph A.) and one temporary dispatcher (Annette) have transitioned over to the RTA from Atascadero. Two Bus

Operators' employment ended since the previous meeting, and five Bus Operators are on extended leave. Three candidates are in the permitting / background check phase,



and they should begin training before the end of August. In total, we have eight open Bus Operator bids – five full-time, and three part-time. The runs in those open bids continue to be covered by Bus Operators who chose Extra-Board shifts, as well as by Casual employees, other employees who choose to work overtime, or Operations Supervisors. While we must occasionally abandon a run due to extreme traffic delays or a vehicle malfunction, it is extremely rare that we miss runs due to lack of an available employee. Aside from Bus Operator recruitment efforts, we are also recruiting to fill three Operation Supervisor positions and one Mechanic position.

Marketing & Communications:

Since we last reported at the March RTA Board meeting, our primary focus was on developing and distributing marketing materials for the August 10th service change. See Agenda Item B-2 for details of these changes. Other marketing efforts included:

- Updating materials to ramp up recruitment for Bus Operators.
- Our team has recently created about 40 custom trip plans, helping people to become bus riders one at a time.

Maintenance & Facilities:

Maintenance Manager Andy Wyly is serving as the project manager on the Phase 2 Electric Vehicle Servicing Equipment and the Photovoltaic System design/build projects. The Phase 2 EVSE project includes implementation of a new charging management software package to ensure BEBs are charged in a more cost-effective manner. Both projects were awarded to Electricraft, Inc. and are in the permitting phase with SLO City. We anticipate on-site construction to begin in late October after the equipment has been delivered. Because of these planned construction activities, we have cancelled this year's Bus Rodeo.

Below is a picture of a specialized ThermoKing heating/ventilation/air-conditioning system training session that we acquired as part of the first set of BEBs. One of warranty providers' staff members also attended this on-site training, since they had not yet worked on this particular system.



We continue operate the battery-electric buses (BEBs) to their fullest extent possible in order to gauge the new technology's ability to meet our long-term operating needs, including mid-day fast-charging to “top up” the batteries. As noted in past meetings, the high peak periods energy usage resulted in our energy supplier (3CE) choosing to change our rate structure in November 2024 to include electricity “demand” charges for both our building’s electrical meter and the separate meter for the electric vehicle charging. As shown in the table on the page below, the demand charges ranged from a low of \$4,200/month to as high as almost \$7,200/month. Note that the demand charges are highest during months of high use of building electricity (winter and summer months).

We are currently working with 3CE and our Phase 2 EVSE consultant to determine peak limits so that we can possibly “throttle down” the charging – especially mid-day top-ups – once the charge management system is implemented as part of the Phase 2 EVSE project. It should be noted that the Photovoltaic project includes a second phase that will include an on-site battery to “shave” peak demand for the building, which alongside the charge management system discussed above will further reduce periods when demand charges are incurred.

Electricity Used to Operate Battery-Electric Buses							
Date Range	Energy Used (kWh)	Total Billed Amount	Avg Cost/kWh	Total Demand Charge	% Demand Charge of Total Billing	Avg Cost/kWh (absent demand charges)	Avg Cost/kWh (demand only)
8/21/24-9/19/24	14,970.56	\$6,129.70	\$0.41	\$0.00	0.0%	\$0.41	\$0.00
9/20/24-10/20/24	24,955.04	\$9,963.83	\$0.40	\$0.00	0.0%	\$0.40	\$0.00
10/21/24-11/18/24	23,684.64	\$9,478.55	\$0.40	\$0.00	0.0%	\$0.40	\$0.00
11/19/24-12/19/24	19,083.60	\$11,719.88	\$0.61	\$6,407.33	54.7%	\$0.28	\$0.34
12/20/24-1/20/25	11,007.76	\$8,061.54	\$0.73	\$5,008.27	62.1%	\$0.28	\$0.45
1/21/2025-2/19/2025	16,939.84	\$10,911.60	\$0.64	\$6,736.76	61.7%	\$0.25	\$0.40
2/20/2025-3/20/2025	22,481.92	\$12,408.06	\$0.55	\$7,042.23	56.8%	\$0.24	\$0.31
3/21/2025-4/20/2025	19,833.44	\$10,295.26	\$0.52	\$7,179.99	69.7%	\$0.16	\$0.36
4/21/2025-5/19/2025	12,590.08	\$6,294.82	\$0.50	\$4,214.98	67.0%	\$0.17	\$0.33
5/20/2025-6/20/2025	15,632.80	\$11,102.35	\$0.71	\$5,924.58	53.4%	\$0.33	\$0.38
6/21/2025-7/21/2025	13,424.00	\$9,013.47	\$0.67	\$4,200.44	46.6%	\$0.36	\$0.31

Finance and Administration:

Negotiations are scheduled to begin on August 27th with Teamsters Local 986. The current collective bargaining agreement expires December 31, 2025. Initial plans are to

meet on Wednesday morning and Thursday afternoon every two weeks. The CBA covers Bus Operators, the Parts Clerk, Mechanics and Utility employees.

As noted during the March and May meetings, staff has submitted grant applications for the four BEBs authorized at the January 2025 Board meeting, including almost \$2.6 million in discretionary FTA 5339(b) Bus and Bus Facilities funds. Unfortunately, we are still awaiting approval from the FTA for this grant, which has been abnormally delayed in comparison to past FTA grant approval actions.

The five BEBs ordered in December 2023 are on the GILLIG manufacturing line, and are scheduled for delivery within the next 30 days. However, GILLIG has issued a notification of price increase due to recent tariffs (\$65k addition to \$6.85M order). We are working with RTA Counsel to determine if our purchase agreement with GILLIG requires us pay all or a portion of the increased cost.

We have been working with Cuesta College to improve the bus rider experience at their main campus in SLO. As part of their administration building project, the campus constructed a new bus pull-out and installed two new passenger shelters that are within closer walking/rolling distance of most classrooms than the current bus stop at the back of the campus. The RTA also provided an LED next-bus sign that will be installed in one of the shelters once the fiber optic cable is pulled in early September. The campus paid the 20% local share for the FTA-funded capital equipment and paid 100% of the installation costs. Once the administration building project is substantially completed and the construction fencing is removed, we will alter the Route 12 path and serve the new bus stop – likely in mid-October.

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

- Annual RTA core fixed-route annual ridership totaled 463,667 in FY24-25, which is an increase of 3.3% over last year (448,691) but still 34% lower than the pre-pandemic total of 700,431. 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 in FY24-25 was actually up 25.2% in comparison to pre-pandemic levels (135,871 vs. 109,410), while also up 8.0% in comparison to FY23-24 (125,839). 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 15.0% below pre-pandemic levels (176,523 vs. 220,528), and is down 2.7% compared to FY23-24 (181,370). 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 27,431 in FY24-25, which is a 1.9% increase compared to FY23-24 (26,912). The pre-pandemic total was 39,848, which was 37.1% 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.

The tables at the end of this report depict unaudited results for the full the fiscal year. Note that the farebox recovery information presented below does not include funds allowable under AB149, so the draft information below is drastically underreported. The AB149 fare information will be included in the annual audit report that will be presented at a later meeting. Some important takeaways include:

- In terms of overall non-capital expenses, we expended 59.5% of the annual Administration budget and 58.0% of the annual Operations budget through 67.7% of the fiscal year. Overall, non-capital expenses are at 58.0%.
- 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 9.2%. The FRR was 16.8% for Paso Robles local fixed-route services, and 5.1% for South County fixed-route services. Runabout's FRR remains low at 2.9%. The results will remain below our standards until such time that recent high inflation abates and/or ridership fully recovers.
- The subsidy per passenger-trip on RTA core fixed-route services was \$15.02, while the Runabout result was \$140.90. The subsidy per passenger-trip is \$5.87 for Paso Robles services and \$11.75 for South County services.
 - It should be noted that an additional 14,306 Runabout registrants boarded fixed-route buses fare-free (436 on Morro Bay, 5,923 on SLO Transit, and 7,947 on RTA-operated fixed-routes). Together with the 27,431 Runabout boardings mentioned above, the effective subsidy per trip is \$93.11. This should be celebrated as a cost-effective method of helping contain Runabout costs.
- Although we only operated a portion of June 2025 for the transit services exclusively funded by the Cities of Atascadero and Morro Bay, I have provided results in the tables below.

STAFF RECOMMENDATION

Receive and file.

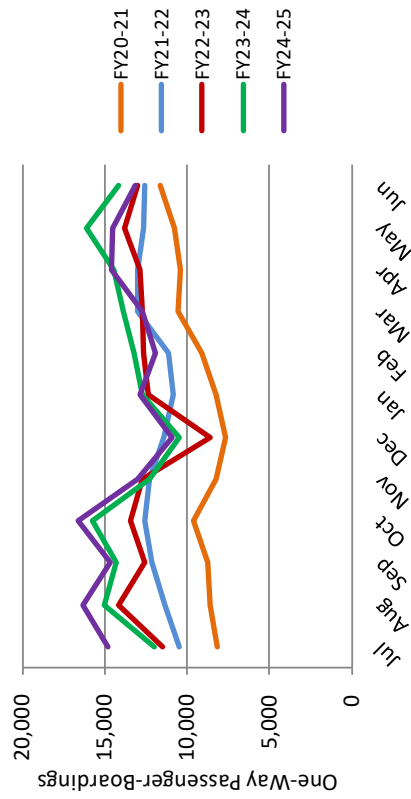
SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
YEAR TO DATE THRU JUNE 30, 2025 - *unaudited*
CURRENT FISCAL YEAR - 2024/2025

	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., CAMBRJA, CAYUCOS, M.B.	TOTAL CORE SERVICES	RUNABOUT	SERVICES PROVIDED FOR THE CITY OF PASO ROBLES	SERVICES PROVIDED FOR SOUTH COUNTY	SERVICES PROVIDED FOR THE COUNTY OF SLO	SERVICES PROVIDED FOR THE CITY OF MORRO BAY	SERVICES PROVIDED FOR THE CITY OF ATASCADERO	SYSTEM TOTAL
REVENUES:													
FARES	\$ 276,342	\$ 274,620	\$ 136,762	\$ 0	\$ 16,745	\$ 704,469	\$ 116,656	\$ 163,788	\$ 110,422	\$ 23,385	\$ 627	\$ 238	\$ 1,119,585
TOTAL ROUTE REVENUES	\$ 276,342	\$ 274,620	\$ 136,762	\$ 0	\$ 16,745	\$ 704,469	\$ 116,656	\$ 163,788	\$ 110,422	\$ 23,385	\$ 627	\$ 238	\$ 1,119,585
EXPENDITURES:													
ADMINISTRATION	\$ 478,786	\$ 403,636	\$ 285,084	\$ 2,118	\$ 142,210	\$ 1,311,833	\$ 879,546	\$ 59,031	\$ 141,160	\$ 116,306	\$ -	\$ -	\$ 2,507,876
MARKETING	39,096	33,212	23,529	172	11,385	107,394	-	-	-	-	-	-	107,394
OPERATIONS/CONTINGENCY	1,715,116	1,544,264	1,035,031	8,269	542,407	4,845,087	2,699,459	797,959	1,707,542	456,855	45,261	6,467	10,558,630
FUEL	273,581	278,993	167,958	1,570	97,500	819,603	189,788	61,089	206,463	36,378	4,332	566	1,318,218
INSURANCE	195,404	199,367	120,007	1,119	69,885	585,782	212,839	55,738	129,911	22,413	2,887	377	1,009,948
TOTAL EXPENDITURES	\$ 2,701,982	\$ 2,459,473	\$ 1,631,608	\$ 13,249	\$ 863,387	\$ 7,669,699	\$ 3,981,631	\$ 973,817	\$ 2,185,075	\$ 631,952	\$ 52,481	\$ 7,411	\$ 15,502,065
FAREBOX RATIO	10.2%	11.2%	8.4%	0.0%	1.9%	9.2%	2.9%	16.8%	5.1%	3.7%	1.2%	3.2%	7.2%
SERVICE MILES	301,093.7	307,250.7	184,889.5	1,729.3	107,164.4	902,127.5	328,363.0	85,967.0	199,856.2	34,737.0	3,781.2	494.0	1,555,325.9
SERVICE HOURS	11,923.0	10,050.0	7,130.1	52.5	3,524.9	32,680.5	21,881.0	6,826.2	14,105.7	4,209.4	322.8	47.0	80,072.6
RIDERSHIP (Automatic Counters)	166,250	164,044	120,386	874	12,116	463,670	27,431	138,010	176,520	14,463	2,072	108	822,274
RIDERS PER MILE	0.55	0.53	0.65	0.51	0.11	0.51	0.08	1.61	0.88	0.42	0.55	0.22	0.53
RIDERS PER HOUR	13.9	16.3	16.9	16.6	3.4	14.2	1.3	20.2	12.5	3.4	6.4	2.3	10.3
COST PER PASSENGER	\$ 16.25	\$ 14.99	\$ 13.55	\$ 15.16	\$ 71.26	\$ 16.54	\$ 145.15	\$ 7.06	\$ 12.38	\$ 43.69	\$ 25.33	\$ 68.62	\$ 18.85
SUBSIDY PER PASSENGER	\$ 14.59	\$ 13.32	\$ 12.42	\$ 15.16	\$ 69.88	\$ 15.02	\$ 140.90	\$ 5.87	\$ 11.75	\$ 42.08	\$ 25.03	\$ 66.41	\$ 17.49

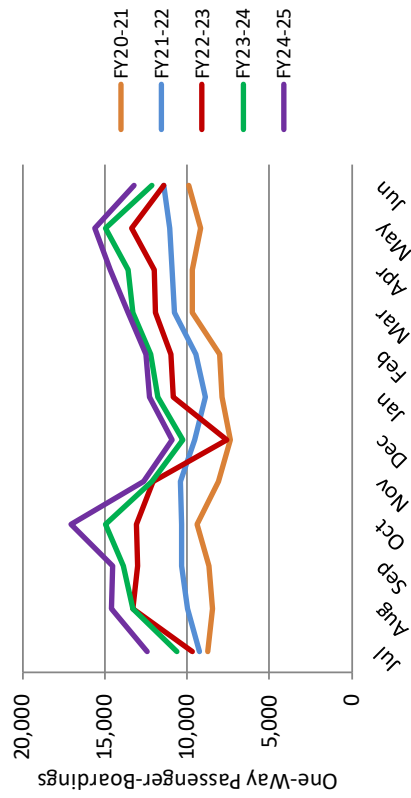
RTA FY24-25 Budget vs. Actual Expenses (unaudited)

		Adopted Budget FY 2024-25	Year to Date FY 2024-25
	Hours	79,390	75,863
	Miles	1,851,210	1,520,589
Administration:			
Labor	operations cost	1,334,260	1,355,234
Labor - Administration Workers Comp	operations cost	47,560	39,123
Office Space Rental	operations cost	59,770	56,837
Property Insurance	operations cost	283,570	281,598
Professional Technical Services	operations cost	320,550	290,774
Professional Development	operations cost	97,340	48,618
Operating Expense	operations cost	419,320	441,056
Marketing and Reproduction	hourly	141,300	107,394
North County Management Contract	operations cost	(59,030)	(59,030)
County Management Contract	operations cost	(121,670)	(121,670)
SCT Management Contract	operations cost	(141,160)	(141,160)
Total Administration		2,381,810	2,298,774
Service Delivery:			
Labor - Operations - Bus Operators	hourly	5,581,200	4,938,608
Labor - Operations - Training Staff	hourly	422,910	412,729
Labor - Operations - Operations Supervisors/Schedulers	hourly	1,551,600	1,469,523
Labor - Operations - Ops Mgt./Oversight	hourly	448,750	460,829
Labor - Operations Workers Comp	hourly	360,680	296,699
Labor - Maintenance	miles	1,998,840	1,740,704
Labor - Maintenance Workers Comp	miles	98,760	81,241
Fuel	miles	1,565,280	1,318,218
Insurance	miles	1,010,430	1,009,948
Special Transportation (for SLOCAT)	n/a	33,500	23,375
Maintenance (parts, supplies, materials)	miles	1,059,720	810,358
Maintenance Contract Costs	miles	156,120	169,631
Total Operations		14,287,790	12,731,863
Capital/Studies:			
Computer System Maintenance/Upgrades		393,260	25,043
Miscellaneous Capital			
Maintenance Equipment		218,760	19,299
Vehicle ITS/Camera System		18,030	16,694
Bus Stop Improvements		324,930	135,288
Large Capital Repairs		402,760	76
Vehicles			
Support Vehicles		45,600	-
Fixed Route Vehicles		320,650	121,887
Trolley Vehicles		293,200	42,053
Cutaway and Dial A Ride Vehicles		154,810	164,629
Runabout Vehicles		1,125,260	277,382
Total Capital Outlay		3,297,260	802,350
Contingency	hourly	200,040	-
PERS Buyout		178,310	178,308
Loan Repayments		472,140	444,635
Short Range Transit Plan and Planning		92,030	92,668
Elks Lane Projects		2,379,560	50,537
Management Contracts		321,860	321,860
TOTAL FUNDING USES		23,610,800	16,920,995
TOTAL NON-CAPITAL EXPENDITURES		17,369,810	15,975,440

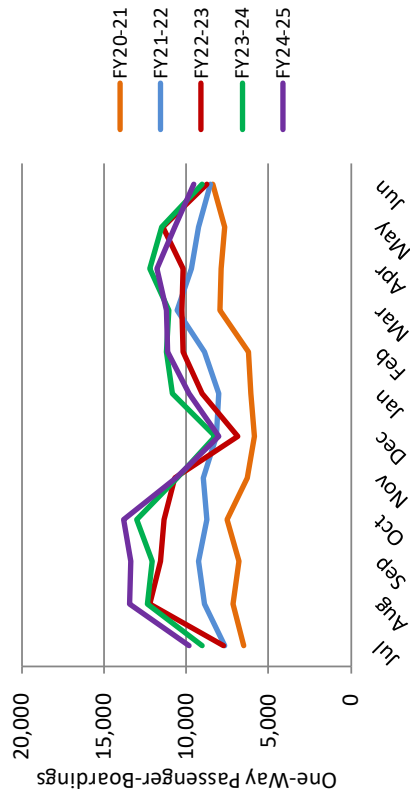
RTA Route 9 Ridership By Month



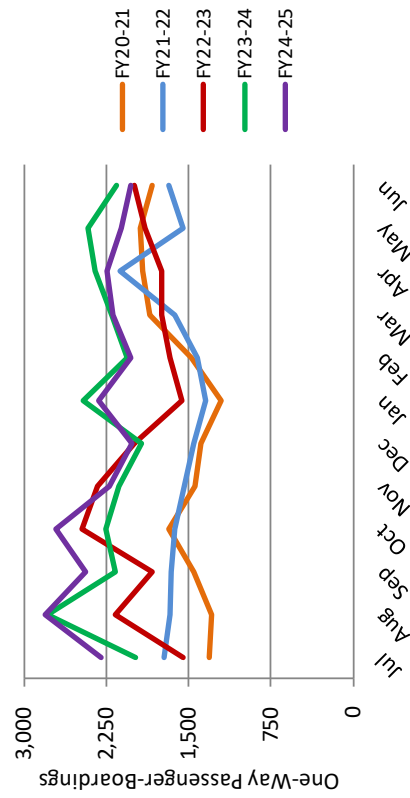
RTA Route 10 Ridership By Month



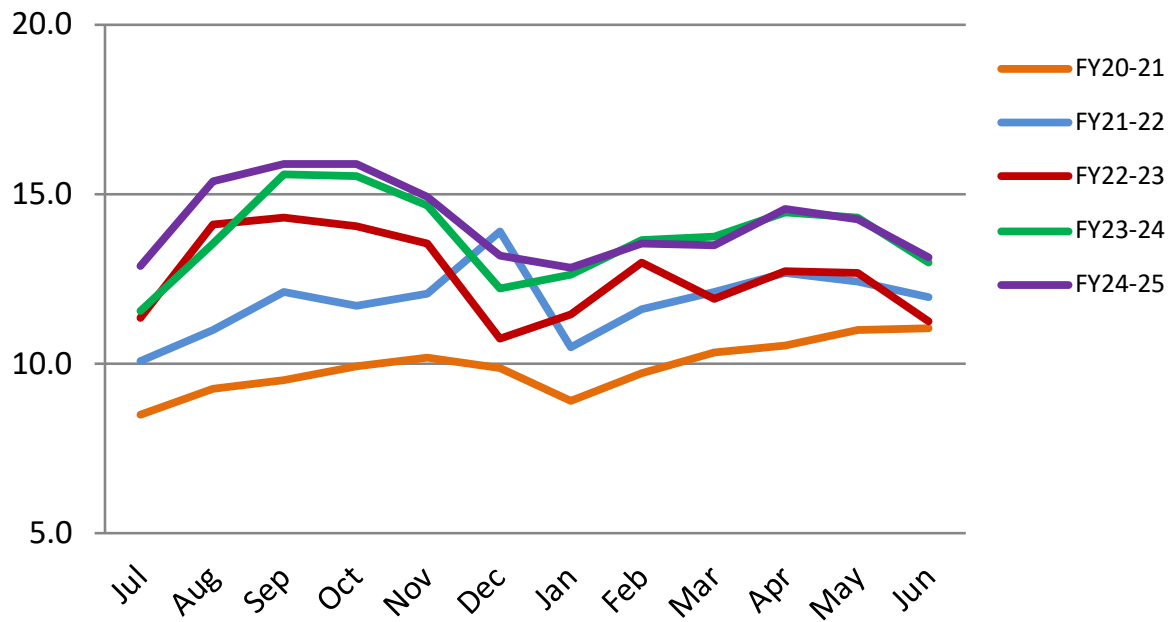
RTA Rtes. 12, 14 & 15 Pass./Mo.



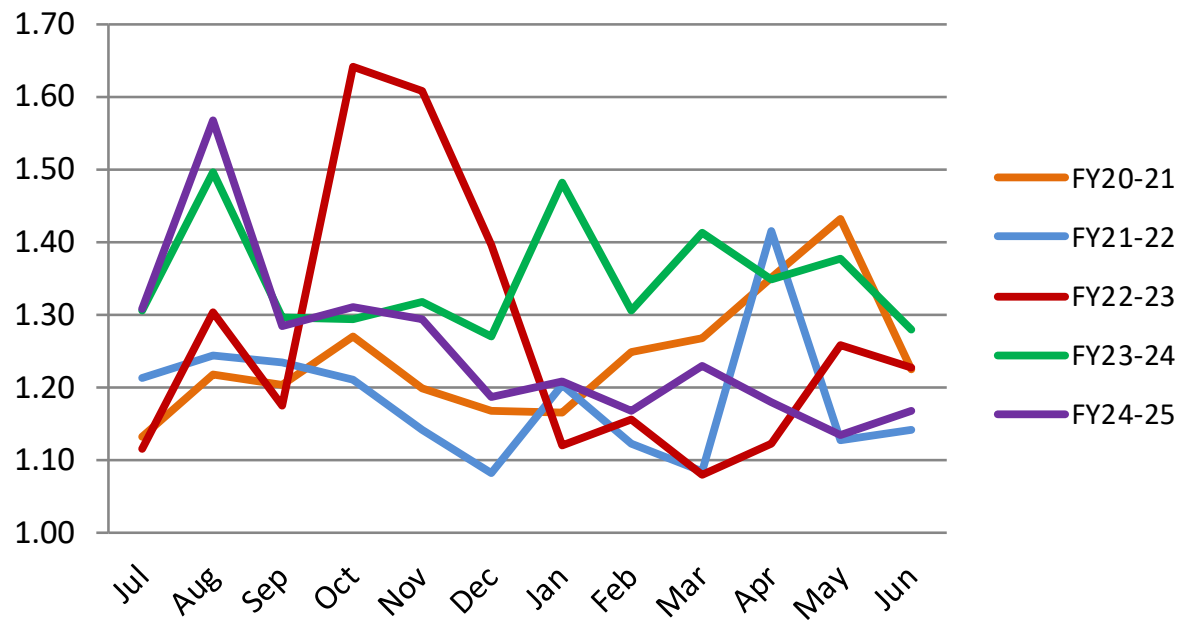
RTA Runabout Ridership by Mo.



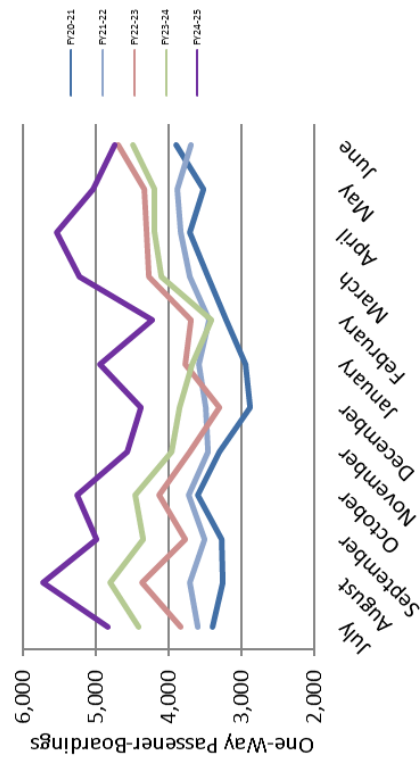
RTA Fixed Route Productivity



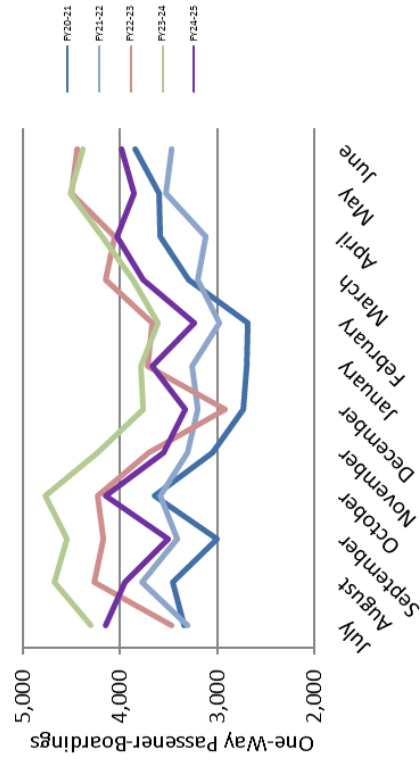
RTA Runabout Productivity



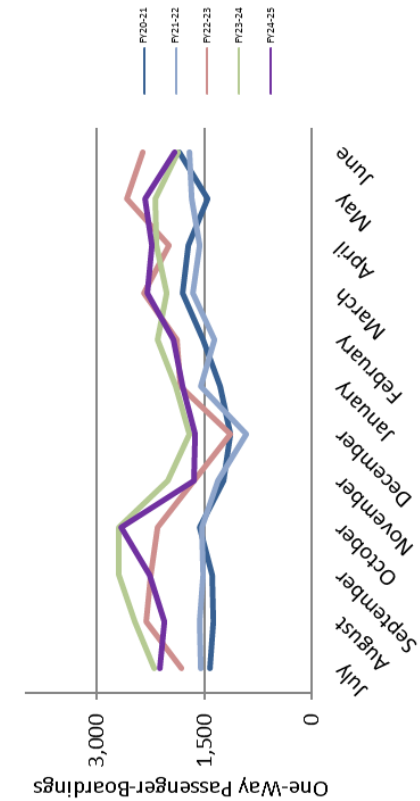
Route 21 Ridership By Month



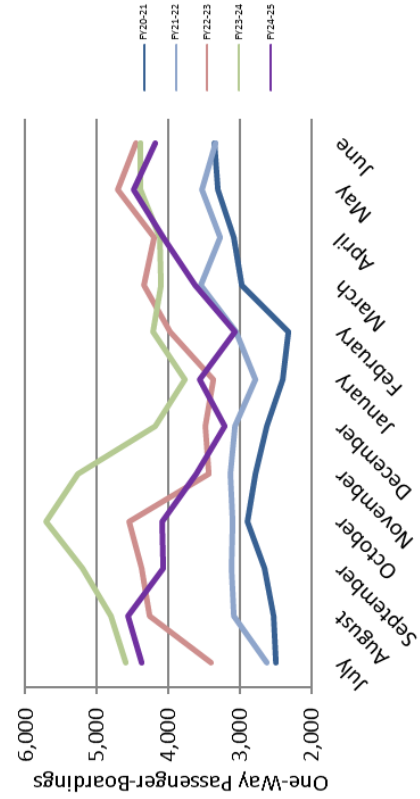
Route 24 Ridership By Month

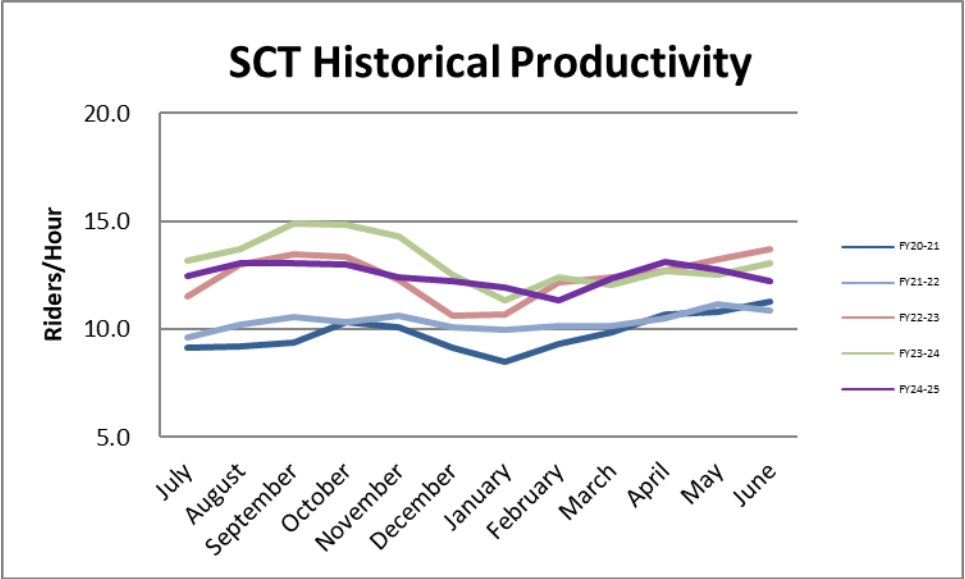


Route 27 Ridership By Month



Route 28 Ridership By Month





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SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 3, 2025
STAFF REPORT

AGENDA ITEM: B-2

TOPIC: Update on August 10th Service Changes

ACTION: Receive

PRESENTED BY: Geoff Straw, Executive Director

STAFF RECOMMENDATION: Accept as Information

BACKGROUND/DISCUSSION

At a May 2025 public hearing, the RTA Board adopted the Short-Range Transit Plan (S RTP) and directed staff to implement S RTP-recommended service changes. Based on public input received prior to and during the public hearing, as well as follow-up discussions with the consultant team, the S RTP recommendations were slightly modified in the Board's action. This staff report provides a summary of those changes and preliminary findings after two weeks of operation.

The service changes included:

1. **Route 10 Service Changes Due to Cessation of Santa Maria Funding:**
 - a. **Streamline Route 10 in Santa Maria** – essentially skipping the Marian Medical Center bus stops on the southbound loops (except the 5:33 PM departure from SLO).
 - b. **Reduce Evening Service into Santa Maria** – the 7:33 PM and 8:33 PM southbound departures from the SLO Government Center ends service in Nipomo.
 - c. **Provide Route 10 Southbound 6:03 AM Run** – the “deadhead” bus that currently departs the SMTC at 7:14 AM now provides “open door” service, arriving at the SMTC at 7:13 AM.
2. **Add Direct Route 9 Mid-Day Service to Cal Poly at 12:17PM**
3. **Add Route 10 Express Roundtrip Departing** – the northbound run departs Santa Maria at 6:05 AM and the southbound departs SLO at 5:15 PM
4. **Add School Tripper Services in Paso Robles and Arroyo Grande** – these are funded separately by the City of Paso Robles and the South County Transit Committee.

5. **Add Saturday Paso Robles Route A Service** – this is funded separately by the City of Paso Robles (using LCTOP funding in FY25-26).
6. **Revise Route 27 & 28 Service in Grover Beach** – bidirectional route pair now operates along the high-density Atlantic City Avenue corridor. This is a carry-over from the 2020 SoCo Transit SRTP, and is funded separately from RTA core services. It uses smaller van-based gasoline-powered vehicles in lieu of the heavy-duty diesel-powered buses that were formerly used on Routes 27/28.

At its May 2025 meeting, the Board also directed staff to implement changes to the fare program to coincide with the launch of the region's **Cal-ITP Open-Loop Contactless Fare-Capping System** in late fall 2025 or early winter 2025. Those changes will include:

1. **Change from Intercity Zone-Based Cash Fare to a Flat Cash Fare** (cost neutral) – a \$2.00 general public / \$1.00 discounted flat cash fare program would be paid upon each passenger boarding. This would also slightly affect fares on longer-distance Runabout trips, which are by ADA law are limited to twice the applicable fixed-route fare(s).
2. **Implement a Discount Fare Verification Process** (\$100k one-time) – will reduce fare evasion, and result in improved average fares collected per passenger.

RTA marketing and administrative staff worked closely with jurisdictions and stakeholders to publicize the August 10th service changes, including assistance to city officials to provide updates to residents (City Manager email blasts, utility notices, etc.). All printed materials for the affected routes were developed and distributed to pass outlets, chambers of commerce, schools and other major activity centers. Staff also used social media to promote the changes, which resulted in ~40 requests for personalized trip plans and press coverage in the Paso Press and New Times. Our website was also updated, including new webpages for the school trippers in Paso Robles / San Miguel and in Arroyo Grande. Our operations and maintenance staff also worked with Grover Beach officials so that our third-party contractor could place the four new bus stops along Atlantic City Avenue and to paint the curbs red. Temporary A-frames with schedule/routing change information were placed at high-use bus stops, and the on-bus LCD screens featured notices to inform riders of impending changes. Our Utility employees placed roughly 400 new information kiosks that provide bus departure information at all affected bus stops on Routes 9, 10, A, B, 27 and 28.

Responses to the changes in Santa Maria have ranged from thankful that service was not completely eliminated at the Marian Medical Center to frustration that the last two evening buses go out of service in Nipomo.

Regarding the school trippers, the academic year began on Thursday August 14th in Paso Robles and Arroyo Grande. As such, we do not yet have good/parsed information from our Automatic Passenger Counting system – but the Bus Operators have reported good ridership on the school trippers, which has relieved overcrowding on the regular fixed-routes during bell-times.

RTA staff and Grover Beach officials recently received complaints from residents near one of the four Atlantic City Avenue bus stops. The complainants have expressed concerns that the placement of the bus stop on Route 27 (clockwise) at 14th Street will remove valuable parking and will increase crime, and the decision to place the bus stop did not seek residents' input. We are working with City officials to provide evidence of direct-mail notices and other outreach efforts so that we can provide a coordinated response. It should be noted that early validated boardings are relatively strong at the Atlantic City Avenue / 14th Street intersection, likely due to the number of high-density housing units nearby: from August 12th to 15th a total of 20 persons boarded at the intersection over the 4-day period. In total, the Routes 27/28 pair provided 42 boardings, while during the same period last year the Routes 27/28 provided only 28 boardings along the previously served Oak Park and Grand Avenue corridors.

Staff will provide an update at the November Board meeting after validated boarding and alighting data is accumulated.

Staff Recommendation for the Board:

Accept as information.

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SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY

SEPTEMBER 3, 2025

STAFF REPORT

AGENDA ITEM:	B-3
TOPIC:	Update on SB125 Funded Capital Projects
ACTION:	Receive
PRESENTED BY:	Geoff Straw, Executive Director
STAFF RECOMMENDATION:	Accept as Information, and Direct Staff to Continue Discussions with Local Officials to Reprogram SB125 According to RTA Staff's Priorities Identified in this Report

BACKGROUND/DISCUSSION

This staff report provides an update on SLOCOG-approved Senate Bill 125 (SB125) funded projects. The staff report also includes the status of each RTA project, as well as staff's priorities for SB125 funded projects.

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. Those projects were considered by the SLOCOG Board at its October 2024 meeting. At the November 6, 2024 meeting, the RTA Board of Directors authorized the Executive Director to execute the Senate Bill 125 (SB125) Cooperative Agreement, which listed all projects currently authorized by SLOCOG and CalSTA. At its March 5, 2025 meeting, the RTA Board authorized the Executive Director to execute Amendment #1 to the SB125 Cooperative Agreement, which allowed the RTA to expend reimbursable funds for the contactless fare program using the Cal-ITP master services agreements.

Included in the August 6, 2025 SLOCOG Board agenda was a staff recommended redistribution schedule to align funding allocation dates with the state's adjusted distribution schedule resulting from this year's budget negotiations. RTA staff continues to provide feedback to SLOCOG on an ongoing basis, including a detailed project update in March 2025 in response to a request about scope and funding for each

project. Staff followed up with discussions on project priorities in the ensuing weeks, to ensure future changes align with RTA staff priorities. Staff notes are included in the table at the end of this staff report.

Notable project updates are:

- RTA-4 (replacement buses) – SLOCOG’s August 6, 2025 Agenda Item C-7 states “Reprogram funds in October.” RTA staff will work with SLOCOG and City of San Luis Obispo officials on this regional reprogramming; SLO Transit likely has bus replacement and/or expansion needs that were not captured in the original November 2023 call for projects. Our original project proposal under RTA-4 would fund replacement of MY13 vehicles that have already surpassed their economically useful lives (originally identified for delivery in late 2025) with battery-electric buses (BEBs).
- RTA-10, -12 and -13 (opportunity recharging projects) – Based on discussions with other transit agencies regarding their recently implemented projects, the original cost estimates were too low. Staff is working to secure additional funding for these projects, and we will not recommend moving forward until RTA-3 (recharging study) is completed and all funding has been secured.
- In terms of staff priorities:
 - The combined park-out yard BEB recharging project in Arroyo Grande and especially in Paso Robles (RTA-7) is the highest priority project, yet it was moved back for funding from FY24-25 to FY25-26 at the April 2025 SLOCOG Board meeting. The Phase 3 recharging project at the SLO Bus Maintenance Facility (RTA-9) is also vital, although its funding year could be delayed from FY23-24 until FY26-27 as long as the project is completed before the future deliveries of BEBs beginning in 2028. Staff will work with SLOCOG to reiterate these priorities.
 - The next highest priority is the purchase of BEBs (RTA-4, RTA-6 and RTA-8, in priority order). These projects advance the transition to battery-electric technologies in lieu of diesel-powered buses that were originally identified in our 2023 *ZEB Rollout Plan*.
 - In terms of opportunity recharging projects, below is the priority order for the four bus layover sites:
 - #1 – Paso Robles (RTA-13);
 - #2 – San Luis Obispo (RTA-12);
 - #3 – Morro Bay (RTA-10); and
 - #4 – Santa Maria (RTA-11).
- RTA 11 (opportunity recharging at Santa Maria Transit Center) – based on past failed negotiations with the City of Santa Maria on transit matters, there is a

possibility that the RTA will not pursue this project. Instead, the RTA Route 10 layovers could be moved to the SLO Government Center site, which would likely require an expanded opportunity recharging need in comparison to the November 2023 request.

It is also worth noting that SLOCOG anticipates a reassessment of funds from several changed or conditionally funded SB125 projects at the October 2025 SLOCOG Board meeting. Of particular interest to RTA staff are the two remaining rail projects (SLOCOG-1 and SLOCOG-2), which are slated to use \$6,968,000 of regional SB125 funds to leverage over \$63 million in statewide TIRCP¹ Cycle 7 funds. The previously approved formula SB125 funds were definitively identified in the June 2025 state budget, but the TIRCP Cycle 7 funds were only tentatively funded pending further negotiation between the Governor and the Legislature on the Cycle 7 TIRCP and other funding priorities.

RTA staff is asking that SLOCOG's reprogramming process that will be considered at the October SLOCOG Board meeting include the identification of contingency public transit projects should the TIRCP Cycle 7 funds be eliminated or delayed so that unfunded transit projects identified in the RTA's and SLO Transit's respective ZEB Rollout Plans can be prioritized and implemented without further delay. According to California Transit Association officials, negotiations on Cap-and-Trade reauthorization and Greenhouse Gas Reduction Fund expenditures were scheduled to begin in late August 2025 but as of August 26th no updates were available.

Please note that yellow-highlighted cells in the table at the end of this staff report reflect changes from the original October 2024 SLOCOG approved funding plan. Green-highlighted cells include staff suggested actions that may require Board authority in the future.

Executive Committee Recommendation:

Accept as information.

Staff Recommendation for the Board:

Accept as information, and direct staff to continue discussions with local officials to reprogram SB125 according to RTA staff's priorities identified in this report.

¹ TIRCP Cycle 1 through 7 are funded through California's Greenhouse Gas Reduction Fund, which is comprised of Cap-and-Trade proceeds.

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Project Name	Project Description	Original December 2023 Award			SLOCOG Staff August 2025 Revisions			RTA Notes & Updates (orange highlighting indicates action should be taken)
		Amount	Fund Source	Funding Year(s)	Amount	Fund Source	Funding Year(s)	
City of MB-1	Master plan to determine transit fleet electrical needs for charging and infrastructure needs.	\$124,000	TIRCP	FY23-24	\$124,000	TIRCP	FY27-28	RTA staff believes this project should be eliminated entirely due to consolidation into the RTA, and the funding should be redistributed.
City of MB-2	Construction of electrical/charging infrastructure for 2 Transit Zero-emission BEBs	\$800,000	TIRCP	FY25-26	\$800,000	TIRCP	FY24-25 & FY26-27	RTA staff believes this project should be eliminated entirely due to consolidation into the RTA, and the funding should be redistributed.
City of SLO-1	Six (6) Battery electric bus procurement	\$280,000	TIRCP	FY23-24	\$280,000	TIRCP	FY23-24	
City of SLO-2	Battery electric bus charging infrastructure	\$395,000	TIRCP	FY23-24	\$395,000	TIRCP	FY23-24	
City of SLO-3	Auto Vehicle Locator system replacement	\$130,000	TIRCP	FY24-25	\$130,000	TIRCP	FY24-25	If CalSTA has not yet distributed FY24-25 funding, this project could be advanced using funding originally identified MB-1.
City of SLO-4	On-bus security camera system replacement	\$750,000	TIRCP	FY24-25	\$750,000	TIRCP	FY24-25	If CalSTA has not yet distributed FY24-25 funding, this project could be advanced using "loaned" funding originally identified in RTA-9.
RTA-1	Close funding gap for 5 battery-electric buses (BEBs), including training and spare parts. Delivery in CY2025.	\$1,778,000	TIRCP	FY23-24	\$1,220,000	TIRCP	FY23-24	RTA secured HVIP funding, reverting SB125 funds back to region. Delivery anticipated in September 2025.
RTA-2	Implement BMF Phase 1b of BEB Direct-Current fast-charging system	\$500,000	TIRCP	FY23-24	\$500,000	TIRCP	FY23-24	Contract awarded to Electricraft at May 2025 RTA Board meeting; renamed "Phase 2" (instead of "Phase 1b"). Design/Build contract awarded to Electricraft. Anticipate construction to becompleted in early 2026.
RTA-3	Planning: Final engineering/design for BMF Phase 2 & Master Plan for off-site BEB fast-charging systems.	\$200,000	ZETCP	FY23-24	\$200,000	ZETCP	FY23-24	Contract awarded to Stantec in March 2025. Anticipate completion of study in early 2026.
RTA-4	Issue PO in early CY24 for 7 BEBs to replace MY13 diesel vehicles; delivery in late CY25. Includes 7 BEB recharging dispensers. Identified in ICT Rollout Plan as diesel-powered buses.	\$4,675,000	TIRCP	FY23-24 & FY24-25	\$4,675,000	TIRCP	FY23-24 & FY24-25	This project was conditinally funded, pending outcome of the SRTPs. Possible reprogramming now moved to October 2025. Staff will seek RTA Board authority in early 2026, with delivery in CY27.
RTA-6	Issue PO in early CY25 for 2 BEBs to replace MY15 diesel vehicles identified for delivery in late CY26, including 2 BEB recharging dispensers.	\$843,000	ZETCP	FY26-27	\$843,000	ZETCP	FY24-25 & FY26-27	Staff will request RTA Board authority in winter 2027 / spring 2028 to purchase replacement buses, with delivery in CY29.
RTA-7	Implement BEB direct-current fast-charging systems at Paso and A.G. bus park-out yards	\$2,000,000	TIRCP	FY24-25	\$2,000,000	TIRCP	FY25-26	Awaiting study recommendations from RTA-3 in early 2026; staff will seek RTA Board authority in mid-2026 for design/build services. This is the highest-priority BEB recharging need (especially the Paso yard).
RTA-8	Issue PO in CY25 for 2 BEBs to replace MY15 diesel vehicles identified for delivery in CY27, including 2 BEB recharging dispensers.	\$877,000	TIRCP	FY24-25	\$877,000	TIRCP	FY24-25	Staff will seek Board authority in winter 2025 / spring 2026 to purchase replacement buses.
RTA-9	Implement Phase 2 BEB recharging at BMF	\$4,000,000	TIRCP	FY23-24	\$4,000,000	TIRCP	FY23-24	Renamed "Phase 3." Seek SLOCOG Board authority to swap funding years w/RTA-6 and RTA-8 to advance them. Seek RTA Board authority for design/build services in mid-2026.
RTA-10	Implement contactless opportunity charging system at Morro Bay passsenger facility.	\$550,000	ZETCP	FY24-25	\$550,000	ZETCP	FY24-25	Awaiting study recommendations from RTA-3 in early 2026. This is the third highest-priority opportunity charging location. Staff wil seek RTA Board authority for design/build services in mid-2026.
RTA-11	Implement contactless opportunity charging system at Santa Maria passsenger facility.	\$550,000	ZETCP	FY23-24 & FY24-25	\$550,000	ZETCP	FY27-28	If SM charging deemed infeasible, we'd want to move Rt. 10 layovers to GC to recharge at an expanded SLO facility. Seek SLOCOG & RTA Board authority to move this funding to RTA-12.
RTA-12	Implement contactless opportunity charging system at San Luis Obispo passenger facility.	\$566,000	TIRCP & ZETCP	FY23-24 & FY24-25	\$538,000	ZETCP	FY25-26	The August 2024 CalSTA approval letter only shows \$538k. Was the \$28k not approved or was it left out by SLOCOG?
RTA-13	Implement contactless opportunity charging system at Paso Robles layover facility.	\$600,000	ZETCP	FY23-24	\$600,000	TIRCP	FY25-26	The August 2024 CalSTA approval letter misidentifies this highest-priority opportunity charging project as being located in South County. That needs to be corrected.
SLOCOG-1	Environmental and design phases for left-hand crossover installation at Orcutt Rd.	\$844,000	TIRCP	FY23-24 & FY24-25	\$1,783,000	TIRCP	FY23-24 & FY24-25	Cycle 7 TIRCP funding earmarked for the FAST rail project is still uncertain. If delayed or deleted, will this be part of the October reprogramming?
SLOCOG-2	Environmental and design phases for rail siding improvements near Templeton	\$3,106,000	TIRCP	FY23-24 & FY24-25	\$5,185,000	TIRCP	FY23-24 & FY25-26	Cycle 7 TIRCP funding earmarked for the FAST rail project is still uncertain. If delayed or deleted, will this be part of the October reprogramming?
SLOCOG-3	Environmental and design phases for rail siding improvements near Santa Margarita	\$3,734,000	TIRCP	FY23-24 & FY24-25	\$0	N/A	N/A	
SLOCOG-4	PTC installation North of SLO to Oakland	\$2,000,000	TIRCP	FY23-24	\$2,000,000	TIRCP	FY24-25 & FY25-26	Cycle 7 TIRCP funding earmarked for the FAST rail project is still uncertain. If delayed or deleted, will this be part of the October reprogramming?
SLOCOG-5	Implement Cal-ITP contactless fare payment system regionwide.	\$2,611,000	TIRCP	FY24-25	\$955,000	TIRCP	FY23-24	Anticipate installation of Cal-ITP equipment in fall 2025, with launch by end of CY25.
SLOCOG-6	Bob Jones Trail funding gap (construction 26/27)	N/A	N/A	N/A	\$2,000,000	TIRCP	FY23-25	Approved at Dec. 2024 SLOCOG Board meeting.
SLOCOG-Admin		\$166,101	ZETCP		\$166,101	ZETCP		
		\$32,079,101			\$31,121,101			

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SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY

SEPTEMBER 3, 2025

STAFF REPORT

AGENDA ITEM: C-1

TOPIC: EnergIIZE Grant Program

PRESENTED BY: Tania Arnold, Deputy Director/CFO

STAFF RECOMMENDATION: Authorize RTA to Apply for EnergIIZE Grant

BACKGROUND/DISCUSSION:

Based on preliminary needs identified in our Zero-Emission Bus Rollout Plan, the RTA submitted SB125 grant applications to SLOCOG to partially fund both battery-electric bus replacement and charging infrastructure needs in November 2023. The RTA is currently working with Stantec Engineering to complete a SB125-funded *Bus Charging and Electrification Study* to determine long-term depot charging needs at our three park-out facilities, as well as opportunity charging needs at bus layover sites. An update on those SB125-funded projects is provided in Agenda Item B-2.

The Energy Infrastructure Incentives for Zero-Emission (EnergIIZE) Commercial Vehicles Project is a block grant designed to rapidly deploy funds to support the increase in deployment of zero-emission vehicle (ZEV) infrastructure in the state of California to meet statewide climate and clean transportation goals to transition old, medium- and heavy-duty (MDHD) vehicles and equipment to zero-emission. EnergIIZE may be combined, or stacked, with other funding sources, such as federal, local, and utility funding programs.

In April 2021, the California Energy Commission (CEC) awarded Clean Transportation Program funding to CALSTART to design and implement a zero-emission vehicle infrastructure incentive project for medium-duty/heavy-duty (MDHD) vehicles. In March 2022, the CEC and CALSTART launched the EnergIIZE Commercial Vehicles block grant to provide financial incentives for MDHD ZEV infrastructure, including equipment, network, and software costs. CALSTART implements EnergIIZE and Tetra Tech supports the application and incentive processing.

EnergIIZE has the funding authority for up to \$544 million, which was approved at the December 2021 and April 2024 CEC business meetings. Each year, the CEC allocates additional funding to CALSTART to advance EnergIIZE's mission. As of February 2025, EnergIIZE has awarded over \$200 million to over 250 projects statewide for ZEV MDHD charging and fueling infrastructure.

EnergIIZE Commercial Vehicles is part of a statewide effort to increase market demand for MDHD ZEVs. As the nation's first commercial fleet infrastructure incentive project, EnergIIZE offers reimbursement-style grants to help offset the costs of deploying ZEV

infrastructure for both on-road and off-road MDHD battery electric and hydrogen fuel cell vehicles and equipment. EnergIIZE eligible costs include equipment, software, warranty, and maintenance.

At the November 6, 2024 RTA Board of Directors meeting, the Board authorized the RTA Executive Director to pursue the California Energy Commission (CEC) Alternative and Renewable Fuels and Vehicle Technology Program (ARFVTP) grant funds up to \$1.7 million. As noted at that time, the RTA was approached by the inductive charging vendor InductEV (formerly known as Momentum Dynamics Corporation), knowing that our Innovative Clean Transit fleet rule Zero-Emission Vehicle Rollout Plan identifies opportunity charging along our intercity fixed-routes as a possible solution to our battery electric bus (BEB) range challenges. Staff was notified verbally on July 31st that the CEC has approved the \$1.7 million ARFVTP grant, and the agreement documents should be ready for review and execution at the November 5, 2025 RTA Board meeting.

As noted in Agenda Item B-2, the following contactless opportunity charging systems are anticipated to move forward:

1. RTA-9 Implementation of Phase 3 BEB recharging at Bus Maintenance Facility
2. RTA-10 Morro Bay passenger facility
3. RTA-12 San Luis Obispo passenger facility
4. RTA-13 Paso Robles layover facility

Staff is actively working to refine the cost estimates but does believe additional funding will be needed to move these projects forward, beyond the SB125 funding and CEC ARFVTP funding. EnergIIZE awards funding on a per charging port basis and the RTA anticipates applying for up to the maximum per charging port based on the kW per charging port, to supplement the SB125 funding secured and the anticipated CEC ARFVTP funds, to fund one hundred percent of the anticipated projects' costs.

Executive Committee Recommendation:

Recommend staff ask the Board to authorize the RTA to apply for EnergIIZE grant funds up to the maximum per opportunity charging port based on the kW per charging port to supplement the SB125 funding secured and the anticipated CEC funds, to fund one hundred percent of the anticipated project cost.

Staff Recommendation for the Board:

Authorize the RTA to apply for EnergIIZE grant funds up to the maximum per opportunity charging port based on the kW per charging port to supplement the SB125 funding secured and the anticipated CEC funds, to fund one hundred percent of the anticipated project cost.

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 3, 2025
STAFF REPORT**

AGENDA ITEM: C-2

TOPIC: Emergency Services MOU

PRESENTED BY: Geoff Straw

STAFF RECOMMENDATION: Authorize RTA Executive Director to
Execute MOU with County OES

BACKGROUND/DISCUSSION:

The San Luis Obispo County Office of Emergency Services (OES) is responsible for local emergency management. OES serves as the Operational Area Coordinator as an administrative subdivision of the State of California under the California Emergency Act and the Standardized Emergency Management System. For many years, the RTA and OES have maintained a focused Standard Operating Procedure agreement under the San Luis Obispo County Nuclear Power Plant Emergency Response Plan.

OES has determined a potential need for professional transportation services in times of other types of emergencies and disasters, and the attached MOU will guide the sharing of resources, including roles and responsibilities. The SLO County Board of Supervisors will consider the MOU at its September 23rd meeting.

Staff Recommendation for the Board:

Authorize the RTA Executive Director to execute the Memorandum of Understanding with the County Office of Emergency Services.

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**MEMORANDUM OF UNDERSTANDING (MOU)
BETWEEN
THE COUNTY OF SAN LUIS OBISPO OFFICE OF EMERGENCY
SERVICES AND
THE SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

THIS MOU is entered into this _____ day of _____ by and between the OFFICE of EMERGENCY SERVICES, (hereinafter referred to as "OES") and the SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY, (hereinafter referred to as "RTA").

WITNESSETH:

WHEREAS OES is responsible for local emergency management and serves as the San Luis Obispo OES Operational Area Coordinator as an administrative subdivision of the State of California under the California Emergency Act and the Standardized Emergency Management System; and

WHEREAS, OES has determined a potential need for professional transit vehicles in times of emergency and disasters; and

WHEREAS, OES maintains a Standard Operating Procedure agreement with RTA under the San Luis Obispo County Nuclear Power Plant Emergency Response Plan; 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; and

NOW THEREFORE, the parties do mutually agree as follows:

1. **RETENTION OF SERVICES** OES hereby engages RTA and RTA hereby agrees to perform for the OES the services hereinafter set forth for reimbursement hereinafter set forth, all pursuant to the terms and conditions herein.
2. **SCOPE OF SERVICES** Pursuant to this MOU RTA and OES shall meet annually to review and agree upon the services identified in Attachment "A" attached hereto as if entirely set forth herein.
3. **COMPENSATION** OES shall pay to RTA as compensation in full for all services performed by RTA pursuant to this MOU, a sum not to exceed the RTA's actual cost of providing the services plus administrative overhead.

Said compensation shall be paid in the following manner: RTA shall annually submit to the OES Director by June 1 an updated cost to provide the services identified in Attachment "A" for the subsequent fiscal year. The OES Director shall annually provide written consent to the cost worksheet.

RTA shall invoice OES. OES shall pay the invoice within 90 days after receiving the invoice. If the services are provided for a city, RTA will directly invoice that city.

In the event that the request for services involves the County and a city(s), the invoice shall be submitted to OES. The county will enter into cost apportionment with the city(s) and the cities will be invoiced by the County.

4. **TERM OF CONTRACT** This MOU shall commence effectively upon signatures and shall continue, until and unless terminated earlier as provided herein. RTA will furnish sufficient personnel to complete all phases of the tasks.
5. **TERMINATION OF MOU 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 be paid for all work satisfactorily completed prior to the effective date of such termination.
6. **TERMINATION OF MOU FOR CAUSE** If, through any cause within its control, either party fails to fulfill in a timely and professional manner its obligations under this Contract, or 'if either party violates any of the terms or provisions of this Contract, either party shall have the right to terminate this Contract effective immediately upon giving written notice thereof to the party. 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 be paid for all work satisfactorily complete prior to the effective date of such termination.
7. **MODIFICATION** This MOU, together with Attachment "A," (Scope of Work) 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.
8. **NON-ASSIGNMENT OF AGREEMENT** In as much as this MOU is intended to secure the specialized services of the RTA, RTA shall not assign, transfer, delegate, or sublet this Agreement or any interest herein without the prior consent of the OES Director.
9. **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.
10. **ENFORCEABILITY** The invalidity and unenforceability of any terms or provisions of shall in no way affect the validity or enforceability of any other terms or provisions.
11. **EMPLOYMENT STATUS** RTA shall during the entire term of the Contract, be construed to be an independent, and shall in no event be construed to be an employee of the County. RTA understands and agrees that its employees are not, and will not, be eligible for membership in or any benefits from any County group plan for hospital, surgical or medical insurance, or for membership in any OES 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 County employee.
12. **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.

13. CONFLICTS OF INTEREST No officer, employee, director or agent of OES shall participate in any decision relating to this Contract 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 Contract or the provisions thereof.

14. INDEMNIFICATION RTA shall defend, indemnify and hold harmless the County, its 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, and that arise out of, or are related any act or omission of RTA relating to this contract. The obligation to indemnity 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 County, its officers and employees.

15. INSURANCE REQUIREMENTS RTA, at its sole cost, shall meet the insurance requirements as outlined in the Contract for Management, Administrative, Financial, and Transit Vehicle Services with the County of San Luis Obispo.

ATTACHMENT
"A"
SCOPE OF WORK

I. ORGANIZATION OF THE COUNTY OF SAN LUIS OBISPO

1. The County of San Luis Obispo is a political subdivision of the State of California.
2. The County Office of Emergency Services (OES), under the authority of the County Administrative Officer is the coordinating body for all COUNTY divisions and instrumentalities in emergency preparedness, response, and recovery. As the Operational Area under the State Disaster Response Plan, it is also the emergency services coordinating body for all political subdivisions within the county boundaries.
3. The County has an Emergency Operations Plan (EOP) and a Nuclear Power Plant Emergency Response Plan and uses the Standardized Emergency Management System (SEMS) which delineates the emergency response and preparedness responsibilities of various County offices, departments, and non-governmental organizations.
4. OES staff pro-actively participate in preparation for disaster response and recovery in the community. During a disaster, County staff will work within established governmental guidelines, with adherence to the California Code of Regulations, Title 19, Division 2, Governor's Office of Emergency Services.

II. ACTIVITIES TO BE CARRIED OUT BY RTA

1. During a Nuclear Power Plant Emergency, OES will activate SOP III.26. RTA will support and carry out the functions as outlined within.
2. RTA will coordinate with OES in preparedness, planning, response and recovery efforts. Consistent with SEMS, RTA will coordinate with other COUNTY departments and cities, as appropriate, in preparedness, planning, response and recovery efforts.
3. RTA will, consistent with its services, provide transportation assistance to the public affected by disaster to the best of its ability, will provide 24-hour evacuation transportation services when there is an immediate threat to life and such services are requested by OES.
4. RTA will cooperate with COUNTY to ensure that RTA services are safe and do not jeopardize public health and safety.
5. RTA will provide appropriate financial statements or invoices at reasonable and customary rates for transportation services performed under specific mission tasking during emergencies or disasters.
6. RTA, if available, will staff the Transportation Branch in the County EOC.
7. A may utilize the California Central Coast Area Public Transit Operators Mutual Aid Agreement to obtain resources.

III. ACTIVITIES TO BE CARRIED OUT BY COUNTY

1. OES shall provide overall operations and policy guidance to all agencies, including RTA during emergencies or disasters.
2. COUNTY will reimburse RTA for appropriate financial statements or invoices at reasonable and customary rates for transportation services performed under specific mission tasking during emergencies or disasters.
3. OES shall maintain the County Emergency Operations Center (EOC) in a state of operational readiness.
4. OES shall serve as the coordination point for operational area disaster response, including shelter and transportation.
5. OES will assist COUNTY departments with development of facility emergency plans.
6. COUNTY will facilitate funding activities with Federal Emergency Management Agency (FEMA) or California Emergency Management Agency (CalEMA).
7. OES will coordinate with responding governmental and non-governmental agencies in the Emergency Operations Center during an emergency or disaster.
8. OES will prioritize and coordinate requests for emergency response to cities within the operational area.

**ATTACHMENT
“B”
OPERATIONAL PROCEDURES**

1. OES shall request resources through the RTA Executive Director. If not available, then The Executive Director will also notify alternate staff to be on standby. If County OES cannot reach the Operations Manager, they will directly contact necessary staff.
2. The Executive Director will notify staff for requested positions at the EOC and supporting facilities. The Executive Director should also notify field staff of the situation.
3. A 12-hour shift, 24-hour capability is required at the ALERT or higher emergency classification level. Requested positions for the EOC will likely be staffed 24 hours a day.
4. RTA shall maintain a notification Roster of its staff and update OES when there are changes.

NAME	POSITION	WORK PHONE	CELL PHONE
Geoff Straw	Executive Director	(805) 781-4465	(805) 458-8216
Tania Arnold	Deputy Executive Director	(805) 781-4397	(805) 471-8268
Omar McPherson	Operations Manager	(805) 781-1171	(805) 540-9135
Shelly Horton	Lead Operations Supervisor	(805) 781-1332	(805) 748-5771
Wes Edwards	Operations Supervisor	(805) 541-2228	(805) 440-2279
Nick Skochko	Operations Supervisor	(805) 541-2228	(805) 668-2225
James Shafer	Operations Supervisor	(805) 541-2228	(805) 404-6926