253 Elks Lane
San Luis Obispo, CA 93401
(805) 541-2228 Fax (805) 781-1291
www.slorta.org

RTA BOARD AGENDA

Wednesday, September 2, 2026 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: Carla Wixom | **Vice President: Heather Moreno**

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)
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 personasque requieran una modificación de la adaptación para participar en esta reunión. RTA también secompromete a ayudar a las personas con dominio limitado del inglés a acceder a los servicios públicosesenciales 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: Kevin Reeder
- Longevity Recognition:
  - Tania Arnold for 20 Years of Service
  - Dianne (DW) Williams, Suzy Sisneros and Tracey Johnson for 15 Year of Service

A. CONSENT AGENDA:

A-1 RTA Board Meeting Minutes of May 6, 2026 (Approve)
A-2 Draft RTAC Minutes of July 16, 2026 (Information)
A-3 Paso Robles Park-Out Facility Lease Extension (Approve)

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A-4 New SLOCPT Rate for July 2027 Implementation (Approve)
A-5 FTA Transit Asset Management Plan Update (Receive)
A-6 Strategic Business Plan Update (Approve)
A-7 Public Transportation Agency Safety Plan Update (Approve)
A-8 Policy for Bilingual Premium Pay (Approve)
A-9 Transfer of Four Decommissioned Wheelchair Accessible Vans (Approve)
A-10 Amended SDRMA Health Benefits Memorandum of Understanding (Approve)
A-11 Electric Bus Recharging Agreement (Approve)
A-12 Support for Tort Reform Efforts (Approve)
A-13 Authorize FTA Section 5339(b) Grant Application (Approve)
A-14 SCTC Public Hearing on October 22, 2026 (Authorize)
A-15 Procure Strategic Planning Services (Authorize)

B. INFORMATION AGENDA:

B-1 Executive Director's Report (Receive)
B-2 Fare Change Implementation and Contactless Fare System (Receive)
B-3 Discount Fare Eligibility Enforcement (Receive)

C. ACTION AGENDA: None

D. CLOSED SESSION: None

BOARD MEMBER COMMENTS

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

DRAFT
SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
BOARD MEETING MINUTES OF MAY 6, 2026
A-1

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 MORENO, FIFTH DISTRICT, COUNTY OF SAN LUIS OBISPO (Vice President)
HEATHER NEWSOM, CITY OF ATASCADERO
DAWN ORTIZ-LEGG, THIRD DISTRICT, COUNTY OF SAN LUIS OBISPO
JIMMY PAULDING, FOURTH DISTRICT, COUNTY OF SAN LUIS OBISPO (Past President)
JOHN PESCHONG, FIRST DISTRICT, COUNTY OF SAN LUIS OBISPO
ERICA A. STEWART, CITY OF SAN LUIS OBISPO
FRED STRONG, CITY OF PASO ROBLES
ED WAAGE, CITY OF PISMO BEACH
CARLA WIXOM, CITY OF MORRO BAY (President)

BOARD MEMBERS ABSENT:

STAFF PRESENT:
GEOFF STRAW, EXECUTIVE DIRECTOR
TANIA ARNOLD, DEPUTY DIRECTOR/CFO
JON ANSOLABEHERE, SAN LUIS OBISPO COUNTY COUNSEL
OMAR MCPHERSON, OPERATIONS MANAGER
ANDY WYLY, MAITENANCE AND FACILITIES MANAGER
MARY GARDNER, MARKETING AND COMMUNITY RELATIONS MANAGER
LUCAS HOUSTON, SAFETY AND TRAINING MANAGER
ANTHONY KALVANS, ADMINISTRATIVE ASSISTANT
KEVIN COOKSLEY, OPERATIONS SUPERVIOR
CINDY HERRERA, BUS OPERATOR
RAFAEL RUIZ, UTILITY WORKER

CALL MEETING TO ORDER, ROLL CALL: President Carla Wixom called the meeting to order at 10:00 AM. Roll call was taken, and a quorum was present.

PUBLIC COMMENT:
Mr. Eric Greening said he continues to be happy with the service. He mentioned that the citizens' ballot initiative stopped due to a flaw and raised his concern that the SLOCOG ballot measure may have that same flaw.

EMPLOYEE RECOGNITION:
Mr. Geoff Straw announced that Damon Blalark was the RTA's employee of the quarter and thanked Mr. Blalark for his service. Mr. Straw then asked the RTA's Maintenance and Facilities Manager to come up and present.

Mr. Andy Wyly recognized Utility Worker Rafael Ruiz as an outstanding achievement winner. **Mr. Wyly** expressed his appreciation for Mr. Ruiz's work in keeping the RTA's bus stops clean and orderly.

Mr. Wyly also recognized Bus Operator Cindy Herrera as an outstanding achievement winner. **Ms. Cindy Herrera** said that her job at the RTA is the best she has ever had and thanked all the people who support the bus drivers.

Mr. Wyly recognized Safety and Training Manager Lucas Houston for his 15 years of service and highlighted that he worked his way up from Bus Operator to his current position. **Mr. Lucas Houston** empathetically thanked the RTA for supporting him and his family over the years. **Mr. Houston** touched on his career growth at the RTA and how much the agency means to him.

Mr. Wyly also recognized Operations Supervisor Kevin Cooksley along with Bus Operator Robert Schwartz for their 10 years of service to the RTA.

Board Member Kassi Dee wanted to highlight that Mr. Balark is a great and positive employee of the RTA. She recounted an interaction between Mr. Balark and a member of the public that showed his positive impact on the community.

Board Member Erica A. Stewart appreciated the fact that the RTA takes the time to recognize employees at board meetings.

Board Member Dawn Ortiz-Legg concurred with Board Member Stewart and appreciated Mr. Houston for sharing his career story.

Public Comment:
There was no public comment received regarding this item.

A. CONSENT AGENDA:

- A-4 Update Representative and Alternative Appointments on CalTIP Board (Approve)
- A-5 Arroyo Grande Park-Out Facility Lease Extension (Approve)
- A-6 Classification and Compensation/Benefits Study (Accept)
- A-7 Contract Renewal – AGP Video Production of Board Meetings (Approve)
- A-8 PRISM MOU for Cyber Liability Program (Approve)
- A-9 Add FTA Civil Right Duties to Deputy Director/CFO Job Description (Approve)
- A-10 Employment Agreement with Executive Director (Approve)
- A-11 Procurement of Various 3rd Party Facility Maintenance Services (Approve)
- A-12 Low-Carbon Transit Operations Program Cycle B Grant Application (Adopt Resolution)
- A-13 Revised Contract for Demand Response Scheduling & Dispatching Software (Approve)
- A-14 Contract Extension for ITS Service Agreement with Connexionz (Approve)

Public Comment:
There was no public comment received regarding this item.

Board Member Heather Moreno made a motion to approve consent agenda item A-1 through A-14 and **Board Member Ortiz-Legg** seconded the motion. The motion passed unanimously of those present via roll call vote.

BOARD MEMBER	YES	NO	ABSENT
KASSI DEE	X		
BRUCE GIBSON	X		
AILEEN LOE	X		
HEATHER MORENO (Vice President)	X		
HEATHER NEWSOM	X		
DAWN ORTIZ-LEGG	X		
JIMMY PAULDING (Past President)	X		
JOHN PESCHONG	X		
ERICA A. STEWART	X		
FRED STRONG	X		
ED WAAGE	X		
CARLA WIXOM (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 great progress being made for recruitment, the start of the Tap2Ride program, ridership performance, and various ongoing capital projects.

Mr. Straw also informed the board that the California Air Resources Board has proposed a reduction of two billion dollars from the Greenhouse Gas Reduction Fund. **Mr. Straw** said that the RTA and SLOCOG will be advocating for the air resources board to either maintain the funding or provide support to implement the Integrated Clean Transit plan.

Board Member Ortiz-Legg commented that the reduction of funds seems to be contrary to what the air resources board would want to do and encouraged members to send comments to their agency's respective lobbyists. She also asked what is leading to Runabout ridership to be down and if it is related to the new Community Partners in Caring program. **Mr. Straw** said that the RTA is working with SLOCOG to evaluate the program and noted that the program is currently not impacting Runabout ridership.

Board Member Aileen Loe asked if staff can send information to the board members. **Mr. Straw** said yes.

Public Comment:

There was no public comment received regarding this item.

B-2 Update on Fare Change Implementation & Contactless Fare System (Receive)

Mr. Straw highlighted that the flat $2 cash fare for intercity bus routes was implemented in April and there has been positive feedback regarding the new program. In addition, he mentioned that the Tap2Ride had a soft launch on May 4th, and that the RTA is looking for alternatives to the ticket vending machine which is outdated and no longer supported by the vendor. **Mr. Straw** also highlighted the various verification programs designed to support paratransit and discounted riders.

Board Member Ortiz-Legg suggested that the RTA work with the Meals that Connect group for events.

Public Comment:

There was no public comment received regarding this item.

B-3 Annual Vacancy Status and Recruitment & Retention Report GC §3502.3 (Receive)

Ms. Tania Arnold highlighted the progress being made regarding Bus Operator recruitment. She noted that the RTA has a 7.2% overall vacancy rate.

There was no Board comment given regarding this item.

Public Comment:

There was no public comment received regarding this item.

C. ACTION AGENDA:

C-1 Fiscal Year 2026-27 Operating and Capital Budget (Approve)

Ms. Arnold presented the Fiscal Year 2026/2027 Budget and went over the key details of what is included in the budget. She addressed the key issues facing the budget including liability costs, US 101 construction, State Transit Assistance funds which are projected to be lower, and the impact to Local Transportation Fund in future years and the funding formula.

Board Member Ed Waage raised concerns about the long-term budget outlook especially regarding the new battery electric buses. **Mr. Straw** said that costs per mile of the electric buses have gone down and that those costs are less than diesel.

Board Member Stewart asked about the eligibility process for discount and ADA cards and if it possible to conduct zoom interviews for applicants. **Ms. Arnold** said that she can investigate what is being done but stressed that in person interviews allow time for applicants to discuss their transit needs and fully understand the services provided by the RTA.

Board Member Moreno asked what percent of Runabout riders are not qualified for the service. **Ms. Arnold** said that the RTA believes it is a small amount.

Public Comment:

There was no public comment received regarding this item.

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

BOARD MEMBER	YES	NO	ABSENT
KASSI DEE	X		
BRUCE GIBSON	X		
AILEEN LOE	X		
HEATHER MORENO (Vice President)	X		
HEATHER NEWSOM	X		
DAWN ORTIZ-LEGG	X		
JIMMY PAULDING (Past President)	X		
JOHN PESCHONG	X		
ERICA A. STEWART	X		
FRED STRONG	X		
ED WAAGE	X		
CARLA WIXOM (President)	X		

C-2 RTA Contingency Fleet Plan (Approve)

Mr. Straw explained that a contingency fleet plan allows the RTA to retire vehicles and keep some as a contingency in case anything happens. He noted that there are requirements for having a contingent fleet including maintenance requirements.

Board Member Stewart said that she supports this item and that the City of San Luis Obispo is also looking at developing a similar plan for SLO Transit.

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

BOARD MEMBER	YES	NO	ABSENT
KASSI DEE	X		
BRUCE GIBSON	X		
AILEEN LOE	X		
HEATHER MORENO (Vice President)	X		
HEATHER NEWSOM	X		
DAWN ORTIZ-LEGG	X		
JIMMY PAULDING (Past President)	X		
JOHN PESCHONG	X		
ERICA A. STEWART	X		
FRED STRONG	X		
ED WAAGE	X		
CARLA WIXOM (President)	X		

D. CLOSED SESSION ITEMS:

There were no items for closed session.

E. BOARD MEMBER COMMENTS:

Board Member John Peschong wished Mr. Anthony Kalvans a happy birthday.

Board Member Stewart mentioned that Board Member Gibson was at an event for Lumina Alliance.

The meeting was adjourned at 11:11 AM.

Next regularly scheduled RTA Board meeting is **July 1, 2026.**

Respectfully Submitted,	Acknowledged by,
______________________________	_______________________________
Anthony Kalvans, Administrative Assistant	Carla Wixom, RTA President 2026

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
REGIONAL TRANSIT ADVISORY COMMITTEE
July 16, 2026
DRAFT MINUTES
C-1

Members Present:

Janeen Burlingame	City of Morro Bay
Mark Dariz	Paratransit User
Alex Fuchs *(Vice Chair)*	City of San Luis Obispo
Eric Greening	Fixed Route User
Todd Katz	Fixed Route User Alternate
Omar McPherson *(Chair)*	Fixed Route Service in South County
Lance Okuno	SLOCOG
Darcy Price	City of Atascadero

Members Absent:

Mason Cleek	Cuesta College
Ryan Cornell	City of Paso Robles
Katie Franco	County of San Luis Obispo Alternate
Colin Pollington	Cal Poly

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:**
Mr. Erick Scmidt introduced himself and said that he was looking forward to learning more about RTAC.

3. **ELECTION OF OFFICERS: Elect RTAC Chair & Vice Chair**
Mr. Omar McPherson opened the floor for nominations and nominated Mr. Alex Fuchs to be the RTAC Chair. **Ms. Janeen Burlingame** seconded the nomination. The nomination was approved by unanimous consent of those present. It was agreed that Mr. Fuchs would take over as RTAC Chair at the next meeting.

   Ms. Burlingame nominated Mr. McPherson to be the RTAC Vice Chair. **Mr. Mark Dariz** seconded the nomination. The nomination was accepted by unanimous consent of those present.

4. **Annual ADA Appeal Committee Assignment**
Mr. McPherson asked the current ADA appeals committee to stay in their post. **Mr. Eric Greening** asked if the appeals committee had to meet this past year. **Mr. McPherson** said no.

Mr. Greening made a motion to reappoint the ADA appeals committee for another year. **Mr. McPherson** seconded the motion. The motion was approved by unanimous consent of those present.

5. A. INFORMATION AGENDA ITEMS:

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

Mr. Geoff Straw introduced his report and gave an overview of the recent events at the RTA. He announced that the RTA has been talking with SLO Transit about Cal Poly class start time and opportunities for alignment.

Mr. Straw reported that both the bus charging program and the photovoltaic system are still progressing. He also noted that four more battery electric buses will go online at the end of September. **Mr. Todd Katz** asked what percentage of the RTA's fleet will be electrified. **Mr. Straw** said roughly one-third.

Mr. Straw also mentioned SLOCOG's work on developing mobility hubs.

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

Mr. Fuchs reported that over the years SLO Transit has been studying different options regarding aligning services to better meet the needs of Cal Poly. A discussion ensued regarding the types of riders that both RTA and SLO Transit serve to Cal Poly.

Mr. Fuchs also mentioned that SLO Transit just transitioned to MV Transportation as their contractor. In addition, he noted that SLO Transit has eight battery electric buses in service, which is ten out of sixteen buses being emission free.

Ms. Burlingame noted that Morro Bay's public works director left the position and the city is actively recruiting candidates to fill the vacancy.

Mr. Greening announced that the Ludwig Center would be hosting a disabilities 101 session. In addition, he asked for clarification on what members of the RTAC can communicate to the public regarding the upcoming sales tax ballot measure. Discussion ensued.

Ms. Darcy Price announced the upcoming El Camino Cruise Night in Atascadero.

Mr. Lance Okuno said that the Mariposa Card received over six hundred applicants for two hundred cards.

Mr. Katz announced that he likes serving on the RTAC but would step down if someone else was interested in his position. RTAC members expressed their appreciation for Mr. Katz's knowledge and perspective.

Mr. McPherson noted that the RTA transitioned to Ecolane as its dispatching software for all demand response services with the goal of increasing efficiencies.

A-3 Present Fare and Tap to Ride Change Results (Verbal)

Ms. Tania Arnold introduced the item and noted that during last month, 2700 riders used contactless payments while 1600 riders used Token Transit. She noted that the most usage for the tap to ride program comes from Route 10.

Ms. Arnold reported that there has been an effort to register more people for discount cards and to increase usage of the tap to ride system; highlighting that Ms. Mary Gardner was conducting outreach. **Mr. Fuchs** noted that his own data suggested that none of the SLO Transit riders reached the 30-day fare cap; representing savings to the rider. **Mr. Straw** recognized Mr. Anthony Kalvans for developing a form letter to support discount riders in the Morro Bay Area. **Mr. Okuno** mentioned that SLOCOG did an Instagram reel about the tap to ride system.

A-4 Atascadero Dial-A-Ride and Morro Bay Transit Update (Verbal)

Mr. McPherson introduced the item and presented the ridership statistics for both services. He noted that over the past year the Atascadero Dial-A-Ride carried 4,515 riders, Morro Bay Call-A-Ride carried 900 riders, Morro Bay weekday service carried 7,700 riders, and the seasonal weekend only Morro Bay trolleys carried 3,200 riders.

Mr. Greening asked if there was any data regarding Atascadero Dial-A-Ride users traveling between the Atascadero and Templeton fare zones. **Mr. McPherson** said he would investigate the data further.

B. ACTION AGENDA ITEMS:

There were no action agenda items.

C. CONSENT AGENDA ITEMS:

C-1 RTAC Minutes of October 16, 2025 (Approve)
C-2 RTAC Minutes of April 9, 2026 (Approve)

Mr. Fuchs noted a typo regarding the April 9th minutes, revising the year to 2026 from 2025.

Mr. Greening made a motion to approve the consent agenda with the suggested correction. **Ms. Burlingame** seconded the motion. The motion was approved by unanimous consent of those present.

D. ADJOURNMENT AND COMMITTEE COMMENTS:

Mr. McPherson adjourned the meeting at 3:10 p.m.

Next Regular Meeting: October 15, 2026
Future Regular Meeting Dates: January 21, 2027; April 8, 2027; July 15, 2027

Respectfully Submitted,	Acknowledged by,
___________________________	___________________________
Anthony Kalvans	Omar McPherson
Administrative Assistant	RTAC Chairperson

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SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 2, 2026
STAFF REPORT

AGENDA ITEM:	**A-3**
TOPIC:	**Paso Robles Park-Out Yard Lease Extension**
PRESENTED BY:	**Geoff Straw, Executive Director**
STAFF RECOMMENDATION:	**Authorize the Executive Director to Exercise the Extended Term Lease Option for 1734 Paso Robles Street in Paso Robles**

BACKGROUND/DISCUSSION:
In April 2017, the RTA executed a lease agreement for a County-owned facility at 1734 Paso Robles Street in Paso Robles. Site improvements were completed in May of 2018. The 2017 lease identified an initial rent of $1,000/month, with annual CPI change limited to a maximum of 5% with an option to extend once for an additional ten-year period. The primary purpose of the facility is to provide a park-out yard for vehicles, including a small modular office for on-site operations (Operations Supervisor office, restrooms, and a break room for Bus Operators to check-out/-in). No vehicle maintenance is completed on site.

At this time, staff recommends we exercise the option to extend the lease. Based on the draft findings and recommendations from the *Bus Charging and Electrification Study* that was authorized by the RTA Board at its March 2025 meeting, the *Study* report will guide implementation of depot charging at both the Arroyo Grande and Paso Robles bus park-out yards. In order to maintain efficient service, the park-out facility in Paso Robles will continue to be critical in the provision of intercity and local transit service in the North County. Staff continues to work through the array of consultant led elements included in the *Study*, including a power demand analysis, coordination with utility providers, conceptual site plans (including outreach to jurisdiction staff members for approval), and cost estimates.

Staff Recommendation
Authorize the Executive Director to exercise the ten-year extended term lease option for 1734 Paso Robles Street in Paso Robles.

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LEASE

THIS LEASE is entered into between the County of San Luis Obispo, a political subdivision of the State of California, hereinafter referred to as "County," and San Luis Obispo Regional Transit Authority, a joint powers authority in the State of California, hereinafter referred to as "Lessee," and will replace and supersede all previous agreements between County and Lessee, with respect to the Premises hereinafter described.

WHEREAS, County owns four contiguous parcels described as APN 008-262-006 (approximately 3.31 acres); APN 008-297-005 (approximately 3.82 acres); APN 008-297-006 (approximately 1.00 acres); and APN 009-054-003 (approximately 0.81 acres) for a total of approximately 8.94 acres of real property, collectively known as the County Corporation Yard ("County Corp Yard") located at 1734 Paso Robles Street in the City of Paso Robles; and

WHEREAS, the County Corp Yard is currently used as a storage yard for County Roads Division, County Fleet Services Division, County Agricultural Commissioner and UC Cooperative Extension Farm Advisor; and

WHEREAS, Lessee desires to lease a portion of the County Corp Yard totaling approximately 1.5 acres of real property encompassed on APNs 008-297-005, 008-297-006, and 009-054-003 as depicted on Exhibit "A" attached hereto, hereinafter referred to as the "Premises," for its North County-based public transportation operation; and

WHEREAS, Lessee desires to obtain all required regulatory permits and entitlements, construct, maintain, and operate a Bus Parking Facility at the Premises, (as defined in Paragraph 7 below); and

WHEREAS, the County Board of Supervisors declares the Premises to be surplus and not needed for County use at the present time; and

WHEREAS, in accordance with California Government Code section 25372, the County may lease any real property that the Board declares surplus to any public agency, and may impose on the lease any terms and conditions it determines to be appropriate.

NOW THEREFORE, in consideration of the mutual covenants and agreements herein contained, the County and Lessee agree as follows:

1. **<u>Grant and Description of Premises:</u>** County, for and in consideration of the promises contained herein, grants to Lessee the nonexclusive right and privilege to lease and to occupy the Premises, as identified on Exhibit "A," and consisting of an approximately 1.5 acre portion of real property at the County Corp Yard.

2. **Condition of Premises:** The taking of possession of the Premises by Lessee shall, in itself, constitute acknowledgment that the Premises are in good and tenantable condition. Lessee agrees to accept the Premises in its existing condition, "as is," with no repairs, warranties or reports provided by County. County shall not be obligated to make any alterations, additions or betterment thereto.

3. **Term:** The Term of this Lease commences upon full execution of the Lease, with the County being the last party to sign (the "Commencement Date") and shall expire ten (10) years from the Commencement Date ("Initial Term"), with an option to extend as described in Paragraph 4 below.

4. **Option to Extend:** Within six (6) months of the expiration date of the Initial Term of the Lease, and with the mutual written consent of the Central Services Director, or Director's designee ("Director") and Lessee, Lessee may notify the County, in writing, of its desire to extend the term of the Lease for an additional ten (10) year period ("Extended Term"). The right of Lessee to negotiate with County any extension of this Lease pursuant to this paragraph is subject to the satisfaction of the following conditions precedent:

a. The Lease shall be in effect and Lessee shall not be in default at the time written notice is given and on the last day of the expiring Initial Term of the Lease;

b. Lessee shall not have incurred nor received more than one written notice of default under the Lease during the then current Lease Term;

c. All parties must accept the terms and conditions of the option extension in writing prior to any effective extension.

If the term of this Lease is not extended as provided in this Paragraph, this Lease and Lessee's right of possession shall terminate at the end of the Initial Term.

5. **Rental:** Beginning upon the Commencement Date, Lessee shall pay County as rent for the Premises the sum of One Thousand Dollars ($1,000.00) per month, payable in advance on the first day of each month, without deduction, offset or abatement. Beginning on the first day of the thirteenth (13th) month, and every subsequent annual anniversary date thereafter, the preceding year's rent shall be adjusted upward according to any percentage rise in the Consumer Price Index (CPI). The adjustment shall be by a percentage equal to the percentage

increase of the Consumer Price Index between the previous **December** published CPI (or most immediately available month prior to the previous January, if no index is published in **December**) and the corresponding CPI for the same period twelve months previous. If there is a decrease or no change in the CPI, then the preceding year's option rent will not be adjusted. Annual CPI adjustment shall not exceed five percent (5%) annually.

The term "Consumer Price Index" refers to the Consumer Price Index for All Urban Consumers, Los Angeles-Riverside-Orange County Statistical Area, California, based on the period of 1982-84 = 100 as published by the Bureau of Labor Statistics of the U.S. Department of Labor.

The index for the adjustment date shall be the one reported in the U.S. Department of Labor's most comprehensive official index then in use and most nearly answering the foregoing description of the index to be used. If it is calculated from a base other than the base period (1982-84=100), the base figure used for calculating the adjustment percentage shall first be converted under a formula supplied by the Bureau.

If the described index is no longer published, another generally recognized as authoritative shall be substituted by agreement of County and Lessee. If County and Lessee are unable to agree within thirty (30) days after demand by either party, on application of either party the substitute index shall be selected by the chief officer of the San Francisco regional office of the Bureau of Labor Statistics or it successor.

County shall provide written notice to Lessee of each adjusted rental amount on an annual basis. If the rent is not adjusted at the time for said adjustment as provided herein, Lessee shall continue to pay the annual rent established for the prior period until such adjustment is made, at which time Lessee shall promptly pay to County any deficiency and shall henceforth pay at the adjusted rate of rent.

All rental payments shall be directed to County at the following address:

County of San Luis Obispo
Attention: Shauna Dragomir, County Real Property Manager
Central Services Department
Property Management Division
1087 Santa Rosa Street
San Luis Obispo, CA 93408
Direct: (805) 781-5206
Email: sdragomir@co.slo.ca.us

with current prevailing wage laws. Lessee shall be solely liable for said compliance and shall defend and indemnify County against any claim to the contrary.

e. Lessee shall be required to follow Federal guidelines on performance security to ensure improvements are constructed as per approved design, and Lessee shall be required to name the County of San Luis Obispo on any bond required to be obtained per Federal Transit Administration requirements.

In the event legal action is required to enforce performance. Lessee will pay to County its reasonable attorney's fees and costs as determined by the court.

12. **Lessee's Personal Property:** Title to all personal property, moveable furniture, and movable equipment provided by the Lessee shall remain in the Lessee. Furniture and equipment affixed to the real property in any way shall be considered a capital improvement and shall be subject to the terms of Paragraph 8. Upon the removal of personal property by Lessee, whether such removal is upon termination of this Lease or at any time prior thereto, Lessee shall repair all damage to the Premises caused by the addition or removal of such property. County shall not be obligated to repair, restore, refurbish, or otherwise incur any expense regarding personal property of Lessee. If Lessee elects to attach an item of personal property to the Premises that Lessee does not wish to be considered a capital improvement, a written request to exclude this item from capital improvements shall be submitted to Director, or Director's designee, for written approval prior to installation of the item.

13. **Equipment and Fixtures:** County shall not be obligated to repair, restore, refurbish, or otherwise incur any expense in improving and/or changing the condition of the equipment, fixtures, furnishings, inventory, or other personal property of Lessee.

14. **Title:** Lessee hereby acknowledges that fee title to the Premises is vested in the County of San Luis Obispo and hereby covenants and agrees never to challenge, contest or resist said title. Lessee may not acquire any right to the Premises by adverse possession or otherwise.

15. **County's Personal Property:** County shall retain title to all County's personal property at the Premises and Lessee shall maintain said personal property; specifically one (1) modular trailer and two (2) seatrain containers used as storage by the County Agricultural Commissioner and UC Cooperative Extension Farm Advisor, during the term of this Lease. Said personal property is located within the fenced separation and gated area of the Premises

described herein in Paragraph 7.a. above. Any improvements hereafter added by County at County's expense shall remain the personal property of County.

16. **Utilities:** Lessee shall be responsible to provide and separately meter and pay for all utilities used on the Premises.

17. **Janitorial:** Lessee shall be solely responsible for complete janitorial services and the furnishing of janitorial supplies to the Premises including rubbish and trash removal.

18. **Weed Abatement:** At least once per year, but as often as necessary, Lessee shall remove all weeds from the Premises.

19. **Maintenance/Repairs:** Lessee shall be responsible for all costs of maintenance and repairs of the Premises and the Required Improvements thereon, including, but not limited to, landscaping, fencing, lighting (exterior and interior), electrical, gas, plumbing, heating and air conditioning, roofing, paint, windows, doors, landscaping, and asphalt. If within fifteen (15) days of written notification by County, Lessee fails or neglects to commence maintenance and/or repair obligations as requested by County, County may, at its option, perform such necessary maintenance and/or repairs and bill Lessee for actual cost of said maintenance. Lessee shall promptly reimburse County upon demand.

In the event of an emergency, County may take action on the Premises as may be required for the protection of persons or property, and Lessee will reimburse County for County's reasonable expenses related to the emergency action. Lessee shall, at all times and at Lessee's expense, do all things reasonably necessary to protect the Premises used by Lessee. Lessee shall not grant, with respect to the Premises, easements, rights-of-way, licenses or permits.

20. **Safety:** Lessee shall immediately correct any unsafe condition of Premises, as well as any unsafe practices occurring thereon. Lessee shall obtain emergency medical care for any member of the public who is in need thereof because of illness or injury. Lessee shall operate Premises in a manner to protect the health, safety, and welfare of the general public.

21. **Employees of Lessee:** All employees, agents, assignees and sub-lessees of Lessee shall be appropriately licensed when required by law. All such employees, agents, assignees and sub-lessees shall be employees, agents, or assignees of Lessee only and shall not in any instance be, or be construed to be, employees, agents, or assignees of the County.

22. **Smoke Free Workplace:** Lessee shall comply with and observe any and all applicable statutes, ordinances, rules and regulations, including, those of the federal, state, municipal, County or other public authority regulating smoking on County properties, including those statutes, ordinances, rules and regulations applying to buildings or structures owned, leased or otherwise operated by the County of San Luis Obispo to conduct County business. Notwithstanding any smoking prohibition set forth by County ordinance, any Lessee may request written approval of a designated smoking area by the County Public Health Officer, if permitted by law or statute.

23. **Drug Free Workplace:** Lessee and Lessee's employees shall comply with all laws related to a drug free workplace. Neither Lessee nor Lessee's employees shall unlawfully manufacture, distribute, dispense, possess, or use controlled substances, including but not limited to marijuana, heroin, cocaine, methamphetamine, or amphetamines at any of Lessee's facilities or County's facilities or work sites.

24. **Gender Harassment Warranty and Liability:** Lessee shall have an obligation to train its employees regarding behavior prohibited by law that constitutes discrimination, sexual harassment and gender harassment.

25. **Storm Water Control Plan and Storm Water Management:** Lessee shall adhere to the requirements of the Storm Water General Permit (Permit) issued to the County of San Luis Obispo by the State Water Resources Control Board (State Board) that governs stormwater and non-stormwater discharges. Activities performed on the Premises shall conform to the Permit, and Lessee shall adhere to all current and future requirements established by the State Board for the County. Further, Lessee shall be responsible for developing a new Stormwater Pollution Prevention Plan (SWPPP) including a Spill Response Plan that is acceptable to County and the City of Paso Robles, for Lessee's use of the Premises. Lessee shall complete and submit to the County by July 1st of each year, an annual inspection report as presented in Exhibit "B". In order to verify compliance with the measures in the Permit and the information in the annual report, the lessee shall allow the County to inspect the Premises up to twice annually and will cooperate with County to correct any violations to the Permit and fulfilling the reporting requirements to the State Board. Failure to correct any violation and/or cooperate with the County in fulfilling these requirements will be deemed a failure of performance as defined in section 33 of this agreement.

26. **Business Hours:** It is understood and agreed that the hours of Lessee's business operations shall be defined in Lessee's Conditional Use Permit with the City of Paso Robles. If required by the City of Paso Robles, Lessee shall propose noise-reduction techniques in their Conditional Use Permit that will go into effect with the construction and occupancy of the adjacent residential property in order to reduce noise impacts.

27. **Indemnification:** To the fullest extent permitted by law, Lessee shall indemnify, defend, and hold harmless the County and its officers, agents, employees, and volunteers from and against all claims, demands, damages, liabilities, loss, costs, and expense (including attorney's fees and costs of litigation) of every nature arising out of or in connection with Lessee's performance or attempted performance of any obligation or duty provided for or relating to this Lease and/or the Premises, except such loss or damage which was caused by sole negligence or willful misconduct of the County. It is the intent of the parties to provide the County the fullest indemnification, defense, and hold harmless rights allowed under the law. If any word(s) continued herein are deemed by a court to be in contravention of applicable law, said word(s) shall be severed from this Lease and the remaining language shall be given full force and effect.

28. **Insurance:** Lessee shall obtain and maintain for the entire term of the Lease and Lessee shall not perform any work under this Lease until after Lessee has obtained insurance complying with the provisions of this paragraph. Said policies shall be issued by companies authorized to do business in the State of California. Lessee shall maintain said insurance in force at all times. The following coverage with the following features shall be provided:

a. **Commercial Liability Insurance:** Lessee shall maintain in full force and effect for the period covered by this Lease, commercial liability insurance. This insurance shall include, but shall not be limited to, comprehensive general and automobile liability insurance providing protection against claims arising from bodily and personal injury, including death resulting therefrom, and damage to property resulting from any act or occurrence arising out of Lessee's operations in the performance of this Lease, including, without limitation, acts involving vehicles. The policy shall be in the form of Insurance Services Office (ISO) Form CG 00 01 covering commercial general liability on an "occurrence" basis for bodily injury and property damage, personal injury and advertising injury, with limits no less than $2,000,000 per occurrence. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this location or the general aggregate limit shall be twice the required occurrence limit. The following endorsements must be attached to the policy:

i. If the insurance policy covers on an "accident" basis, it must be changed to "occurrence".

ii. The policy must cover personal injury as well as bodily injury.

iii. Blanket Contractual liability must be afforded and the policy must contain a cross liability or severability of interest endorsement.

b. **Workers' Compensation Insurance:** In accordance with the provisions of sections 3700 et seq. of the California Labor Code, if Lessee has any employees, Lessee is required to be insured against liability for workers' compensation or to undertake self-insurance. Lessee agrees to comply with such provisions before commencing the performance of this Lease.

c. **Primary Coverage.** For any claims related to this Lease, Lessee's insurance coverage shall be primary insurance as respect to the County, its officers, officials, employees, and volunteers. Any insurance or self-insurance maintained by the County, its officers, officials, employees, or volunteers shall be excess of the Lessee's insurance and shall not contribute with it.

d. **Notice of Cancellation.** Each insurance policy required above shall provide that coverage shall not be canceled, except with notice to the County.

e. **Waiver of Subrogation.** Lessee hereby grants to County a waiver of any right to subrogation which any insurer of said Lessee may acquire against the County by virtue of the payment of any loss under such insurance. Lessee agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not the County has received a waiver of subrogation endorsement from the insurer.

f. **Additional Insureds to Be Covered:** The commercial general liability policies shall name "County of San Luis Obispo, its officers and employees" as additional insureds. The policy shall provide that the Lessee's insurance will operate as primary insurance and that no other insurance maintained by the County, or additional insureds will be called upon to contribute to a loss hereunder.

g. **Certification of Coverage:** Within fifteen (15) calendar days of the first day of the commencement date of this Lease, Lessee shall furnish County with the following for each insurance policy required to be maintained by this Lease, and annually thereafter:

i. A copy of the Certificate of Insurance shall be provided. The certificate of insurance must include a certification that the policy will not be canceled or reduced in coverage or changed in any other material aspect without thirty (30) days prior written notice to the County.

ii. A Workers' Compensation certificate of insurance must be provided.

iii. Upon written request by the County, the Lessee shall provide a copy of the complete insurance policy.

iv. Approval of Insurance by County shall not relieve or decrease the extent to which the Lessee may be held responsible for payment of damages resulting from Lessee's services or operations pursuant to this Lease. Further, County's act of acceptance of an insurance policy does not waive or relieve Lessee's obligations to provide the insurance coverage required by the specific written provisions of this Lease.

29. Effect of Failure or Refusal: If Lessee fails or refuses to procure or maintain the insurance required by this Lease, or fails or refuses to furnish County with the certifications required by *Subparagraph G.* above, County shall have the right, at its option, to forthwith terminate the Lease for cause.

30. Taxes: As a qualified joint powers agency, the County Assessor's Office has determined that Lessee shall not be liable for possessory interest taxes or personal property taxes.

31. Lessee's Responsibility for Compliance: Lessee shall at all times observe and comply with, and shall cause all his agents, employees and sublessors to observe and comply with all present and future laws, statutes, ordinances, regulations, rules, resolutions, or other binding enactments of any governmental authority, now or at any time during the term of this Lease and any extensions thereof. If any future laws, rules, regulations, or ordinances are passed by the County of San Luis Obispo and said legislative enactment has any impact fiscal or otherwise on Lessee, and if Lessee does not make a timely objection to County during course of legislative process, Lessee will be deemed to have waived any right to object at a later time and waives al damages flowing therefrom. Lessee shall and does hereby assume responsibility for payment of any and all licenses applicable to Lessee's operation on the Premises.

32. Notices: Any notice required to be given pursuant to the terms and provisions hereof shall be in writing and shall be sent by certified or registered mail as follows:

To the Lessee at:

San Luis Obispo Regional Transit Authority
Attn: Geoff Straw, Executive Director
179 Cross Street
San Luis Obispo, CA 93401

To the County at:

County of San Luis Obispo
Attn: Shauna Dragomir, Real Property Manager
Central Services Department
1087 Santa Rosa Street
San Luis Obispo, CA 93408

The address to which the notices may be mailed as aforesaid by either party may be changed by written notice given by such party to the other as herein before provided, but nothing herein contained shall preclude the giving of any such notice by personal service.

33. **Termination and Breach:** If any of the following occur, the Director shall have the right to terminate this Lease effective immediately for cause upon giving written notice to the Lessee:

a. Lessee fails to perform its duties to the satisfaction of the Director, or Director's designee, including the accumulation of multiple less-significant instances of failure to perform in accordance with this Lease; or

b. Lessee fails to fulfill in a timely and professional manner its legal and contractual obligations under this Lease.

At the discretion of the Director, or Director's designee, Lessee may be allowed ten (10) days after receiving written notice to correct any breach hereunder. Failure to correct the breach will result in immediate possession of the Premises.

The exercise of the remedies provided for in this section shall be cumulative and in no way affect or replace other remedies available to the County.

34. **Assignment of Lease:** Lessee shall not assign, transfer, or delegate this Lease or any interest therein without the prior written consent of Director, or Director's designee, and any such assignment, transfer, or delegation without the Director's written approval shall be considered null and void.

County may at its option, sell, assign, transfer to or delegate the Premises to another governmental agency provided that such sale, assignment, transfer, or delegation shall not terminate this Lease.

35. **Waiver of Claim:** Lessee hereby unconditionally waives any claim against the County, its officers, agents or employees for damage or loss caused by any suit during the term of this Lease or in the future. Any action, proceeding or claim, directly or indirectly, attacking the validity of this Lease, or any part thereof, shall be the sole responsibility and liability of Lessee.

36. **Limitation of Actions:** Lessee shall have no other legal or equitable rights, entitlement or interests other than those expressly stated in this Lease. This shall apply regardless of any information exchanged or representations made by County staff or others during negotiations, prior to execution, or after execution. No representation by County staff shall be binding unless said provision is in writing and signed by the Board of Supervisors prior to the effective date.

37. **Eminent Domain:** If the whole of the Premises shall be taken or condemned by any competent authority under power of eminent domain for a public or quasi-public use or purpose, then the leasehold estate hereby created shall cease and terminate as of the date actual physical possession of the Premises is taken by the condemnor. All compensation and damages awarded for such total taking shall belong to and be the sole property of Lessee, provided, however, that County shall be entitled to receive any award for the taking of or damage to County equipment, fixtures, or any improvements made by County to the Premises which County would have had, but for the condemnation, the right to remove on expiration or sooner termination of the Lease.

In the event that there shall be partial taking of the Premises during the Lease term under the power of eminent domain, this Lease shall terminate as to that the portion of the Premises so taken on the date when actual physical possession of said portion is taken by the condemnor, but this Lease shall at County's option, continue in force and effect. The compensation and damages for such partial taking shall belong to and be sole property of Lessee, provided, however, that County shall be entitled to receive any award made by County to the Premises which County would have had, but for the condemnation, the right to remove on expiration or sooner termination of this Lease and, in the event that this Lease is continued as to that portion of that Premises not condemned, any award made for alterations, modifications or repairs which may be reasonably required in order to place the remaining portion of the Premises not taken in a suitable condition shall belong to County.

38. **Destruction of Premises:** Should any matter or condition beyond the control of the parties hereto, such as war, public emergency, or calamity, fire, earthquake, flood, act of God, strike, or any other labor disturbance prevent performance of this Lease in accordance with the rights and privileges granted herein, this Lease shall immediately be terminated and the County shall be under no obligation to the Lessee by reason of said matter or condition.

Should any aforementioned matter or condition create eligibility for Federal, State or any other governmental jurisdictional relief assistance and/or aid, both parties agree to take all reasonable steps necessary to procure such assistance and/or aid, in their respective capacities at the time of such application.

39. **Non-Discrimination:** Lessee shall not discriminate against any person or class of persons in violation of the Civil Rights Act of 1964 as amended or any other applicable laws prohibiting discrimination in the use of the Premises.

40. **Americans With Disabilities Act:** Lessee shall be responsible for alterations necessary to comply with the Americans With Disabilities Act of 1990, 42 U.S.C. sect. 12101 et seq., as currently enacted and in accordance with applicable laws.

41. **Public Records:** Any and all written information submitted to and/or obtained by County from Lessee or any other person or entity having to do with or related to this Lease and/or the Premises, either pursuant to this Lease or otherwise, at the option of County, may be treated as a public record open to inspection by the public pursuant to the California Records Act (Government Code Section 6250 et seq.), as now in force or hereafter amended, or any Act in substitution thereof, or otherwise made available to the public and Lessee hereby waives, for itself, its agents, employees, subtenants, and any person claiming by, through or under Lessee, any right or claim that any such information is not public record or that the same is trade secret or confidential information and hereby agrees to indemnify

42. **Hazardous Waste:** Lessee shall at all times and in all respects comply with all federal, state and local laws, ordinances and regulations ("Hazardous Materials Laws") relating to industrial hygiene, environmental protection, or the use, analysis, generation, manufacture, storage, disposal or transportation of any oil, fuels, gasoline, flammable explosives, asbestos, UREA formaldehyde, radioactive materials or waste, or other hazardous, toxic, contaminated or

polluting materials, substances or wastes, including, without limitation, any "hazardous substances," "Hazardous wastes," "hazardous materials" or "TOXIC SUBSTANCES" under such laws, ordinance or regulations (collectively "Hazardous Materials"). Lessee shall, except in the event of County's sole negligence, indemnify, defend, protect and hold County, each of County's offices, directors, employees, agents, attorneys, successors and assigns, free and harmless from and against any and all claims, liabilities, penalties, forfeitures, losses or expenses or death of or injury to any person or damage to any property whatsoever, arising from or caused in whole or in part, directly or indirectly by: (a) the presence in, on, under or about the Premises or discharge in or from the Premises of any Hazardous Materials or Lessee's use, analysis, storage, transportation, disposal, release, threatened release, discharge or generation of Hazardous Materials, to, in, on, under, or about or from the Premises, or (b) Lessee's failure to comply with any Hazardous Materials law. Lessee's or County's obligations hereunder shall include, without limitation, and whether foreseeable or unforeseeable, all costs of any required or necessary repair, clean-up, or detoxification or decontamination of the Premises, and the preparation and implementation of any closure, remedial action or other required plans in connection therewith caused by Lessee and County and shall survive the expiration or earlier termination of the term of this Lease. For purposes of the release and indemnity provisions hereof, any acts or omissions of County, or by employees, agents, assignees, lessors, or sublessors of County or others acting for or on behalf of County (whether or not they are negligent, intentional, willful or unlawful) shall be strictly attributable to County.

43. **Severability:** The invalidity of any provision of this Lease shall not affect the validity, enforceability of any other provisions of this Lease.

44. **Law:** This Lease has been executed and delivered in the State of California and the validity, enforceability and interpretation of any of the clauses of this Lease shall be determined and governed by the laws of the State of California.

45. **Venue:** San Luis Obispo County shall be the venue for any action or proceeding that may be brought or arise out of, in connection with or by reason of this Lease.

46. **Entire Lease and Modifications:** This Lease supersedes all previous leases and constitutes the entire understanding of the parties hereto. Lessee shall be entitled to no other benefits than those specified herein. No changes, amendments, or modifications shall be effective unless in writing and signed, in advance of the effective date of the changed amendment or modification, by both parties. Lessee specifically acknowledges that in entering into this Lease, Lessee relies solely upon the provisions contained in this Lease and no previous leases or oral discussions prior to entering into this Lease.

47. **Authority to Lease:** Any individual executing this Lease on behalf of Lessee represents and warrants that he/she is duly authorized to execute and deliver this Lease on behalf of the Lessee, and that this Lease is binding upon Lessee in accordance with its terms.

48. **Waiver of Lease Terms:** No waiver by either party at any time of any of the terms, conditions or covenants of this Lease shall be deemed as a waiver at any time thereafter of that same or of any other terms, condition or covenant herein contained, nor of the strict and prompt performance thereof. No delay, failure or omission of County to re-enter the Premises or to exercise any right, power or privilege or option arising from any default, nor any subsequent acceptance of rent than or thereafter accursed shall impair any such right, power or privilege or option or b construed as a waiver of such default or a relinquishment of any right or acquiescence therein. No notice to Lessee shall be required to restore or revive after the waiver by County of any default. No option, right, power, remedy or privilege of County shall be construed as being exhausted by the exercise thereof in one or more instances. The rights, powers, options and remedies given to County by this Lease shall be deemed cumulative.

49. **Entire Agreement and Modifications:** This Lease and the attached Exhibits made a part of this Agreement by reference, embodies the whole Lease between the parties hereto as it pertains to the subject real property and there are no promised terms, conditions, or obligations referring to the subject matter hereof, other than as contained herein. Any alterations, changes or modifications to this Lease must be in writing and executed by both Lessee and County.

///////////////NOTHING FURTHER EXCEPT SIGNATURES PAST THIS POINT////////////////

IN WITNESS WHEREOF, the parties hereto have executed this Lease this 4th day of April, 2017.

COUNTY OF SAN LUIS OBISPO	**LESSEE:**
	San Luis Obispo Regional Transit Authority
By: JOHN PESCHONG Chairperson of the Board of Supervisors	By: ______ Geoff Straw, Executive Director
APPROVED BY THE BOARD OF SUPERVISORS	Date: 3-1-17

This 4th day of April, 2017

ATTEST:

TOMMY GONG

Clerk of the Board of Supervisors By: SANDY CURRENS
Deputy Clerk

APPROVED AS TO FORM AND LEGAL EFFECT:

RITA L. NEAL
County Counsel

By: ______
Deputy County Counsel

Date: 3/3/17

EXHIBIT "A"
CONCEPTUAL PLAN – APPROXIMATE LOCATION OF PREMISES

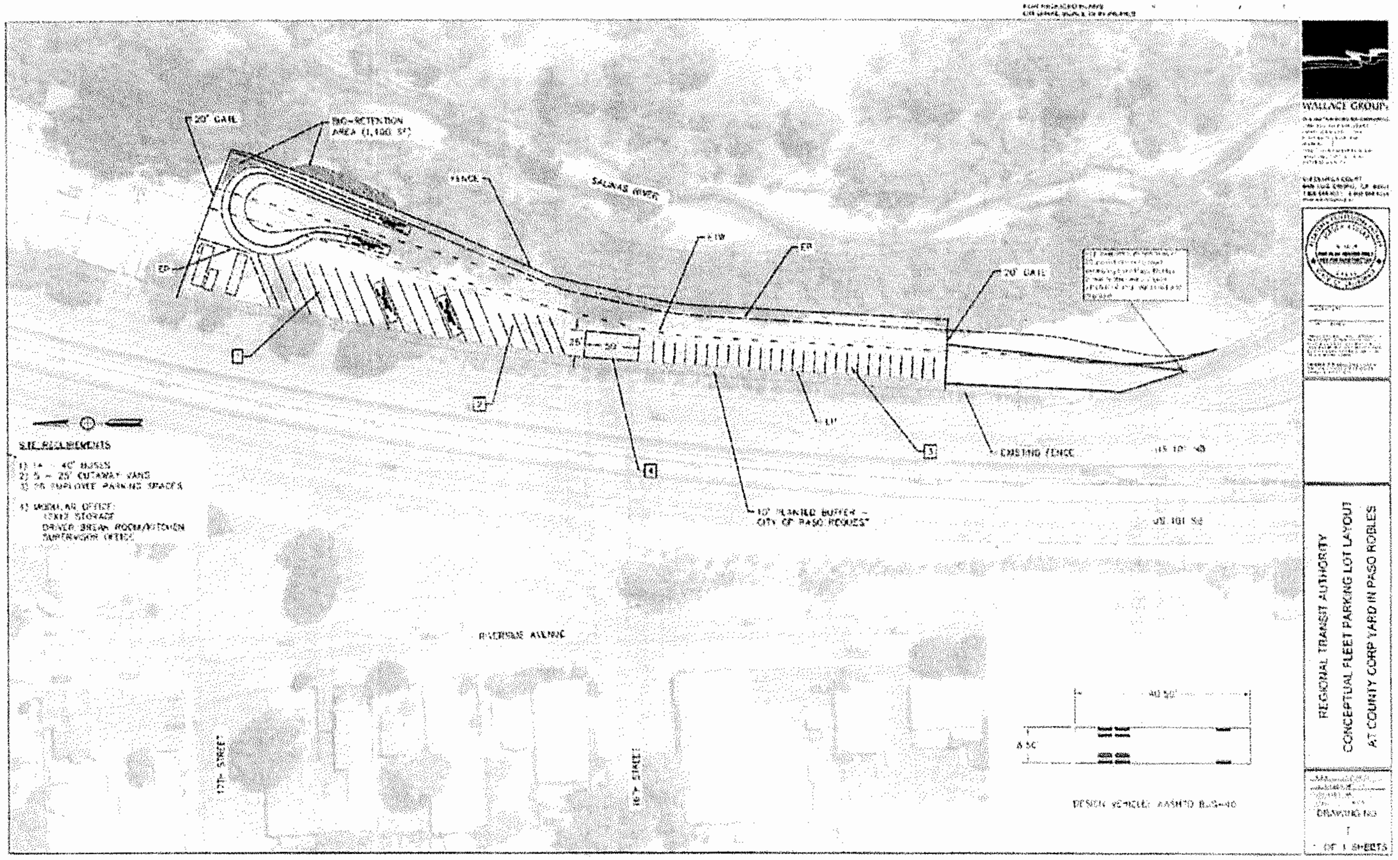
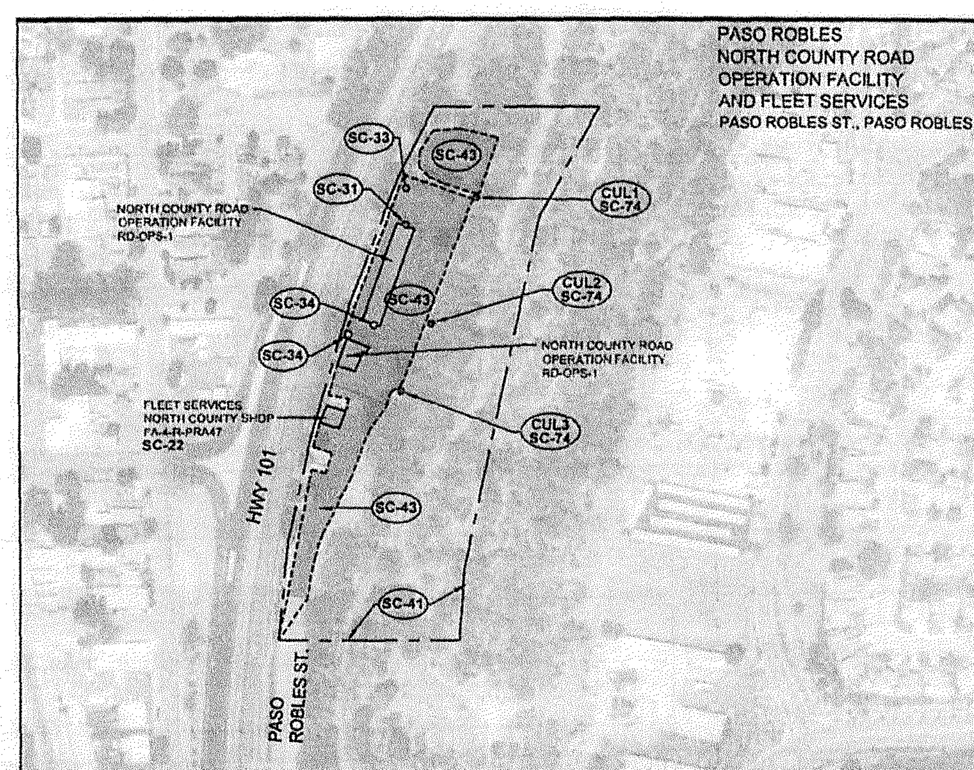


EXHIBIT "B"
COUNTY STORMWATER MANAGEMENT STRUCTURAL BMPs AND STORMWATER FACILITY SITE INSPECTION REPORT



STRUCTURAL BMP's

CUL1	CULVERT SAP ID: 10013197
CUL2	CULVERT SAP ID: 10013196
CUL3	CULVERT SAP ID: 10013196

SOURCE CONTROL BMP's

SC-22	VEHICLE AND EQUIPMENT REPAIR	SC-41	BUILDING AND GROUNDS MAINTENANCE
SC-31	OUTDOOR CONTAINER STORAGE	SC-43	PARKING AND STORAGE AREA MAINTENANCE
SC-33	OUTDOOR STORAGE OF RAW MATERIALS	SC-74	DRAINAGE SYSTEM MAINTENANCE
SC-34	WASTE HANDLING AND DISPOSAL		

PASO ROBLES
NORTH COUNTY ROAD
OPERATION FACILITY AND
FLEET SERVICES
DRAINAGE PLAN

NORTH

No	Revisions	Date	By

County Facility
OPS-1
PRA47

Drawn By	AE
Checked By	XX
Date	July 2016

StormWater Managment (SWM)
NORTH COUNTY ROAD OPERATION FACILITY RD-OPS-1 AND FLEET SERVICES FA-4-R-PRA47

DRNG.01

File No
Project No 350060

Stormwater Facility Site Inspection Report

General Information		
Facility Name:	Facility Location or Description:	
County Facility Code & APN:	Date of Inspection:	
Inspector's Name(s), Title(s) & Phone:	Type of Inspection: ❑ Regular Maintenance ❑ Pre-storm event ❑ During storm event ❑ Post-storm event	
Total Site Area:	Total Building Area:	Total Parking Area:
Proximity to Receiving Water: Does the facility discharge directly or adjacent to a 303(d) water body or environmentally sensitive area? ❑Yes ❑No		
Weather Information		
Weather at time of this inspection? ❑ Clear ❑Cloudy ❑ Rain ❑ Sleet ❑ Fog ❑ Snowing ❑ High Winds ❑ Other: Temperature:		
Site Stormwater Management Information		
Is there a chronic history of spills and leaks? ❑Yes ❑No ❑N/A If yes, describe:	Is there evidence of leaks and drips from equipment and machinery? ❑Yes ❑No ❑N/A If yes, describe:	
Have any discharges occurred since the last inspection? ❑Yes ❑No ❑N/A If yes, describe:	Is there a spill prevention and response team? ❑Yes ❑No ❑N/A If yes, describe:	
Are there any discharges at the time of inspection, including non-stormwater related outfall? ❑Yes ❑No ❑N/A If yes, describe:	Are appropriate spill containment and cleanup materials kept on site and in convenient locations? ❑Yes ❑No ❑N/A If yes, describe:	
Are cleanup procedures for spills followed regularly and correctly? ❑Yes ❑No ❑N/A If yes, describe:	Are personnel regularly trained in the used of spill control materials? ❑Yes ❑No ❑N/A If yes, describe:	

	Site Construction Project Activity	Applicable Activity:	Maint. Required:	Effectiveness of BMP Measures, Corrective Action Needed and Notes:
1	Are all slopes, graded and disturbed areas being worked on properly stabilized?	☐Yes ■No ☐N/A	☐Yes ☐No	☐1 ☐2 ☐3 ☐4 ☐5
2	Are natural resource areas (streams, wetlands, mature trees, etc.) protected with barriers, filtration or other BMP's?	☐Yes ☐No ☐N/A	☐Yes ☐No	☐1 ☐2 ☐3 ☐4 ☐5
3	Are perimeter controls and sediment barriers adequately installed (keyed into substrate) and maintained?	☐Yes ☐No ☐N/A	☐Yes ☐No	☐1 ☐2 ☐3 ☐4 ☐5
4	Are storm drain inlets properly protected and are discharge points and receiving waters free of any sediment deposits?	☐Yes ☐No ☐N/A	☐Yes ☐No	☐1 ☐2 ☐3 ☐4 ☐5
5	Is the construction exit preventing sediment from being tracked into the street?	☐Yes ☐No ☐N/A	☐Yes ☐No	☐1 ☐2 ☐3 ☐4 ☐5
6	Are washout facilities (paint, stucco, concrete) available, clearly marked and maintained?	☐Yes ☐No ☐N/A	☐Yes ☐No	☐1 ☐2 ☐3 ☐4 ☐5
7	Is trash/litter from work areas collected and placed in covered dumpsters?	☐Yes ☐No ☐N/A	☐Yes ☐No	☐1 ☐2 ☐3 ☐4 ☐5
8	Are materials that are potential stormwater contaminants stored inside or under cover?	☐Yes ☐No ☐N/A	☐Yes ☐No	☐1 ☐2 ☐3 ☐4 ☐5
9	Are non-stormwater discharges (wash water, dewatering) properly controlled?	☐Yes ☐No ☐N/A	☐Yes ☐No	☐1 ☐2 ☐3 ☐4 ☐5

	Material Stored Onsite:	Typical Quantity/Frequency: (ex. – gal/day, lbs/wk)	Is Stored Material Likely to Generate Pollutants?	Corrective Action Needed and Notes:
1			☐Yes ☐No	
2			☐Yes ☐No	
3			☐Yes ☐No	
4			☐Yes ☐No	
5			☐Yes ☐No	
6			☐Yes ☐No	

	Material Stored Onsite:	Typical Quantity/Frequency: (ex. – gal/day, lbs/wk)	Is Stored Material Likely to Generate Pollutants?	Corrective Action Needed and Notes:
7			❑Yes ❑No	
8			❑Yes ❑No	

For Effectiveness of *Best Management Practices (BMP's)* listed, ❑1 = No BMP's used and stormwater pollution likely, ❑2 = Some BMP's used but not effective, ❑3 = Some BMP's used and moderately effective, ❑4 = Source control BMP's used and very effective/structural BMP's needed, or ❑5 All necessary BMP's used and very effective.

	Site Activity and BMP* (*note: for each typical BMP see SC-11 for Spill Prevention, Control and Cleanup Procedures)	Applicable Activity:	Maint. Required:	Effectiveness of BMP Measures, Corrective Action Needed and Notes:
A	**Vehicle and Equipment Fueling: (Ref. SC-20)** • Are areas free of spills/leaks/trash, shutoff valves installed, staff training in fueling + cleanup procedures, spill control absorbent materials ready, drains labeled for oil/water separator, sewer, and stormdrain, fuel area cover or overhanging roof?	❑Yes ❑No ❑N/A	❑Yes ❑No	❑1 ❑2 ❑3 ❑4 ❑5
B	**Vehicle and Equipment Washing/Steam Cleaning: (Ref. SC-21)** • Are areas free of spills/leaks/trash, vehicles cleaned at commercial cleaning facility off-site, washing area clearly marked, signage posted that discharges to stormdrain prohibited, trash containers provided, map of storm drain to prevent discharge of wash water?	❑Yes ❑No ❑N/A	❑Yes ❑No	❑1 ❑2 ❑3 ❑4 ❑5
C	**Vehicle and Equipment Maintenance and Repair: (Ref. SC-22)** • Are areas free of spills/leaks/trash, idle equipment stored under cover, drip pans used for leaking vehicles/equipment, maintenance areas designed to prevent stormwater pollution, signs painted on stormdrain inlets to prohibit liquid or solid wastes, covered or roofed work area, spill control materials available?	❑Yes ❑No ❑N/A	❑Yes ❑No	❑1 ❑2 ❑3 ❑4 ❑5
D	**Outdoor Loading or Unloading of Materials: (Ref. SC-30)** • Are areas free of spills/leaks/trash, materials stored inside when feasible, training of staff in transfer of materials + spill management, spill control materials available, dry sweeping of area, storage containers have lids and are in good condition?	❑Yes ❑No ❑N/A	❑Yes ❑No	❑1 ❑2 ❑3 ❑4 ❑5
E	**Outdoor Container Storage of Liquids: (Ref. SC-31)** • Are areas free of spills/leaks/trash, liquids stored			❑1 ❑2 ❑3 ❑4 ❑5

	Site Activity and BMP* (*note: for each typical BMP see SC-11 for Spill Prevention, Control and Cleanup Procedures)	Applicable Activity:	Maint. Required:	Effectiveness of BMP Measures, Corrective Action Needed and Notes:
	inside when feasible, training of staff in transfer of liquids + spill management, spill control materials available, storage containers have lids and are in good condition, secondary containment berm or curb?	❑Yes ❑No ❑N/A	❑Yes ❑No	
F	**Outdoor Process Equipment Operations and Maintenance: (Ref. SC-32)** • Are areas free of spills/leaks/trash, training staff in spill management, spill control materials available, secondary containment berm or curb, cover or overhead roof, trash containers provided, labeling of stormdrain?	❑Yes ❑No ❑N/A	❑Yes ❑No	❑1 ❑2 ❑3 ❑4 ❑5
G	**Outdoor Storage of Raw Materials: (Ref. SC-33)** • Are areas free of spills/leaks/trash, materials stored inside when feasible, outside stockpile areas covered, roofed over or enclosed, storage containers in good condition with lids, drums in secure storage area?	❑Yes ❑No ❑N/A	❑Yes ❑No	❑1 ❑2 ❑3 ❑4 ❑5
H	**Waste Handling and Disposal: (Ref. SC-34)** • Are areas free of spills/leaks/trash, trash collected and placed in covered dumpsters, storage containers in good condition, recycling containers utilized, areas dry swept regularly, no hazardous waste materials stored, secondary containment methods, staff trained in spill prevention?	❑Yes ❑No ❑N/A	❑Yes ❑No	❑1 ❑2 ❑3 ❑4 ❑5
I	**Building and Grounds Maintenance: (Ref. SC-41)** • Are areas free of spills/leaks/trash, drop cloths used for maintenance, any washing done with stormdrain filtration, spill control training and materials available, utilize non-toxic chemicals for maintenance, recyclable cleaning materials, regular dry sweeping?	❑Yes ❑No ❑N/A	❑Yes ❑No	❑1 ❑2 ❑3 ❑4 ❑5
J	**Parking/Storage Area Maintenance: (Ref. SC-43)** • Are areas free of spills/leaks/trash, site designed to include vegetated strips, swales or infiltration devices, rooftop drains prevent drainage directly onto paved surfaces, lot includes semi-permeable hardscape, trash receptacles provided, dry sweeping and regular parking lot sweeping?	❑Yes ❑No ❑N/A	❑Yes ❑No	❑1 ❑2 ❑3 ❑4 ❑5
	Other Comments or Non-Compliance Issues:			

	Site Activity and BMP* (*note: for each typical BMP see SC-11 for Spill Prevention, Control and Cleanup Procedures)	Applicable Activity:	Maint. Required:	Effectiveness of BMP Measures, Corrective Action Needed and Notes:
Area for information and comments or incidents of non-compliance not described above.				

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 2, 2026
STAFF REPORT

AGENDA ITEM:	**A-4**
TOPIC:	**New SLOCPT Rates for July 2027 Implementation**
PRESENTED BY:	**Tania Arnold, Deputy Director/CFO**
STAFF RECOMMENDATION:	**Approve the Implementation Date of July 2027 at a Rate of 1.59%**

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

Based on the County Pension Trust's 2025 actuarial study completed in June 2026, 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 2026. To meet our required funding obligation to the Pension Trust, the RTA must determine if the implementation date should be January 2027 or July 2027. A January 2027 implementation date would result in a 1.53% increase in rates, and a July 2027 implementation date would result in a 1.59% increase in rates.

Although the July 2027 rate increase (1.59%) is higher than the January 2027 rate (1.53%), staff recommends 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 2027. 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 2027 at a rate of 1.59%.

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SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 2, 2026
STAFF REPORT

AGENDA ITEM:	**A-5**
TOPIC:	**FTA Transit Asset Management Plan Update**
PRESENTED BY:	**Geoff Straw, Executive Director**
STAFF RECOMMENDATION:	**Receive and File Update to the FY2026 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 agency designation and therefore must meet the following four TAM Plan 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.

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 FY2026.

Transit Asset Management Plan
The RTA's Strategic Business Plan and 2026 TAM Performance Target were set for all revenue vehicles to allow no more than **28%** of Heavy Duty Buses, **11%** Cutaways and **25%** 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 **20%,** with maintenance trucks and equipment set at **20%.**

The Bus Maintenance Facility (BMF) located at 253 Elks Lane in San Luis Obispo supports maintenance, operations and administrative functions for the RTA and was constructed in 2022. In accordance with federal requirements, a formal facility condition assessment is required to be reported to the National Transit Database (NTD) every four (4) years. As such, the BMF facility condition assessment will be due to the NTD in October 2026. As the BMF building is still so new, the facility condition assessment has been rated as **"5 - Excellent Condition"** with no visible defects. The RTA's facility condition assessment performance targets remain set at **0.0%,** meaning that no Bus Maintenance Facility assets are expected to come into a state of needing repairs, or receive a condition rating of less than adequate (3).

While not all performance measures were met in FY2026, 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 NTD and are summarized below in Table 1.

Table 1: NTD - Transit Asset Management Performance Measure Targets (A-90)

<table>
<tr><th></th><th>Vehicle Type</th><th>FY2026 Target (%)</th><th>Total Vehicles Allowed to Exceed State of Good Repair</th><th>ACTUAL FY2026 Performance (%)</th><th>ACTUAL Vehicles Exceeding State of Good Repair in FY2026</th><th>Target Met / Unmet</th></tr>
<tr><td rowspan="2">REVENUE SERVICE VEHICLES</td><td>Heavy Duty Bus (30)</td><td>28.0%</td><td>9</td><td>20.59%</td><td>7</td><td>MET</td></tr>
<tr><td colspan="6">Description: The RTA replaced five (5) heavy-duty diesel-powered buses with zero-emission electric buses to be delivered in FY2026. Three of the 2013 diesel-powered buses were retained in contingency fleet status as the RTA was facing reliability issues with the battery electric buses. The three Contingency Fleet Vehicles have been removed from active fleet status and are not accounted for in the TAM plan. The RTA issued a purchase order for four (4) more battery electric buses to replace four 2013 heavy-duty diesel-powered buses. These BEBs are expected to be delivered in the Fall 2026 (FY27). The RTA is scheduled to receive 5307 and 5339 apportionment funds to replace the three (3) remaining 2013 heavy-duty diesel-powered buses with diesel buses. The RTA anticipates issuing this purchase order in FY2027.</td></tr>
</table>

<table>
<tr><th></th><th>Vehicle Type</th><th>FY2026 Target (%)</th><th>Total Vehicles Allowed to Exceed State of Good Repair</th><th>ACTUAL FY2026 Performance (%)</th><th>ACTUAL Vehicles Exceeding State of Good Repair in FY2026</th><th>Target Met / Unmet</th></tr>
<tr><td rowspan="4">REVENUE SERVICE VEHICLES (CONT.)</td><td>Cutaways (19), (1) MobilityTransit & Trolleys (4)</td><td>11.0%</td><td>2</td><td>29.17%</td><td>7</td><td>unmet</td></tr>
<tr><td colspan="6">Description: To date, the RTA has replaced 5 out of the 9 mid-duty vehicles in 2026. The remaining 4 MobilityTransits have an estimated delivery date of Fall 2026 (FY27). The RTA also issued a purchase order to replace one (1) seasonal-service Trolley for the County which is scheduled for delivery in Fall 2026 (FY27).

<u>FY2026 PROGRAM CONSOLIDATIONS ADDED 7 Vehicles to the RTA Fleet</u>:
The FY2026 Consolidation of the City of Morro Bay program into the RTA added two (2) (20124 & 2025) Cutaways and two (2) (2019 & 2022) Trolleys to the RTA Fleet. The FY2026 consolidation of the Atascadero Dial-A-Ride program into the RTA added three vehicles (two 2018 Cutaways and one 2024) MobilityTransit) to the RTA Fleet. The seven (7) total vehicles acquired from program consolidations are included in the RTA's FY2026 TAM Plan performance measures for the period of July 1, 2025 - June 30, 2026.</td></tr>
<tr><td>ADA Accessible Minivans (15)</td><td>25.0%</td><td>2</td><td>60.00%</td><td>9</td><td>unmet</td></tr>
<tr><td colspan="6">Description: Grants funds have been received for the nine vehicle replacements. The RTA is reviewing current ridership to determine vehicle replacement type and if fleet downsizing is needed. The RTA is scheduled to issue purchase orders to replace these vehicles in FY27.</td></tr>
<tr><td rowspan="4">NON-REVENUE SUPPORT VEHICLES & EQUIPMENT</td><td>(Non-Revenue) Automobiles (10)</td><td>20.0%</td><td>2</td><td>11.11%</td><td>1</td><td>MET</td></tr>
<tr><td colspan="6">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 replaced one support vehicle in FY26 and anticipates issuing a purchase orders for one electric support vehicle in FY27.</td></tr>
<tr><td>(Non-Revenue) Maintenance Trucks and Equipment (5)</td><td>20.0%</td><td>2</td><td>14.29%</td><td>2</td><td>MET</td></tr>
<tr><td colspan="6">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 replaced two (2) maintenance/utility service trucks in FY26 and anticipates replacing one support maintenance truck in FY27.</td></tr>
</table>

<table>
<tr><th></th><th>Vehicle Type</th><th>FY2026 Target (%)</th><th>Total Vehicles Allowed to Exceed State of Good Repair</th><th>ACTUAL FY2026 Performance (%)</th><th>ACTUAL Vehicles Exceeding State of Good Repair in FY2026</th><th>Target Met / Unmet</th></tr>
<tr><td rowspan="2">FACILITIES</td><td>Facilities (1)
Bus Maintenance Facility (BMF) located at 253 Elks Lane, SLO</td><td>0.00%</td><td>0</td><td>0.00%</td><td>0</td><td>MET</td></tr>
<tr><td colspan="6">Description: Construction of the BMF was completed in January 2021. 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.</td></tr>
</table>

Staff recommendation

Receive and file the FY2026 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 24 Aug 26 at 13:38

08/24/26

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 Atacadero as a Subrecipient to the RTA. The City of Atascadero provides only Dial-A-Ride services to their community.

- The RTA's fleet performance measurementstandard 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	2027 Target	2028 Target	2029 Target	2030 Target	2031 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	25%	25%	25%		25%
	CU - Cutaway Bus	20%	10%	20%	10%	10%
	DB - Double Decked Bus	N/A				
	FB - Ferryboat	N/A				
	MB - Mini-bus	N/A				
	MV - Mini-van	15%	10%	10%	10%	
	RT - Rubber-tire Vintage Trolley	10%			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**	15%			20%	20%
	Steel Wheel Vehicles	N/A				
	Trucks and other Rubber Tire Vehicles	15%			30%	
	Forklift	1%			100%	
	Utility Cart	1%				
	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
RevenueVehicles	**71**	**6.2**	**207,221**	**$801,360.55**
AB - Articulated Bus	0	-	-	-
AO - Automobile	0	-	-	-
BR - Over-the-road Bus	0	-	-	-
BU - Bus	32	8.0	373,531	$1,509,097.78
CU - Cutaway Bus	20	3.5	76,582	$271,240.00
DB - Double Decked Bus	0	-	-	-
FB - Ferryboat	0	-	-	-
MB - Mini-bus	0	-	-	-
MV - Mini-van	15	5.3	66,355	$92,251.33
RT - Rubber-tire Vintage Trolley	4	9.0	58,178	$449,225.00
SB - School Bus	0	-	-	-
SV - Sport Utility Vehicle	0	-	-	-
TB - Trolleybus	0	-	-	-
VN - Van	0	-	-	-
Custom 1	0	-	-	-
Custom 2	0	-	-	-
Custom 3	0	-	-	-
Equipment	**17**	**4.0**	**32,194**	**$53,803.76**
Non Revenue/Service Automobile	12	3.0	29,240	$54,575.33
Steel Wheel Vehicles	0	-	-	-
Trucks and other Rubber Tire Vehicles	2	7.5	97,966	$79,350.00
Forklift	1	10.0	393	$37,800.00
Utility Cart	2	3.5	42	$31,630.00
Custom 3	0	-	-	-
Facilities	**1**	**5.0**	**N/A**	**$24,000,000.00**
Administration	0	-	N/A	-
Maintenance	1	5.0	N/A	$24,000,000.00
Parking Structures	0	-	N/A	-
Passenger Facilities	0	-	N/A	-
Custom 1	0	-	N/A	-
Custom 2	0	-	N/A	-
Custom 3	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
RevenueVehicles	**71**	**6.2**	**207,221**	**N/A**	**$801,360.55**	**32%**
AB - Articulated Bus	0	-	-	N/A	-	-
AO - Automobile	0	-	-	N/A	-	-
BR - Over-the-road Bus	0	-	-	N/A	-	-
BU - Bus	32	8.0	373,531	N/A	$1,509,097.78	22%
CU - Cutaway Bus	20	3.5	76,582	N/A	$271,240.00	30%
DB - Double Decked Bus	0	-	-	N/A	-	-
FB - Ferryboat	0	-	-	N/A	-	-
MB - Mini-bus	0	-	-	N/A	-	-
MV - Mini-van	15	5.3	66,355	N/A	$92,251.33	60%
RT - Rubber-tire Vintage Trolley	4	9.0	58,178	N/A	$449,225.00	25%
SB - School Bus	0	-	-	N/A	-	-
SV - Sport Utility Vehicle	0	-	-	N/A	-	-
TB - Trolleybus	0	-	-	N/A	-	-
VN - Van	0	-	-	N/A	-	-
Custom 1	0	-	-	N/A	-	-
Custom 2	0	-	-	N/A	-	-
Custom 3	0	-	-	N/A	-	-
Equipment	**17**	**4.0**	**32,194**	**N/A**	**$53,803.76**	**12%**
Non Revenue/Service Automobile	12	3.0	29,240	N/A	$54,575.33	8%
Steel Wheel Vehicles	0	-	-	N/A	-	-
Trucks and other Rubber Tire Vehicles	2	7.5	97,966	N/A	$79,350.00	50%
Forklift	1	10.0	393	N/A	$37,800.00	0%
Utility Cart	2	3.5	42	N/A	$31,630.00	0%
Custom 3	0	-	-	N/A	-	-
Facilities	**1**	**5.0**	**N/A**	**5.0**	**$24,000,000.00**	**N/A**
Administration	0	-	N/A	-	-	N/A
Maintenance	1	5.0	N/A	5.0	$24,000,000.00	N/A
Parking Structures	0	-	N/A	-	-	N/A
Passenger Facilities	0	-	N/A	-	-	N/A
Custom 1	0	-	N/A	-	-	N/A
Custom 2	0	-	N/A	-	-	N/A
Custom 3	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.
- All Fleet Replacement Projects and Costs are reflective of the region's FY27 FTIP, adopted August 2026.

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.

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

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	393	$37,800.00
Equipment	Non Revenue/Service Automobile	520	FORD	ESCAPE	1	1FMCU0F72FUA82168	SLO RTA	2015	75,378	$46,624.00
Equipment	Non Revenue/Service Automobile	525	CHEVROLET	EUV E-Bolt	1	1G1FY6S07P4139265	SLO RTA	2023	53,611	$49,850.00
Equipment	Non Revenue/Service Automobile	528	CHEVROLET	E-BOLT	1	1G1FY6S01P4189353	SLO RTA	2023	39,906	$49,850.00
Equipment	Non Revenue/Service Automobile	529	CHEVROLET	E-BOLT	1	1G1FY6S06P4189428	SLO RTA	2023	40,278	$49,850.00
Equipment	Non Revenue/Service Automobile	530	CHEVROLET	E-BOLT	1	1G1FY6S02P4193962	SLO RTA	2023	38,559	$49,850.00
Equipment	Non Revenue/Service Automobile	531	CHEVROLET	E-BOLT	1	1GYFY6S05P4193969	SLO RTA	2023	20,316	$51,350.00
Equipment	Non Revenue/Service Automobile	532	CHEVROLET	E-BOLT	1	1G1FY6S08P4195408	SLO RTA	2023	21,958	$51,350.00
Equipment	Non Revenue/Service Automobile	533	CHEVROLET	E-BOLT	1	1GYFY6S08P4187292	SLO RTA	2023	23,239	$51,350.00
Equipment	Non Revenue/Service Automobile	534	CHEVROLET	E-BOLT	1	1G1FY6S03P4193937	SLO RTA	2023	23,387	$51,350.00
Equipment	Non Revenue/Service Automobile	535	FORD	F-250 Truck	1	1FD7X2AA5TEC31721	SLO RTA	2026	1,870	$94,580.00
Equipment	Non Revenue/Service Automobile	536	FORD	F-150 Lightning Truck	1	1FT6W1BM6SWG25050	SLO RTA	2025	4,782	$54,450.00
Equipment	Non Revenue/Service Automobile	537	CHEVROLET	EQUIONOX	1	1FT6W1BM6SWG25050	SLO RTA	2026	7,599	$54,450.00
Equipment	Trucks and other Rubber Tire Vehicles	522	FORD	F-250	1	1FD7X2A66GED42246	SLO RTA	2016	120,333	$77,000.00
Equipment	Trucks and other Rubber Tire Vehicles	524	FORD	F-250	1	1FTFX1C50MKD87727	SLO RTA	2021	75,598	$81,700.00
Equipment	Utility Cart	526	Taylor Dunn	Big Foot	1	222461	SLO RTA	2022	71	$20,900.00
Equipment	Utility Cart	527	JCB	Utility Cart	1	5324865	SLO RTA	2023	13	$42,360.00
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	610,886	$737,375.00
RevenueVehicles	BU - Bus	1302	GILLIG	LOW FLOOR	1	15GGD2716D1182292	SLO RTA	2013	555,663	$737,375.00
RevenueVehicles	BU - Bus	1304	GILLIG	LOW FLOOR	1	15GGD271XD1182294	SLO RTA	2013	619,603	$737,375.00
RevenueVehicles	BU - Bus	1305	GILLIG	LOW FLOOR	1	15GGD2711D1182295	SLO RTA	2013	590,224	$1,459,986.00
RevenueVehicles	BU - Bus	1308	GILLIG	LOW FLOOR	1	15GGB271XD1182298	SCT	2013	521,398	$1,459,986.00
RevenueVehicles	BU - Bus	1309	GILLIG	LOW FLOOR	1	15GGB2711D1182299	SCT	2013	553,875	$1,459,986.00
RevenueVehicles	BU - Bus	1310	GILLIG	LOW FLOOR	1	15GGB2714D1182300	SCT	2013	572,565	$1,459,986.00
RevenueVehicles	BU - Bus	1501	GILLIG	LOW FLOOR	1	15GGD2719F1184847	SLO RTA	2015	593,262	$1,336,760.00
RevenueVehicles	BU - Bus	1502	GILLIG	LOW FLOOR	1	15GGD2710F1184848	SLO RTA	2015	562,819	$1,336,760.00
RevenueVehicles	BU - Bus	1503	GILLIG	LOW FLOOR	1	15GGD2712F1184849	SLO RTA	2015	557,470	$798,867.00
RevenueVehicles	BU - Bus	1504	GILLIG	LOW FLOOR	1	15GGD2719F1184850	SLO RTA	2015	575,528	$798,867.00
RevenueVehicles	BU - Bus	1505	GILLIG	LOW FLOOR	1	15GGD2710F1184851	SLO RTA	2015	534,327	$798,867.00
RevenueVehicles	BU - Bus	1506	GILLIG	LOW FLOOR	1	15GGD2712F1184852	SLO RTA	2015	501,395	$1,684,397.00
RevenueVehicles	BU - Bus	1507	GILLIG	LOW FLOOR	1	15GGD2714F1184853	SLO RTA	2015	497,353	$784,834.00
RevenueVehicles	BU - Bus	1508	GILLIG	LOW FLOOR	1	15GGD2716F1184854	SLO RTA	2015	575,969	$784,834.00
RevenueVehicles	BU - Bus	1509	GILLIG	LOW FLOOR	1	15GGB2710F1184855	SCT	2015	484,012	$784,834.00
RevenueVehicles	BU - Bus	1801	GILLIG	LOW FLOOR	1	15GGD2715J3190447	SLO RTA	2018	394,464	$1,695,300.00
RevenueVehicles	BU - Bus	1802	GILLIG	LOW FLOOR	1	15GGD2717J3190448	SLO RTA	2018	389,964	$1,746,160.00
RevenueVehicles	BU - Bus	1803	GILLIG	LOW FLOOR	1	15GGD2719J3190449	SLO RTA	2018	375,438	$822,860.00
RevenueVehicles	BU - Bus	1910	GILLIG	LOW FLOOR	1	15GGD2710K3191300	SLO RTA	2019	364,083	$1,852,534.00
RevenueVehicles	BU - Bus	1911	GILLIG	LOW FLOOR	1	15GGD2712K3191301	SLO RTA	2019	336,660	$1,852,533.00
RevenueVehicles	BU - Bus	1912	GILLIG	LOW FLOOR	1	15GGD2714K3191302	SLO RTA	2019	362,110	$1,852,533.00
RevenueVehicles	BU - Bus	2101	GILLIG	LOW FLOOR	1	15GGD2711M3197061	SLO RTA	2021	199,000	$1,965,320.00
RevenueVehicles	BU - Bus	2102	GILLIG	LOW FLOOR	1	15GGD2713M3197062	SLO RTA	2021	205,108	$1,965,320.00

Asset Category	Asset Class	Asset Name	Make	Model	Count	ID/Serial No.	Asset Owner	Acquisition Year	Vehicle Mileage	Replacement Cost/Value
RevenueVehicles	BU - Bus	2301	GILLIG	ELECTRIC BUS	1	15GGD281XR3198795	SLO RTA	2024	82,824	$2,085,010.00
RevenueVehicles	BU - Bus	2302	GILLIG	ELECTRIC BUS	1	15GGD2811R3198796	SLO RTA	2024	63,986	$2,085,010.00
RevenueVehicles	BU - Bus	2401	GILLIG	LOW FLOOR	1	15GGD2713R3200338	SLO RTA	2024	117,256	$2,147,560.00
RevenueVehicles	BU - Bus	2501	GILLIG	ELECTRIC BUS	1	15GGD2811S3201296	SLO RTA	2025	45,855	$2,211,980.00
RevenueVehicles	BU - Bus	2502	GILLIG	ELECTRIC BUS	1	15GGD2813S3201297	SLO RTA	2025	8,076	$2,211,980.00
RevenueVehicles	BU - Bus	2503	GILLIG	ELECTRIC BUS	1	15GGD2815S3201298	SLO RTA	2025	33,907	$2,211,980.00
RevenueVehicles	BU - Bus	2504	GILLIG	ELECTRIC BUS	1	15GGD2817S3201299	SLO RTA	2025	46,720	$2,211,980.00
RevenueVehicles	BU - Bus	2505	GILLIG	ELECTRIC BUS	1	15GGD2811S3201300	SLO RTA	2025	21,187	$2,211,980.00
RevenueVehicles	CU - Cutaway Bus	1831	FORD	STARCRAFT E450	1	1FDFE4FS1HDC78904	SLO RTA (Atascadero DAR)	2018	108,027	$191,250.00
RevenueVehicles	CU - Cutaway Bus	1832	FORD	STARCRAFT E450	1	1FDFE4FS5HDC78906	SLO RTA (Atascadero DAR)	2018	107,099	$191,250.00
RevenueVehicles	CU - Cutaway Bus	1906	FORD	STARCRAFT E450	1	1FDFE4FS9KDC26304	SLO RTA	2019	163,450	$137,590.00
RevenueVehicles	CU - Cutaway Bus	1907	FORD	STARCRAFT E450	1	1FDFE4FS9KDC26305	SLO RTA	2019	163,956	$137,590.00
RevenueVehicles	CU - Cutaway Bus	1908	FORD	STARCRAFT E450	1	1FDFE4FS9KDC26306	SLO RTA	2019	165,010	$137,590.00
RevenueVehicles	CU - Cutaway Bus	2031	FORD	STARCRAFT E450	1	1FDFE4FN6MDC15074	SLO RTA	2019	103,074	$338,300.00
RevenueVehicles	CU - Cutaway Bus	2331	CHEVROLET	ARBOC	1	1HA6GUB78NN011454	SLO RTA	2022	67,145	$98,250.00
RevenueVehicles	CU - Cutaway Bus	2332	CHEVROLET	ARBOC	1	1HA6GUB77NN011459	SLO RTA	2022	68,543	$98,250.00
RevenueVehicles	CU - Cutaway Bus	2333	CHEVROLET	ARBOC	1	1HA6GUB70NN011464	SLO RTA	2022	71,756	$98,250.00
RevenueVehicles	CU - Cutaway Bus	2334	FORD	STARCRAFT E450	1	1FDFE4FN1PDD37488	SLO RTA	2023	182,041	$233,100.00
RevenueVehicles	CU - Cutaway Bus	2335	FORD	STARCRAFT E450	1	1FDFE4FN1PDD37474	SLO RTA	2023	174,304	$233,100.00
RevenueVehicles	CU - Cutaway Bus	2431	FORD	STARCRAFT E450	1	1FDFE4FN6RDD43192	SLO RTA	2024	36,213	$403,950.00
RevenueVehicles	CU - Cutaway Bus	2432	FORD	STARCRAFT E450	1	1FDFE4FN8SDD04898	SLO RTA (MORRO BAY)	2024	45,352	$392,150.00
RevenueVehicles	CU - Cutaway Bus	2461	MOBILITY TRANSIT	CLASS V	1	1FDVU4X83RKA90030	SLO RTA (Atascadero DAR)	2024	16,415	$154,900.00
RevenueVehicles	CU - Cutaway Bus	2531	FORD	STARCRAFT E450	1	1FDFE4FN3TDD24090	SLO RTA	2025	25,222	$416,040.00
RevenueVehicles	CU - Cutaway Bus	2532	FORD	STARCRAFT E450	1	1FDFE4FN3TDD26311	SLO RTA (MORRO BAY)	2025	24,876	$416,040.00
RevenueVehicles	CU - Cutaway Bus	2631	FORD	STARCRAFT E450	1	1FDFE4FNXTDD41596	SLO RTA	2026	2,295	$436,800.00
RevenueVehicles	CU - Cutaway Bus	2632	FORD	STARCRAFT E450	1	1FDFE4FNXTDD42781	SLO RTA	2026	2,297	$436,800.00
RevenueVehicles	CU - Cutaway Bus	2633	FORD	STARCRAFT E450	1	1FDFE4FNXTDD42814	SLO RTA	2026	2,287	$436,800.00
RevenueVehicles	CU - Cutaway Bus	2634	FORD	STARCRAFT E450	1	1FDFE4FN7TDD43273	SLO RTA	2026	2,283	$436,800.00
RevenueVehicles	MV - Mini-van	2051	DODGE	BRAUN ENTRAVAN	1	2C7WDGBG0KR798819	SLO RTA	2019	90,748	$87,010.00
RevenueVehicles	MV - Mini-van	2052	DODGE	BRAUN ENTRAVAN	1	2C7WDGBG9KR798818	SLO RTA	2019	87,782	$87,010.00
RevenueVehicles	MV - Mini-van	2053	DODGE	BRAUN ENTRAVAN	1	2C7WDGBG9KR798835	SLO RTA	2019	90,803	$87,010.00
RevenueVehicles	MV - Mini-van	2054	DODGE	BRAUN ENTRAVAN	1	2C7WDGBG9KR801121	SLO RTA	2019	95,603	$87,010.00
RevenueVehicles	MV - Mini-van	2055	DODGE	BRAUN ENTRAVAN	1	2C7WDGBGXKR799394	SLO RTA	2019	93,927	$87,010.00
RevenueVehicles	MV - Mini-van	2056	DODGE	BRAUN ENTRAVAN	1	2C7WDGBGXKR801077	SLO RTA	2019	88,734	$87,010.00
RevenueVehicles	MV - Mini-van	2057	DODGE	BRAUN ENTRAVAN	1	2C7WDGBG1KR808323	SLO RTA	2019	96,716	$87,010.00
RevenueVehicles	MV - Mini-van	2151	DODGE	BRAUN ENTRAVAN	1	2C7WDGBG7KR800808	Paso DAR	2020	52,191	$92,600.00
RevenueVehicles	MV - Mini-van	2152	DODGE	BRAUN ENTRAVAN	1	2C7WDGBG3KR800918	Paso DAR	2020	54,603	$92,600.00
RevenueVehicles	MV - Mini-van	2351	CHRYSLER	VOYAGER	1	2C4RC1CG3NR163073	SLO RTA	2022	71,566	$98,250.00
RevenueVehicles	MV - Mini-van	2352	CHRYSLER	VOYAGER	1	2C4RC1CG3NR171738	SLO RTA	2022	57,376	$98,250.00
RevenueVehicles	MV - Mini-van	2353	CHRYSLER	VOYAGER	1	2C4RC1CG3NR171741	SLO RTA	2022	49,757	$98,250.00
RevenueVehicles	MV - Mini-van	2451	CHRYSLER	VOYAGER	1	2C4RC1CG3NR224230	SLO RTA	2024	15,433	$98,250.00
RevenueVehicles	MV - Mini-van	2452	CHRYSLER	VOYAGER	1	2C4RC1CG3NR212143	SLO RTA	2024	25,929	$98,250.00
RevenueVehicles	MV - Mini-van	2453	CHRYSLER	VOYAGER	1	2C4RC1CG6NR212170	SLO RTA	2024	24,163	$98,250.00
RevenueVehicles	RT - Rubber-tire Vintage Trolley	1013	DOUBLE K	VILLAGER	1	1F66F5DY7B0A04333	SLO RTA	2010	113,251	$285,400.00
RevenueVehicles	RT - Rubber-tire Vintage Trolley	1707	DOUBLE K	VILLAGER TROLLEY	1	1F66F5DY0H0A10659	SLO RTA	2017	80,245	$350,000.00
RevenueVehicles	RT - Rubber-tire Vintage Trolley	1941	DOUBLE K	VILLAGER TROLLEY	1	1F66F5DYXK0A04214	SLO RTA (MORRO BAY)	2019	26,259	$350,000.00

Asset Category	Asset Class	Asset Name	Make	Model	Count	ID/Serial No.	Asset Owner	Acquisition Year	Vehicle Mileage	Replacement Cost/Value
RevenueVehicles	RT - Rubber-tire Vintage Trolley	2241	DOUBLE K	VILLAGER TROLLEY	1	1F66F5DN8N0A03332	SLO RTA (MORRO BAY)	2022	12,957	$811,500.00

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	13	610,886	$737,375.00	12	Yes
RevenueVehicles	BU - Bus	1302	1	15GGD2716D1182292	13	555,663	$737,375.00	12	Yes
RevenueVehicles	BU - Bus	1304	1	15GGD271XD1182294	13	619,603	$737,375.00	12	Yes
RevenueVehicles	BU - Bus	1305	1	15GGD2711D1182295	13	590,224	$1,459,986.00	12	Yes
RevenueVehicles	BU - Bus	1308	1	15GGB271XD1182298	13	521,398	$1,459,986.00	12	Yes
RevenueVehicles	BU - Bus	1309	1	15GGB2711D1182299	13	553,875	$1,459,986.00	12	Yes
RevenueVehicles	BU - Bus	1310	1	15GGB2714D1182300	13	572,565	$1,459,986.00	12	Yes
RevenueVehicles	BU - Bus	1501	1	15GGD2719F1184847	11	593,262	$1,336,760.00	12	No
RevenueVehicles	BU - Bus	1502	1	15GGD2710F1184848	11	562,819	$1,336,760.00	12	No
RevenueVehicles	BU - Bus	1503	1	15GGD2712F1184849	11	557,470	$798,867.00	12	No
RevenueVehicles	BU - Bus	1504	1	15GGD2719F1184850	11	575,528	$798,867.00	12	No
RevenueVehicles	BU - Bus	1505	1	15GGD2710F1184851	11	534,327	$798,867.00	12	No
RevenueVehicles	BU - Bus	1506	1	15GGD2712F1184852	11	501,395	$1,684,397.00	12	No
RevenueVehicles	BU - Bus	1507	1	15GGD2714F1184853	11	497,353	$784,834.00	12	No
RevenueVehicles	BU - Bus	1508	1	15GGD2716F1184854	11	575,969	$784,834.00	12	No
RevenueVehicles	BU - Bus	1509	1	15GGB2710F1184855	11	484,012	$784,834.00	12	No
RevenueVehicles	BU - Bus	1801	1	15GGD2715J3190447	8	394,464	$1,695,300.00	12	No
RevenueVehicles	BU - Bus	1802	1	15GGD2717J3190448	8	389,964	$1,746,160.00	12	No
RevenueVehicles	BU - Bus	1803	1	15GGD2719J3190449	8	375,438	$822,860.00	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	1910	1	15GGD2710K3191300	7	364,083	$1,852,534.00	12	No
RevenueVehicles	BU - Bus	1911	1	15GGD2712K3191301	7	336,660	$1,852,533.00	12	No
RevenueVehicles	BU - Bus	1912	1	15GGD2714K3191302	7	362,110	$1,852,533.00	12	No
RevenueVehicles	BU - Bus	2101	1	15GGD2711M3197061	5	199,000	$1,965,320.00	12	No
RevenueVehicles	BU - Bus	2102	1	15GGD2713M3197062	5	205,108	$1,965,320.00	12	No
RevenueVehicles	BU - Bus	2301	1	15GGD281XR3198795	2	82,824	$2,085,010.00	12	No
RevenueVehicles	BU - Bus	2302	1	15GGD2811R3198796	2	63,986	$2,085,010.00	12	No
RevenueVehicles	BU - Bus	2401	1	15GGD2713R3200338	2	117,256	$2,147,560.00	12	No
RevenueVehicles	BU - Bus	2501	1	15GGD2811S3201296	1	45,855	$2,211,980.00	12	No
RevenueVehicles	BU - Bus	2502	1	15GGD2813S3201297	1	8,076	$2,211,980.00	12	No
RevenueVehicles	BU - Bus	2503	1	15GGD2815S3201298	1	33,907	$2,211,980.00	12	No
RevenueVehicles	BU - Bus	2504	1	15GGD2817S3201299	1	46,720	$2,211,980.00	7	No
RevenueVehicles	BU - Bus	2505	1	15GGD2811S3201300	1	21,187	$2,211,980.00	7	No
RevenueVehicles	CU - Cutaway Bus	1831	1	1FDFE4FS1HDC78904	8	108,027	$191,250.00	7	Yes
RevenueVehicles	CU - Cutaway Bus	1832	1	1FDFE4FS5HDC78906	8	107,099	$191,250.00	7	Yes
RevenueVehicles	CU - Cutaway Bus	1906	1	1FDFE4FS9KDC26304	7	163,450	$137,590.00	7	Yes
RevenueVehicles	CU - Cutaway Bus	1907	1	1FDFE4FS9KDC26305	7	163,956	$137,590.00	7	Yes
RevenueVehicles	CU - Cutaway Bus	1908	1	1FDFE4FS9KDC26306	7	165,010	$137,590.00	7	Yes
RevenueVehicles	CU - Cutaway Bus	2031	1	1FDFE4FN6MDC15074	7	103,074	$338,300.00	7	Yes
RevenueVehicles	CU - Cutaway Bus	2331	1	1HA6GUB78NN011454	4	67,145	$98,250.00	7	No
RevenueVehicles	CU - Cutaway Bus	2332	1	1HA6GUB77NN011459	4	68,543	$98,250.00	7	No
RevenueVehicles	CU - Cutaway Bus	2333	1	1HA6GUB70NN011464	4	71,756	$98,250.00	7	No
RevenueVehicles	CU - Cutaway Bus	2334	1	1FDFE4FN1PDD37488	3	182,041	$233,100.00	10	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	1FDFE4FN1PDD37474	3	174,304	$233,100.00	10	No
RevenueVehicles	CU - Cutaway Bus	2431	1	1FDFE4FN6RDD43192	2	36,213	$403,950.00	10	No
RevenueVehicles	CU - Cutaway Bus	2432	1	1FDFE4FN8SDD04898	2	45,352	$392,150.00	7	No
RevenueVehicles	CU - Cutaway Bus	2461	1	1FDVU4X83RKA90030	2	16,415	$154,900.00	7	No
RevenueVehicles	CU - Cutaway Bus	2531	1	1FDFE4FN3TDD24090	1	25,222	$416,040.00	7	No
RevenueVehicles	CU - Cutaway Bus	2532	1	1FDFE4FN3TDD26311	1	24,876	$416,040.00	7	No
RevenueVehicles	CU - Cutaway Bus	2631	1	1FDFE4FNXTDD41596		2,295	$436,800.00	7	No
RevenueVehicles	CU - Cutaway Bus	2632	1	1FDFE4FNXTDD42781		2,297	$436,800.00	7	No
RevenueVehicles	CU - Cutaway Bus	2633	1	1FDFE4FNXTDD42814		2,287	$436,800.00	7	No
RevenueVehicles	CU - Cutaway Bus	2634	1	1FDFE4FN7TDD43273		2,283	$436,800.00	5	No
RevenueVehicles	MV - Mini-van	2051	1	2C7WDGBG0KR798819	7	90,748	$87,010.00	5	Yes
RevenueVehicles	MV - Mini-van	2052	1	2C7WDGBG9KR798818	7	87,782	$87,010.00	5	Yes
RevenueVehicles	MV - Mini-van	2053	1	2C7WDGBG9KR798835	7	90,803	$87,010.00	5	Yes
RevenueVehicles	MV - Mini-van	2054	1	2C7WDGBG9KR801121	7	95,603	$87,010.00	5	Yes
RevenueVehicles	MV - Mini-van	2055	1	2C7WDGBGXKR799394	7	93,927	$87,010.00	5	Yes
RevenueVehicles	MV - Mini-van	2056	1	2C7WDGBGXKR801077	7	88,734	$87,010.00	5	Yes
RevenueVehicles	MV - Mini-van	2057	1	2C7WDGBG1KR808323	7	96,716	$87,010.00	5	Yes
RevenueVehicles	MV - Mini-van	2151	1	2C7WDGBG7KR800808	6	52,191	$92,600.00	5	Yes
RevenueVehicles	MV - Mini-van	2152	1	2C7WDGBG3KR800918	6	54,603	$92,600.00	5	Yes
RevenueVehicles	MV - Mini-van	2351	1	2C4RC1CG3NR163073	4	71,566	$98,250.00	5	No
RevenueVehicles	MV - Mini-van	2352	1	2C4RC1CG3NR171738	4	57,376	$98,250.00	5	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	MV - Mini-van	2353	1	2C4RC1CG3NR171741	4	49,757	$98,250.00	5	No
RevenueVehicles	MV - Mini-van	2451	1	2C4RC1CG3NR224230	2	15,433	$98,250.00	5	No
RevenueVehicles	MV - Mini-van	2452	1	2C4RC1CG3NR212143	2	25,929	$98,250.00	5	No
RevenueVehicles	MV - Mini-van	2453	1	2C4RC1CG6NR212170	2	24,163	$98,250.00	12	No
RevenueVehicles	RT - Rubber-tire Vintage Trolley	1013	1	1F66F5DY7B0A04333	16	113,251	$285,400.00	12	Yes
RevenueVehicles	RT - Rubber-tire Vintage Trolley	1707	1	1F66F5DY0H0A10659	9	80,245	$350,000.00	12	No
RevenueVehicles	RT - Rubber-tire Vintage Trolley	1941	1	1F66F5DYXK0A04214	7	26,259	$350,000.00	12	No
RevenueVehicles	RT - Rubber-tire Vintage Trolley	2241	1	1F66F5DN8N0A03332	4	12,957	$811,500.00	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	10	393	$37,800.00	15	No
Equipment	Non Revenue/Service Automobile	520	1	1FMCU0F72FUA82168	11	75,378	$46,624.00	10	Yes
Equipment	Non Revenue/Service Automobile	525	1	1G1FY6S07P4139265	3	53,611	$49,850.00	10	No
Equipment	Non Revenue/Service Automobile	528	1	1G1FY6S01P4189353	3	39,906	$49,850.00	10	No
Equipment	Non Revenue/Service Automobile	529	1	1G1FY6S06P4189428	3	40,278	$49,850.00	10	No
Equipment	Non Revenue/Service Automobile	530	1	1G1FY6S02P4193962	3	38,559	$49,850.00	10	No
Equipment	Non Revenue/Service Automobile	531	1	1GYFY6S05P4193969	3	20,316	$51,350.00	10	No
Equipment	Non Revenue/Service Automobile	532	1	1G1FY6S08P4195408	3	21,958	$51,350.00	10	No
Equipment	Non Revenue/Service Automobile	533	1	1GYFY6S08P4187292	3	23,239	$51,350.00	10	No
Equipment	Non Revenue/Service Automobile	534	1	1G1FY6S03P4193937	3	23,387	$51,350.00	10	No
Equipment	Non Revenue/Service Automobile	535	1	1FD7X2AA5TEC31721		1,870	$94,580.00	10	No
Equipment	Non Revenue/Service Automobile	536	1	1FT6W1BM6SWG25050	1	4,782	$54,450.00	10	No
Equipment	Non Revenue/Service Automobile	537	1	1FT6W1BM6SWG25050		7,599	$54,450.00	10	No
Equipment	Trucks and other Rubber Tire Vehicles	522	1	1FD7X2A66GED42246	10	120,333	$77,000.00	10	Yes
Equipment	Trucks and other Rubber Tire Vehicles	524	1	1FTFX1C50MKD87727	5	75,598	$81,700.00	10	No
Equipment	Utility Cart	526	1	222461	4	71	$20,900.00	10	No
Equipment	Utility Cart	527	1	5324865	3	13	$42,360.00	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	5	5	$24,000,000.00

Appendix C: Proposed Investment Project List

Project Year	Project Name	Asset/Asset Class	Cost	Priority
2026	Replace - 40ft Transit Buses - Electric (4) with 5339b Funds(#1305, #1308, #1309 & #1310)	RevenueVehicles	$5,937,988.00	High
2026	Replace - Cutaway Medium Duty (4) - gasoline (#1905-1908)	RevenueVehicles	$617,500.00	High
2026	Replace - Trolley Bus (County funded) (#1013)	RevenueVehicles	$280,400.00	High
2027	Replace - 40ft Transit Buses - Diesel (3) with (#1301, #1302, #1304)	RevenueVehicles	$4,675,000.00	High
2027	Replace - ADA Runabout Minivans (7) - (#2051-#2057)	RevenueVehicles	$609,000.00	Medium
2027	Replace - Support Vehicle (non-revenue) - electric (1) (#520)	Equipment	$46,600.00	Medium
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 - Diesel (3) (#1501 - #1503)	RevenueVehicles	$3,149,500.00	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
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

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 2, 2026
STAFF REPORT

AGENDA ITEM:	**A-6**
TOPIC:	**Strategic Business Plan Results**
PRESENTED BY:	**Geoff Straw**
STAFF RECOMMENDATION:	**Receive and File the SBP Results through June 2026**

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 new performance standards.

With the adoption of the Short-Range Transit Plan (SRTP) at the May 7, 2025 RTA Board meeting, staff incorporated the recommended revised performance standards that we can use to measure progress. In addition, staff streamlined the references to the various services the RTA operates on behalf of area jurisdictions. Below is a summary of the updates incorporated starting for FY24-25:

<u>Standards of Excellence Section 1: Service Quality and Efficiency</u>

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

<u>Standards of Excellence Section 2: Revenue and Resources</u>

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

    The SRTP peer agencies did not report this information by service type 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 SRTP peer agencies did not report this information by service type 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, and are now unattainable after the impacts on ridership behavior caused by the COVID-19 pandemic.

Staff also worked with the fiscal auditor on the farebox recovery ratio calculation. As was previously reported, the RTA struggled to meet the standard. Due to the global pandemic and its impact on ridership behavior, 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. Beginning in FY23-24, the RTA included the FTA 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 30, 2026.

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, Morro Bay 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 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

FY 26 Productivity

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	YTD
RTA Fixed	14.4	16.6	17.8	16.3	15.1	14.2	14	14.5	15.4	16	15.7	17.8	15.66
Route Deviation	3.7	3.2	2.6	3.2	3.3	2.7	3.1	2.8	4.9	3	4	3.9	3.4
Paso Express	19.7	24	26	27.1	23.5	22.6	23.1	25.3	26.9	20.7	23.3	21	23.8
SCT Fixed	11.4	11.8	11.3	12.9	11.6	11.1	11.3	11.6	12.1	12.2	11.2	11.7	11.7
MB Fixed	4.9	4.5	4.7	5.6	4.9	6.6	5.2	4.6	5.4	5.1	3.9	5.6	5
Runabout	1.2	1.2	1.2	1.1	1.4	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.2
Paso DAR	1.9	1.8	1.6	1.6	1.3	1.3	1.6	1.4	1.6	1.4	1.3	1.4	1.5
Nipomo DAR	1.5	2.6	3.5	3	3	2.5	3.2	2.9	3.1	3	3.7	2.1	2.9
Atascadero DAR	2.1	2.1	1.9	1.9	1.8	1.7	1.7	1.8	2	1.9	1.8	1.7	1.9

With the addition of Atascadero DAR and Morro Bay deviated fixed-route services (known as Call-A-Ride, or CAR) in June 2025, the tables above show that RTA intercity fixed-routes, Route 15 deviated fixed-route, Paso Robles local fixed-routes, SCT local fixed routes, Morro Bay CAR and Nipomo DAR met the standards for FY25 and FY26. However, we did not meet the standards for Runabout, Paso DAR or Atascadero DAR. Overall ridership is modestly trending the same for these periods, 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 delivered 50,642 trips in FY25-26. In FY25-26, the RTA missed 18 trips, Paso Robles missed 92 trips, Morro Bay missed 6 and South County missed 31 trips, resulting in an overall 99.7% delivery rate. This delivery rate dropped due to driver shortages at the Paso Robles service. However, it should be noted that there was still service in the opposite direction, so passengers still had service – albeit at a lower level.

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:

A. Regional intercity fixed-route and Express runs shall be 85% or greater.
B. Local fixed-route shall be 90% or greater.
C. 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 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%
So. County	85%	83%	83%	85%	86%	89%	89%	86%	90%	89%	87%	89%	87%

FY 2026 OTP

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	YTD
RTA	89%	84%	82%	83%	83%	81%	83%	84%	82%	81%	82%	83%	83%
Paso	95%	89%	82%	80%	82%	84%	80%	85%	83%	84%	81%	86%	84%
Route 15	92%	93%	92%	87%	92%	91%	86%	80%	82%	81%	85%	77%	87%
So. County	88%	89%	92%	90%	91%	89%	92%	91%	90%	91%	89%	88%	90%
Morro Bay	98%	95%	98%	98%	98%	97%	97%	98%	99%	98%	98%	96%	98%

For FY25, all standards were met. For FY26, RTA intercity and Paso Robles local fixed-route services did not meet standards, but the Route 15, South County local fixed-routes and Morro Bay met the standard with a result of 85% or better. 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 FY26, with a 99.18% 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.
  1. Schedule revisions and minor route alignment changes are evaluated routinely to improve service delivery.
  2. 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:

A. 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.
B. 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 FY25-26, there was one trip that experienced overcrowding. This was the Paso Robles local Route A in the afternoon due to the large number of high school and junior high students riding. In August of 2025 the RTA added a school tripper service to alleviate overcrowding and help improve on-time performance. Staff will continue to monitor the other services 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:

  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)
  FY25-26 Result: Operating Costs are 89.9% of the adopted budget through June 2026 (net of depreciations 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.

  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

FY25-26 Result: 7.1% (including local and inter-city routes) through June, unaudited, before adjustments

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. All yellow-highlighted measures below exceeded the standard.

Cost-Per-Passenger, $			
Service	**FY23-24**	**FY24-25**	**FY25-26**
RTA Fixed	15.20	15.07	15.20
Route Deviation	63.13	71.26	72.08
Paso Robles	7.01	5.97	7.29
South County	12.51	12.38	15.31
Runabout	138.73	145.15	163.01
Paso DAR	71.87	75.98	99.12
Nipomo DAR	67.26	57.00	49.84

*FY25-26 unaudited

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

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

Measurement: Objective.

- Tracked monthly and reported bimonthly to the RTA Board. All yellow-highlighted measures below exceeded the standard.

Cost-Per-Vehicle Revenue Hour			
Service	**FY23-24**	**FY24-25**	**FY25-26**
RTA Fixed	225.53	233.45	233.92
Route Deviation	235.76	244.94	243.45
Paso Robles	157.17	145.60	177.93
South County	164.20	154.91	179.27
Runabout	187.38	181.97	188.14
Paso DAR	140.64	129.59	152.28
Nipomo DAR	158.69	141.98	144.13

*FY25-26 unaudited

<u>Standards of Excellence Section 3: Safety</u> – 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:

  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
  FY25-26 Result: **0.68** 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 FY25-26, the Safety Resource Committee closed **47** action items, with **4** open action items and two recurring items remaining. The action items included:

  1. Maintenance on AC systems for all buses
  2. Reprogramming the kneeler switches on the ARBOC buses so drivers can kneel the vehicle before opening the doors to reduce the risk of passengers tripping while stepping into vehicle.
  3. The Committee continues to address requests concerning areas where the weeds or tree limbs are blocking the view of traffic. The requests are sent to appropriate jurisdictions to have them trimmed to improve visibility.
  4. A few bus stop lights were added so passengers are visible to Bus Operators during hours of darkness.
  5. Driver sunshade in bus 1508 was fixed so it stays in place to block the sun.
  6. Proper materials for drivers to clean windows without streaks.

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 safe and easily accessible.
9. The Committee also continues to address difficult locations on the demand response services, particularly those areas 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:

  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 (two are open as of June 30, 2026), and 8 first aid/incidents/medical-only (they are all closed)
  FY23-24 Result: 10 lost-time claims (two are open as of June 30, 2026) and 8 first aid/incidents/medical-only (they are all closed)
  FY24-25 Result: 6 lost-time claims (two are open as of June 30, 2026) and 12 first aid/incidents/medical-only (they are all closed)
  FY25-26 Results: 7 lost-time claims (four open as of June 30, 2026) and 10 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 fall 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:

  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)
FY25-26 Result: 10.6% of total operating costs through June (unaudited) (net of depreciation and pension expense/GASB 68 adjustment)

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:
2021 – 19%
2022 – 16%
2023 – 17%
2024 – 18%
2025 – 20%
2026 – 7.3% (January 1 – July 31, 2026)

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 daily to help both the organization and staff grow professionally and enhance safe operations.

- Maintenance: In FY25-26, our Mechanics averaged 37 hours per person. Training included the Gillig Battery Electric Buses, Hunter alignment rack, fork and scissor lifts, and emergency evacuations.

  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.

- Operations Supervisors: In FY25-26, the average was 31 training hours per Operations Supervisor; standard is 24 hours annually. Our Training staff and our third-party trainers have conducted 400 total training hours. These training modules include the following:
  - ChargePoint EV training,
  - Supervisor Training
  - Reasonable Suspicion
  - Verification of Transit Training
  - Fire evacuation plan
  - Nuke 101
  - New vehicle type Ford Transit training
  - Classroom and Behind-the-Wheel training completed for EV Buses
  - Transportation Safety Institute Instructor's Course
  - Wheelchair securement on newer buses
  - Preventing violence in the workplace
  - Crisis communication for transit managers

- Bus Operator training: Besides the required 8 hours of annual Verification of Transit Training, Bus Operators have received a combined total of 316 additional training hours conducted by our training department for topics listed below, but not limited to:
  - 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
  - Fourteen Bus Operators completed new hire training through June 2026
  - Eight applicants attended DMV Permit Study Classes with the Training staff
  - Four Bus Operators participated in the five-day TSI Instructor's Course hosted regionally at the RTA BMF
  - General Public Paratransit Vehicle (GPPV) Certification Behind The Wheel (BTW) hours for Original and/or Refresher training

    - CalTIP course on “Occurrence Management”

- 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. FY25-26 trainings included the CalPELRA Human Resources Conference, LCTOP Office Hours, CARB CalFleet Webinar, EnergIIZE webinar, FTA DBE webinar hosted by Caltrans, FTA Charter Bus Regulations, FTA Triennial Review Workshop, LCTOP Workshops, Contactless Payment training, and the CalTIP Board of Directors strategic planning and Board 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.

<u>Standards of Excellence Section 5: Fleet and Facility</u> – 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 6/30/2026 the average age of our 35 fixed-route vehicles is 8.99 years with an average of 396,091 miles per vehicle. The average age of our 43 demand-response vehicles (including Runabout, Trolley, and other Dial-A-Ride vans) is 5.5 years with an average of 79,919 miles. We are currently within the RTA's vehicle life standards.

Staff worked closely with our consultants and partner agencies to update the Short-Range Transit Plan, 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 8 major mechanical system failures and 28 other mechanical system failures in FY25-26. This equates to 2.65 failures per 100,000 vehicle revenue miles for fixed-route buses and 0.80 for demand response vans.

As a comparison, 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 0.27 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 fall 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, as well as repairing and enhancing bus stop lighting.

  Bust 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 fall 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 2026 TDA Triennial Performance Audit or in the 2026 FTA Triennial Review, nor in the most recent CHP Terminal Inspection completed in July 2026. Preventive maintenance has been completed on a timely basis, with no CHP findings.

<u>Standards of Excellence Section 6: Leadership</u> – 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. Staff is working with City of SLO officials to develop a mutual aid agreement, addressing BEB recharging.

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 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 2, 2026
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 FY25-26 as to whether we are meeting the 2026 targets and if changes should be considered for 2027. 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.

Finally, I am attaching at the end of this Agenda Item the two-page action/remediation steps recommended by RTA Safety and Training Manager Luke Huston. This is a new annual reporting step the RTA has implemented to ensure we continually improve safety at our agency and remain accountable to the goals we have established in the PTASP.

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 2, 2026

Revisions Dates:
May 6, 2020
January 11, 2023
September 6, 2023
August 25, 2025
August 21, 2026

[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 2025-2026

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 2, 2026 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 2, 2026**, as is attested to by Public Transportation Agency Safety Plan (PTASP), which can be viewed and maintained at RTA Elks Lane facility on the internal computer network, "G Drive", internal employee website, "ADP" and the public website: www.slorta.org.

<table>
<tr><td rowspan="3">Certification of Compliance on an annual basis</td><td>Public Transportation Agency Safety Plan (PTASP) Plan Approval</td><td>Date of Certification

September 2, 2026</td></tr>
<tr><td colspan="2">Regional Transit Authority, Geoff Straw, Executive Director/PTASP Accountable Executive and San Luis Obispo Board of Directors</td></tr>
<tr><td colspan="2">Relevant Documentation Appendix A</td></tr>
</table>

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.

Safety Performance Targets The safety performance targets will be evaluated over a fiscal year period with a baseline year of Fiscal Year 2025-2026. 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	4	.32	9	.72	37,668
ADA / Paratransit	0	0	0	0	2	.53	125,234

RTA has set additional safety performance measures with specific 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

<table>
<tr><td colspan="3">Safety Performance Target Coordination</td></tr>
<tr><td colspan="3">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.</td></tr>
<tr><td rowspan="3">Targets Transmitted to the State

Annually –November of each year</td><td>California Department of Transportation (Cal-Trans)</td><td></td></tr>
<tr><td>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</td><td>Date Targets Transmitted</td></tr>
<tr><td>Metropolitan Planning Organization(s) Name</td><td>Date Targets Transmitted</td></tr>
<tr><td>Targets Transmitted to the Metropolitan Planning Organization (s)</td><td>San Luis Obispo Council of Governments (SLOCOG)
Annually – November of each year for changes</td><td></td></tr>
</table>

San Luis Obispo Regional Transit Authority

SAFETY HAZARD IDENTIFICATION MATRIX **FYI 2025-2026** 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: Lucas Houston	**Last Updated: August 18, 2026**	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** **FY25-26**
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 Fundamentals of Bus Collision Investigation SMS Awareness Transportation Safety Institute (TSI) SMS Safety Assurance SMS Principles for Transit	FY 2024-2025 Achieved Performance Target 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 2024-2025 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 2024-2025 zero third party injury claims (0)*	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 2024-2025 0 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 Businees Plan.	FY 2024-2025 Driver Injury Claims filed. Severity is Marginal (7)	No more than 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 Businees Plan.	FY 2024-2025: 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 2024-2025: Zero Injury Claims Filed Performance Target (0)	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 2024-2025: Preventable lost time claims Severity is Marginal (3)	No more than 6- Preventable lost time claims, annually - Severity is Marginal	
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 2024-2025- Preventable (7) 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 FY25-26
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 2024-2025: 18 incidents 1.5% Rate of preventable vehicle collisions will not exceed 1.0 per 100,000 miles.	Reduce by 50% or 1 incident 2025-2026 = 1.0 per 100,000 miles	
11	**Demand Response Preventable vehicle collisions**	Measured by monthly Preventable collision Reports and revenue service miles annually	FY 2024-2025 .27% = 1 incident	Reduce by 50% or 1 incident	
12	**Fixed Route Backing Transit Vehicles related to the movement of a transit vehicle**	Measured by monthly Preventable collision Reports and revenue service miles annually	FY 2024-2025: 5.26%, Total of 1 preventable collisions Fixed Route = 1	NO more than 1 annually/reduce by 50%	
13	**Demand Response Backing Transit Vehicles related to the movement of a transit vehicle**	Measured by monthly Preventable collision Reports and revenue service miles annually	FY 2024-2025: 5.26%, Total of 1 preventable collisions Demand Response = 1	NO more than 1 annually/reduce by 50%	
14	**Fixed Objects related to the movement of a transit vehicle**	Measured by monthly Preventable collision Reports and revenue service miles annually	FY 2024-2025 3 incidents 10.53%	2024-2025 5 incidents	
15	**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 2024-2025 Performance Target 13 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.	
16	**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	2024-2025- RTA missed a total, 99% delivery rate.	99% or greater Reviewed quarterly by Operations. Reported bi-annually by the Executive Director to the Board.	
17	**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	2024-2025- 85% Average Fixed Route - 88% Deviated Route - 88% Total = 88%	85% or greater on time performance fixed route and Route deviation services 70% or greater	
18	**On-Time Performance Paratransit**	on-time if the van arrives within 30 minutes of the appointed pick-up time. Review Quarterly	FY 2024-2025 99% Average	Runabout and other demand response services shall be 95% or greater.	
19	**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 2024-2025 Achieved Performance Target	No significant annual fiscal and compliance audit findings. Zero FTA Triennial Audit findings	
20	**Customer and community perception of system safety**	Due to COVID unable to conduct customer survey Survey anticipated to be in Fall 2026	Calendar Year 2025 Short Range Transit Plan Delayed 2025	Based on Community Perception Survey At least 90% overall Rating system safety.	
21	**Total risk management costs**	Reported monthly in financials and YTD budget. Reported bimonthly to the RTA Board meetings.	*FY 2024-2025 10.7% of total operating cost.*	Not exceed 10% of total annual operating cost	
22	**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 2024-2025 Achieved Performance Target A. 30.8% B. Met C. Met	A. Maintenance: 30 Hours per technician annually. B. Operations Supervisors: 24 Hours annually. C. Finance and Administration: 16 Hours per employee annually.	

	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 FY25-26
23	**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 2024-2025: Achieved Performance Target Met 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	
24	**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 2024-2025: 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.	
25	**Assault Prevention**	The National Transit Database (NTD) defines an "assault on a transit worker" as a circumstance in which an individual, knowingly and without lawful authority, interferes with, disables, or incapacitates a transit worker while they are performing their duties. The act must be carried out either with the intent to endanger the safety of an individual or with reckless disregard for the safety of human life.	FY 2024-2025: Achieved Performance Target	Review and train as needed. Discussions during Monthly Operations Staff Meetings, Maintenance Meetings, and Department Heads meetings	
26	**Assaults**	RTA 1,352,742 revenue miles per year	FY 2024-2025 RTA 0 - Zero Assaults Achieved Performance Target (0)	Zero assaults	
27	**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 2024-2025: Achieved Performance Target	Employees will be evaluated annually. Goals and Objectives established previous year	
28	**Bus Operators Evaluations**	On Board, Follow Behind and Yard Check Evaluations to ensure the public's safety.	FY 2024-2025: 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 Operations will change evaluations to FY July - June	Conduct individual evaluations annually. Safety Award on anniversary dates. Must meet RTA/SoCo performance standards. Employee retraining as needed.	
29	**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 100,000 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 2024-2025: 2.44	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	
30	**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 100,000 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 2024-2025: .27	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	

	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 FY25-26
31	**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 2024-2025: 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.	
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.				
32	**Hazards**	Building Design walkway employee parking through bus yard to operations building.	FY 2024-2025 Achieved Performance Target Placed Speed Limit Sign in yard and directional arrows. Stop Signs in employee parking lot	Review annually for hazards	
33	**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 2024-2025 Achieved Performance Target Meetings are held the first Tuesday every other month. Collision Prevention Team/PTASP meetings are held the last Friday of every month	Assigned tasks to appropriate department member, follow up, agenda items monitored and tracked and completed.	
34	**Develop and promote a Non-Punitive Reporting Policy**	100% of staff receiving Non-Punitive Reporting Policy - Safety Suggestion Forms	FY 2024-2025 Achieved Performance Target Non-Putative 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.	
35	**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. Narrowly avoided safety event. Serves as an early warning system that focuses on programs instead of people. The system also provides incentives to learn from errors rather than try to conceal them, and seeks to target the root cause of an issue, not the symptoms."	FY 2024-2025 Total # (5) reported Achieved Performance Target	No more than 10 reported incidents, safety issues or customer service valid complaints.	
36	**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 2024-2025 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	
37	**Driving in Adverse Weather Conditions**	Acts of God are natural and unavoidable catastrophes that interrupt the expected course of events, such as earthquakes, floods, other high winds, lightning, hail. Bus transportation safety during weather events requires preparedness and caution from both drivers and passengers, focusing on slow driving, maintaining safe distances, proper equipment use (like low beams and handrails), and having emergency plans in place. Remember your priorities (#1 Protect Life, #2 Preserve Property, and #3 Maintain Service). ■ Remain calm.	FY 2024-2025 Training provided to Drivers and Supervisors on vehicle control during adverse weather conditions. Slippery Roads, Limited Visability, vehicle control problems, extreme tempertures, catastrophic conditions, slippery roads, road surface, grades, etc. Remember your priorities (#1 Protect Life, #2 Preserve Property, and #3 Maintain Service). ■ Remain calm.	Training Employees, what to do before you drive and on your route. Communicate with dispatch, checking road conditions, weather reports, and weather conditions. Key strategies include drivers using low-beam headlights, maintaining extra following distance, and avoiding sudden stops to prevent skidding. Passengers should use handrails, secure belongings, keep aisles clear, and follow instructions from transit staff. Both parties should monitor weather alerts, have emergency plans, and consider postponing travel if conditions are severe.	

	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 FY25-26
38	**Service Animals - Safety for employees and the general public**	At RTA, we use the Code of Federal Regulations definition—which includes other animals as well as signal dogs and guide dogs (49 CFR § 37.3). Training Bulletins, RTA Policies & Procedures. RTA loves service animals as permitted by the Americans with Disabilities Act and all other applicable state and federal laws. As long as these pets are under control and accompanied by an individual with a disability or a person responsible for training the animal, they're welcome aboard. Cannot require special ID cards for the animal or ask about the customer's disability.	FY- 2024-2025 RTA Policy Posted on ADP RTA allows Service Animals onboard buses, in the Transit Center, or at bus stops/shelters. If you travel with a Service Animal: It doesn't need to be in a carrier, but it must be under your control and be housetrained It can't behave in a way that poses a direct threat to the health or safety of others It can't block an aisle or take up a seat/seating area	Refresher Training during VTT and Safety Poster as needed. Bringing prohibited animals without placing them in a carrier. Emotional support, therapy, comfort and companion pets are not considered service animals and therefore must be kept in a carrier when on RTA property. Bringing carriers that block the aisle or doorway. All pet carriers must be rigid and have locks or latches.	
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.				
39	**Scheduled preventative maintenance**	Monthly, Simi- annually and annually preventative maintenance inspections are completed and per specified period of time or specified vehicle mileage	FY 2024-2025 - 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

Emergency Preparedness 2023-2024 APPENDIX C Hazard Identification.xlsx

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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
6	**Cover Page**	Current Revision Date – Month and Year	08/21/2026
6	**Appendix B**	Annual Review of the PTASP in **July** of each Fiscal Year	08/21/2026
6	**Page 3**	Revisions will be submitted to the Board annually at their September Board Meeting	08/21/2026
6	**Page 3**	Update Safety Performance Targets to Baseline Year	08/21/2026
6	**Page 9**	Hazard Identification (Tab #1) **Appendix C**	08/21/2026
6	**Page 4**	Appendix C – #25 Assault Prevention – NTD Definition	08/25/2025
6	**Page 4**	Appendix C – #26 Bus Operator Evaluation Tracking July 1 – June 30 Annually	08/25/2025
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

Appendix B

Annual Review and Update of the Public Transportation Agency Safety Plan

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
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
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

EXECUTIVE BRIEFING NOTE

PTASP Safety Performance Target (SPT) Exceedances

Date: August 21, 2026	Prepared By: Lucas Houston Safety & Training Manager
Subject: FY2026 Target Variances	Framework: Public Transportation Agency Safety Plan

1. Executive Summary

- **System Status:** 92.3% of agency Safety Performance Targets (SPTs) remain fully on track, demonstrating a highly resilient safety management framework.
- **The Variance:** 3 out of 39 tracked metrics exceeded their annual safety thresholds, triggering immediate data analysis.
- **Management Action:** All three gaps are operationally or financially interlinked. Management has already initiated formal Safety Risk Management (SRM) corrective action plans to reverse these trends.

2. Performance Matrix Data

Metric (SPT)	Annual Target	Actual YTD	Variance	Action Status
#6 Maintenance Injuries	≤ 1	3	**+2 Injuries**	Active SRM Mitigation
#9 Preventable Claims	≤ 5	6	**+1 Claim**	Active SRM Mitigation
#21 Risk Mgmt Costs	≤ 10.0%	10.6%	**+0.6 Percentage points**	Under Management Review

3. Root Cause Analysis & Corrective Actions

Item #6: Mechanic & Utility Employee Injuries

- **The Issue:** Review of the reported maintenance injuries reveals ergonomic strains and sprains occurring predominantly during heavy component extraction and handling within maintenance bays.
- **The Fix:** Reinforce task-specific Job Safety Analyses (JSAs) for maintenance activities involving high-force applications, awkward positioning, and restricted-access work areas.

Evaluate work-area conditions and employee positioning when performing maintenance tasks to reduce the potential for slips, trips, and twisting injuries. Conduct targeted maintenance safety refreshers addressing body positioning, force application, tool use, and situational awareness. Continue monitoring injury mechanisms and contributing factors to determine whether additional controls are warranted.

Item #9: All-Employee Preventable Incident-Only Claims

- **The Issue:** The identified preventable claims include slips, trips, and falls in yard areas associated with tire stops. The incidents indicate a need to reinforce employee awareness of tire-stop locations and safe movement through yard areas.
- **The Fix:** Instituting a 'Goal Zero' yard safety campaign. Reinforce employee awareness of tire-stop locations through targeted safety communication and training. Continue monitoring slips, trips, and falls to determine whether additional corrective measures are warranted.

Item #21: Total Risk Management Costs

- **The Issue:** Risk-management costs are currently 0.6 percentage points above the established target. The variance is influenced by insurance and risk-modification factors over the last 5 years.
- **The Fix:** Continue strengthening injury and incident-prevention practices. Maintain emphasis on safety expectations for both new and existing employees.

4. Management Assessment

- **Framework Effectiveness Demonstrated:** The PTASP framework and our SMS metrics performed exactly as designed. They served as an early warning system, pinpointing minor, isolated operational trends before they escalated into systemic issues.
- **Operational Mitigations Support Financial Performance:** The financial risk management variance (+0.6%) is influenced by shop injuries and yard incidents. Addressing the underlying operational risks should support improved future loss experience and risk-management costs.
- **Existing Resources Can Support Implementation:** All planned corrective action plans (CAPs) are strictly operational, policy-driven, and behavioral. These mitigations require nominal administrative overhead and can be fully integrated using existing resource allocations immediately.

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 2, 2026
STAFF REPORT

AGENDA ITEM:	**A-8**
TOPIC:	**Policy for Bilingual Premium Pay**
PRESENTED BY:	**Geoff Straw, Executive Director**
STAFF RECOMMENDATION:	**Approve Policy for Bilingual Premium Pay**

BACKGROUND/DISCUSSION:
At its May 7, 2025 meeting, the RTA Board authorized staff to procure third-party consulting services to conduct a comprehensive classification and compensation study. The study's objective was to provide staff and the Board guidance on personnel related issues and address the RTA's ability to hire and retain qualified employees, maintain equitable internal relationships among employees, and comply with state and federal laws.

The final report completed by Evergreen Solutions, LLC was provided to the RTA Board at its May 6, 2026 meeting and included several recommendations. The final recommendation included in Evergreen's report was that the RTA consider implementing a secondary language certification pay program to recognize and incentivize employees who utilize bilingual or multilingual skills in the performance of their duties. Given the public-facing nature of transit operations, the ability to effectively communicate with a diverse ridership can enhance service delivery, customer experience, and operational efficiency.

Under this program, eligible employees would receive additional compensation upon demonstrating proficiency in a secondary language relevant to the RTA's service population. Proficiency will be validated through a standardized assessment to ensure consistency and fairness in program administration. This supports the RTA's ability to better serve its community while recognizing valuable employee skills in a structured and equitable manner.

The RTA reviewed the recommended compensation options in the report and believes the proposed $120 per month of Bilingual Premium Pay is in line with the recommendation.

Staff Recommendation
Approve the policy for bilingual premium pay.

RTA Policy for Bilingual Premium Pay

September 2, 2026

The San Luis Obispo Regional Transit Authority (RTA) recognizes that employees who use a language other than English may improve access to transit services, strengthen communication with riders and employees, and support safe and effective operations. This policy establishes eligibility for the Bilingual Premium Pay.

Eligibility Requirements

An employee may receive the premium when all the following requirements are satisfied:

1. The language is needed to support RTA riders, employees, applicants, community members, or other stakeholders.

2. The employee is formally assigned to provide bilingual communication as part of their regular responsibilities.

3. The employee successfully completes a proficiency assessment administered by an independent third-party testing provider approved by Human Resources.

Possession of second-language skills alone does not establish eligibility. Occasional or incidental use of another language does not qualify an employee for the premium unless the RTA has identified an ongoing operational need and formally assigned the employee to meet that need.

The Executive Director or designee has final authority to interpret and administer this policy, subject to applicable labor agreements and legal requirements.

Bilingual Premium Pay Amount

An employee meeting the eligibility requirements shall receive one hundred twenty ($120) dollars per month. The amount will be adjusted annually by the same percentage the RTA Board approves as an inflationary wage adjustment as part of the budget approval process, effective the first full pay period in July of each fiscal year.

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 2, 2026
STAFF REPORT

AGENDA ITEM: **A-9**

TOPIC: **Transfer of Surplus Vehicles**

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

STAFF RECOMMENDATION: **Authorize Executive Director to Transfer Surplus Vehicles to Other Transportation Provider(s) or to Salvage Vehicles**

BACKGROUND/DISCUSSION:
In an effort to reduce demand for costly Runabout ADA paratransit services in SLO County, the RTA Board amended its Purchasing Policy in 2016 to allow transfer of surplus wheelchair accessible vans to other elderly/disabled transportation providers in the county. By all accounts, this innovative process has worked well in our county.

This staff report focuses on the transfer of four model year 2019 Ford E-450-based cutaway vans that have met or exceeded their economically useful lives. At its March 2026 meeting, the RTA Board declared these four vehicles surplus upon the delivery of the replacement Ford Transit-based wheelchair-accessible vans. As part of that surplus declaration, the Board determined that the RTA would have no practical, efficient or appropriate use for the surplus vehicles, nor will it have such a use for them in the near future. The vehicles have exceeded the FTA useful life requirements (standard of 7-years or 200,000 miles, whichever comes first) and, as a result of the advanced age, are regularly experiencing mechanical failures. The higher-cost repairs do not make it economically prudent to keep them as part of the active fleet.

Below is a table providing information on the four vehicles as of July 1, 2026.

Bus #	Odometer 7/1/2026	Make	Year	Model	VIN	Fuel Type	GVWR	In Service Date
1903	170,855	FORD	2019	STARCRAFT E450	1FDFE4FS9KDC26301	U	14,500	4/24/2019
1904	170,906	FORD	2019	STARCRAFT E450	1FDFE4FS0KDC26302	U	14,500	4/24/2019
1906	161,103	FORD	2019	STARCRAFT E450	1FDFE4FS4KDC26304	U	14,500	4/24/2019
1908	162,821	FORD	2019	STARCRAFT E450	1FDFE4FS8KDC26306	U	14,500	4/24/2019

Authorization to Transfer Vehicles
The RTA Purchasing Policy requires staff to determine if surplus equipment or vehicles have a per-unit fair market value greater than $10,000. Should surplus equipment or 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. Staff has completed market value research and we have determined the value of none of the vehicles presented in the table exceed the $10,000 threshold, so staff is not suggesting that we ask the accepting transportation agency to pay the fair market value as part of the transfer of the vehicles.

On July 28th, I solicited interest via email from organizations that provide wheelchair accessible transportation in our county; I provided an August 10th deadline for response – including a requirement that the requesting agency commit to using the transferred vehicles to transport elderly and disabled passengers in SLO County. I advised interested parties that vehicle 1903 has been pulled from service due to recurring P0300 engine misfire codes and thus would be available for transfer upon Board authorization. The remaining three vehicles would be available for transfer upon the replacement Ford Transit-based vehicles entering revenue service, which is expected in December 2026 or January 2027.

Below is a recap of the vehicle requests received:

1. The City of San Luis Obispo is interested in a transfer, requesting vehicle 1906.

2. Ride-On Transportation was the only non-profit agency to respond, and requested two vehicles (priority order 1904, 1906 and 1908).

3. Ventura Transit Systems (VTS) was the only for-profit agency to respond, with a request for all four vehicles (1903, 1904, 1906 and 1908).

Staff is seeking Board authorization to immediately transfer vehicle 1903 to VTS, since it has been retired from revenue service. In addition, once the four replacement vans are placed into revenue service, staff is seeking authorization to transfer vehicle 1906 to the City of SLO, and to transfer vehicles 1904 and 1908 to Ride-On Transportation. If any of the requesting agencies fail to follow-through on one or more of the requested vehicles, we would then go down the priority list as presented above. Any remaining vehicles would be either salvaged at a nearby recycler or sold through auction.

Staff Recommendation
Authorize Executive Director to transfer surplus vehicles to other transportation provider(s) or to salvage vehicles.

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 2, 2026
STAFF REPORT

AGENDA ITEM:	**A-10**
TOPIC:	**Amended SDRMA Health Benefits MOU**
PRESENTED BY:	**Tania Arnold, Deputy Director/CFO**
STAFF RECOMMENDATION:	**Approve the Resolution and Revised MOU Between the SDRMA and the RTA in Order to Continue to Participate in the PRISM Small Group Health Benefits Program**

BACKGROUND/DISCUSSION:
At its September 5, 2018 meeting, the RTA Board approved the Memorandum of Understand with Special District Risk Management Authority (SDRMA) to participate in the Public Risk Innovation, Solutions and Management (PRISM, formerly CSAC EIA) small group health benefits program.

As a member of SDRMA, the RTA is able to provide employees with health coverage options so they get the coverage they want and can afford. Since its inception, the PRISM Health Program has consistently outperformed the marketplace, effectively competing with standalone plans, other pooled arrangements and CalPERS. Since the transition, RTA has enjoyed plan stability within budgetary limits and it has allowed the RTA to take advantage of the shared risk model offered by an insurance pool of small agencies as well as large agencies.

At its June 24, 2026 meeting, the SDRMA Board of Directors approved amendments to the SDRMA Health Benefits Memorandum of Understanding (MOU). The amendments better align the MOU with the PRISM MOU and industry norms. In order to continue to participate in SDRMA, the RTA must execute the revised MOU prior to November 1, 2026. A summary of the changes is attached.

Staff Recommendation
Approve the Resolution and Revised Memorandum of Understanding between the Special District Risk Management Authority and the RTA in order to continue to participate in the PRISM small group health benefits program.

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Section	Previous Language	Revised Language	Description of Change
Definitions	Various terms and definitions, some not clearly defined or missing.	Expanded and clarified definitions for "Committee," "Coverage Documents," "Program Participation Agreement," "Program," and "Program Documents."	Improved clarity and specificity of key terms for better understanding and administration.
Entry into Program	ENTITY shall enroll in the Program by making application through SDRMA.	ENTITY shall apply for participation by executing all forms prescribed by SDRMA, subject to approval by the Program's Underwriter.	Clarifies the application process and emphasizes underwriter approval.
Maintenance of Effort	Program provides health benefits to all participants of the ENTITY.	Specifies eligible participants (active employees, retired employees, dependents, public officials) and outlines optional participation for some groups.	Clarifies eligibility and participation requirements.
Premiums	ENTITY will remit monthly premiums based on rates established by SDRMA.	Premiums and rates are set by the Committee; SDRMA adds an administrative fee. Details on billing, penalties for late payment, and termination for non-payment added.	Adds detail on premium calculation, billing, and consequences for late payment.

Section	Previous Language	Revised Language	Description of Change
Benefits	Benefits as set forth in ENTITY's Plan Summary.	Benefits must be agreed upon with employee organizations and approved by the Program underwriter.	Adds requirement for underwriter approval of plan selections.
Assessments & Dividends	Assessments/dividends used sparingly; allocation based on premiums paid.	Committee may impose premium assessments if funds are insufficient; details on liability for withdrawn entities and dividend formula.	Expands on funding adequacy, assessment process, and dividend distribution.
Withdrawal	ENTITY may withdraw with 90 days' notice.	Notice period extended to 120 days prior to January 1; rescission deadline added; 3-year waiting period for re-entry after withdrawal.	Tightens withdrawal process and re-entry requirements.
Arbitration	Not previously specified.	Adds binding arbitration clause for disputes, specifying Sacramento, CA as venue.	Introduces formal dispute resolution process.
Amendment	Amendments require written agreement by both parties.	Clarifies amendment process, including SDRMA's right to terminate if ENTITY does not execute required amendments.	Strengthens amendment and termination provisions.

RESOLUTION NO. _______

A RESOLUTION OF THE OF THE (GOVERNING BODY) OF San Luis Obispo Regional Transit Authority APPROVING THE FORM OF AND AUTHORIZING THE EXECUTION OF A MEMORANDUM OF UNDERSTANDING AND AUTHORIZING PARTICIPATION IN THE SPECIAL DISTRICT RISK MANAGEMENT AUTHORITY'S HEALTH BENEFITS PROGRAM

WHEREAS, San Luis Obispo Regional Transit Authority, a public agency duly organized and existing under and by virtue of the laws of the State of California (the "ENTITY"), has determined that it is in the best interest and to the advantage of the ENTITY to participate in the Health Benefits Program offered by Special District Risk Management Authority (the "Authority"); and

WHEREAS, the Authority was formed in 1986 in accordance with the provisions of California Government Code 6500 *et seq.,* for the purpose of providing risk financing, risk management programs and other coverage protection programs; and

WHEREAS, participation in Authority programs requires the ENTITY to execute and enter into a Memorandum of Understanding which states the purpose and participation requirements for the Health Benefits Program; and

WHEREAS, all acts, conditions and things required by the laws of the State of California to exist, to have happened and to have been performed precedent to and in connection with the consummation of the transactions authorized hereby do exist, have happened and have been performed in regular and due time, form and manner as required by law, and the ENTITY is now duly authorized and empowered, pursuant to each and every requirement of law, to consummate such transactions for the purpose, in the manner and upon the terms herein provided.

NOW, THEREFORE, BE IT RESOLVED BY THE GOVERNING BODY OF THE ENTITY AS FOLLOWS:

Section 1. Findings. The ENTITY's Governing Body hereby specifically finds and determines that the actions authorized hereby relate to the public affairs of the ENTITY.

Section 2. Memorandum of Understanding. The Memorandum of Understanding, to be executed and entered into by and between the ENTITY and the Authority, in the form presented at this meeting and on file with the ENTITY's Secretary, is hereby approved. The ENTITY's Governing Body and/or Authorized Officers ("The Authorized Officers") are hereby authorized and directed, for and in the name and on behalf of the ENTITY, to execute and deliver to the Authority the Memorandum of Understanding.

Section 3. Program Participation. The ENTITY's Governing Body approves participating in the Special District Risk Management Authority's Health Benefits Program.

Section 4. Severability. If any provision of this resolution or the application thereof to any person or circumstance is held invalid, such invalidity shall not affect other provisions or applications of the resolution which can be given effect without the invalid provision or application, and to this end the provisions of this resolution are severable.

Section 5. Other Actions. The Authorized Officers of the ENTITY are each hereby authorized and directed to execute and deliver any and all documents which are necessary in order to consummate the transactions authorized hereby and all such actions heretofore taken by such officers are hereby ratified, confirmed and approved.

Section 6. Effective Date. This resolution shall take effect immediately upon its passage.

PASSED AND ADOPTED this _____ day of ___________________, 20_____ by the following vote:

AYES: ___________________

NOES: ___________________

ABSENT: ___________________

____
Name

____
Title

____
ENTITY Secretary

MEMORANDUM OF UNDERSTANDING

THIS MEMORANDUM OF UNDERSTANDING (HEREAFTER "MEMORANDUM") IS ENTERED INTO BY AND BETWEEN THE SPECIAL DISTRICT RISK MANAGEMENT AUTHORITY (HEREAFTER "SDRMA") AND THE PARTICIPATING PUBLIC ENTITY (HEREAFTER "ENTITY") WHO IS SIGNATORY TO THIS MEMORANDUM.

WHEREAS, on August 1, 2006, SDRMA in its capacity as a member of Public Risk Innovation, Solutions and Management (PRISM) and having executed the Joint Powers Agreement (JPA) governing PRISM, was appointed administrator for the purpose of enrolling small public entities into the (PRISM) Health and/or Employee Benefits Small Group Program (hereinafter "Program"); and

WHEREAS, the terms and conditions of the PROGRAM as well as benefit coverage, rates, assessments, and premiums are governed by the PRISM Health Committee and/or PRISM Employee Benefits Committee for the Program (the "Committee") and not SDRMA; and

WHEREAS, ENTITY desires to enroll and participate in the Program, acknowledging that SDRMA acts solely in an administrative capacity and does not establish Program terms.

NOW THEREFORE, SDRMA and ENTITY agree as follows:

1. DEFINITIONS. For purposes of this MEMORANDUM, unless the context otherwise requires, the following terms when capitalized have the respective meanings set out below and are applicable to the singular as well as to the plural forms of such terms and to the masculine as well as to the feminine and neuter genders of such terms.

a. "Committee" means the PRISM Health Committee and/or PRISM Employee Benefits Committee for the Program.

b. "Coverage Documents" means, except as otherwise provided herein, coverage documents from each carrier outlining the coverage provided, including terms and conditions of coverage, are controlling with respect to the coverage of the Program and will be provided by SDRMA to each ENTITY. Documents will be made available through the online SDRMA Portal and be accessible to approved users of the ENTITY.

c. "Program Participation Agreement" means the agreement issued by PRISM/AUS Underwriting to the Entity that details the final terms of acceptance and any special exceptions or terms that have been made a part of the underwriting approval and is required to be completed and executed in order to constitute full acceptance as a member of the PRISM Small Group Program.

d. "Program" or "PRISM" means the Public Risk Innovation, Solutions and Management (PRISM) Health and/or Employee Benefits Small Group Program.

e. "Program Documents" means the following: SDRMA Program Administrative Guidelines, SDRMA Resolution, Program Underwriting application and any required underwriting documents, Program approval, Program Underwriting & Eligibility Rules and Program Participation Agreement.

2. PURPOSE**.** ENTITY is signatory to this MEMORANDUM for the sole purpose of enrolling in the Program.

3. ENTRY INTO PROGRAM**.** ENTITY shall apply for participation in the Program by executing and all forms prescribed by SDRMA. SDRMA shall submit the completed forms to the Program's Underwriter who has the authority to accept or reject Entity's application in its sole discretion based on the Program's governing documents and in accordance with the Program's eligibility guidelines.

4. MAINTENANCE OF EFFORT**.** Program provides health benefits to all active employees, retired employees, dependents of an active or retired employee and public officials of the ENTITY who satisfy requirements for participation. ENTITY public officials may participate in the Program only if they are currently being covered and their own ENTITY's enabling act, plans and policies allow it. ENTITY must contribute at least the minimum percentage required by the eligibility requirements

5. PREMIUMS. ENTITY agrees and acknowledges that premiums and rates for the Program are set by the Committee and that SDRMA's Administrative Fee is set by SDRMA For each billing cycle. ENTITY will remit the total monthly amount billed by SDRMA for each category of participants and the census of covered employees, public officials, dependents and retirees. PREMIUMs are based on a full month, and there are no partial months or prorated PREMIUMs. Enrollment for mid-year qualifying events and termination of coverage will be made in accordance with the SDRMA Program Administrative Guidelines.

Late Payment Penalties. ENTITY shall pay all PREMIUM invoices as billed to SDRMA, regardless of any changes to eligibility or adjustments to PREMIUMS that may occur during the billing month and not reflected in the PREMIUM invoice. SDRMA shall issue PREMIUM invoices to ENTITY prior to the coverage month in which they are due. PREMIUM invoices are due by the due date stated on the invoice and considered delinquent thirty (30) calendar days from the due date. In addition to the outstanding balance due for any unpaid invoice, ENTITY shall be liable to SDRMA for a late payment penalty of 1% of the outstanding balance of any unpaid portion of such invoice effective (30) calendar days after the invoice due date. SDRMA reserves the right to terminate the

MEMORANDUM and ENTITY'S Participation Agreement, including immediate cessation of all services under the Program, any time after it provides written notice to ENTITY of its failure to pay the amount due of any invoice.

6. BENEFITS. Benefits provided to ENTITY participants shall be as set forth in ENTITY's Plan Summary for the Program and as agreed upon between the ENTITY and its recognized employee organizations as applicable. Not all plan offerings will be available to ENTITY, and plans requested by ENTITY must be submitted to Program underwriter for approval.

7. ASSESSMENTS AND DIVIDENDS. The Program annual premium, as approved by the Committee will be established at a level which is anticipated to provide adequate overall funding. The Program will directly manage surpluses and deficits. Premiums are targeted to fund expected claims (including incurred-but-not-reported (IBNR) and run-out), reinsurance (if any), Program/administrative expenses, and any reserve or margin adopted by the Committee.

   If Program funds are insufficient (including funding IBNR), the Committee may impose premium assessments on all applicable participating Entities, consistent with the JPA, including ENTITY signing this MEMORANDUM. Entities that have withdrawn from the Program are liable for assessments attributable to plan year(s) in which they participated.

   After appropriate reserves and obligations are funded and any Committee-approved margin is achieved, the Committee may declare a dividend or premium credit, using a formula recommended by the Program Underwriters and actuary.

8. WITHDRAWAL. ENTITY may withdraw from this MEMORANDUM and terminate its Program Participation Agreement for a subsequent calendar year subject to the following condition: ENTITY shall notify SDRMA in writing of its intent to withdraw from this MEMORANDUM and terminate its Program Participation Agreement at least 120 days prior to January 1st of the subsequent calendar year in which it shall be effective. No withdrawal shall become effective until December 31 of the year that notice of termination is received. ENTITY may rescind its notice of intent to withdraw and terminate no later than October 1st. Once ENTITY withdraws from the Program, there is a 3-year waiting period to come back into the Program, and the ENTITY will be subject to underwriting approval.

9. ARBITRATION OF DISPUTES. To the extent permitted by law, all controversies between the ENTITY and SDRMA that may arise out of or relate to any of the services provided by SDRMA under the MEMORANDUM, or the construction, performance or breach of this

or any other agreement between the ENTITY and SDRMA, whether entered into prior to, on or subsequent to the date hereof, shall be settled by binding arbitration in the City of Sacramento, California, under the Commercial Arbitration Rules of the American Arbitration Association. Judgment upon any award rendered by the arbitrator(s) shall be final and may be entered into any court having jurisdiction.

10. GOVERNING LAW. This MEMORANDUM shall be governed in accordance with the laws of the State of California.

11. VENUE. Venue for any dispute or enforcement shall be in the City of Sacramento, California.

12. ATTORNEY FEES. The prevailing party in any dispute shall be entitled to an award of reasonable attorney fees.

13. COMPLETE AGREEMENT. This MEMORANDUM together with the related Program Documents constitutes the full and complete agreement of the ENTITY.

14. SEVERABILITY. Should any provision of this MEMORANDUM be judicially determined to be void or unenforceable, such determination shall not affect any remaining provision.

15. AMENDMENT OF MEMORANDUM; WAIVER. This MEMORANDUM may not be modified, nor shall any provision hereof be waived or amended, except in a writing duly signed by authorized representatives of SDRMA and ENTITY. The failure of either Party to enforce at any time any provision of the MEMORANDUM shall not be construed to be a waiver of such provision, nor in any way to affect the validity of the MEMORANDUM or the right of either party thereafter to enforce each and every such provision. If ENTITY fails or refuses to execute an amendment to this MEMORANDUM by the deadline included in written notice of SDRMA'S execution of said amendment, SDRMA reserves the right to terminate this MEMORANDUM and ENTITY'S Program Participation Agreement effective as of the next annual renewal date.

16. EFFECTIVE DATE. This MEMORANDUM shall become effective on the later of the first date of coverage for the ENTITY or the last date of signing of this MEMORANDUM by the Chief Executive Officer or Board President of SDRMA and the authorized person for the ENTITY.

17. 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: ___________________ By:___________________________________

Special District Risk
Management Authority

Dated: ___________________ By:___________________________________

San Luis Obispo Regional Transit Authority

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MEMORANDUM OF UNDERSTANDING

THIS MEMORANDUM OF UNDERSTANDING (HEREAFTER "MEMORANDUM") IS ENTERED INTO BY AND BETWEEN THE SPECIAL DISTRICT RISK MANAGEMENT AUTHORITY (HEREAFTER "SDRMA") AND THE PARTICIPATING PUBLIC ENTITY (HEREAFTER "ENTITY") WHO IS SIGNATORY TO THIS MEMORANDUM.

WHEREAS, on August 1, 2006, SDRMA in its capacity as a member of Public Risk Innovation, Solutions and Management (PRISM) and having executed the Joint Powers Agreement (JPA) governing PRISM, was appointed administrator for the purpose of enrolling small public entities into the ~~Public Risk Innovation, Solutions and Management~~ (PRISM) Health and/or Employee Benefits Small Group Program (hereinafter "P~~ROGRAM~~rogram"); and

WHEREAS, the terms and conditions of the PROGRAM as well as benefit coverage, rates, assessments, and premiums are governed by the PRISM Health Committee and/or PRISM Employee Benefits Committee for the P~~ROGRAM~~rogram (the "C~~OMMITTEE~~ommittee") and not SDRMA; and

WHEREAS, ENTITY desires to enroll and participate in the P~~ROGRAM~~rogram, acknowledging that SDRMA acts solely in an administrative capacity and does not establish Program terms.

NOW THEREFORE, SDRMA and ENTITY agree as follows:

1. DEFINITIONS. For purposes of this MEMORANDUM, unless the context otherwise requires, the following terms when capitalized have the respective meanings set out below and are applicable to the singular as well as to the plural forms of such terms and to the masculine as well as to the feminine and neuter genders of such terms.

a. "Committee" means the PRISM Health Committee and/or PRISM Employee Benefits Committee for the Program.

b. "Coverage Documents" means, except as otherwise provided herein, coverage documents from each carrier outlining the coverage provided, including terms and conditions of coverage, are controlling with respect to the coverage of the Program and will be provided by SDRMA to each ENTITY. Documents will be made available through the online SDRMA Portal and be accessible to approved users of the ENTITY.

c. "Program Participation Agreement" means the agreement issued by PRISM/AUS Underwriting to the Entity that details the final terms of acceptance and any special exceptions or terms that have been made a part of the underwriting approval and is required to be completed and executed in order to constitute full acceptance as a member of the PRISM Small Group Program.

d. “Program” or “PRISM” means the Public Risk Innovation, Solutions and Management (PRISM) Health and/or Employee Benefits Small Group Program.

e. “Program Documents” means the following: SDRMA Program Administrative Guidelines, SDRMA Resolution, Program Underwriting application and any required underwriting documents, Program approval, Program Underwriting & Eligibility Rules and Program Participation Agreement.

~~1~~2. PURPOSE. ENTITY is signatory to this MEMORANDUM for the ~~express~~ sole purpose of enrolling in the Program~~ROGRAM~~.

~~2~~3. ENTRY INTO PROGRAM. ENTITY shall ~~enroll~~ apply for participation in the Program~~ROGRAM~~ by ~~making application through~~ executing and all forms prescribed by SDRMA. ~~-~~SDRMA shall submit the completed forms to ~~which shall be subject to approval by~~ the Program~~ROGRAM~~'s Underwriter who has the authority to accept or reject Entity’s application in its sole discretion based on the Program’s ~~and~~ governing documents and in accordance with the Program’s~~applicable~~ eligibility guidelines.

~~3~~4. MAINTENANCE OF EFFORT. Program ~~ROGRAM is designed to provide an alternative~~ provides health benefits ~~solution~~ to all ~~participants~~ active employees, retired employees, dependents of an active or retired employee and public officials of the ENTITY who satisfy requirements for participation. ~~of the ENTITY including active employees, retired employees (optional), dependents (optional) and public officials (optional).~~ ENTITY public officials may participate in the Program~~ROGRAM~~ only if they are currently being covered and their own ENTITY’s enabling act, plans and policies allow it. ENTITY must contribute at least the minimum percentage required by the eligibility requirements

~~4~~5. PREMIUMS. ENTITY ~~understands~~ agrees and acknowledges that premiums and rates for the Program ~~ROGRAM~~ are set by the ~~COMMITTEE~~Committee and that SDRMA’s Administrative Fee is set by SDRMA For each billing cycle,. ENTITY will remit the total monthly ~~premiums based upon rates established~~ amount billed by SDRMAfor each category of participants and the census of covered employees, public officials, dependents and retirees. PREMIUMs are based on a full month, and there are no partial months or prorated PREMIUMs. Enrollment for mid-year qualifying events and termination of coverage will be made in accordance with the SDRMA Program Administrative Guidelines.

~~Rates for the ENTITY and each category of participant will be determined by the COMMITTEE designated for the PROGRAM based upon advice from its consultants and/or a consulting Benefits Actuary and insurance carriers. In addition, SDRMA adds an administrative fee to premiums and rates for costs associated with administering the PROGRAM. Rates may vary depending upon factors including, but not limited to, demographic characteristics, loss experience of all public entities participating in the PROGRAM and differences in benefits provided (plan design), if any.~~

~~SDRMA will administrate a billing to ENTITY each month, with payments due by the date specified by SDRMA. Payments received after the specified date will accrue penalties up to and including termination from the PROGRAM. Premiums are based on a full month, and there are no partial months or prorated premiums. Enrollment for mid-year qualifying events and termination of coverage will be made in accordance with the SDRMA Program Administrative Guidelines~~.

Late Payment Penalties. ENTITY shall pay all PREMIUM invoices as billed to SDRMA, regardless of any changes to eligibility or adjustments to PREMIUMS that may occur during the billing month and not reflected in the PREMIUM invoice. SDRMA shall issue PREMIUM invoices to ENTITY prior to the coverage month in which they are due. PREMIUM invoices are due by the due date stated on the invoice and considered delinquent thirty (30) calendar days from the due date. In addition to the outstanding balance due for any unpaid invoice, ENTITY shall be liable to SDRMA for a late payment penalty of 1% of the outstanding balance of any unpaid portion of such invoice effective (30) calendar days after the invoice due date. SDRMA reserves the right to terminate the MEMORANDUM and ENTITY'S Participation Agreement, including immediate cessation of all services under the Program, any time after it provides written notice to ENTITY of its failure to pay the amount due of any invoice.

~~5~~6. BENEFITS. Benefits provided to ENTITY participants shall be as set forth in ENTITY's Plan Summary for the Program ~~ROGRAM~~ and as agreed upon between the ENTITY and its recognized employee organizations as applicable. Not all plan offerings will be available to ENTITY, and plans requested by ENTITY must be submitted to Program~~ROGRAM~~ underwriter for approval.

6. ~~COVERAGE DOCUMENTS. Except as otherwise provided herein, coverage documents from each carrier outlining the coverage provided, including terms and conditions of coverage, are controlling with respect to the coverage of the PROGRAM and will be provided by SDRMA to each ENTITY. SDRMA will provide each ENTITY with additional documentation, defined as the SDRMA Program Administrative Guidelines which provide further details on administration of the PROGRAM.~~

7. ~~PROGRAM FUNDING. It is the intent of this MEMORANDUM to provide for a fully funded PROGRAM by any or all of the following: pooling risk; purchasing individual stop loss~~

~~coverage to protect the pool from large claims; and purchasing aggregate stop loss coverage.~~

~~8. Assessments. Should the PROGRAM not be adequately funded for any reason, pro-rata assessments to the ENTITY 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 determination and approval of the COMMITTEE in accordance with the following:~~

~~a. Assessments/dividends will be used sparingly. Generally, any over/under funding will be factored into renewal rates.~~

~~b. If a dividend/assessment is declared, allocation will be based upon each ENTITY's proportional share of total premiums paid for the preceding 3 years. An ENTITY must be a current participant to receive a dividend, except upon termination of the PROGRAM and distribution of assets.~~

~~c. ENTITY will be liable for assessments for 12 months following withdrawal from the PROGRAM.~~

~~d. Fund equity will be evaluated on a total PROGRAM-wide basis as opposed to each year standing on its own.~~

7. ASSESSMENTS AND DIVIDENDS. The Program annual premium, as approved by the Committee will be established at a level which is anticipated to provide adequate overall funding. The Program will directly manage surpluses and deficits. Premiums are targeted to fund expected claims (including incurred-but-not-reported (IBNR) and run-out), reinsurance (if any), Program/administrative expenses, and any reserve or margin adopted by the Committee.

If Program funds are insufficient (including funding IBNR), the Committee may impose premium assessments on all applicable participating Entities, consistent with the JPA, including ENTITY signing this MEMORANDUM. Entities that have withdrawn from the Program are liable for assessments attributable to plan year(s) in which they participated.

After appropriate reserves and obligations are funded and any Committee-approved margin is achieved, the Committee may declare a dividend or premium credit, using a formula recommended by the Program Underwriters and actuary.

~~9~~8. Withdrawal. ENTITY may withdraw from this MEMORANDUM and terminate its Program Participation Agreement for a subsequent calendar year subject to the following condition: ~~ENTITY shall notify SDRMA and the PROGRAM in writing of its~~

~~intent to withdraw at least 90 days prior to their requested withdrawal date~~. ENTITY shall notify SDRMA in writing of its intent to withdraw from this MEMORANDUM and terminate its Program Participation Agreement at least 120 days prior to January 1st of the subsequent calendar year in which it shall be effective . No withdrawal shall become effective until December 31 of the year that notice of termination is received. ENTITY may rescind its notice of intent to withdraw and terminate no later than October 1st.ENTITY may rescind its notice of intent to withdraw. ENTITY may rescind its notice of intent to withdraw and terminate no later than October 1st. Once ENTITY withdraws from the Program~~ROGRAM~~, there is a 3-year waiting period to come back into the Program~~ROGRAM~~, and the ENTITY will be subject to underwriting approval ~~again~~.

~~10. LIAISON WITH SDRMA. Each ENTITY shall maintain staff to act as liaison with SDRMA and between the ENTITY and SDRMA's designated PROGRAM representative.~~

9. ARBITRATION OF DISPUTES. To the extent permitted by law, all controversies between the ENTITY and SDRMA that may arise out of or relate to any of the services provided by SDRMA under the MEMORANDUM, or the construction, performance or breach of this or any other agreement between the ENTITY and SDRMA, whether entered into prior to, on or subsequent to the date hereof, shall be settled by binding arbitration in the City of Sacramento, California, under the Commercial Arbitration Rules of the American Arbitration Association. Judgment upon any award rendered by the arbitrator(s) shall be final, and may be entered into any court having jurisdiction.

~~11~~10. GOVERNING LAW. This MEMORANDUM shall be governed in accordance with the laws of the State of California.

~~12~~11. VENUE. Venue for any dispute or enforcement shall be in the City of Sacramento, California.

~~13~~12. ATTORNEY FEES. The prevailing party in any dispute shall be entitled to an award of reasonable attorney fees.

~~14.~~13. COMPLETE AGREEMENT. This MEMORANDUM together with the related Program~~ROGRAM~~ ~~documents~~ Documents constitutes the full and complete agreement of the ENTITY.

~~15~~14. SEVERABILITY. Should any provision of this MEMORANDUM be judicially determined to be void or unenforceable, such determination shall not affect any remaining provision.

~~16~~15. AMENDMENT OF MEMORANDUM; WAIVER. This MEMORANDUM may not be modified, nor shall any provision hereof be waived or amended, except in a writing duly signed by authorized representatives of SDRMA and ENTITY. The failure of either Party to enforce at any time any provision of the MEMORANDUM shall not be construed to be a waiver of such provision, nor in any way to affect the validity of the MEMORANDUM or the right of either party thereafter to enforce each and every such provision.~~may be amended by the SDRMA Board of Directors and such amendments are subject to approval of ENTITY's designated representative, or alternate, who shall have authority to execute this MEMORANDUM.~~ ~~Any~~ If ENTITY ~~who~~ fails or refuses to execute an amendment to this MEMORANDUM ~~–~~by the deadline included in written notice of SDRMA'S execution of said amendment, SDRMA reserves the right to terminate ~~shall be deemed to have withdrawn~~ this MEMORANDUM and ENTITY'S Program Participation Agreement ~~from the PROGRAM~~ effective as of ~~on~~ the next annual renewal date.

~~17~~16. EFFECTIVE DATE. This MEMORANDUM shall become effective on the later of the first date of coverage for the ENTITY or the last date of signing of this MEMORANDUM by the Chief Executive Officer or Board President of SDRMA and the authorized person for the ENTITY.

~~18~~17. 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: ____________________ By:_____________________________________

Special District Risk
Management Authority

Dated: ____________________ By:_____________________________________

~~Agency~~ ENTITY Name

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 2, 2026
STAFF REPORT

AGENDA ITEM:	**A-11**
TOPIC:	**Electric Bus Recharging Agreement**
PRESENTED BY:	**Geoff Straw, Executive Director**
STAFF RECOMMENDATION:	**Authorize the Executive Director to Execute Electric Bus Recharging Agreement with the City of San Luis Obispo**

BACKGROUND/DISCUSSION:
The purpose of the attached draft Electric Bus Recharging License and Use Agreement is to establish a formal, mutual assistance agreement the RTA and our partner the City of San Luis Obispo Transit Department (SLO Transit) to facilitate rapid, short-term deployment of emergency battery-electric bus recharging. Both the RTA and SLO Transit may use each other's Electric Vehicle Servicing Equipment (EVSE) as outlined in the Agreement.

Participation in this alliance is beneficial to the RTA because it broadens the resources available to the RTA during localized power outages or other EVSE failures. It also encourages resource sharing amongst transit agencies by establishing a standard process for requesting and providing resources and gives member agencies the flexibility to make requests or fulfill requests in a manner that works for their situational needs.

This agreement is similar to those that other disciplines such as law enforcement, public works, and utilities have used for many decades, which support the sharing of resources from like disciplines across jurisdictions based on need and availability. Authorizing the Executive Director to apply mutual assistance will forge a more resilient, formal, and mutually beneficial relationship between the RTA and SLO Transit for sharing resources and will strengthen our continuity of operations capabilities during power emergencies.

This Electric Bus Recharging License and Use Agreement is similar in many ways to the California Central Coast Area Public Transit Operators Mutual Aid Agreement that the RTA Board authorized in January 2019. Other signatories to that Mutual Aid Agreement include the Monterey Salinas Transit District, the San Benito Local Transportation Authority, and the Santa Cruz Metropolitan Transit District.

Staff Recommendation for the Board:
Authorize the Executive Director to execute the Electric Bus Recharging License and Use Agreement with the City of San Luis Obispo.

ELECTRIC BUS RECHARGING LICENSE AND USE AGREEMENT

This Electric Bus Recharging License and Use Agreement, (hereinafter referred to as the "Agreement") is made and entered into as of __/__/____ (the "Effective Date") by and between by those PARTIES who have adopted and signed the AGREEMENT (hereafter referred to individually as a "PARTY" or together as the "PARTIES"), which include the following organizations:

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
CITY OF SAN LUIS OBISPO

RECITALS:

WHEREAS, PARTIES are currently transitioning their respective public transit fleets to zero-emission battery electric buses (BEBs); and

WHEREAS, RTA has direct-current recharging stations at its bus maintenance facility located at 253 Elks Lane, San Luis Obispo (the "RTA Facility"); and

WHEREAS, the City of San Luis Obispo has constructed direct-current recharging stations at its bus maintenance facility located at 29 Prado Road, San Luis Obispo (the "City Facility") ; and

WHEREAS, the PARTIES understand that any organization that lends recharging station access (hereinafter referred to as the "LENDING PARTY") to another organization (hereinafter referred to as the "BORROWING PARTY") shall be reimbursed by the BORROWING PARTY for equipment, personnel, supplies and other resources made available under this Agreement; and

WHEREAS, by this Agreement, the PARTIES desire to set forth the terms and conditions to allow use of the recharging stations at each other's facilities on an emergency and "as-needed" basis.

AGREEMENT:

NOW THEREFORE, in consideration of the conditions and covenants contained herein, the PARTIES agree as follows:

1. **Term**.

This Agreement shall be effective as of the Effective Date and shall remain in effect until either Party gives the other Party thirty days prior written notice of termination. Notwithstanding the foregoing, any PARTY shall have the right to immediately terminate this Agreement upon written notice to other PARTY when such PARTY determines, in its sole discretion, that continued use of the recharging stations is materially interfering with the PARTY's use of its facility or is otherwise not in the best interests of the PARTY.

2. **<u>License of Recharging Stations</u>**:

Subject to the terms and conditions in this Agreement, each PARTY hereby licenses to the other PARTY the right to use the recharging stations at each other's respective location. Prior to any PARTY's use of another PARTY's recharging facilities, the BORROWING PARTY agrees to have the BORROWING PARTY's employees who will be using the recharging stations schedule a brief training with LENDING PARTY's employees so that such employees can become familiar with LENDING PARTY's facility and any requirements regarding the use of the LENDING PARTY's recharging stations. BORROWING PARTY shall not have the right to modify or make alterations to the recharging stations or the LENDING PARTY's facility.

3. **<u>Payment and Expenses:</u>**

   a. <u>Charging Expenses</u>: BORROWING PARTY shall pay to LENDING PARTY for all costs of electricity associated with the recharging of BORROWING PARTY's electric buses. All PARTIES' Recharging Stations are capable of calculating all of the electricity that is used by BORROWING PARTY to recharge each bus. LENDING PARTY shall invoice BORROWING PARTY on a monthly basis, which shall be due within thirty days. LENDING PARTY may charge a 15% fee on each invoice in order to cover LENDING PARTY's administrative and maintenance costs associated with this Agreement. Any late payments shall be subject to interest at the rate of ten percent (10%) per month until payment is made.

   b. <u>Damage</u>. BORROWING PARTY shall be responsible for any damage to the LENDING PARTY's recharging stations, the LENDING PARTY's facility or any other property of LENDING PARTY caused by BORROWING PARTY, its officials, employees or contractors. BORROWING PARTY shall immediately notify LENDING PARTY of any damage to such facilities. BORROWING PARTY shall not be responsible for any damage to the recharging stations caused by LENDING PARTY, its officials, employees or contractors. In the event LENDING PARTY discovers any damage that it believes was caused by BORROWING PARTY, it shall promptly notify BORROWING PARTY of such damage and the reasons LENDING PARTY believes BORROWING PARTY caused such damage.

   c. **<u>Operational Requirements</u>:**

      i. In the event LENDING PARTY needs access to LENDING PARTY's recharging station, either for its own use, maintenance, repair or otherwise, BORROWING PARTY shall make the facilities immediately available upon notice by LENDING PARTY. BORROWING PARTY shall uncouple buses from the recharging stations and shall egress the LENDING PARTY's Facility as instructed by LENDING PARTY's on-site staff members.

      ii. If requested, LENDING PARTY will provide BORROWING PARTY with a "FOB" which will allow BORROWING PARTY access to the LENDING PARTY's facility during non-business hours. BORROWING PARTY will attempt to notify LENDING PARTY if it intends to access the LENDING PARTY's facility during such time. BORROWING PARTY shall notify LENDING PARTY in the event a FOB is lost. BORROWING PARTY shall be responsible for any and all "reprogramming" and other costs in the event BORROWING PARTY's employees lose a FOB.

iii. All PARTIES acknowledge that use of the LENDING PARTY's recharging facilities and access to the LENDING PARTY's facility revolves around the daily operational needs and activities of the LENDING PARTY. As such, BORROWING PARTY agrees to comply with all operational directives issued by LENDING PARTY relative to same. The PARTIES acknowledge and agree that each PARTY shall primarily use their respective recharging facilities and shall only use the other PARTY's facilities in the event of an emergency or on an "as-needed basis." LENDING PARTY shall strive to provide BORROWING PARTY with as much advance notice as reasonably possible for any directives which may materially impact BORROWING PARTY's use of the recharging stations so that LENDING PARTY may make alternative vehicles available in the event the recharging stations are not available.

4. **No Warranties or Representations**:

LENDING PARTY makes no representations or warranties whatsoever regarding:

a. The recharging stations or the suitability of such equipment for BORROWING PARTY's use or application. BORROWING PARTY acknowledges and agrees that it has had the opportunity to fully inspect the recharging stations and agrees that the equipment is compatible with BORROWING PARTY's vehicles.

b. The safety, security or condition of the LENDING PARTY's Facility. BORROWING PARTY agrees that any damage or loss that may occur to its vehicles or its contents while at the LENDING PARTY's Facility is the sole responsibility of BORROWING PARTY. BORROWING PARTY further understands and agrees that the LENDING PARTY cannot and does not assume responsibility for any such property damage to BORROWING PARTY's vehicles, theft of the vehicle, or any part of the vehicle, or loss of personal articles from the vehicle. BORROWING PARTY hereby releases and forever discharges LENDING PARTY from any and all liability, claims, or damages whatsoever, for any damage to BORROWING PARTY's vehicles or personal injury to BORROWING PARTY's employees related to the use of LENDING PARTY's facilities except for any liability, claim or damages arising from or related to the sole negligence or willful misconduct of LENDING PARTY, and its officials, employees, contractors and agents.

5. **No Other Rights; No Bailment:**

BORROWING PARTY acknowledges that this Agreement only licenses certain rights to the BORROWING PARTY to use the recharging stations and LENDING PARTY Facility subject to certain terms and conditions and that no other rights except as specifically set forth in this Agreement are granted. Further, no bailment between LENDING PARTY and BORROWING PARTY is hereby created.

6. **Indemnity & Insurance**:

To the fullest extent of the law, BORROWING PARTY agrees to indemnify, and hold harmless, LENDING PARTY, its members, officials, officers, employees, and contractors from and against any and all claims, actions, losses, injuries, damages, or liability for damages, demands, actions, losses, costs, penalties and expenses of every name, kind, and description, including litigation cost and attorney's fees incurred, arising out of, , or resulting from the use of the recharging stations at LENDING PARTY's facility by BORROWING PARTY, including use by its contractors, employees and authorized users, excepting only loss, damage, or other liability solely attributable to the sole negligence or willful acts of LENDING PARTY, its officers and employees, or as expressly prescribed by statute. This duty to indemnify and hold LENDING PARTY free and harmless includes the duties to defend, inclusive of this set forth in California Civil Code Section 2778.

For the term of this Agreement, BORROWING PARTY agrees to maintain the insurance policies (or equivalent) as set forth in Exhibit B, attached hereto.

7. **Third Parties:**

Nothing herein shall be construed to create any right of action by third party for any cause whatsoever.

8. **Entire Agreement:**

This Agreement constitutes the entire understanding of the PARTIES with respect to the subject matter hereof, any prior or contemporaneous oral or written agreements by and between the PARTIES or their agents and representatives with respect to the subject matter of this Agreement are revoked and extinguished by this Agreement.

9. **Amendments:**

This Agreement may only be amended by an instrument in writing signed by all PARTIES.

10. **Notices:**

All other notices and communications deemed by the Parties to be necessary or desirable to be given to the other Parties shall be in writing and may be given by personal delivery to a representative of the Parties, by electronic communication to the email addresses indicated, or by mailing the same, postage prepaid, addressed as follows:

Executive Director **SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY** 253 Elks Lane San Luis Obispo, CA 93401 gstraw@slorta.org	Mobility Services Business Manager **CITY OF SAN LUIS OBISPO** 919 Palm Street San Luis Obispo, CA 93401 afuchs@slocity.org

The address to which mailings may be made may be changed from time to time by notice mailed as described above. Any notice given by mail shall be deemed given on the day after that on which it is deposited in the United States mail as provided above

IN WITNESS WHEREOF, the PARTIES to the AGREEMENT have executed this AGREEMENT on the day and year set forth above.

Agency: SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY

Geoff Straw

RTA Executive Director

Date __/__/____

Agency: CITY OF SAN LUIS OBISPO

Whitney McDonald

City Manager

Date __/__/____

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SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 2, 2026
STAFF REPORT

AGENDA ITEM:	**A-12**
TOPIC:	**Support for Tort Reform Efforts**
PRESENTED BY:	**Geoff Straw, Executive Director**
STAFF RECOMMENDATION:	**Authorize Executive Director to Submit Letters of Support to CAJPA and PRISM for Tort Reform in California**

BACKGROUND/DISCUSSION:
As indicated in the attached legislative proposals from the California Association of Joint Powers Authorities (CAJPA), liability costs have tripled for public agencies in California over the past seven years. In addition, the Public Risk Innovation, Solutions and Management (PRISM) risk sharing pool is seeking support for its tort reform efforts as presented in https://www.protectlocalservices.org/ to help curb the growing crisis for public services. The escalation of costs described in these two resources is unsustainable due to increasing annual premiums, the potential need for special assessments, reduced coverage limits and the possible inability to obtain coverage at all. It costs taxpayers billions of dollars annually, and if gone unchecked will ultimately result in reduced public service levels.

CAJPA and PRISM are partnering to seek legislative relief in California. The RTA is a member of CAJPA through our membership in the California Transit Indemnity Pool and directly as a member of PRISM as a provider of worker's compensation and various health benefits programs. Both CAJPA and PRISM are seeking what they refer to as a balanced solution that includes reasonable limits on damages, proportional liability and stronger evidence standards.

While it is unusual for the RTA to endorse legislative efforts (these types of efforts are typically handled through our partnership with the San Luis Obispo Council of Governments), staff believes that tort reform relief is necessary to help us contain ever-rising operating costs. Therefore, staff is seeking the RTA Board's authority to submit letters of support to CAJPA and PRISM in their California tort reform efforts.

Staff recommendation
Authorize Executive Director to submit letters of support to CAJPA and PRISM for tort reform in California.

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CAJPA California Association of Joint Powers Authorities

association of california school administrators

csba California School Boards Association

CASBO Smart business. Smart schools.

RCRC

LAUSD UNIFIED

LEAGUE OF CALIFORNIA CITIES

CARPD California Association of Recreation and Park Districts

SELF

California Latino School Boards Association

CSDA

CITY OF OROVILLE, CALIFORNIA

California Est. 1933

CITY OF DUNSMUIR CALIFORNIA

CITY OF PLACERVILLE OLD HANGTOWN

CITY OF SHASTA LAKE Established 1993

CITY OF MT. SHASTA INCORPORATED MAY 31, 1905

HERMOSA BEACH CITY SCHOOL DISTRICT

DESERT SANDS UNIFIED SCHOOL DISTRICT

COLTON

City of Jurupa Valley

LA MESA-SPRING VALLEY SCHOOLS

REDONDO BEACH UNIFIED SCHOOL DISTRICT

IRVINE UNIFIED SCHOOL DISTRICT

LIVE OAK

CITY OF WILLOWS CALIFORNIA

SEBASTOPOL CHARTER A Public Waldorf School

RIDEPV

ABC

SIERRA SANDS Unified School District

HUNTINGTON BEACH CITY SCHOOL DISTRICT

KCSOS Kern County Superintendent of Schools

SANTA ROSA CITY SCHOOLS

YREKA "THE GOLDEN CITY"

City of Elk Grove

CITY OF CHICO INC 1872

FAIRFIELD

VACAVILLE

CITY OF BELLFLOWER "GROWING TOGETHER"

CITY OF WALNUT CREEK

BARSTOW

Hope Elementary School District

SAN MARCOS UNIFIED SCHOOL DISTRICT engaging students...inspiring futures

NORTHERN CALIFORNIA SCHOOLS INSURANCE GROUP

CITY OF LA MIRADA

CITY OF LA MESA JEWEL of the HILLS

PETALUMA 1858

PARAMOUNT
THE CITY
Safe, Healthy, and Attractive

OROVILLE
UNION HIGH SCHOOL DISTRICT
EST. 1892

NATOMAS
CHARTER
SCHOOL

CITY OF MARYSVILLE, YUBA COUNTY, CAL.
INCORPORATED FEB. 5, 1851

CITY OF
FOLSOM
DISTINCTIVE BY NATURE

CITRUS
HEIGHTS
Solid roots. New growth

GSRMA
GOLDEN STATE RISK MANAGEMENT AUTHORITY

COUNTY OF INYO
CALIFORNIA

CITY OF RANCHO CORDOVA
CALIFORNIA

CITY OF SOUTH GATE
CALIFORNIA

NORCAL CITIES
NCCSIF
ESTABLISHED 1979
SELF INSURANCE FUND

BUTTE SCHOOLS
SELF-FUNDED PROGRAMS

CITY OF
STANTON
CALIFORNIA

RESIG
SAFETY FIRST
COLLABORATION
EDUCATION AT THE CORE
BEST PRACTICES
INCLUSIVE COMMUNITY

CJPRMA

SIA for Kids
SCHOOLS IN PARTNERSHIP

Tuolumne JPA
Serving Schools Since 1980

SIG
Schools
Insurance
Group

BAKERSFIELD

SONOMA CHARTER SCHOOL
YOUTH GROWTH RESPECT

CITY OF
EUREKA
CALIFORNIA

CITY of PERRIS
INC. 1911

CITY OF
CLOVERDALE

CITY OF EASTVALE
INCORPORATED 2010

CALIMESA
California

CITY OF HIGHLAND
NOVEMBER 24, 1987

RANCHO
CUCAMONGA

CITY OF LAKEPORT
INCORPORATED APRIL 30, 1888

CITY OF WHITTIER CALIFORNIA
INC. 1898

CITY of COTATI
1963

CITY OF FORT BRAGG
CALIFORNIA

CITY OF UPLAND
CALIFORNIA

CITY OF
ROSEVILLE
CALIFORNIA

CIRA
CALIFORNIA INTERGOVERNMENTAL
RISK AUTHORITY

CITY OF TEHAMA
Little City of Big Trees

TRINDEL
Risk Management for Rural Counties

MENIFEE

MERCED
COUNTY

CRSIG
Central Region
School Insurance Group

WEST COVINA
UNIFIED SCHOOL DISTRICT

CalSSD
CALIFORNIA ASSOCIATION OF
SUBURBAN SCHOOL DISTRICTS

LEMON GROVE SCHOOL DISTRICT
CALIFORNIA

CITY OF
WEED

POWAY UNIFIED
SCHOOL DISTRICT

TORRANCE
UNIFIED SCHOOL DISTRICT

COUNTY OF KINGS
CALIFORNIA

CITY OF CORONA
EST. 1896

LINDSAY UNIFIED
SCHOOL DISTRICT

MURRIETA
City of Murrieta

CITY OF
RIVERSIDE

CITY OF
LAKE ELSINORE
DREAM EXTREME

Blythe

BURREL VALLEY
UNION SCHOOL DISTRICT

SDRMA
SPECIAL DISTRICT RISK MANAGEMENT AUTHORITY

Date: June 19, 2026

To: Members, California State Legislature

Urgent Need for Comprehensive Tort Reform to Protect California Taxpayers, Survivors, and Essential Public Services

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On behalf of the undersigned organizations, we urge the Legislature to enact meaningful tort reform for civil actions against public entities. New data released by the California Association of Joint Powers Authorities (CAJPA) confirms what our members have been warning lawmakers about for years: **public-entity liability costs have tripled in the last seven years, now exceeding $7 billion in known exposure. Costs are on pace to grow another 70 percent by 2027–28.** The fiscal trajectory is unsustainable, the structure of liability is fundamentally unfair to taxpayers, and the consequences are now measured in billions of dollars diverted away from classrooms, fire stations, roads, mental health services, and the essential programs Californians depend on every day.

Our organizations share a deep and unwavering commitment to ensuring that survivors of harm receive justice, support, and meaningful compensation. California's public agencies are not asking for insulation from accountability. We do not seek to deny survivors their day in court. Instead, we seek to fix a system that, as currently structured, transfers enormous wealth to plaintiffs' law firms and threatens the financial solvency of the very public agencies tasked with protecting and serving our vulnerable community members. The longer the Legislature waits, the more public services will be cut, the more agencies will face insolvency.
The Path Forward. We urge the Legislature to advance a comprehensive tort reform package for civil actions against public entities that, at minimum, includes the following:

- **Defined benefits** including caps on damages in civil actions against public entities, ensuring survivors and other injured parties are made whole while preserving the capacity to deliver essential public services.

- **Proportional (several) liability for economic damages** in civil actions against public entities, so that taxpayers pay only for the share of harm actually attributable to the public agency. This way the perpetrators bear the cost of their own conduct and not taxpayers.

- **Heightened evidentiary and procedural standards** for claims where witnesses, records, and evidence archives are absent or insufficient to assign culpability.

Why are Billions of Taxpayer Dollars Being Diverted from Essential Services? AB 218 (Gonzalez, Chapter 861, Statutes of 2019) related to childhood sexual assault is one stark driver, but it is not the only one. Across the spectrum of civil litigation against public entities — from premises liability to dangerous conditions — plaintiffs' firms are increasingly targeting governmental defendants precisely because they are perceived as having the deepest pockets. The result is an unreasonable transfer of public resources to private wealth that the Legislature has both the power and the responsibility to address

How Are Claims Against Public Entities Funded? Most cities, counties, special districts, and school districts in California do not purchase liability coverage from traditional commercial insurance carriers because it is either too expensive, does not provide sufficient coverage, or is simply not offered. Instead, they self-fund their liability coverage or they collectively pool risk through Joint Powers Authorities (JPAs), which are not insurance companies with large capital reserves. Every self-funded claim, including those paid out of a JPA, comes from taxpayer-funded member contributions paid by cities, counties, schools, and other public agencies from the same general fund dollars that pay for police officers, firefighters, teachers, road crews, and homelessness response.

When a JPA pays out claims of magnitude, every member agency in that pool feels it through higher premiums, the potential need for special assessments, reduced coverage limits, and/or increasingly, the inability to obtain coverage at all. Public agencies that have never had a single AB 218 claim filed against them are facing double-digit premium increases. For schools, this means Proposition 98 education dollars intended to support today's students are paying for decades-old liabilities. Even for cities and counties that have few claims filed against them it means delaying critical infrastructure maintenance and reducing local government's ability to provide social-safety-net services to the most vulnerable Californians.

Plaintiffs' Attorneys Are on Track to Profit Over Half a Billion Taxpayer Dollars Every Year. In civil actions against public entities, plaintiffs' counsel commonly recover contingency fees of 40 percent or more of the gross judgment or settlement. Even using a conservative 30 percent contingency assumption, **estimated plaintiff attorney fees in actions against California public entities have climbed to over $500 million annually.** In many individual cases, **attorney fees approach 50 percent of the taxpayer-funded settlement or award.** That means that for every $10 million paid by a city, county, JPA, or school district, as much as $4 to $5 million is paid to a private law firm. It does not go to the survivor, nor does it go to mental health services, prevention or victim assistance, or back to the taxpayers who funded the payment. Plaintiffs' firms are, in many cases, the single largest beneficiaries of the current system.

Caps on Damages Are Essential to Preserve Public Services and Solvency. Support for meaningful tort reform must include caps on damages in actions against public entities. Without such caps, the cascading effects of recent legislation will only worsen, and the very real threat of insolvency among California's public agencies, already materializing in some regions, will only accelerate. California already imposes reasonable limits in medical malpractice cases under MICRA, recognizing the public interest in such restrictions. The same principle should apply when taxpayer dollars are the source of the payment.

Public Entities Should Pay in Proportion to Their Actual Fault — Not for the Crimes of Others. Under California's current liability structure, a public entity found just one percent at fault can be ordered to pay the entirety of a plaintiff's economic damages — even when the overwhelming majority of fault lies with a criminal actor who has no assets to satisfy a judgment.

The result is morally indefensible: perpetrators escape financial accountability for their conduct, while taxpayers — through their cities, counties, transit agencies, and school districts — are forced to pay for the harm that resulted. It allows perpetrators to walk away while public services are gutted to satisfy awards for conduct the public entity did not commit. **The Legislature must restore proportional (several) liability for economic damages in actions against public entities, so that they are responsible only for the share of harm attributable to the public agency's own conduct.**

Survivors Deserve Their Day in Court, and Public Entities Deserve a Meaningful Opportunity to Defend. Restoring balance to AB 218 claims involving decades-old conduct does not require closing the courthouse door to survivors. Rather, it requires recognizing that, after decades have passed, the records and witnesses needed to fairly adjudicate a claim are often incomplete or simply gone. For claims involving conduct that occurred decades ago, we urge the Legislature to restore balance by reinstating a prior-knowledge requirement, paired with a clear-and-convincing-evidence standard. Prior to AB 218, California law permitted survivors to bring claims against public entities outside the statute of limitations, when a plaintiff could show the entity "knew or had reason to know, or was otherwise on notice, of any unlawful sexual conduct" by the perpetrator and failed to implement reasonable safeguards. That framework provided a meaningful path to justice for survivors with evidence of institutional culpability while also protecting taxpayers from liability for conduct the public entity had no realistic means to anticipate, prevent, or now defend against.

Our coalition stands ready to work with the Legislature, the Administration, and the survivor community to craft a balanced, durable solution so that necessary action can be taken now. Detailed findings and supporting data are available in CAJPA's recent report, *Protecting Public Funds: The Rising Cost of Claims Against California Public Entities*. Please do not hesitate to contact us with questions or to discuss specific legislative vehicles.

Sincerely,

California Association of Joint Powers Authorities (CAJPA)
California School Boards Association (CSBA)
California Association of School Business Officials (CASBO)
Los Angeles Unified School District (LAUSD)
Association of California School Administrators (ACSA)
The Rural County Representatives of California (RCRC)
California Association of Recreation and Park Districts (CARPD)
California Special Districts Association (CSDA)
League of California Cities
City of Eastvale
City of Bakersfield
City of Blythe
City of Calimesa
City of Cloverdale
City of Chico
City of Cotati
City of Corona
City of El Segundo
City of Fort Bragg
City of Highland
City of Eureka
City of Rancho Cucamonga
City of Riverside
City of Lake Elsinore
City of Fairfield
City of Dunsmuir

City of Upland
City of Oroville
City of Menifee
City of Vacaville
City of St. Helena
City of Placerville
City of Shasta Lake
City of Mt. Shasta
City of Marysville, Yuba County
City of Colton
City of Jurupa Valley
City of Rancho Cordova
City of Folsom
City of Paramount
City of South Gate
City of Citrus Heights
City of Stanton
City of Elk Grove
City of Perris
City of Roseville
City of Petaluma
City of Whittier
City of Yreka
City of Weed
City of Willows
City of Walnut Creek
City of Lake Port
City of La Mesa
City of Murrieta
City of Tehama
La Mesa Spring Valley Schools
City of Live Oak
City of La Mirada
City of Bellflower
Hope School District
Merced County
Northern California Schools Insurance Group
ABC Unified School District
Wheatland Union High School District
Brett Harte Union High School District
Sebastopol Charter
Redwood Empire Schools Insurance Group (RESIG)
NorCal Cities Self-Insurance Fund
Lemon Grove School District
Natomas Charter School
Sonoma Charter School

Santa Rosa City Schools
Huntington Beach City School District
Kern County Superintendent of Schools (KCSOS)
Sebastopol Independent Charter School
Palo Verde Valley Transit Agency (PVVTA)
Schools Excess Liability Fund (SELF)
Butte Schools Self-Funded Programs
Hermosa Beach City School District
Oroville Union High School District
Schools Insurance Authority (SIA)
Schools Insurance Group
Tuolumne JPA
San Marcos Unified School District
Sierra Sands Unified School District
Tulare Joint Union High School District
Desert Sands Unified School District
Golden State Risk Management Authority
County of Inyo
County of Kings
County of Solano
County of Siskiyou
Trindel Risk Management for Rural Counties
Central Region School Insurance Group
West Covina Unified School District
California Association of Suburban School Districts
Poway Unified School Districts
Torrance Unified School Districts
Lindsay Unified School Districts
Bennett Valley Union School District
Special District Risk Management Authority
Oroville City Elementary School District
Buckeye Union School District
Southern California Regional Liability Excess Fund (SCR)
Northern California Regional Liability Excess Fund (NCR)
Schools Association For Excess Risk (SAFER)
Cajon Valley Union School District
Redondo Beach Unified School District
Corona Norco Unified School District
Irvine Unified School District
East Side Union High School District
North Coast Schools Insurance Group
Alameda County Schools Insurance Group
Town of Truckee
City of Grass Valley
Central Fire District, Santa Cruz County
Beta Healthcare Group

School & College Legal Services of California
Sebastopol Independent Charter School
Wright Elementary School District
Sonoma County Office of Education
California Affiliated Risk Management Authorities (CARMA)
Employment Risk Management Authority (ERMA)
California LULAC (League of United Latin American Citizens)
California Intergovernmental Risk Authority (CIRA)
California Joint Powers Risk Management Authority (CJPRMA)

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SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 2, 2026
STAFF REPORT

AGENDA ITEM:	**A-13**
TOPIC:	**Authorize FTA Section 5339(b) Grant Application**
PRESENTED BY:	**Melissa Mudgett, Grants and Finance Manager**
STAFF RECOMMENDATION:	**Adopt Resolution Authorizing a Grant Application for FTA 5339(b) Buses and Bus Facilities Program Funds to Purchase Six Diesel-Powered Heavy-Duty Replacement Buses and Related Equipment**

BACKGROUND/DISCUSSION:
On July 27, 2026, the Federal Transit Administration (FTA) published a Notice of Funding Opportunity announcing the availability of $610 million in discretionary Federal Fiscal Year 2027 grants for the Section 5339 Buses and Bus Facilities Infrastructure Programs. Of this, approximately $21 million is authorized under the subsection 5339(b) Buses and Bus Facilities Program. The main purpose of the 5339(b) program is to assist in the financing of bus and bus facility capital projects, including replacing, rehabilitating, purchasing or leasing buses or related equipment, and rehabilitating, purchasing, constructing or leasing bus-related facilities.

Although the $21 million available nationwide is significantly lower[1] in comparison to prior years, declining funding support also at the State of California level and the lost opportunity under the now-defunct *Measure H - Local Roads First* initiative suggests that the RTA should pursue all capital funding grant programs possible – regardless of the likelihood of award – in order to maintain an acceptable long-term fleet state of repair.

The RTA continues to work closely with the San Luis Obispo Council of Governments and our partners at SLO Transit to develop the Federal Transportation Improvement Program (FTIP) to address transit fleet replacement needs in our region. As alluded to above, the RTA has benefited from prior financial support from the FTA and various State of California funding programs that allowed us to accelerate our transition to zero-emission technologies – most recently the execution of a FFY24 Section 5339(b) grant for $2.6 million as well as SB125 grants awarded by SLOCOG.

Staff recommends pausing this accelerated transition to zero-emission technologies and instead focus on replacing diesel-powered heavy-duty buses with new diesel buses to the extent possible under current California Air Resources Board (CARB) rules in light of our funding reality. The lower upfront price of diesel-powered buses also reduces the

[1] FFY26 included $2.4 billion overall, and $787 million for the 5339(b) Bus and Bus Facilities Program.

use of California Transportation Development Act (TDA) funds for local match purposes; any remaining TDA funds currently provide partial funding for municipal and county public works departments' streets/roads projects. The 2023 RTA *Innovative Clean Transit Zero Emissions Bus Rollout Plan* identifies annual proportional purchases of battery electric, diesel- and gasoline-powered vehicles through 2029, in compliance with CARB requirements. Staff has also secured a CARB exemption to purchase US EPA certified diesel engines in lieu of CARB-compliant engines through 2029, since no CARB-compliant engines currently exist in the marketplace.

Staff recommends applying for grant funding to purchase a total of six replacement diesel-powered 40-ft replacement buses (three in FY27 and three in FY28), to replace aging buses that will have met or exceeded the FTA determined useful life in years and/or accumulated miles. Based on the projected price per diesel bus, this equates to a total 5339(b) grant request of approximately $3.8 million. To be sure, $3.8 million represents roughly 18% of available 5339(b) funds nationwide, and it would be unreasonably optimistic to presume we would be successful in attaining such a large proportion – but it is imperative that the RTA be aggressive in seeking outside funds. The grant application must also include a Board resolution authorizing the submittal of the grant application and authorizing the Executive Director to execute and file all necessary assurances and any other documentation as required by the FTA (see attached). The deadline for a Section 5339(b) grant application is September 21, 2026.

Staff Recommendation

Adopt the attached resolution authorizing a grant application for FTA 5339(b) Buses and Bus Facilities program to purchase six diesel-powered heavy-duty 40-ft replacement buses and related equipment.

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
RESOLUTION NO. 26-______

RESOLUTION AUTHORIZING THE FILING OF APPLICATIONS WITH THE FEDERAL TRANSIT ADMINISTRATION, AN OPERATING ADMINISTRATION OF THE UNITED STATES DEPARTMENT OE TRANSPORTATION, FOR FEDERAL TRANSPORTATION ASSISTANCE AUTHORIZED BY FTA SECTION 5339(b) BUSES AND BUS FACILITIES PROGRAM

WHEREAS, the Federal Transit Administration (FTA) has been delegated authority by the United States Department of Transportation to award Federal financial assistance for transit projects; and

WHEREAS, a grant or cooperative agreement for Federal financial assistance will impose certain obligations upon the San Luis Obispo Regional Transit Authority (RTA), and may require the RTA to provide the local share of the project cost; and

WHEREAS, the RTA has or will provide all annual certifications and assurances to the FTA required for the projects included in a grant application; and

WHEREAS, the RTA as the Grantee will file and execute applications for FTA Section 5339(b) discretionary funds, to the maximum extent allowed to fund the capital project to purchase of six (6) diesel heavy-duty 40-ft buses, three (3) in FY27 and three (3) in FY28, to replace aging diesel-powered buses that will have met or exceeded the FTA determined useful life in years and/or mileage at time of replacement.

NOW, THEREFORE, BE IT HEREBY RESOLVED, that the Board of Directors of the San Luis Obispo Regional Transit Authority:

1. Authorize the Executive Director or designee to execute and file applications for Federal assistance on behalf of RTA with the FTA for Federal Assistance authorized by 49.U.S.C. Chapter 53, Title 23, United States Code, or other Federal statues authorizing a project administered by the FTA and has received concurrence from the San Luis Obispo Council of Government, San Luis Obispo, California, the MPO, to apply for FTA Section 5339(b) Discretionary Fund Program Assistance authorized by 49 U.S.C.

2. Authorize the Executive Director or designee to execute and file with its application the annual Certifications and Assurances required by the FTA before awarding a Federal assistance grant or cooperative agreement.

3. Authorize the Executive Director or designee to execute and file such applications, assurances or any other documents required by FTA for the purpose of complying with Title VI of the Civil Rights Act of 1964.

4. Authorize the Executive Director or designee to furnish such additional information as the FTA may require in connection with the program of projects identified in applications.

5. The President of the RTA Board of Directors is authorized to execute grant and cooperative agreements with the FTA on behalf of the RTA.

On a motion of Director ____________, seconded by Director _____________, and on the following roll call, to wit:

AYES:

NOES:

ABSENT:

ABSTAINING:

The foregoing resolution is hereby passed and adopted at a regular meeting of said Board of Directors held on the 2nd day of September 2026.

____
President of the RTA Board of Directors

ATTEST:

____
Geoff Straw, Executive Director
San Luis Obispo Regional Transit Authority

APPROVED AS TO FORM AND LEGAL EFFECT:

By: ______________________________
Jenna Morton, RTA Legal Counsel
County of San Luis Obispo

Date: ________________________

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 2, 2026
STAFF REPORT

AGENDA ITEM:	**A-14**
TOPIC:	**SCTC Public Hearing on October 22, 2026**
PRESENTED BY:	**Geoff Straw**
STAFF RECOMMENDATION:	**Authorize Staff to Solicit Public Input on Proposed Service Changes to Local Fixed-Routes in South County**

BACKGROUND/DISCUSSION:
The local fixed-routes operated in the Five Cities Area currently convene hourly at a passenger facility consisting of four bus bays located on Ramona Avenue between 9th and 10th Streets. This arrangement facilitates passenger transfers between the two South County bidirectional route pairs (Routes 21/24 and Routes 27/28). As noted in the RTA's 2025 Short-Range Transit Plan, the City of Grover Beach intends to redevelop its Ramona Garden Park and adjacent areas. In early 2026, the City notified RTA staff that the bus bays will no longer be available for bus operations in January 2027.

Staff has been working with Grover Beach officials to wind down the RTA's use of the Ramona Garden Passenger Facility. We have also been working with Pismo Beach officials to modify the South County fixed-routes to better align with intercity Route 10 operating between San Luis Obispo and Santa Maria buses at the Pismo Outlets Passenger Facility. Of particular interest is modifying the bidirectional Routes 27/28 pair routing and timing, since those two routes do not currently serve the Pismo Outlets facility and they do not connect well with the north- and southbound Route 10 buses at the Halcyon Park-and Ride bus stop in Arroyo Grande. This results in persons living in Oceano and other areas served by Routes 27/28 having poor access to the communities served by Route 10 between San Luis Obispo and Santa Maria.

Staff is seeking the Board's authority to set a Public Hearing to solicit input from the public on proposed changes. The Public Hearing would be led by the South County Transit Committee, which would meet on October 22nd at the Pismo Beach City Council Chambers located at 760 Mattie Road. The Public Hearing would begin at 10:00AM, and staff will present:

1. Suggested routing changes in the vicinity of the Ramona Park Passenger Facility for all four fixed-routes,

2. Suggested routing changes for Routes 27 and 28 to serve the Pismo Outlets Passenger Facility, and

3. Timing changes on all four fixed-routes as a result of no longer serving the Ramona Park facility.

As soon as those routing and timing recommendations are further developed, staff would publish the maps and narrative on the RTA website no later than seven calendar days before the October 22nd Public Hearing.

It should be noted that the Routes 21 and 24 currently layover at the Pismo Outlets facility (Route 21 from 51 minutes past each hour until 5 minutes past the next hour, and Route 24 from 55 minutes past each hour until 10 minutes past). That allows timed-transfers between the two South County local fixed-route buses and the two Route 10 buses at the top of each hour. However, there is not sufficient curb space at the Pismo Outlets facility to increase the number of buses from four to six to accommodate Routes 27/28.

Under staff's proposal, the two Routes 27 and 28 buses would deboard passengers at the Pismo Outlets facility bus stop prior to when the two Route 10 buses arrive, travel to another nearby site to layover, and then re-enter the bus stops area after the Route 10 buses depart to complete the passenger transfer process. That will allow all South County passengers to make reasonably well timed transfers among all six buses. Once we complete the transition on Routes 21/24 from 35-foot heavy-duty buses to the smaller 27-foot buses used on Routes 27/28, staff will re-evaluate if all six buses could convene simultaneously at the Pismo Outlets Passenger Facility.

Staff will summarize public input received, and present the summary to the full RTA Board at its November 2026 meeting. If the Board concurs with staff's recommendations, the service changes would be implemented to coincide with the January 2027 Bus Operator bid.

Staff Recommendation:
Authorize staff to solicit public input on proposed service changes to local fixed-routes in South County.

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 2, 2026
STAFF REPORT

AGENDA ITEM:	**A-15**
TOPIC:	**Procurement of Strategic Planning Services**
PRESENTED BY:	**Geoff Straw, Executive Director**
STAFF RECOMMENDATION:	**Authorize Executive Director to Issue a RFP and Execute Agreement to Conduct a Strategic Planning Study**

BACKGROUND/DISCUSSION:
The RTA has a relatively long history of using strategic planning to guide its capital investments and operating plans. As noted in Agenda Item A-5, 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 in October 2008. Those elements were incorporated into the FY09-10 Operating and Capital Program, and the 2012-14 Strategic Business Plan (SBP) was subsequently adopted in October 2011. The SBP incorporated goals and objectives developed as part of the 2010 RTA Short Range Transit Plan (SRTP).

Over the next 15 years, staff used the measurable standards in the SBP to help guide the organization toward meeting the agency's goals and objectives, with staff-driven updates approximately every three years. In 2017, the Board directed staff to prepare for a more formal update when the 2018-20 SBP expired. However, the pandemic thwarted those efforts, and staff is now seeking the Board's authorization to conduct a formal update now that recommendations from the 2025 SRTP are being implemented. The timing is good, since the Board will need to begin recruiting for a new Executive Director in late 2027 in preparation for retirement in early 2028.

Attached is the final draft Scope of Services for a strategic planning effort. It includes two overarching Tasks, with several opportunities for involvement by Board members, senior managers at each jurisdiction, specific stakeholders, and the general public. Many of these study products identified in this study will help inform the Board's Executive Director recruiting strategies and documentation, as well as for overall succession planning.

Of note is the Request for Proposals will require bidders to detail their proposed use of artificial intelligence, particularly in reviewing existing RTA documents and in crafting potential revisions to the RTA Vision, Vision Elements, Mission of the Organization, and Strategies in achieving the Mission. A budget of $25,000 has been identified for this effort.

Since the project's budget is within the Executive Director's budgetary authority, he will execute the underlying agreement and report back to the Board, likely in November 2026, including a proposed schedule (likely five to six months to complete the study).

Staff Recommendation
Authorize the Executive Director to issue a Request for Proposals and execute an agreement to conduct a Strategic Planning Study.

I. OBJECTIVE

The objective of this Strategic Planning effort is to develop a clear path that will focus the RTA's long-range efforts and continue the organization's success in meeting our Mission. A key aspect of this study is to help define the strengths and weaknesses of the agency, which will assist the RTA Board in developing recruiting materials to replace the Executive Director upon his retirement in early 2028.

II. SCOPE OF SERVICES

TASK 0. PROJECT KICKOFF & COORDINATION

Kickoff meeting. Meeting to confirm the goals of this project, to finalize the schedule, and to identify key stakeholders and their relationship to project phases. Key stakeholders should include the twelve RTA Board members, leadership at each city and the county, institutional clients, and external agency partners.

On-going collaboration meetings. The success of this Strategic Planning effort relies on ensuring that tasks are focused on meeting the study objectives, the tasks are completed on time, stakeholders are engaged and participate fully, and there is open and clear communication throughout. To that end, the scope assumes regular check-ins between the selected consultant and the RTA Executive Director and Board Chair to provide status updates and identify any obstacles or opportunities for adaptation as they arise. All products, including drafts, will be shared with the Study Steering Committee for comment and feedback, which will consist of the RTA Executive Director and three department heads.

Deliverables:
● *Project milestone schedule*

TASK 1. REVIEW OF EXISTING PLANS, SURVEYS & PRE-SESSION MEETINGS

The objective of Task 1 is for the consultant to better understand the organization, beginning with a comprehensive review of existing plans and organizational structure documents, followed by surveys of stakeholders, and ending with pre-meetings in preparation for in-person strategic planning sessions.

Task 1A. Review of Existing Plans and Organizational Structure
● *Documents Review.* The consultant will review the current *Strategic Business Plan* and the past two years' bi-annual SBP status update reports. In addition, the consultant will review the *2025 Short-Range Transit Plan*, RTA's *2026 TDA Triennial Audit*, and the *RTA* FY*26-27 Operating and Capital Budget* (the latter provides two years' of operating and five years' of capital plans). The consultant will detail how artificial intelligence tools were used as part of this review, and how AI might be used in evaluating subsequent tasks.

● *Organizational Review.* The consultant will review the organizational structure of the RTA, including roles and responsibilities outlined in the *2026 Classification and Compensation Study* and other pertinent documents.

Task 1B. External Input

● *External Survey.* The selected consultant will develop a scale-based anonymous survey to gain an understanding of the perceptions of the RTA by key external stakeholders and of how well the RTA is accomplishing its Mission. As identified in *Task 0*, the survey will be given to a focused group of up to 30 stakeholders; at a minimum RTA contacts at each jurisdiction, SLOCOG, Cal-Poly, Cuesta College, Hancock College, CAPSLO, and specific SLO County Departments (Public Works, Social Services, Sheriff, etc.). The RTA will distribute the survey link to the selected stakeholders and the selected consultant will compile and provide survey results during a Task 1D pre-session meeting.

Task 1C. Internal Engagement

● *Staff Survey*. The selected consultant will develop a scale-based anonymous survey to understand the internal environment and work culture. The RTA will distribute the survey link to all employees and the selected consultant will provide a simple quantifiable summary of survey results during the Task 1D pre-session meetings.

Task 1D. Strategic Planning Preparation Meetings

● *Pre-Session Meetings.* The consultant will lead up to three meetings with the Study Steering Committee throughout Task 1 to discuss upcoming strategic planning session needs and provide focus topics for the Study Steering Committee to refine ahead of the strategic planning sessions. Information analysis and development will require work by RTA staff and the consultant outside of Task 1D meetings to summarize key data primarily in tabular and graphical formats, including:

- Stakeholder insights gathered as part of the Tasks 1B and 1C survey efforts.
- Financial report/summary to include previous 3 years and projected 3-4 years (using Short-Range Transit Plan estimates).
- List of the RTA's current and potential multi-year operating and administrative initiatives.
- List of the RTA's current and planned capital projects, as identified in the annual budget and in the SRTP (i.e., the currently unfunded Consolidated Downtown SLO Transit Center).

● *Preliminary Recommended Changes to SBP.* Refinement of the RTA's current Mission and Values may be appropriate leading up to and following strategic planning sessions to ensure overall alignment of the organization's envisioned future state. The consultant will provide an array of preliminary suggested changes to the Mission and Values during these Task 1D meetings that could be incorporated into the Task 2 Strategic Planning Sessions.

Deliverables:

● *Compiled survey results*

● *Various Task 1D handouts for use in Task 2*

TASK 2. STRATEGIC PLANNING SESSIONS

Task 2 involves conducting two strategic planning sessions to engage the RTA's senior managers and RTA Board members in collaborative processes to define its strategic plan. The selected consultant will work collaboratively with the RTA Executive Director and Board President to develop session agendas and a project approach in the time leading up to each session. The expected outcomes discussed within Tasks 1 & 2 will determine each session's design.

Task 2A. Session 1: Visioning

● The selected consultant will conduct a half-day, in-person Visioning Session with the RTA Board, Regional Transit Advisory Committee and senior managers to articulate the ideal organization the RTA wants to be now and in the future. The session will focus on the big-picture strategic goals and priorities.

Task 2B. Session 2: Strategic Priorities

● The selected consultant will conduct a half-day, in-person Strategic Priorities Session with the Study Steering Committee that builds on findings from the visioning session. This session would focus on refining strategic framing of goals and priorities for 2027-2042 as well as identifying a framework for achieving the priorities. On a more near-term level, the session will also focus on organizational gaps, overlaps and future role needs that will support the next Executive Director. The objective of this near-term effort is to define the characteristics, leadership style and priorities that will best position the RTA for the next chapter following the current Executive Director's retirement.

At the conclusion of the two strategic planning sessions, the selected consultant will deliver a final 15-year Strategic Plan that summarizes decisions regarding the RTA's key goals and priorities, along with the framework for achieving the plan.

Deliverables:

● *2027-2042 Strategic Plan*

●*Strategic Plan summary handouts*

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SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 2, 2026
STAFF REPORT

AGENDA ITEM:	**B-1**
TOPIC:	**Executive Director's Report**
PRESENTED BY:	**Geoff Straw, Executive Director**
STAFF RECOMMENDATION:	**Receive and File**

BACKGROUND/DISCUSSION:

Late-Breaking News:
After an atypically long 18-month delay, our $2.6 million FTA Section 5339(b) Buses and Bus Facilities grant to accelerate our transition to battery-electric buses (BEBs) was finally executed in early August. As noted at prior RTA Board meetings, the federal fiscal year 2023-24 award was announced at our Bus Maintenance Facility ribbon-cutting in March 2022, and RTA staff was notified our grant application was conditionally approved in March 2025. In the past, our prior 5339 discretionary grants were typically executed within 60 days after we "pin" the grant. The grant includes funding for four BEBs, additional chargers and workforce development. The four BEBs are scheduled to enter the manufacturing line this week, with delivery expected by late September.

Employee Recognition:
We will recognize the Employee of the Quarter and others for Outstanding Achievement and longevity awards at the beginning of the Board meeting.

Kevin Reeder was again nominated by his peers and riders as the Employee of the Quarter, and this time he made the cut. Kevin has worked for us since November 2022, and he currently drives a Runabout bid based out of our San Luis Obispo facility. His nominators lauded Kevin for possessing integrity, loyalty and lives our core values on- and off-site. His coworkers expressed a lot of support for him during the nomination process.

Also, Bus Operators Mauricio Najera and Lori Dean were recognized by riders and co-workers for Outstanding Achievement Awards.

The Maintenance and Utility teams were also recognized for the deep cleaning of the shop in preparation for our FTA Triennial Audit site visit (more on this later). According to the nomination the shop "was so shiny, clean and organized and it even smelled good. Thank you for the extra effort and attention!"

We will also recognize four employees for longevity awards: Deputy Director/CFO Tania Arnold (20 years – our longest tenured employee!), and Bus Operators Tracey Johnson, Suzy Sisneros and DW Williams – all 15 years.

Operations:
Since the previous regular Board meeting in May, four Bus Operators (Austin, Max, Daniel V., Brian) completed training and began operating in revenue service. Five Bus Operators (Jamie, Adrian, Jeremy, Dillon, Ann) successfully completed their DMV licensing test and should be operating in revenue service by early September. Three Bus Operator candidates are currently working full-time toward completing our six-week training program (Jason, Daniel S., Eric) and will be ready for revenue service in late September. Three additional candidates are in the permitting / background check phase, and we are hopeful that they will begin training in the middle of September. With the addition of these trainees and no subsequent employment separations, we will be fully staffed in the Bus Operator classification for the first time since the onset of the pandemic in 2020. While we work with trainees to complete their classroom, behind-the-wheel, DMV testing and cadetting, the runs in those 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 as a last resort by Operations Supervisors.

We successfully implemented the Fall bid on August 16th. The Fall bid includes seasonal service changes like the wind-down of Trolley services, beginning of school tripper services and other changes that coincide with Cuesta College classes and the transition of Cal Poly to semester classes.

We implemented the new Ecolane computerized dispatch system for Runabout and other demand response services on July 1st. The system more efficiently and cost-effectively allocates rides among the in-service vans, while still meeting the service requirements under the ADA. In many cases, this has resulted in longer in-bus travel times for riders as the system has forced a greater proportion of shared rides (aka, less-direct service) and we have already fielded complaints from riders and several Bus Operators – especially upon the initial launch of the new software before the system adjusted trip sequencing and normalized lunch break times. There are some other Ecolane initiatives we will consider over the next six months to increase efficiencies that might also cause disruption. However, the per passenger subsidy on Runabout is high, and these measures should increase productivity and reduce costs over time.

Marketing & Communications:
Since we last reported at the May RTA Board meeting, our primary focus has been managing public information and responding to rider inquiries on the *Tap2Ride* system implemented on May 4th and on the new simpler cash fare program we implemented on April 4th. Below are some details on other marketing efforts over the past four months:

- Launched a new ridership boosting ad campaign, using social media outlets – including new Google Search and YouTube ads.

- Worked with campus officials to get the word out on this year's school Tripper services at Paso Robles High School and Arroyo Grande High School.

- Preparing for the bi-annual comprehensive customer survey. We are working with a third-party consultant to assist with these on-bus and general public surveys, which will take place in October 2026.

- Continued replacement of faded bus stop signs throughout the service area using grant funds.

Maintenance & Facilities:
I am happy to report that our Photovoltaic System contractor (Electricraft) mobilized on March 24th. The schedule calls for 24 to 36 workdays, so the project should be wrapped up in time for our October 11th Bus Roadeo. Once the PV system is fully commissioned, staff will seek the Board's authority to subsequently implement a state-funded battery-energy storage system to both serve as an emergency power source and to "shave" peak power demands. Once completed, we expect to save on the order of $10,000 per month in facility-related electricity costs and our campus will be a net zero energy facility. The picture above shows the existing PV canopy, as well as the initial materials and equipment mobilized by the contractor.

We are still experiencing long delays in warranty repairs for our fleet of seven BEBs. Our first two model year 2023 BEBs have been out of service since April due to excessive rear axle noise, and we are working through battery and battery-management issues for three of the five 2025 BEBs. Below is a table depicting in-service vs. out-of-service days for all seven BEBs through the end of June. Bus 2502 has been particularly problematic, as it has been red-tagged almost 81% of service days – yet two others in the same sub-fleet have less than 3% red-tag status. We continue to work with the manufacturer (GILLIG) and warranty providers to resolve these “teething” issues.

2301	In-service Date	Today's Date	Current Mileage	In-Service Days	out-of service days
	7/14/2024	6/3/2026	82824	498	191
2302	In-service Date	Today's Date	Current Mileage	In-Service Days	out-of service days
	7/14/2024	6/3/2026	63986	323	366
2501	In-service Date	Today's Date	Current Mileage	In-Service Days	out-of service days
	10/15/2025	6/3/2026	40168	225	6
2502	In-service Date	Today's Date	Current Mileage	In-Service Days	out-of service days
	10/16/2025	6/3/2026	6767	44	186
2503	In-service Date	Today's Date	Current Mileage	In-Service Days	out-of service days
	10/15/2025	6/3/2026	33100	160	71
2504	In-service Date	Today's Date	Current Mileage	In-Service Days	out-of service days
	10/15/2025	6/3/2026	40904	231	0
2505	In-service Date	Today's Date	Current Mileage	In-Service Days	out-of service days
	10/15/2025	6/3/2026	18035	184	47

We successfully completed our annual CHP Terminal Inspection, and no deficiencies were reported. This inspection includes a review of commercial driver licensing requirements, as well as vehicle maintenance records and physical inspections of buses/vans to ensure no safety or other defects. It is interesting to note that a former CHP Inspector conducted the on-site review (he last completed an inspection of RTA almost ten years ago) and he was highly complimentary of our current practices in comparison to his previous experiences – even though he did not report deficiencies previously. It just goes to show that continuing to improve goes noticed even by seasoned inspectors. Kudos go to RTA Maintenance Manager Andy Wyly, Operations Manager Omar McPherson and their staff members for such good work.

Finance and Administration:

The RTA successfully completed our FTA Triennial Review in early August. For context, my first FTA Triennial Review was in 1996 and this is the first time the transit agency I lead received no deficiencies or suggested improvements. Thanks go to RTA Deputy Director/CFO Tania Arnold, Grants & Finance Manager Melissa Mudgett and Accounting Technician II Erin Newman for assembling/submitting the large number of requested files and for ensuring compliance with increasingly complex FTA grant requirements – especially on the last FTA Triennial of my career.

As noted in recent SLOCOG meetings, the Greenhouse Gas Reduction Fund (GGRF) provides funding for a range of important public health related programs, but the three that are most tied to the transit industry's mandate to transition to zero-emission vehicles are the SB 125 program, the Transit and Intercity Rail Capital Program (TIRCP) and Low Carbon Transit Operations Program (LCTOP) programs. However, due to actions by the California Air Resources Board and other factors, available GGRF are significantly less than expected when the Cap and Invest agreement was made last year. Staff is closely watching the negotiations between the Administration and the Legislature to determine if changes in our Innovative Clean Transit Zero-Emission Rollout Plan will be necessary in the coming months. As noted in Agenda Item A-13, <u>the reduced financial support for zero-emissions vehicles at the Federal and State levels – not to mention the lost opportunity of the now-defunct *Measure H - Local Roads First* initiative – suggests the RTA should pause our efforts to accelerate the transition to ZEVs</u> and instead seek to only meet the bare minimum requirements of our ICT Rollout Plan.

A summary of our <u>unaudited year-end FY25-26 operating results through June 30th</u> is provided below. Graphs showing ridership trends are provided at the end of this report.

- Year-end RTA core <u>fixed-route annual ridership totaled 462,645</u>, which is a decline of less than 1% compared to FY24-25 (463,671). Overall, Route 9 SLO-Paso is down 1%, Route 10 SLO-Santa Maria is up 2.5%, Route 12 SLO-Morro Bay-Los Osos is down 2.6%, and Route 15 Morro Bay–San Simeon is up 0.1% compared to the same period last year. Saturday ridership is actually up across route 9, 10 and 12, but it is down on three of the four weekday routes (only Route 10 is up – by 3.7% – on weekdays). This continues to be encouraging news, since the service into Santa Maria was actually cut on August 10th as a result of the City of Santa Maria eliminating the pass-through of FTA funds.

- When looking at non-core local fixed-route services operated by the RTA, the <u>Paso Express ridership in FY25-26 was actually up 38.3%</u> in comparison to pre-pandemic levels (151,357 vs. 109,410), while also up 11.4% in comparison to FY24-25 (135,871). A large part of the increase is due to boardings by K-12 students and the reintroduction of Saturday service in August 2025.

- <u>South County ridership is 22.6% below pre-pandemic levels</u> (170,792 vs. 220,528), and is down 3.3% compared to FY24-25 (176,523).

- <u>Runabout ridership totaled 23,568 in FY25-26</u>, which is a 14.1% decline compared to FY24-25 (38,848). The pre-pandemic total was 29,947, which was 40.9% higher than in FY25-26.

- <u>Trends over the past five years for ridership and productivity</u>, 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 services, and thankfully from a staffing/financial perspective lagging ridership on 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 financial and operating results for FY25-26. 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 93.2% of the annual Administration budget and 90.5% of the annual Operations annual budget. Overall, non-capital expenses were at 89.9%.
- 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 7.6%. The FRR was 14.4% for Paso Robles local fixed-route services, and 3.5% 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 $15.34, while the Runabout result was $158.32, and drops to $95.76 when the trips provided on fixed route are included in the calculation. The subsidy per passenger-trip was $7.50 for Paso Robles services and $14.77 for South County services.

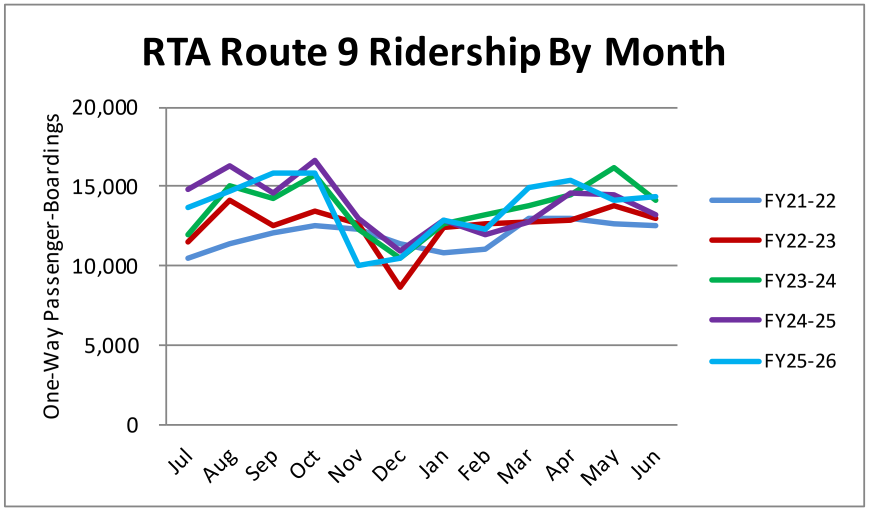
STAFF RECOMMENDATION
Receive and file.

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
YEAR TO DATE THRU JUNE 30, 2026
CURRENT FISCAL YEAR - 2025/2026

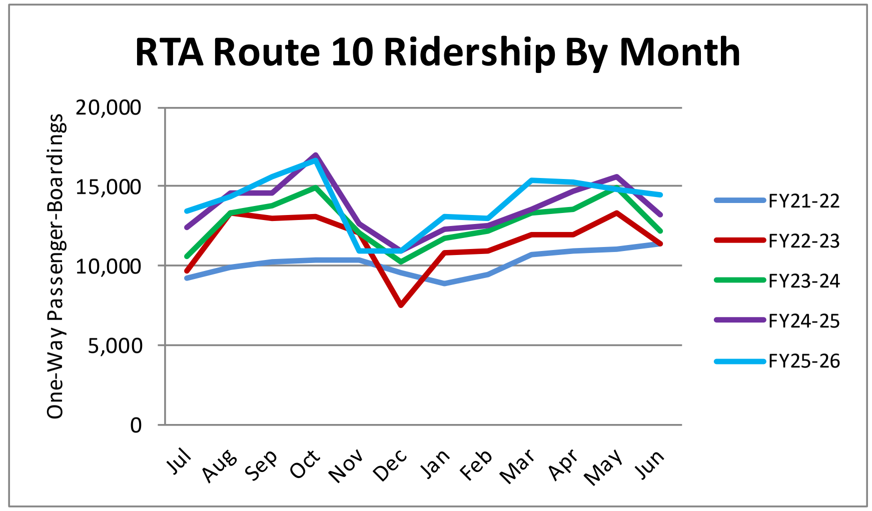
	RT 9 P.R., TEMP., ATAS., S.M., CAL POLY, S.L.O.	RT 10 S.M., NIPOMO, A.G., S.L.O.	RT 12 MORRO BAY, CUESTA, SAN LUIS	RT 14 CUESTA, SAN LUIS TRIPPER	RT 15 SAN SIM., CAMBRIA, CAYUCOS, M.B.	TOTAL RTA CORE SERVICES	RUNABOUT	SERVICES PROVIDED FOR THE CITY OF PASO ROBLES	SERVICES PROVIDED FOR SOUTH COUNTY	SERVICES 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	$ 225,346	$ 241,779	$ 104,287	$ 13	$ 16,108	$ 587,534	$ 110,530	$ 168,238	$ 92,392	$ 25,566	$ 12,625	$ 12,941	$ 1,009,825
TOTAL ROUTE REVENUES	$ 225,346	$ 241,779	$ 104,287	$ 13	$ 16,108	$ 587,534	$ 110,530	$ 168,238	$ 92,392	$ 25,566	$ 12,625	$ 12,941	$ 1,009,825
EXPENDITURES:													
ADMINISTRATION	$ 449,048	$ 379,739	$ 256,298	$ 1,906	$ 131,694	$ 1,218,685	$ 699,723	$ 219,502	$ 438,436	$ 113,300	$ 90,783	$ 67,395	$ 2,847,823
MARKETING	-	-	-	-	-	-	-	-	-	-	-	-	-
OPERATIONS/CONTINGENCY	1,768,678	1,610,769	1,037,957	7,954	566,429	4,991,786	2,653,857	936,723	1,836,602	500,288	381,720	296,187	11,597,164
FUEL	290,919	295,866	171,333	1,642	101,885	861,646	282,851	93,046	197,890	36,484	34,501	21,826	1,528,244
INSURANCE	206,904	210,691	122,524	1,164	73,071	614,354	205,401	67,456	142,652	24,739	23,888	15,681	1,094,170
TOTAL EXPENDITURES	$ 2,715,550	$ 2,497,065	$ 1,588,113	$ 12,665	$ 873,078	$ 7,686,471	$ 3,841,832	$ 1,316,726	$ 2,615,581	$ 674,811	$ 530,892	$ 401,088	$ 17,067,401
FAREBOX RATIO	8.3%	9.7%	6.6%	0.1%	1.8%	7.6%	2.9%	12.8%	3.5%	3.8%	2.4%	3.2%	5.9%
SERVICE MILES	306,817.0	312,312.6	181,535.4	1,729.9	107,993.5	910,388.4	302,649.0	99,375.3	210,439.8	36,969.0	35,712.7	23,217.0	1,618,751.1
SERVICE HOURS	11,943.9	10,307.0	6,973.3	52.7	3,591.2	32,868.1	20,419.6	7,568.0	14,590.1	4,337.0	3,173.2	2,531.7	85,487.7
RIDERSHIP (Automatic Counters)	164,554	168,077	117,248	642	12,129	462,650	23,568	153,144	170,792	15,292	13,069	4,730	843,245
RIDERS PER MILE	0.54	0.54	0.65	0.37	0.11	0.51	0.08	1.54	0.81	0.41	0.37	0.20	0.52
RIDERS PER HOUR	13.8	16.3	16.8	12.2	3.4	14.1	1.2	20.2	11.7	3.5	4.1	1.9	9.9
COST PER PASSENGER	$ 16.50	$ 14.86	$ 13.54	$ 19.73	$ 71.98	$ 16.61	$ 163.01	$ 8.60	$ 15.31	$ 44.13	$ 40.62	$ 84.80	$ 20.24
SUBSIDY PER PASSENGER	$ 15.13	$ 13.42	$ 12.66	$ 19.71	$ 70.65	$ 15.34	$ 158.32	$ 7.50	$ 14.77	$ 42.46	$ 39.66	$ 82.06	$ 19.04

RTA FY25-26 Budget vs. Actual Expenses (unaudited)

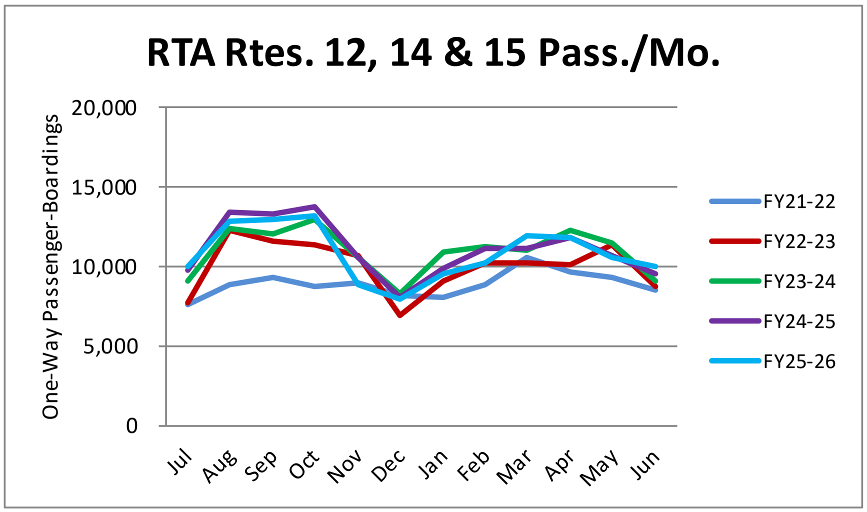
		Adopted Budget FY 2025-26	Year to Date FY 2025-26	Percent of Total Budget FY 2025-26
	Hours	89,900	81,151	90.3%
	Miles	1,735,020	1,581,782	91.2%
Administration:				
Labor	operations cost	1,539,550	1,494,937	97.1%
Labor - Administration Workers Comp	operations cost	52,720	42,169	80.0%
Office Space Rental	operations cost	59,670	58,780	98.5%
Property Insurance	operations cost	323,370	273,393	84.5%
Professional Technical Services	operations cost	458,710	354,724	77.3%
Professional Development	operations cost	93,290	34,960	37.5%
Operating Expense	operations cost	368,030	491,948	133.7%
Marketing and Reproduction	hourly	164,730	102,241	62.1%
Total Administration		3,060,070	2,853,151	93.2%
Service Delivery:				
Labor - Operations - Bus Operators	hourly	6,531,680	5,704,001	87.3%
Labor - Operations - Training Staff	hourly	443,360	402,884	90.9%
Labor - Operations - Operations Supervisors/Schedulers	hourly	1,595,710	1,612,571	101.1%
Labor - Operations - Ops Mgt./Oversight	hourly	506,310	468,164	92.5%
Labor - Operations Workers Comp	hourly	399,810	319,792	80.0%
Labor - Maintenance	miles	2,055,710	1,990,956	96.9%
Labor - Maintenance Workers Comp	miles	109,470	87,561	80.0%
Fuel	miles	1,629,970	1,528,247	93.8%
Insurance	miles	1,191,000	1,094,173	91.9%
Special Transportation (for SLOCAT)	n/a	32,070	26,549	82.8%
Maintenance (parts, supplies, materials)	miles	961,580	677,803	70.5%
Maintenance Contract Costs	miles	149,840	204,606	136.5%
Total Operations		15,606,510	14,117,306	90.5%
Capital/Studies:				
Computer System Maintenance/Upgrades		504,040	241,792	48.0%
Miscellaneous Capital				
Maintenance Equipment		188,650	80,170	42.5%
Vehicle ITS/Camera System		-	6,662	
Bus Stop Improvements		147,000	111,254	75.7%
Large Capital Repairs		586,820	724,232	123.4%
Vehicles				
Support Vehicles		353,010	218,065	61.8%
Fixed Route Vehicles		13,843,000	6,232,693	45.0%
Trolley Vehicles		251,150	-	0.0%
Cutaway and Dial A Ride Vehicles		586,970	470,996	80.2%
Runabout Vehicles		1,140,100	-	0.0%
Total Capital Outlay		17,600,740	8,085,863	45.9%
Contingency	hourly	224,000	-	0.0%
PERS Buyout		178,310	178,308	100.0%
Loan Repayments		458,060	430,555	94.0%
Short Range Transit Plan and Planning		67,100	67,072	100.0%
Regional Contactless Fare Payment System		388,000	68,372	17.6%
Regional Contactless Charging		2,266,000	16,861	0.7%
Regional Bus Charging Projects		4,000,000	964,271	24.1%
Master Planning & Implementation - Offsite fast charging		2,000,000	84,459	4.2%
TOTAL FUNDING USES		45,848,790	26,866,220	58.6%
TOTAL NON-CAPITAL EXPENDITURES		19,068,890	17,148,766	89.9%



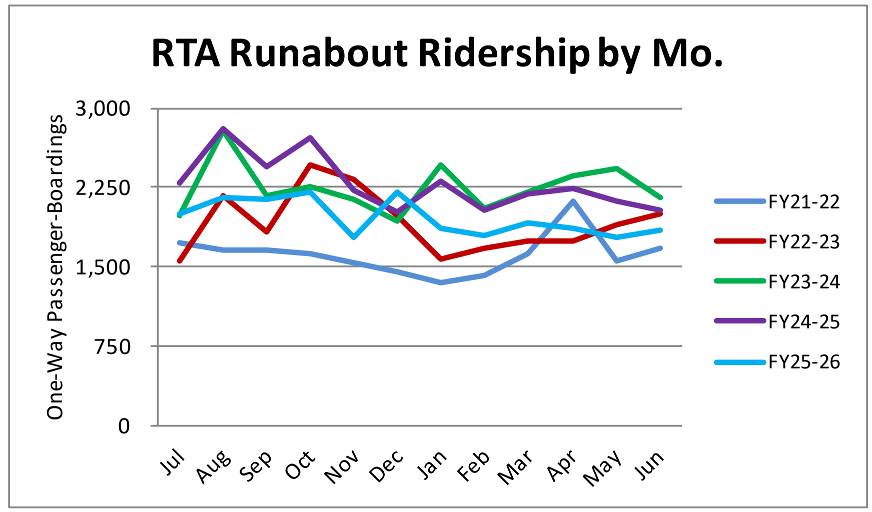
RTA Route 9 Ridership By Month
One-Way Passenger-Boardings
20,000
15,000
10,000
5,000
0
Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun
FY21-22
FY22-23
FY23-24
FY24-25
FY25-26



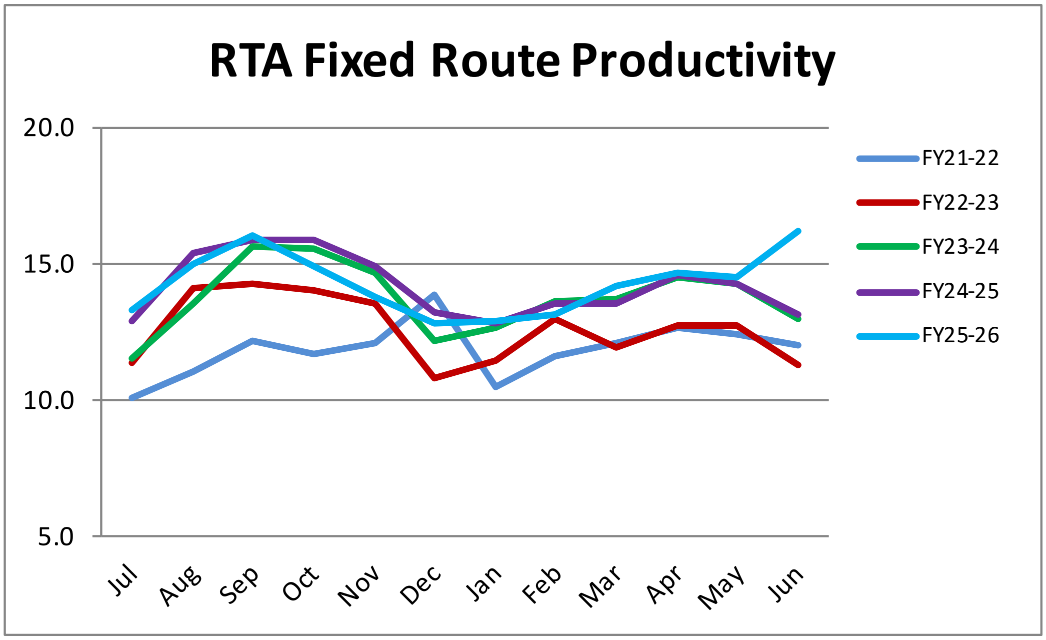
RTA Route 10 Ridership By Month
One-Way Passenger-Boardings
20,000
15,000
10,000
5,000
0
Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun
FY21-22
FY22-23
FY23-24
FY24-25
FY25-26

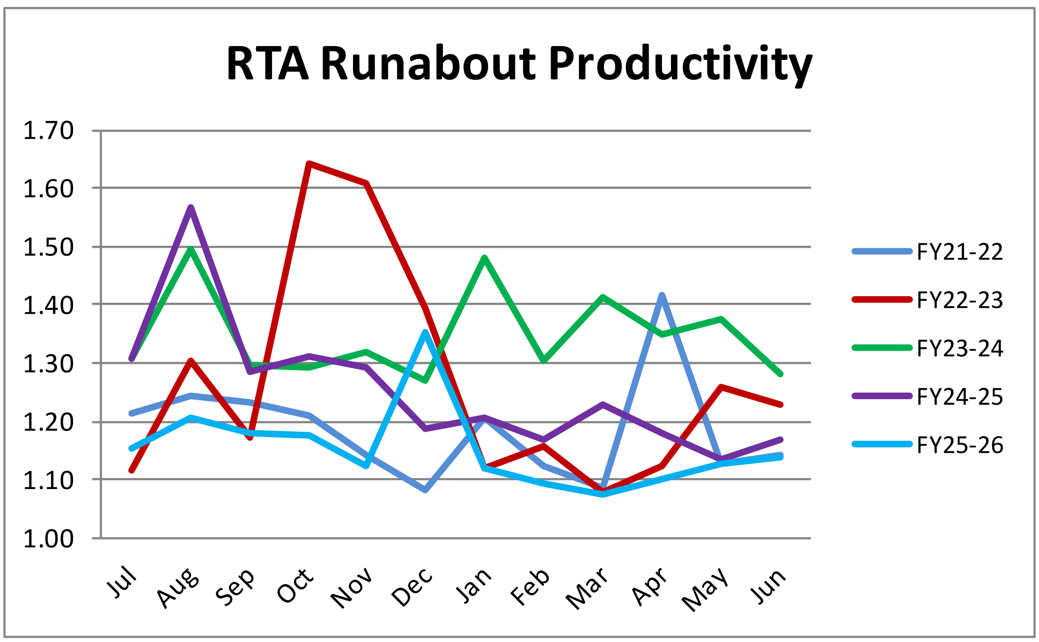


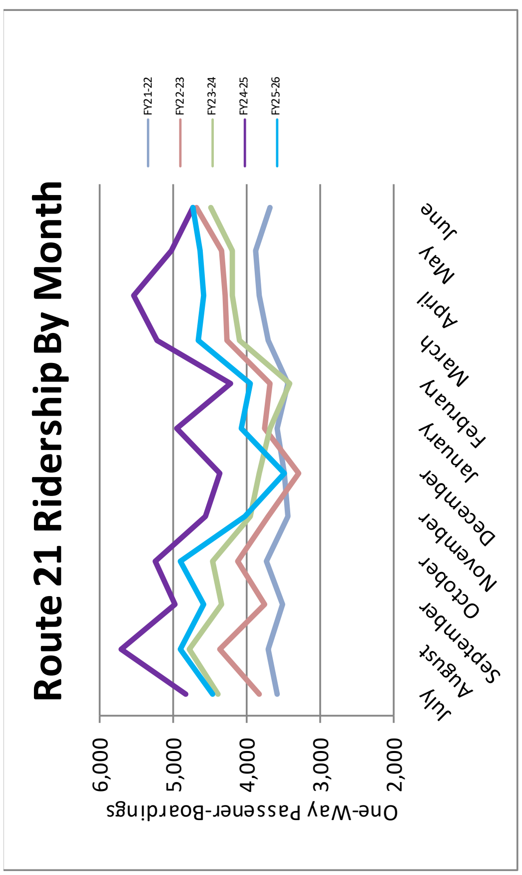
RTA Rtes. 12, 14 & 15 Pass./Mo.
One-Way Passenger-Boardings
20,000
15,000
10,000
5,000
0
Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun
FY21-22
FY22-23
FY23-24
FY24-25
FY25-26

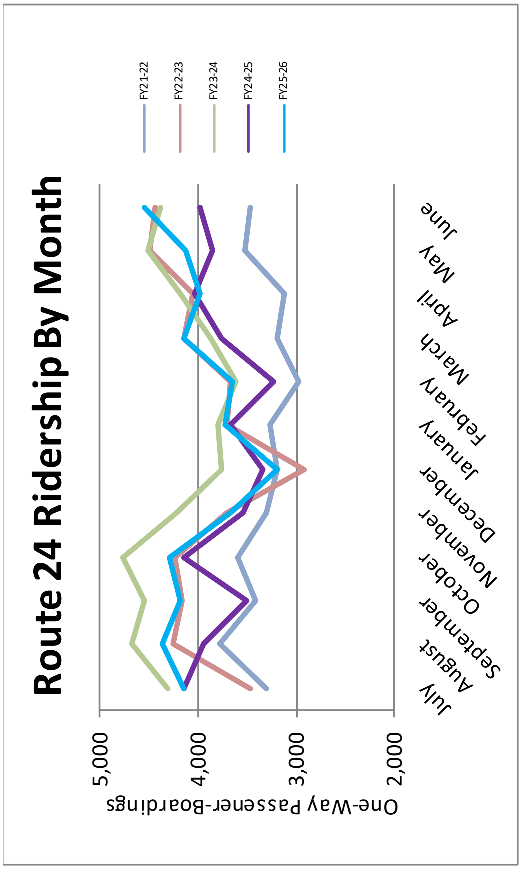


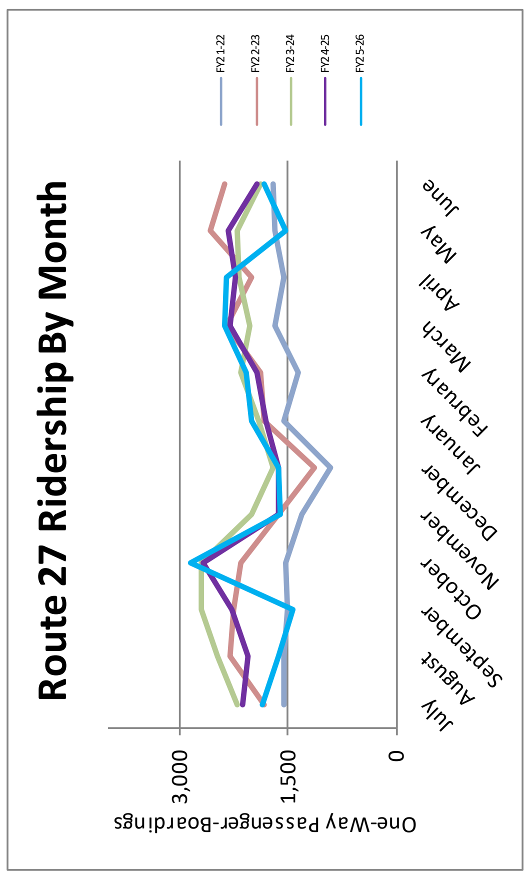
RTA Runabout Ridership by Mo.
One-Way Passenger-Boardings
3,000
2,250
1,500
750
0
Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun
FY21-22
FY22-23
FY23-24
FY24-25
FY25-26

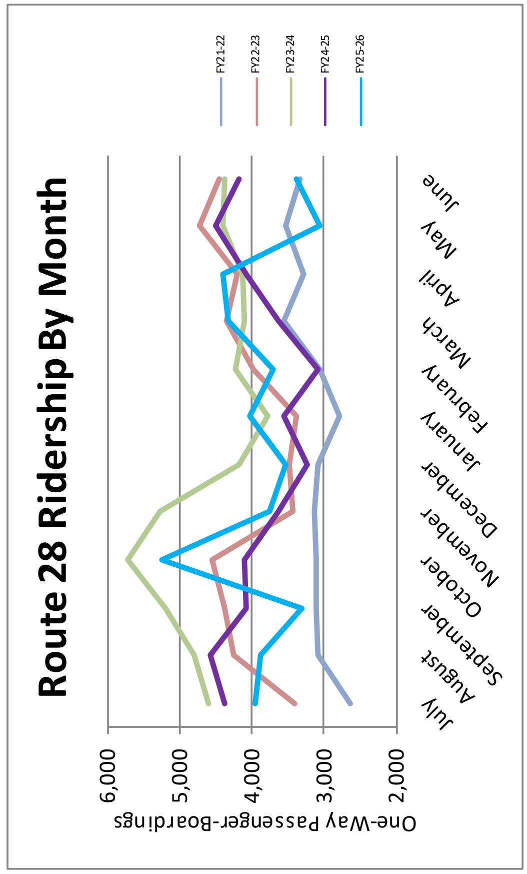

RTA Fixed Route Productivity
20.0
15.0
10.0
5.0
Jul
Aug
Sep
Oct
Nov
Dec
Jan
Feb
Mar
Apr
May
Jun
FY21-22
FY22-23
FY23-24
FY24-25
FY25-26

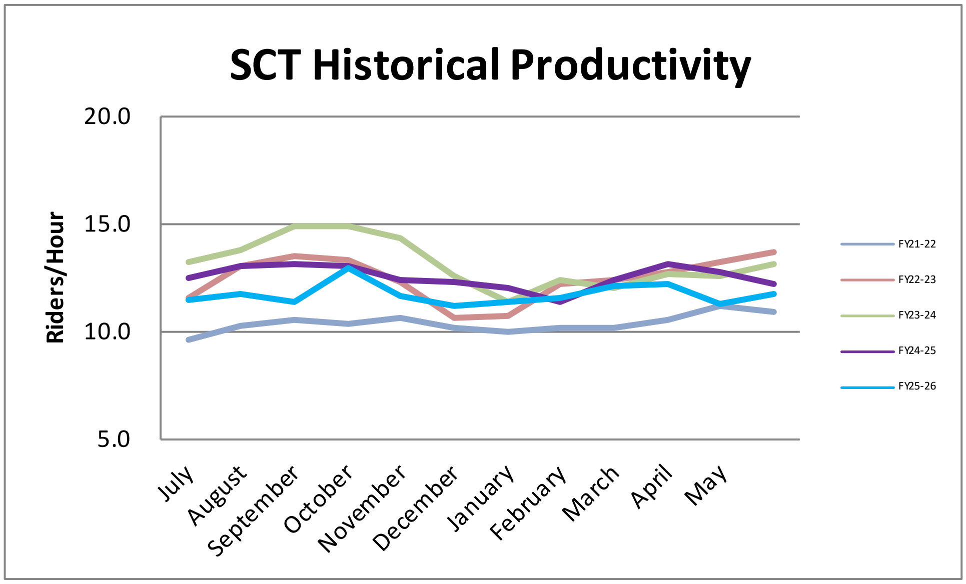

RTA Runabout Productivity
1.70
1.60
1.50
1.40
1.30
1.20
1.10
1.00
Jul
Aug
Sep
Oct
Nov
Dec
Jan
Feb
Mar
Apr
May
Jun
FY21-22
FY22-23
FY23-24
FY24-25
FY25-26


Route 21 Ridership By Month
One-Way Passener-Boardings
6,000
5,000
4,000
3,000
2,000
July
August
September
October
November
December
January
February
March
April
May
June
FY21-22
FY22-23
FY23-24
FY24-25
FY25-26


Route 24 Ridership By Month
One-Way Passener-Boardings
5,000
4,000
3,000
2,000
July
August
September
October
November
December
January
February
March
April
May
June
FY21-22
FY22-23
FY23-24
FY24-25
FY25-26


Route 27 Ridership By Month
One-Way Passenger-Boardings
3,000
1,500
0
July
August
September
October
November
December
January
February
March
April
May
June
FY21-22
FY22-23
FY23-24
FY24-25
FY25-26


Route 28 Ridership By Month
One-Way Passenger-Boardings
6,000
5,000
4,000
3,000
2,000
July
August
September
October
November
December
January
February
March
April
May
June
FY21-22
FY22-23
FY23-24
FY24-25
FY25-26



SCT Historical Productivity
20.0
15.0
10.0
5.0
Riders/Hour
July
August
September
October
November
December
January
February
March
April
May
FY21-22
FY22-23
FY23-24
FY24-25
FY25-26

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 2, 2026
STAFF REPORT

AGENDA ITEM:	**B-2**
TOPIC:	**Update on Fare Change Implementation & Contactless Fare System**
PRESENTED BY:	**Geoff Straw, Executive Director**
STAFF RECOMMENDATION:	**Receive and File**

BACKGROUND/DISCUSSION:
I reported at the May 2026 RTA Board meeting that we implemented the *Tap2Ride* contactless fare-capping system on May 4th and we implemented the simpler $2.00 general fare and $1.00 discounted fare on April 6th. Below are updates on those two implementations.

<u>New Intercity Route Cash Fare Implemented on April 6th</u>
It has been roughly five months since we implemented the simpler cash fare system on the regional/intercity fixed-routes (RTA Routes 9, 10, 12, 14, and 15). Both riders and Bus Operators appear to strongly support it, since it speeds the boarding process. It is also much simpler for Bus Operators to explain and for riders to understand. Finally, it reduces the number of fare-related conflicts between riders and the Bus Operator. All local fixed-route fares in the county remain at $1.50/$0.75.

For the period May 4, 2026 through July 27, 2026 we had the following breakdown of cash riders on Routes 9, 10, 12 and 15 buses: 10,871 regular cash fare paying riders ($21,742 in revenue), and 11,738 discounted cash fare riders ($11,738). This totals 22,609 riders and $33,480 in revenue, which equates to an average fare $1.48 per passenger.

For the same date range in 2025 (May 5, 2025 – July 28, 2025), here is the breakdown: 10,605 regular ($23,773.75), and 9,562 discounted ($10,312). This totals 20,167 riders and $34,085.75 revenue, which equates to an average fare of $1.69. As you can see, there is a notably higher proportion of discounted cash riders in 2026 when compared to the same period in 2025. If 40% of those transition from discounted to full fare then the average fare would essentially be the same as the 2025 average.

It should be noted that the Discount Fare Eligibility Verification program has been “soft launched,” but we have not instructed our Bus Operators to begin enforcing the discounted fare (both for cash fares and for multi-ride media) until we have given disabled and elderly community members sufficient time to enroll. When the Discount Fare Eligibility program is formally enforced (likely in January 2027), we expect the proportion of discount eligible fares to decline and thus the average fare to increase.

See Agenda Item B-3 for more details on the Discount Fare Eligibility Enforcement program.

<u>*Tap2Ride* Implemented on May 4th</u>

We launched the *Tap2Ride* system jointly with SLO Transit on Monday May 4th on all fixed-routes in the county. I am happy to report that it is working well for riders using a chip-enabled card or a mobile wallet (Google Pay or Apple Wallet). Remember that under the *Tap2Ride* program, the fare-capping feature sets a maximum amount a rider pays for fares over a specified period corresponding with our paper multiride fare media.

During the same May 4 to July 27, 2026 period discussed above regarding cash fares, we recorded 5,903 *Tap2Ride* boardings, resulting in $9,689.50 in revenues. When regional/intercity RTA fixed-routes are evaluated separately, the average fare is $2.00 per passenger – showing that no discounted *Tap2Ride* fares have been honored on those buses yet. The number of adjusted price journeys (aka, fare-capping) is increasing every month (32 in May, 143 in June and 268 in July) as is the number of taps each month (1,553 in May, 1,943 in June, and 2,407 in July). We expect many of the paper multi-ride fare media used by current riders will be replaced with *Tap2Ride* over time as riders become aware of its many benefits.

However, the QR code reader used for *Token Transit* boardings is not currently working universally well on all vehicles – a few of the on-bus readers appear to be more light- and/or distance-sensitive than others. We are working with the vendor to determine next steps, including ensuring the distance from the reader to the dashboard is at least 10 cm (see picture at the left). We have confirmed that the *Token Transit* app automatically maximizes brightness when using the app, but we are looking at other conditions that may be affecting its use. The timing is not great, since *Token Transit* is used by many families, wherein a parent buys passes and sends them to their child/children. We are keeping a close eye on this to ensure it does not discourage rides by youth now that school is back in session. As noted in a previous report, the QR code integration sets the stage for future use by Cal Poly and Cuesta College affiliates once those two institutions fully roll out that feature across their respective campuses.

STAFF RECOMMENDATION

Receive and file.

SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
SEPTEMBER 2, 2026
STAFF REPORT

AGENDA ITEM:	**B-3**
TOPIC:	**Discount Fare Eligibility Enforcement**
PRESENTED BY:	**Geoff Straw**
STAFF RECOMMENDATION:	**Receive and File**

BACKGROUND/DISCUSSION:
When the RTA Board considered the recommended cash fare change presented in the 2025 Short-Range Transit Plan (SRTP) at its May 20205 meeting, the Board spent considerable time discussing the new Discount Fare Eligibility Verification program also recommended in the SRTP. The new Discount Fare Eligibility Verification program was designed to address suspected fare evasion by riders who likely are not eligible for the lower Discount fares – whether using on-bus cash fares or paper multiride fare media.

Under the new program, persons eligible for a Discount fare (youth, elderly or disabled) must show an approved identification card when boarding the RTA bus in order to pay the half-fare. Elderly riders paying with cash or a paper multi-ride card can either show a valid California ID card or an RTA-provided Discount Eligibility Card to the Bus Operator upon entering the bus. Elderly riders using the Tap2Ride system can pre-register their chip-enabled card / mobile wallet on the Cal-ITP website directly or work with RTA staff to register their Discount Eligibility Card on the Cal-ITP website so their chip-enabled card or mobile wallet will be charged the lower fare. Similarly, disabled riders can obtain an RTA-provided Discount Eligibility Card, and RTA staff will work with that person to register on the Cal-ITP website; that will allow them to pay the lower fare whether using *Tap2Ride*, cash or a Discount multi-ride card. K-12 riders must show student body identification (either physical card or electronic) when boarding in order to pay the Discount cash fare or to use Discount multi-ride fare media. There currently is not a youth registration option on the Cal-ITP website.

Staff has conducted numerous outreach activities throughout the county, including workshops at senior centers and one-on-one meetings with advocacy groups (CAPSLO, Tri-Counties Regional Center, Ride-On, etc.) that represent persons eligible for the Discount fare. We have posted information about the new Discount eligibility program on our website and we will start a new advertising campaign on social media (Facebook, Instagram and YouTube) in September. We will also add new window decals on our bus exteriors and put messaging on the LED screen inside the buses. To be able to get a card without coming into our office, we are adding new functionality to our website’s “Discounts” page so that a rider can fill out the eligibility form online and upload their photos. Our planned Customer Survey in October will include questions about the *Tap2Pay* system and the Discount Eligibility Card, too. We have also been issuing the Discount Eligibility Cards since May, with an example Discount Eligibility Card shown above. Through August 24th, we have issued a total of 100 Discount Eligibility Cards.

Based on projected workloads and continued interest from community groups, we believe we will have provided sufficient opportunities to community members by the end of November to obtain an RTA Discount Eligibility Card. We plan to begin the training process for Bus Operators and Operations Supervisors to enforce Discount fares in conjunction in conjunction with the implementation of the January 2027 Bus Operator bids – currently slated for January 18, 2027. We will also launch a marketing effort in early December clearly stating our intention to begin enforcing the Discount fare program on that date.

Staff Recommendation
Receive and file.