



**SPECIAL MEETING**  
of the  
**SANTA BARBARA METROPOLITAN TRANSIT DISTRICT BOARD OF DIRECTORS**  
a Public Agency  
**Tuesday, December 8, 2020**  
**8:30 AM**  
**VIA TELECONFERENCE**

**IMPORTANT NOTICE REGARDING THIS BOARD MEETING:**

This virtual meeting is being conducted utilizing teleconferencing and electronic means pursuant to State of California Executive Order N-29-20 issued by Governor Gavin Newsom on March 17, 2020, regarding the COVID-19 pandemic. The public may only view a livestream of the meeting online at: <http://tinyurl.com/sbmtdyoutube>

**Public Participation**

To make a general public comment or to comment on a specific agenda item, the following methods are available: Email, Phone, and Zoom webinar.

**All comments will be limited to 3 minutes per speaker.**

**1. Email:**

- Submit public comment to [clerk@sbmtd.gov](mailto:clerk@sbmtd.gov) *before 12 p.m.* on the Monday prior to the Board meeting for advance distribution to the Board of Directors.
- Public comment emails submitted to [clerk@sbmtd.gov](mailto:clerk@sbmtd.gov) *during* the meeting will be recognized *if* the email is received prior to or during the item to be addressed.
- **In ALL emailed Public Comments, please include:**
  - (A) The agenda item(s) to be addressed
  - (B) If you would like your comment read into the record
  - (C) Public Comment text

**2. Phone:** Call the Zoom webinar line *10 minutes prior* to the 8:30 a.m. meeting start time:

- Toll-Free Dial-in: **(669) 900-6833.**
  - When prompted, enter Meeting ID **949 2717 3688** and then #.
  - When prompted for a password, dial **025148** and then #.
- When the item you wish to address is announced, dial \*9 to request to comment.

Please mute your phone until called to speak. If you do not have a mute button, you may mute by dialing \*6. You can unmute by pressing the same keys (\*6). When the chair calls for public comment, the clerk will announce you and will unmute your microphone.

**3. Zoom webinar & computer audio:** View the webinar at the following link at 8:30 a.m.:

<https://zoom.us/j/94927173688?pwd=SzEvRkZhTXA4WW9UZ1hOEVpQkdoQT09>

To give public comment via the Zoom webinar, click the "Raise Hand" button only when the item you wish to speak on has begun. When the chair calls for public comment, the clerk will announce you and will unmute your microphone. The public will not be able to share their video or screen.

## BOARD OF DIRECTORS AGENDA

### BOARD MEMBERS WILL JOIN VIA TELECONFERENCE

#### ITEMS TO BE CONSIDERED:

1. **CALL TO ORDER**

2. **ROLL CALL OF THE BOARD MEMBERS**

Dave Davis (Chair), David Tabor (Vice Chair), Bill Shelor (Secretary), Olivia Rodriguez (Director), Dick Weinberg (Director), Chuck McQuary (Director), Paula Perotte (Director).

3. **REPORT REGARDING POSTING OF AGENDA**

#### CONSENT CALENDAR

4. **APPROVAL OF PRIOR MINUTES - (ACTION MAY BE TAKEN)**

The Board of Directors will be asked to approve the draft minutes for the meeting of November 17, 2020.

5. **CASH REPORT - (ACTION MAY BE TAKEN)**

The Board of Directors will be asked to review and approve the Cash Report from the following dates: November 7, 2020, through November 27, 2020.

#### THIS CONCLUDES THE CONSENT CALENDAR

6. **PUBLIC COMMENT**

Members of the public may address the Board of Directors on items within the jurisdiction of the Board that are not scheduled for public hearing. The time allotted per speaker will be at the discretion of the Board Chair. If you wish to address the Board under this item number, see the above instructions on giving remote public comment. Additional public comment will be allowed during each agenda item, including closed session items.

7. **RECOGNITION OF DIRECTOR OLIVIA RODRIGUEZ - (ATTACHMENT - ACTION MAY BE TAKEN)**

Staff and the Board of Directors will honor the service of Board Director Olivia Rodriguez with Resolution 2020-06.

8. **MICROTRANSIT VAN PROCUREMENT - (ACTION MAY BE TAKEN)**

Staff will request that the Board authorize the General Manager to purchase three 2021 Ford Transit passenger vans with Lightning eMotors' electric propulsion system from A-Z Bus Sales.

9. **CHARGEPOINT ELECTRIC VEHICLE CHARGER PROCUREMENT - (ACTION MAY BE TAKEN)**

Staff will request that the Board authorize the General Manager to purchase 10 heavy-duty electric vehicle chargers from ChargePoint, Inc. (ChargePoint) with an option of four additional chargers at an added cost.

10. **FIRST AMENDMENT TO FUNDING AGREEMENT WITH SANTA BARBARA COUNTY ASSOCIATION OF GOVERNMENTS FOR MTD FACILITY IMPROVEMENTS - (ATTACHMENT - ACTION MAY BE TAKEN)**

## BOARD OF DIRECTORS AGENDA

Staff will recommend that the Board authorize execution of the attached First Amendment to the funding agreement with the Santa Barbara County Association of Governments (SBCAG) to provide Transit and Intercity Rail Capital Program (TIRCP) funds to assist with MTD facility improvement projects.

**11. FISCAL YEAR 2020-21 FIRST QUARTER PERFORMANCE REPORTS – (ATTACHMENT - INFORMATIONAL)**

Staff will present First Quarter Fiscal Year 2020-21 Performance Reports for the three-month period ending September 30, 2020.

**12. GENERAL MANAGER’S REPORT - (INFORMATIONAL)**

The General Manager will provide an update on district activities.

**13. OTHER BUSINESS AND REPORTS - (INFORMATIONAL)**

The Board will report on other related public transit issues and committee meetings.

**14. RECESS TO CLOSED SESSION: PUBLIC EMPLOYEE PERFORMANCE EVALUATION - (ACTION MAY BE TAKEN)**

The Board will meet in closed session, pursuant to Government Codes § 54957 and § 54954.5(e), to evaluate the performance of the District’s General Manager.

**15. RECESS TO CLOSED SESSION: CONFERENCE WITH LEGAL COUNSEL REGARDING LITIGATION - (ACTION MAY BE TAKEN)**

The Board will meet in closed session with legal counsel, pursuant to Government Code § 54956.9 (b), regarding: Significant exposure to potential litigation based on existing facts and circumstances (unknown number of cases).

**PUBLIC COMMENT RELATED TO CLOSED SESSION ITEM(S) WILL BE ALLOWED BEFORE THE RECESS**

**16. ADJOURNMENT**

**AMERICANS WITH DISABILITIES ACT:** If you need special assistance to participate in this meeting, please contact the MTD Administrative Office at 805.963.3364 at least **48 hours in advance** of the meeting to allow time for MTD to attempt a reasonable accommodation.



**BOARD OF DIRECTORS DRAFT MINUTES**

**REGULAR MEETING**  
of the  
**BOARD OF DIRECTORS**  
of the  
**SANTA BARBARA METROPOLITAN TRANSIT DISTRICT**  
A Public Agency  
**Tuesday, November 17, 2020**  
**8:30 AM**  
**John G. Britton Auditorium**  
550 Olive Street, Santa Barbara, CA 93101

**ITEMS TO BE CONSIDERED:**

- 1. CALL TO ORDER**  
Chair Dave Davis called the meeting to order at 8:30 AM.
- 2. ROLL CALL OF THE BOARD MEMBERS**  
Chair Davis reported that all members were present, with the exception of Director Dick Weinberg.
- 3. REPORT REGARDING POSTING OF AGENDA**  
Christina Perry, Clerk of the Board and Administrative Assistant, reported that the agenda was posted on Friday, November 13, 2020, at MTD's Administrative office, mailed and emailed to those on the agenda list, and posted on MTD's website.

**CONSENT CALENDAR**

- 4. APPROVAL OF PRIOR MINUTES - (ACTION MAY BE TAKEN)**  
The Board of Directors was asked to approve the draft minutes for the meeting of November 3, 2020.
- 5. CASH REPORT - (ACTION MAY BE TAKEN)**  
The Board of Directors was asked to review and approve the Cash Report from the following dates: October 24, 2020 through November 6, 2020.

Vice Chair Dave Tabor moved to approve the consent calendar. Director Olivia Rodriguez seconded the motion. Chair Davis opened a roll call vote and the motion passed unanimously with abstention from Director Chuck McQuary for the Prior Minutes.

**THIS CONCLUDES THE CONSENT CALENDAR**

- 6. PUBLIC COMMENT**  
No public comments were made.

**BOARD OF DIRECTORS DRAFT MINUTES**

**7. FY 2019-20 AUDITED FINANCIAL STATEMENTS AND REPORTS - (ATTACHMENTS - INFORMATIONAL)**

Director of Finance and Administration Brad Davis presented the Single Audit Report for the fiscal year ended June 30, 2020 to the Board. Mr. Brad Davis was assisted in his presentation by Brown Armstrong Partner Ryan Nielsen.

Chair Dave Davis requested a motion to accept receipt of the report. Director Paula Perotte made the motion as suggested. Director Chuck McQuary seconded the motion. The motion passed unanimously in a roll call vote.

**8. FINANCIAL UPDATE & FIRST QUARTER REVIEW OF FISCAL YEAR 2020-21 - (ATTACHMENT - INFORMATIONAL)**

Mr. Brad Davis presented an update to the Board on the current financial outlook and the first quarter results for Fiscal Year 2020-21.

**9. FLEET RENEWAL CAMPAIGN RFP CONTRACT AWARD RECOMMENDATION - (ACTION MAY BE TAKEN)**

Capital Projects Manager Ryan Gripp requested that the Board authorize the General Manager to enter into a contract with Complete Coach Works for a bus refurbishment campaign.

Director Perotte moved to grant authorization to General Manager Jerry Estrada to enter into the contract as recommended. Vice Chair Tabor seconded the motion. The motion passed after a unanimous roll call vote.

**10. RECOMMENDATION TO AWARD A SOLE SOURCE CONTRACT TO CUMMINS PACIFIC - (ACTION MAY BE TAKEN)**

Mr. Gripp requested that the Board authorize the General Manager to award a contract to Cummins Pacific for the procurement of seven Cummins EPA2017 L9 diesel engines.

Director Rodriguez moved to grant authorization to General Manager Estrada to enter into the contract as recommended. Vice Chair Tabor seconded the motion. The motion passed after a unanimous roll call vote.

**11. AWARD AGREEMENT FOR A WORKERS' COMPENSATION THIRD PARTY ADMINISTRATOR - (ATTACHMENTS - ACTION MAY BE TAKEN)**

Staff recommended that the Board authorize the General Manager to award and execute an agreement with Tristar Risk Management for Third-Party Administration (TPA) Services for MTD's self-insured Workers' Compensation Program. Presentation to the Board was made by Mary Gregg, Director of Human Resources and Risk, Valerie White, Purchasing Agent, and Adrian Garcia, representing Tristar Risk Management.

Vice Chair Tabor moved to authorize General Manager Estrada to award and execute the recommended agreement. Director Rodriguez seconded the motion. The motion passed after a unanimous roll call vote.

**12. GENERAL MANAGER'S REPORT - (INFORMATIONAL)**

General Manager Estrada provided an update on district activities.

**13. COMMUNICATIONS - (INFORMATIONAL)**

<b>BOARD OF DIRECTORS DRAFT MINUTES</b>
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General Manager Estrada noted correspondence regarding Measure A Investment Plan Amendment Letter.

**14. OTHER BUSINESS AND REPORTS - (INFORMATIONAL)**

Chair Davis reminded the Board that a Special Meeting will convene on December 8, 2020.

**15. ADJOURNMENT**

Director Rodriguez moved to adjourn the meeting. Director Perotte seconded the motion. The motion was approved after a roll call vote and the meeting was adjourned at 10:29 AM.

**Santa Barbara Metropolitan Transit District**  
**Cash Report**  
**Board Meeting of December 8, 2020**  
**For the Period November 7, 2020 through November 27, 2020**

**MONEY MARKET**

**Beginning Balance November 7, 2020** **\$5,120,994.99**

Property Tax Revenue	213,150.95
Accounts Receivable	32,148.10
Miscellaneous Income	2,476.65
Interest Income	770.65
Passenger Fares	190.50
<b>Total Deposits</b>	<b>248,736.85</b>

Miscellaneous Transfers	(545.97)
Bank & Credit Card Fees	(2,496.13)
401(k)/Pension Transfer	(30,943.40)
Workers' Compensation	(44,775.08)
Payroll Taxes	(139,484.10)
Payroll	(330,330.52)
Accounts Payable	(818,446.63)
<b>Total Disbursements</b>	<b>(1,367,021.83)</b>

**CERTIFICATES OF DEPOSIT**

<b>Institution</b>	<b>Maturity</b>	<b>Rate</b>	
American Riviera Bank	2/28/2021	2.00%	1,523,222.75
<b>Total Certificates of Deposit</b>			<b>1,523,222.75</b>

**\$1,523,222.75**

**Ending Balance**

**\$5,525,932.76**

**CASH INVESTMENTS**

LAIF Account	\$5,859,597.74
Money Market Account	5,525,932.76

**Total Cash Balance**

**\$11,385,530.50**

**SELF INSURED LIABILITY ACCOUNTS**

WC / Liability Reserves	(\$4,842,022.27)
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**Working Capital**

**\$6,543,508.23**

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**Santa Barbara Metropolitan Transit District**  
**Cash Receipts of Accounts Receivable**

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<b>Date</b>	<b>Company</b>	<b>Description</b>	<b>Amount</b>
11/13/2020	Goodwin & Thyne Properties	Advertising on Buses	1,040.00
11/13/2020	Sansum Clinic	Advertising on Buses	2,934.00
11/20/2020	Santa Barbara County - Census	Advertising on Buses	20,220.00
11/25/2020	Darlington Marketing	Bus Advertising	2,771.00
11/25/2020	Hiltachk Marketing Group/SB Airport	Advertising on Buses	3,854.70
11/25/2020	Wells Marketing, LLC	Advertising on Buses	1,328.40
<b>Total Accounts Receivable Paid During Period</b>			<b>\$32,148.10</b>

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**Santa Barbara Metropolitan Transit District  
Accounts Payable**

Check #	Date	Company	Description	Amount	Voids
125036	10/9/2020	ALI HABIBI	RETIREE HEALTH REIMBURSEMENT	285.00	V
125268	11/12/2020	ABC BUS COMPANIES INC	BUS PARTS	6,343.32	
125269	11/12/2020	AMERICAN MOVING PARTS, LLC	BUS PARTS	357.55	
125270	11/12/2020	HENRY ANDREWS	RETIREE HEALTH REIMBURSEMENT	285.00	
125271	11/12/2020	ASBURY ENVIRONMENTAL SERVI	WASTE OIL RECYCLER	160.00	
125272	11/12/2020	BARCODESOURCE INC.	BARCODE SUPPLIES	101.14	
125273	11/12/2020	JAMES BRACKETT	RETIREE HEALTH REIMBURSEMENT	178.00	
125274	11/12/2020	KARL BRETZ	RETIREE HEALTH REIMBURSEMENT	517.16	
125275	11/12/2020	BROWN ARMSTRONG ACCOUNTA	ANNUAL AUDIT	10,000.00	
125276	11/12/2020	ROBERT BURNHAM	RETIREE HEALTH REIMB/SDRMA REF	285.00	
125277	11/12/2020	BYD MOTORS LLC	CAPITAL LEASE PAYMENT	31,625.22	
125278	11/12/2020	GILBERT CALLES	RETIREE HEALTH REIMBURSEMENT	178.00	
125279	11/12/2020	CITY OF CARPINTERIA	CHARGING STATION ELECTRICITY	141.31	
125280	11/12/2020	CITY OF SANTA BARBARA	CSR PARKING PERMITS	40.00	
125281	11/12/2020	CENTRAL COAST CIRCULATION, L	BUS BOOK DISTRIBUTION	627.00	
125282	11/12/2020	STAN CISOWSKI	RETIREE HEALTH REIMBURSEMENT	274.90	
125283	11/12/2020	COX COMMUNICATIONS, CORP.	INTERNET & CABLE TV	469.23	
125284	11/12/2020	CUMMINS SALES & SERVICE dba	BUS PARTS & REPAIRS	1,219.84	
125285	11/12/2020	NANCY CURTIS	RETIREE HEALTH REIMBURSEMENT	215.75	
125286	11/12/2020	DAVID DAVIS JR.	DIRECTOR FEES	120.00	
125287	11/12/2020	DENMUN OFFICE SOLUTIONS DB	IT CONTRACT SERVICES	3,612.50	
125288	11/12/2020	EASY LIFT TRANSPORTATION, IN	MONTHLY ADA SUBSIDY	83,463.33	
125289	11/12/2020	FRONTIER CALIFORNIA INC.	TELEPHONE SERVICE	100.98	
125290	11/12/2020	GIBBS INTERNATIONAL INC	BUS PARTS	914.59	
125291	11/12/2020	GILLIG LLC	BUS PARTS	3,298.34	
125292	11/12/2020	GARY GLEASON	RETIREE HEALTH REIMBURSEMENT	496.35	
125293	11/12/2020	GOGETTERS, LLC DBA	COURIER SERVICES	480.00	
125294	11/12/2020	JILL GRISHAM	RETIREE HEALTH REIMB/SDRMA REF	260.23	
125295	11/12/2020	JIM HAGGERTY	RETIREE HEALTH REIMBURSEMENT	509.12	
125296	11/12/2020	ALI HABIBI	RETIREE HEALTH REIMBURSEMENT	570.00	
125297	11/12/2020	ROBERT HARTMAN, JR.	RETIREE HEALTH REIMBURSEMENT	204.02	
125298	11/12/2020	HIGH IMPACT INC.	FORKLIFT SAFETY TRAINING	190.00	
125299	11/12/2020	JAY DANIEL ROBERTSON	RETIREE HEALTH REIMBURSEMENT	570.00	
125300	11/12/2020	DONALD JACKSON	RETIREE HEALTH REIMBURSEMENT	534.00	
125301	11/12/2020	JAVIER JIMENEZ	RETIREE HEALTH REIMBURSEMENT	285.00	
125302	11/12/2020	LOUIS JONES	RETIREE HEALTH REIMBURSEMENT	221.00	
125303	11/12/2020	LABOR ALLIANCE MANAGED TRU	UNION DENTAL INSURANCE	10,559.25	
125304	11/12/2020	LAWSON PRODUCTS INC	SHOP SUPPLIES	1,424.19	

Check #	Date	Company	Description	Amount	Voids
125305	11/12/2020	LOUIS MANDEVILLE	RETIREE HEALTH REIMBURSEMENT	506.10	
125306	11/12/2020	MC CORMIX CORP. (OIL)	LUBRICANTS	3,465.15	
125307	11/12/2020	MC CORMIX CORP. (GAS)	FUEL-SERVICE VEHICLES	1,028.69	
125308	11/12/2020	MCMASTER-CARR SUPPLY CO.	SHOP/B&G SUPPLIES	260.72	
125309	11/12/2020	CHUCK MCQUARY	DIRECTOR FEES	120.00	
125310	11/12/2020	MIKE CUEVAS GARDENING SERVI	LANDSCAPE MAINTENANCE SERVICE	1,045.00	
125311	11/12/2020	MOUNTAIN SPRING WATER	SHOP & OFFICE SUPPLIES	983.80	
125312	11/12/2020	NEWEGG BUSINESS, INC	IT EQUIPMENT & SUPPLIES	304.86	
125313	11/12/2020	NEWARK ELEMENT14	BUS PARTS	14.86	
125314	11/12/2020	NFI PARTS DBA	BUS PARTS	2,514.86	
125315	11/12/2020	CARLOS ORNELAS	RETIREE HEALTH REIMBURSEMENT	200.00	
125316	11/12/2020	PAULA A. PEROTTE	DIRECTOR FEES	120.00	
125317	11/12/2020	CAREY POINDEXTER	RETIREE HEALTH REIMBURSEMENT	285.00	
125318	11/12/2020	POWERSTRIDE BATTERY CO.	BATTERIES	598.89	
125319	11/12/2020	PRISCILLA REID	RETIREE HEALTH REIMBURSEMENT	60.00	
125320	11/12/2020	OLIVIA RODRIGUEZ	DIRECTOR FEES	120.00	
125321	11/12/2020	AL ROMERO SR.	RETIREE HEALTH REIMBURSEMENT	89.00	
125322	11/12/2020	SPECIAL DISTRICT RISK MGMT	HEALTH INSURANCE	61,572.30	
125323	11/12/2020	WILLIAM JOHN SHELOR	DIRECTOR FEES	120.00	
125324	11/12/2020	SO. CAL. EDISON CO.	UTILITIES	3,063.40	
125325	11/12/2020	SOUTHWEST LIFT & EQUIPMENT,	LIFT REPAIRS & SUPPLIES	340.67	
125326	11/12/2020	DAVID T. TABOR	DIRECTOR FEES	120.00	
125327	11/12/2020	TEAMSTERS MISC SECURITY TRU	UNION MEDICAL INSURANCE	211,891.00	
125328	11/12/2020	TRI COUNTY BLINDS AND DRAPE	OFFICE BLINDS	737.00	
125329	11/12/2020	TRUMAN ARNOLD COMPANIES (T	DIESEL FUEL	21,224.65	
125330	11/12/2020	J.C.M. AND ASSOCIATES INC.	UNIFORMS	1,749.59	
125331	11/12/2020	VALLEY POWER SYSTEMS, INC.	BUS PARTS	6,019.40	
125332	11/12/2020	VERIZON WIRELESS	WIRELESS PHONES & AIM CELLULAR	3,016.73	
125333	11/12/2020	WAXIE SANITARY SUPPLY DBA	JANITORIAL SUPPLIES	484.64	
125334	11/12/2020	RICHARD WEINBERG	DIRECTOR FEES	60.00	
125335	11/20/2020	ABC BUS COMPANIES INC	BUS PARTS	2,242.23	
125336	11/20/2020	ASBURY ENVIRONMENTAL SERVI	WASTE OIL RECYCLER	300.00	
125337	11/20/2020	CALIFORNIA ELECTRIC SUPPLY, I	SHOP/B&G SUPPLIES	617.27	
125338	11/20/2020	CALACT	SEMINAR	1,055.00	
125339	11/20/2020	CAPITOL HARDWARE & BUILDING	B&G SUPPLIES	188.55	
125340	11/20/2020	CUMMINS SALES & SERVICE dba	BUS PARTS & REPAIRS	2,615.57	
125341	11/20/2020	DESTIN THOMAS COMMUNICATIO	RADIOS SUPPLIES/REPAIRS	3,028.50	
125342	11/20/2020	DOCUPRODUCTS CORPORATION	COPIER MAINTENANCE/SUPPLIES	181.33	
125343	11/20/2020	ESP LOCKSMITH DBA	B&G REPAIRS & SUPPLIES	1,356.88	
125344	11/20/2020	EVERSHADE LLC DBA	STEAM CLEANING BUS STOPS	1,750.00	
125345	11/20/2020	FIRST LOAN	PAYROLL RELATED	50.00	

Check #	Date	Company	Description	Amount	Voids
125346	11/20/2020	STATE OF CALIFORNIA	PAYROLL RELATED	32.50	
125347	11/20/2020	FRONTIER CALIFORNIA INC.	TELEPHONE SERVICE	2,005.21	
125348	11/20/2020	GIBBS INTERNATIONAL INC	BUS PARTS	1,129.40	
125349	11/20/2020	GILLIG LLC	BUS PARTS	2,635.12	
125350	11/20/2020	GOODYEAR TIRE & RUBBER CO	BUS TIRE LEASE	225.10	
125351	11/20/2020	GRAINGER, INC.	SHOP/B&G SUPPLIES	175.70	
125352	11/20/2020	HAYWARD LUMBER	SHOP SUPPLIES	187.77	
125353	11/20/2020	HOME IMPROVEMENT CTR.	SHOP/B&G SUPPLIES	94.30	
125354	11/20/2020	HR AUTOGLASS DBA	BUS PARTS/REPAIRS	245.00	
125355	11/20/2020	LANSPEED DBA	IT SERVICES	4,758.00	
125356	11/20/2020	LAWSON PRODUCTS INC	SHOP SUPPLIES	1,435.37	
125357	11/20/2020	MARBORG INDUSTRIES (INC)	UTILITIES & RENTAL FEES	1,124.75	
125358	11/20/2020	MC CORMIX CORP. (OIL)	LUBRICANTS	3,505.15	
125359	11/20/2020	MEDCO TOOL	SHOP SUPPLIES	114.63	
125360	11/20/2020	NATIONAL DRIVE	PAYROLL DEDUCTION	28.00	
125361	11/20/2020	NATIONAL INTERSTATE INS INC.	LIABILITY INSURANCE	37,819.28	
125362	11/20/2020	NEWTON CONSTRUCTION & MGM	TRANSIT CENTER RENOVATIONS	100,000.00	
125363	11/20/2020	NFI PARTS DBA	BUS PARTS	981.75	
125364	11/20/2020	PREVOST CAR (US) INC.	BUS PARTS	978.32	
125365	11/20/2020	POWERSTRIDE BATTERY CO.	BATTERIES	598.89	
125366	11/20/2020	LETICIA RAMIREZ	PAYROLL RELATED	650.00	
125367	11/20/2020	REPUBLIC ELEVATOR, INC	ELEVATOR MAINTENANCE	170.00	
125368	11/20/2020	SB COUNTY FEDERAL CREDIT UNI	PAYROLL DEDUCTION	260.00	
125369	11/20/2020	SILVAS OIL CO., INC.	LUBRICANTS	352.02	
125370	11/20/2020	SM TIRE, CORP.	BUS TIRE MOUNTING	256.45	
125371	11/20/2020	SO. CAL. EDISON CO.	UTILITIES	4,191.27	
125372	11/20/2020	SOCALGAS	UTILITIES	210.12	
125373	11/20/2020	STATE BOARD OF EQUALIZATION	PAYROLL RELATED	250.00	
125374	11/20/2020	STATEWIDE SAFETY SYSTEMS	SAFETY SIGNS	1,808.36	
125375	11/20/2020	STEWART'S DE-ROOTING & PLUM	PLUMBING REPAIRS	450.00	
125376	11/20/2020	TEAMSTERS UNION LOCAL NO. 18	UNION DUES	942.50	
125377	11/20/2020	TRAPEZE SOFTWARE GROUP, INC.	ANNUAL SOFTWARE LICENSE FEES	5,457.00	
125378	11/20/2020	TRUMAN ARNOLD COMPANIES (T	DIESEL FUEL	21,321.92	
125379	11/20/2020	UNITED WAY OF SB	PAYROLL DEDUCTION	40.00	
125380	11/20/2020	J.C.M. AND ASSOCIATES INC.	UNIFORMS	368.37	
125381	11/20/2020	VALLEY POWER SYSTEMS, INC.	BUS PARTS	16.75	
125382	11/20/2020	VALLEY POWER SYSTEMS, INC.	BUS PARTS	1,961.06	
125383	11/20/2020	VEHICLE MAINTENANCE PROGRA	BUS PARTS	807.31	
125384	11/20/2020	WAGER COMPANY DBA	SHOP EQUIPMENT	3,956.20	
125385	11/20/2020	YACO SCHOLARSHIP FUND	PAYROLL DEDUCTION	53.00	
125386	11/24/2020	ABC BUS COMPANIES INC	BUS PARTS	1,111.85	

Check #	Date	Company	Description	Amount	Voids
125387	11/24/2020	BIG BRAND TIRES, BRANDCO BILL	SERVICE VEHICLE MAINTENANCE	173.65	
125388	11/24/2020	MANUEL CASTANON	DMV REIMBURSEMENT	462.00	
125389	11/24/2020	CELTIS VENTURES, INC.	MARKETING SERVICES	4,845.00	
125390	11/24/2020	CUMMINS SALES & SERVICE dba	BUS PARTS & REPAIRS	14,595.81	
125391	11/24/2020	DESTIN THOMAS COMMUNICATIO	RADIOS SUPPLIES/REPAIRS	1,059.00	
125392	11/24/2020	DIESEL FORWARD, INC.	BUS PARTS	2,524.97	
125393	11/24/2020	FAUVER, LARGE, ARCHBALD&SPR	LEGAL COUNSEL	12,456.64	
125394	11/24/2020	FEDEX dba	FREIGHT CHARGES	146.55	
125395	11/24/2020	SHERRIE FISHER	RETIREE HEALTH REIMBURSEMENT	328.07	
125396	11/24/2020	FLEET SERVICES, INC.	BUS PARTS	179.56	
125397	11/24/2020	GENFARE, A DIVISION OF SPX CO	FAREBOX REPAIRS & PARTS	395.97	
125398	11/24/2020	GIBBS INTERNATIONAL INC	BUS PARTS	1,880.46	
125399	11/24/2020	GILLIG LLC	BUS PARTS	7,264.41	
125400	11/24/2020	GOODYEAR TIRE & RUBBER CO	BUS TIRE LEASE	11,112.64	
125401	11/24/2020	HAYWARD LUMBER	SHOP SUPPLIES	17.51	
125402	11/24/2020	HOME IMPROVEMENT CTR.	SHOP/B&G SUPPLIES	33.26	
125403	11/24/2020	INTELLICORP RECORD INC.	PRE-EMPLOYMENT CHECK	250.15	
125404	11/24/2020	LMA ARCHITECTS, CORP.	TC CONSTRUCTION OVERSIGHT	5,487.02	
125405	11/24/2020	MARBORG INDUSTRIES (INC)	UTILITIES & RENTAL FEES	213.75	
125406	11/24/2020	MC CORMIX CORP. (OIL)	LUBRICANTS	2,422.89	
125407	11/24/2020	MC CORMIX CORP. (GAS)	FUEL-SERVICE VEHICLES	1,071.58	
125408	11/24/2020	MOHAWK MFG. AND SUPPLY CO.	BUS PARTS	136.24	
125409	11/24/2020	NATIONAL TESTING NETWORK, I	DRIVER TRAINING	123.00	
125410	11/24/2020	NEOPART TRANSIT LLC	BUS PARTS	446.05	
125411	11/24/2020	NEW PIG CORP.	BUS CLEANING SUPPLIES	1,081.25	
125412	11/24/2020	NFI PARTS DBA	BUS PARTS	2,082.98	
125413	11/24/2020	O'REILLY AUTO PARTS DBA	BUS PARTS	6.33	
125414	11/24/2020	POWERSTRIDE BATTERY CO.	BATTERIES	598.89	
125415	11/24/2020	RALPH'S GROCERY	SAFETY AWARDS	8,250.75	
125416	11/24/2020	SANSUM CLINIC	MEDICAL EXAMS	3,146.56	
125417	11/24/2020	SILVAS OIL CO., INC.	LUBRICANTS	217.72	
125418	11/24/2020	SM TIRE, CORP.	BUS TIRE MOUNTING	382.94	
125419	11/24/2020	SOCALGAS	UTILITIES	57.80	
125420	11/24/2020	STANTEC ARCHITECTURE INC.	FACILITIES MASTER PLAN	3,009.00	
125421	11/24/2020	STATEWIDE SAFETY SYSTEMS	SAFETY SIGNS	739.18	
125422	11/24/2020	SB CITY OF-REFUSE/WATER	UTILITIES	544.02	
125423	11/24/2020	THE MEDCENTER	MEDICAL EXAMS	1,399.00	
125424	11/24/2020	TANK TEAM INC.	TANK TESTS	128.00	
125425	11/24/2020	TRUMAN ARNOLD COMPANIES (T	DIESEL FUEL	21,369.60	
125426	11/24/2020	J.C.M. AND ASSOCIATES INC.	UNIFORMS	1,068.35	
125427	11/24/2020	U.S. BANK CORP. PAYMENT SYST	CREDIT CARD PURCHASES	4,474.05	

Check #	Date	Company	Description	Amount	Voids
125428	11/24/2020	VALLEY POWER SYSTEMS, INC.	BUS PARTS	27.26	
125429	11/24/2020	VALLEY POWER SYSTEMS, INC.	BUS PARTS	1,961.06	
125430	11/24/2020	VERIZON WIRELESS	WIRELESS PHONES & AIM CELLULAR	603.04	
125431	11/24/2020	WAXIE SANITARY SUPPLY DBA	JANITORIAL SUPPLIES	916.29	
				<b>818,731.63</b>	
				<b>Current Cash Report Voided Checks:</b>	0.00
				<b>Prior Cash Report Voided Checks:</b>	285.00
				<b>Grand Total:</b>	<b>\$818,446.63</b>



<b>BOARD OF DIRECTORS REPORT</b>
----------------------------------

**MEETING DATE:** DECEMBER 8, 2020 **AGENDA ITEM: #7**

**DEPARTMENT:** BOARD OF DIRECTORS

**TYPE:** ACTION ITEM

**PREPARED BY:** JERRY ESTRADA

\_\_\_\_\_  
*Signature*

**REVIEWED BY:** GENERAL MANAGER

\_\_\_\_\_  
*Signature*

**SUBJECT:** RECOGNITION OF DIRECTOR OLIVIA RODRIGUEZ

**RECOMMENDATION:**

Staff and the Board of Directors will honor the service of Board Director Olivia Rodriguez.

**ATTACHMENT:**

- Resolution 2020-06 recognizing Director Rodriguez

**RESOLUTION**  
*of the*  
**BOARD OF DIRECTORS**  
*of the*  
**SANTA BARBARA METROPOLITAN TRANSIT DISTRICT**

IN THE MATTER OF HONORING THE SERVICE  
OF MTD DIRECTOR OLIVIA RODRIGUEZ

**RESOLUTION NO. 2020-06**

**WHEREAS**, Olivia Rodriguez has served as a board member of Santa Barbara Metropolitan Transit District (District) for thirteen years; and

**WHEREAS**, Olivia's leadership and experience as a lifelong community servant benefited public transit service throughout the South Coast of Santa Barbara County; and

**WHEREAS**, Olivia advocated for human resource practices that valued diversity to create an enriched workplace environment, in which employees are hired based on their skill and qualifications; and

**WHEREAS**, Olivia's effort to enhance the District's ethical standards and hiring practices are reflected throughout the organization via its policies and workforce; and

**WHEREAS**, Olivia's professional experience provided critical support and guidance to the Board on a variety of legal matters such as collective bargaining, liability, and risk; and

**WHEREAS**, Olivia's professionalism and skill was evident during numerous negotiations and through her service on the Finance, Human Resources & Risk Committee, and Olivia's expectation of prudent financial management was most evident in her persuasive support for funding the District's OPEB trust account to address unfunded liabilities; and

**WHEREAS**, in doing so, Olivia helped to preserve and further the District's reputation within the community; and

**IN RECOGNITION** and gratitude for these achievements to the betterment of the South Coast of Santa Barbara County, the Board and Staff of the District wholeheartedly thank Olivia Rodriguez.

**PASSED AND ADOPTED** by the Board of Directors of the Santa Barbara Metropolitan Transit District this 8th day of December 2020 by the following vote:

AYES: \_\_\_\_\_  
NAYS: \_\_\_\_\_  
ABSENT: \_\_\_\_\_

\_\_\_\_\_  
Chair, Board of Directors  
Santa Barbara Metropolitan Transit District

ATTEST:

\_\_\_\_\_  
Secretary, Board of Directors  
Santa Barbara Metropolitan Transit District



**BOARD OF DIRECTORS REPORT**

**MEETING DATE:** DECEMBER 8, 2020 **AGENDA ITEM: #8**  
**DEPARTMENT:** CAPITAL PROJECTS  
**TYPE:** ACTION ITEM  
**PREPARED BY:** VALERIE WHITE \_\_\_\_\_  
*Signature*  
**REVIEWED BY:** GENERAL MANAGER \_\_\_\_\_  
*Signature*  
**SUBJECT:** MICROTRANSIT VAN PROCUREMENT

**RECOMMENDATION:**

Staff requests that the Board authorize the General Manager to purchase three 2021 Ford Transit passenger vans with Lightning eMotors' electric propulsion system from A-Z Bus Sales for a total cost of \$677,053. The recommendation if approved would result in a budget revision to the Capital Budget of \$417,053.

**DISCUSSION:**

General Background—MTD has adopted a number of initiatives to improve ridership and meet changing mobility demands. The most prominent example is the microtransit pilot project, which is designed to deliver flexible, curb-to-curb, on-demand service using smaller vehicles instead of larger transit buses. On September 17, 2019, the Board of Directors approved the purchase of three Ford Transit passenger vans with diesel engines (a battery-electric option was not widely available at the time) to provide the service. Since then, however, Ford Motor Company discontinued production of their diesel Transit passenger vans. Fortunately, significant demand for such vehicles has resulted in several options coming to market. It also compelled large procurement entities such as the California Department of General Services (DGS) and the California Association for Coordinated Transportation (CALACT) to perform formal solicitations to establish cooperative purchasing contracts for electric passenger vans.

The Vehicles—The three vehicles MTD intends to procure from A-Z Bus Sales are Americans with Disabilities Act (ADA)-accessible Ford Transit 350EL passenger vans equipped with Lightning eMotors' electric drivetrain. The electric propulsion system has an advertised range of 120-miles and supports Level 2 (currently available in MTD's bus yard) and Level 3 (planned with MTD's Charge Ready Transport project) charging. The interior layout will provide seating for nine passengers without a mobility device, or seating for seven passengers with one. The ADA conversion and auxiliary equipment will be provided by Nor Cal Vans and the electric propulsion system by Lightning eMotors.

**BUDGET & FUNDING:**

The FY 2020-21 Capital Budget reflects \$260,000 of State Transit Assistance (STA) funding for the three microtransit vehicles, which presents a shortfall of \$417,053 for the proposed acquisition. Thus, staff is requesting a budget revision of \$417,053 to cover the shortfall. MTD



**BOARD OF DIRECTORS REPORT**

has sufficient Transportation Development Act – State Transit Assistance (TDA-STA) capital funds to absorb the additional budget allocation.

To offset some of the cost, staff intends to pursue the California Air Resources Board’s (CARB) Hybrid and Zero-emission Truck and Bus Voucher Incentive Program (HVIP). CARB will accept new voucher requests when FY 2020-21 funding is available, which is anticipated in early 2021. Based upon information released by CARB about the FY 2020-21 vouchers, the electric Ford Transit passenger vans will qualify for up to \$51,750 per vehicle and could potentially offset MTD’s capital outlay for this project by up to \$155,250. CARB’s meeting to consider the Proposed Fiscal Year 2020-21 Funding Plan for Clean Transportation Incentives will occur on December 10, 2020.

**PROCUREMENT METHOD:**

CALACT Cooperative Purchasing— After reviewing the available acquisition methods, staff determined that the CALACT cooperative purchase contract with A-Z Bus Sales represented the most advantageous purchasing strategy. Leveraging CALACT’s cooperative purchasing contract significantly reduces time and resources invested in acquiring the vehicles. It also allows MTD to benefit from more favorable pricing resulting from the collective purchasing power of multiple agencies. Other transit agencies such as the Orange County Transportation Authority (OCTA) and San Joaquin Regional Transit District (RTD) have procured vans through CALACT contracts for their own microtransit pilot programs. The procurement methodology used by CALACT was thorough and comprehensive. Staff concluded that the solicitation was conducted in a manner that conforms to MTD’s procurement requirements.

A-Z Bus Sales Contract Award—Through a Request for Proposal (RFP) that led to multiple awards for the best value zero emissions electric vans, a panel of industry experts reviewed offers submitted by A-Z Bus Sales, Masters Transportation, Nations Bus, Lion Electric, Morgan Olson/Karstan, RO Bus Sales, and Creative Bus Sales. The resulting A-Z Bus Sales contract (NorCal Van Conversions and Lightning eMotors listed as subcontractors) best fits MTD’s microtransit needs.

Price Analysis—The base cost of the ADA-accessible Ford Transit 350EL passenger van equipped with Lightning eMotors’ electric drivetrain from the CALACT contract is \$179,821. The additional expenses for MTD-specified options (includes surveillance cameras, farebox, Shift N Step mobility device lift, vinyl graphics, and others) and sales tax brings the total cost per van to \$225,684 (\$677,053 for three). Comparison to a valid independent cost estimate (ICE) is one of the six price analysis techniques listed in the *Pricing Guide for FTA Grantees*. As shown below, CALACT’s base price for the electric Ford Transit passenger van is \$179,821. The base price of a similar vehicle in the ICE is \$200,144. Thus, the CALACT contract price is \$20,323 less than the ICE. Based upon the foregoing, the CALACT contract price is considered to be fair and reasonable.

<b>Ford Transit EV</b>	<b>Base Price</b>	<b>Unit</b>
Independent Cost Estimate	\$200,144	Per Vehicle
CALACT Contract Price	\$179,821	Per Vehicle
Difference (\$)	\$20,323	Per Vehicle
Difference (%)	10.15%	Per Vehicle

## BOARD OF DIRECTORS REPORT

### **IMPLEMENTATION:**

If approved by the Board, a purchase order (PO) will be issued to A-Z Bus Sales for the three Ford Transit passenger vans. According to A-Z Bus Sales, the current lead time is approximately six months from issuance of the PO.



**BOARD OF DIRECTORS REPORT**

**MEETING DATE:** DECEMBER 8, 2020 **AGENDA ITEM: #9**  
**DEPARTMENT:** CAPITAL PROJECTS  
**TYPE:** ACTION ITEM  
**PREPARED BY:** RYAN GRIPP \_\_\_\_\_  
*Signature*  
**REVIEWED BY:** GENERAL MANAGER \_\_\_\_\_  
*Signature*  
**SUBJECT:** CHARGEPOINT ELECTRIC VEHICLE CHARGER PROCUREMENT

**RECOMMENDATION:**

Staff requests that the Board authorize the General Manager to purchase 10 heavy-duty electric vehicle chargers from ChargePoint, Inc. (ChargePoint) for \$632,120 with an option of four additional chargers at an added cost of \$248,908. The total cost of the acquisition would be \$881,028 if MTD elects to pursue the four optional chargers.

**DISCUSSION:**

General Background—Earlier this year, the Board authorized the General Manager to execute the Charge Ready Transport Program Participation Agreement with Southern California Edison (SCE) to provide make ready infrastructure for heavy-duty charge ports at Terminal 1. MTD’s Charge Ready project was approved for up to 14 charge ports, but no less than 10. While SCE covers the cost of design, construction, and installation of electrical equipment like transformers, switchgear and meters, the customer is responsible for procuring and maintaining the electric vehicle (EV) charging equipment. Customers are also required to commit to the acquisition of a certain number of electric vehicles to utilize the Charge Ready infrastructure during the 10-year term of the Agreement. For MTD, that number is 14 battery-electric buses, four of which were approved by the Board in September. This recommendation for the acquisition of 10 heavy-duty electric vehicle chargers with the option for up to four more meets SCE’s minimum requirements for MTD’s proposed Charge Ready project, and affords MTD some flexibility with the design of the charger layout and capital outlay for the project.

ChargePoint, Inc.—ChargePoint has emerged as a dominant manufacturer of electric vehicle charging equipment in the light-duty and heavy-duty market segments. They are well regarded in the industry and are committed to staying on the bleeding edge of EV charging technologies, which is critical in such a rapidly evolving market. Currently, MTD owns and operates 15 ChargePoint chargers at Terminal 1, one is accessible to the public and the other 14 are dedicated to MTD’s non-revenue EV fleet. The ChargePoint charger selected for this project, the CPE250, is a robust high-power DC charger with a modest footprint. The charger is also capable of being paired, which doubles the power from 62.5kW to a maximum nominal rate of 125kW. That provides MTD with the benefit of shrinking the charge time when buses are needed for deployment more rapidly. ChargePoint chargers are also networked, which allows MTD’s maintenance team to login to a single dashboard to control charge times and review data and

## BOARD OF DIRECTORS REPORT

analytics from individual chargers or MTD's entire charger network. Maintaining a uniform collection of charging equipment from a single manufacturer will be critical to the success of MTD's electrification efforts moving forward.

### **PROJECT BUDGET & FUNDING:**

The cost for 10 ChargePoint CPE250 chargers, networking, extended warranty, and installation is \$632,120. The four optional chargers brings the total capital outlay to \$881,028, which is not currently listed in the FY 2020-21 Capital Budget. MTD has sufficient Transportation Development Act – State Transit Assistance (TDA-STA) capital funds to absorb the additional budget allocation. The expense will also be included in the FY 2020-21 Budget Revision presented to the Board in Q1 of 2021.

MTD's proposed Charge Ready project is also eligible for SCE's Charging Equipment Rebate, which provides 50% of the charging equipment cost, up to \$20,500 (hardware only; does not cover other costs such as installation or networking). The rebate will aid in offsetting a sizeable portion of MTD's costs. Staff will also pursue any available grant funding opportunities that have the potential of reducing MTD's financial commitment to the project.

### **PROCUREMENT METHOD:**

Sourcewell Cooperative Purchasing—After reviewing the available acquisition methods, staff determined that the Sourcewell cooperative purchase agreement with ChargePoint represented the most advantageous purchasing strategy. Sourcewell, formerly known as The National Joint Powers Alliance (NJPA), serves its membership of government, education, and nonprofit organizations by conducting formal procurement activities in accordance with government standards and best practices. Such procurement activities result in cooperative purchasing contracts with the responsive and responsible vendor that provides the best value to its members. Pursuing this type of procurement strategy significantly reduces MTD staff time and resources inherent in conducting a formal solicitation and includes the added benefit of volume pricing.

ChargePoint, Inc. Contract Award—MTD staff reviewed the procurement documents and procedures from the Sourcewell solicitation for chargers that resulted in Contract No. 051017-CPI, and found them to be in conformance with MTD requirements. Sourcewell received 14 proposals in response to the solicitation and the evaluation committee ranked ChargePoint number one, citing "...a comprehensive maintenance plan for a complete turn-key solution..." and "...pricing proposal includes a range of considerable discounts from list price on equipment purchases."

Price Analysis—Comparison to a valid independent cost estimate (ICE) is one of the six price analysis techniques listed in the *Pricing Guide for FTA Grantees*. While Sourcewell performed its own price analysis prior to contract award, MTD staff also compared the contract pricing with several other sources, which was the basis for the \$45,602 per unit ICE. The Sourcewell contract price received by MTD from ChargePoint of \$38,760 per charger is \$6,842 less than the ICE. The price differential is likely due to the volume pricing provided to Sourcewell. As a result of the foregoing, the \$38,760 price per ChargePoint CPE250 charger under Sourcewell Contract No. 051017-CPI appears to be fair and reasonable.

**BOARD OF DIRECTORS REPORT**

	ICE	ChargePoint 2020 List Price	Sourcewell Contract Price
Cost per unit	\$45,602	\$40,800	\$38,760
<i>Unit Cost Savings (\$)</i>	<i>\$6,842</i>	<i>\$2,040</i>	
<i>Unit Cost Savings (%)</i>	<i>15%</i>	<i>5%</i>	

**IMPLEMENTATION:**

If the Board authorizes the General Manager to purchase the chargers, MTD staff will issue a purchase order to ChargePoint. Delivery of the equipment will be scheduled to coincide with the completion of the make ready infrastructure provided by SCE under MTD's Charge Ready project.



**BOARD OF DIRECTORS REPORT**

**MEETING DATE:** DECEMBER 8, 2020 **AGENDA ITEM: #10**

**DEPARTMENT:** GOVERNMENT RELATIONS

**TYPE:** ACTION ITEM

**PREPARED BY:** JERRY ESTRADA

\_\_\_\_\_  
*Signature*

**REVIEWED BY:** GENERAL MANAGER

\_\_\_\_\_  
*Signature*

**SUBJECT:** FIRST AMENDMENT TO FUNDING AGREEMENT WITH SANTA BARBARA COUNTY ASSOCIATION OF GOVERNMENTS FOR MTD FACILITY IMPROVEMENTS

**RECOMMENDATION:**

Staff recommends that the Board authorize execution of the attached First Amendment to the funding agreement with the Santa Barbara County Association of Governments (SBCAG) to provide Transit and Intercity Rail Capital Program (TIRCP) funds to assist with MTD facility improvement projects.

**DISCUSSION:**

SBCAG was awarded a Transit and Intercity Rail Capital Program (TIRCP) grant in April 2018 by the State Department of Transportation (Caltrans), which included \$1.5 million in capital funds for improvements to MTD's transit facilities.

TIRCP is funded by Cap and Trade auction proceeds and SB1 funds. SBCAG successfully competed for two grants, one to expand Coastal Express bus service in support of the new peak hour Pacific Surfliner train service using battery-powered coaches and make local transit facility improvements, and a second grant to construct a train station on a parcel purchased by the City of Goleta adjacent to the current Goleta station.

MTD supported both grant applications and agreed to partner with SBCAG and Ventura County transit providers to expand Coastal Express bus service in support of the new peak hour Pacific Surfliner train service using battery-powered coaches and to make local transit facility improvements to its Goleta and Santa Barbara properties.

At the request of Caltrans, the attached First Amendment to the funding agreement further defines eligible expenditures and responsibilities of the parties related to the MTD transit facility improvements.

**ATTACHMENT:**

- Attachment 1 – First Amendment to TIRCP Funding Agreement MTD and SBCAG

**FIRST AMENDMENT**  
**to the Funding Agreement Between the**  
**Santa Barbara County Association of Governments**  
**and the**  
**Santa Barbara Metropolitan Transit District**

**THE FUNDING AGREEMENT** made by and between the SANTA BARBARA COUNTY ASSOCIATION OF GOVERNMENTS (hereafter “SBCAG”) and the SANTA BARBARA METROPOLITAN TRANSIT DISTRICT (hereafter “MTD”), individually referred to as Party, or collectively as Parties and effective May 16, 2019, is hereby amended (First Amendment) as follows:

WHEREAS, SBCAG applied for and received \$9,009,000 under the 2018 Transit and Intercity Rail Capital Program (TIRCP) to expand Coastal Express regional transit service by purchasing electric over-the-road coaches and to make facility and infrastructure improvements to MTD-owned facilities (FACILITIES), including, that located at 5353 Overpass Road in Goleta (PROJECT) and 550 Olive Street in Santa Barbara; and

WHEREAS, the parties originally entered into the Funding Agreement for full amount of \$1.5 million in anticipation of the allocation being made by the California Transportation Commission (CTC); and

WHEREAS, in October 2018, the CTC allocated \$300,000 in funding under the SBCAG TIRCP grant that was available for making improvements to MTD-owned facilities; and

WHEREAS, in June 2020, the CTC allocated the additional \$1.2 million in funding under the SBCAG TIRCP grant making it available for improvements to MTD-owned facilities; and

WHEREAS, the California Department of Transportation requires that the Parties update the Funding Agreement after the June 2020 allocation by the CTC; and

WHEREAS, MTD has conducted a facility assessment that has identified significant and specific improvements necessary to return the 5353 Overpass Road property to a minimum level of functionality to support transit operations; and

WHEREAS, SBCAG and MTD agree that MTD will be the lead agency for any grant-funded improvements to the FACILITY that will require reimbursement from SBCAG for the costs of implementing these improvements; and

WHEREAS, MTD and SBCAG agree that MTD is best equipped to provide project management for engineering and design components and to oversee any technical studies

needed for environmental approvals and permitting for infrastructure improvements at the facilities; and

WHEREAS, the Parties may amend the Funding Agreement pursuant to Section 21.

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

**1. Exhibit D, Attachment 1, Part B. Detailed Scope adds the following:**

Terminal 2 reactivation for vehicle operations and storage.

The existing Terminal 2 facilities have not been used for about 20 years and require significant refurbishment. The following improvements are under consideration prior to operating transit vehicles out of this location.

- The entire site must be secured, including a new 8-foot tall perimeter fence for the entire facility.
- To fuel vehicles, a temporary 12,000 gallon, UL listed above-ground fuel tank with integral dispenser will be installed at a cost of about \$180,000.
- Lighting repairs/replacement and new security cameras should be installed throughout the facility to further secure the property.
- The existing building requires minor improvements to allow use of the facility for storage, restroom access, and other uses.
- Pavement repairs are required throughout the Overpass facility, in particular around existing storm drain catch basins where pavement is in poor condition.
- The existing bus wash equipment will either be replaced, or removed entirely in favor of manually washing vehicles. If the latter is the desired approach, lighting will be installed within the wash bay.
- Design and permitting costs associated with the aforementioned improvements

2. **Ratifications.** The terms and provisions set forth in First Amendment shall modify and supersede all inconsistent terms and provisions set forth in the Funding Agreement. The terms and provisions of the Funding Agreement, except as expressly modified and superseded by this First Amendment, are ratified and confirmed and shall continue in full force and effect, and shall continue to be legal, valid, binding, and enforceable obligations of the parties.

3. **Counterparts.** This First Amendment may be executed in several counterparts, all of which taken together shall constitute a single agreement between the parties.



**IN WITNESS WHEREOF**, the parties have executed this First Amendment to the Funding Agreement to be effective on the date when fully executed by both parties.

SANTA BARBARA METROPOLITAN  
TRANSIT DISTRICT:

By: \_\_\_\_\_  
Dave Davis, Chair

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

ATTEST:

By: \_\_\_\_\_  
Jerry Estrada, General Manager  
Santa Barbara Metropolitan Transit District

SANTA BARBARA COUNTY ASSOCIATION  
OF GOVERNMENTS:

By: \_\_\_\_\_  
Gregg Hart, Chair

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

ATTEST:

By: \_\_\_\_\_  
Marjie Kirn  
Executive Director SBCAG

APPROVED AS TO FORM:  
Michael C. Ghizzoni  
County Counsel

By: \_\_\_\_\_  
Deputy County Counsel



**BOARD OF DIRECTORS REPORT**

**MEETING DATE:** DECEMBER 8, 2020 **AGENDA ITEM: #11**  
**DEPARTMENT:** ADMINISTRATION  
**TYPE:** INFORMATIONAL ITEM  
**PREPARED BY:** STAFF \_\_\_\_\_  
*Signature*  
**REVIEWED BY:** GENERAL MANAGER \_\_\_\_\_  
*Signature*  
**SUBJECT:** FISCAL YEAR 2020-21 FIRST QUARTER PERFORMANCE REPORTS

**RECOMMENDATION:**

Staff will present First Quarter Fiscal Year 2020-21 Performance Reports for the three-month period ending September 30, 2020.

**ATTACHMENT:**

- First Quarter Report of Fiscal Year 2020-21



# QUARTERLY REPORT

Fiscal Year 2020-21

For the Three-Month Period Ending  
September 30, 2020



FY 2020-21 FIRST QUARTER PERFORMANCE REPORTS

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FY 2020-21 FIRST QUARTER PERFORMANCE REPORTS

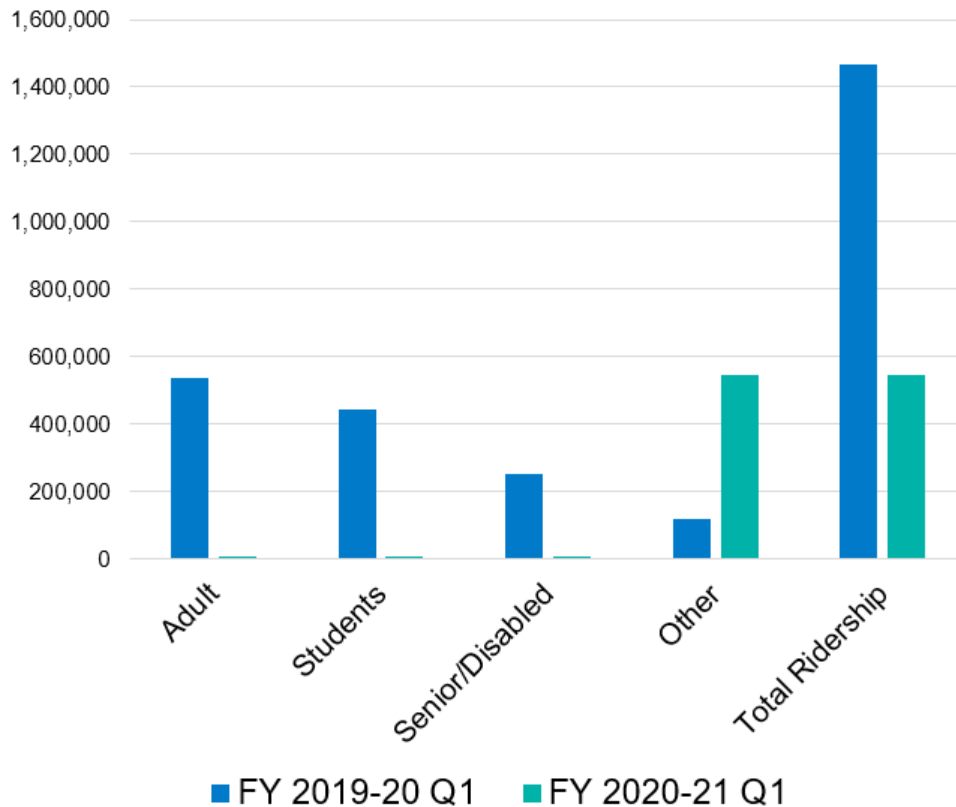
# Ridership Summary

For the Three-Month Period Ending September 30, 2020

## Ridership Performance Indicators

Systemwide ridership increased during the first quarter (July through September) of FY 2020-21 totaled 544,425 representing a 62.8% decrease of approximately 920,331 riders from the same period of FY 2019-20. The COVID-19 pandemic has had an unprecedented effect on MTD’s service and ridership. The first quarter of FY 2019-20 saw strong ridership increases over FY 2018-19, making the gulf between last year and this year even wider. No fares were collected in the 1<sup>st</sup> quarter this fiscal year. The fare category “other” below includes free rides. Which makes up the entirety of the quarter’s ridership.

### 1st Quarter Ridership by Fare Category



## FY 2020-21 FIRST QUARTER PERFORMANCE REPORTS

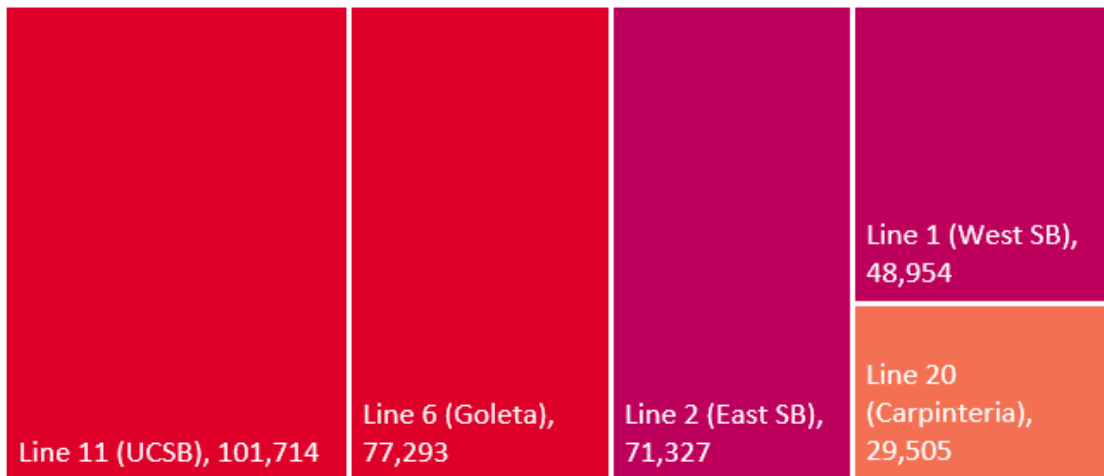
In the first quarter, revenue hours and miles were down over the same period in FY 2019-20. Several lines were suspended in this time period, due to COVID-19 service reductions. With regards to the decrease in passengers per revenue hour and passengers per mile, this can be accounted for by the combination of decreased ridership and restricted passenger capacity (15 passengers on 40' buses, 10 passengers on 30' buses).

1 <sup>st</sup> Quarter	Total Passengers	Revenue Hours	Revenue Miles	Passengers per Revenue Hour	Passengers per Mile
FY 19-20	1,464,756	55,327	657,061	26.5	2.2
FY 20-21	543,871	43,791	532,782	12.4	1

The chart below shows the top 5 lines by ridership in the first quarter of FY 20-21. The ridership on these lines (11, 6, 2, 1, and 20) composes over 50% of the quarter's total ridership.

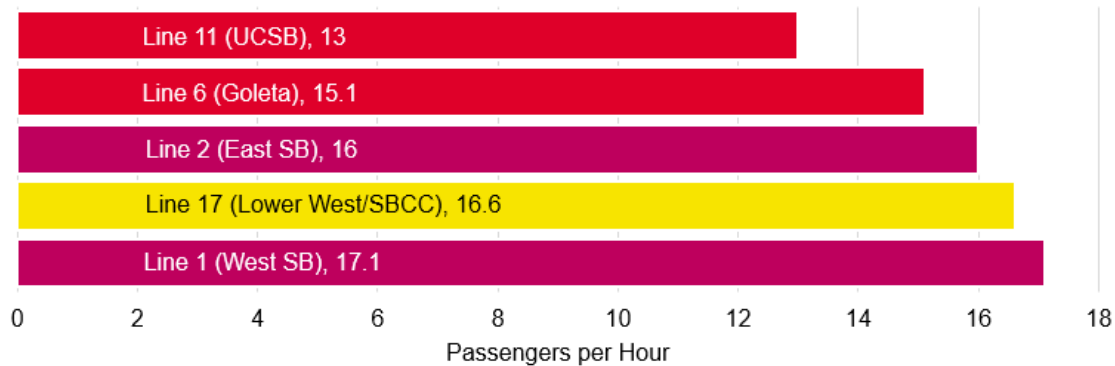
### Top 5 Lines by Ridership, 1st Quarter

- Line 11 (UCSB)
- Line 6 (Goleta)
- Line 2 (East SB)
- Line 20 (Carpinteria)
- Line 1 (West SB)





As stated above, the systemwide average of passengers per revenue hour for the quarter is down to 12.4 passengers per hour. The chart below shows the top 5 lines by passengers per hour, with the Line 1 (West Santa Barbara) coming in first with 17.1 passengers per hour, followed by Line 17 (16.6), Line 2 (16), Line 6 (15.1), and Line 11 (13).

## Top 5 Lines by Passengers per Hour



The first quarter of the year is often dominated by ridership driven by students from EF, the English language school in Santa Barbara. Due to the pandemic, there was no EF activity. Wheelchair boardings were down over last year, though only at about half the rate that ridership has declined. Remarkably, despite a 62.8% decrease in ridership, MTD buses carried 94 more bicycles in the 1<sup>st</sup> quarter of FY 2020-21 than were carried in FY 2019-20.

## Numbers At-A-Glance

				
Total Ridership	At-Capacity Loads	Too Full to Board Loads	2,758 Wheelchairs Boarded	21,870 Bicycles Carried
-62.8%	-90.6%	+204.1%	-31.5%	0.4%

### Service Days and Student Ridership

As shown in the table below, the total number of service days in the first quarter of FY 2020-21 was the same as FY 2019-20, with all service day types being the same. UCSB,

<b>FY 2020-21 FIRST QUARTER PERFORMANCE REPORTS</b>
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SBCC, and K-12 school campuses were all closed to students for the entirety of the 1<sup>st</sup> quarter. This makes for no comparison on school days.

### MTD SERVICE CALENDAR DAYS

<u>SERVICE DAYS</u>	FY 2021		FY 2020		Year to Date
	Q1	YTD	Q1	YTD	Change
Weekdays	64	64	64	64	0
Saturdays	13	13	13	13	0
Sundays	15	15	15	15	0
<b>Total</b>	<b>92</b>	<b>92</b>	<b>92</b>	<b>92</b>	<b>0</b>

<u>SCHOOL DAYS</u>	FY 2021		FY 2020		Year to Date
	Q1	YTD	Q1	YTD	Change
SBCC	0	0	47	47	(47)
UCSB	0	0	64	64	(64)
Secondary	0	0	47	47	(47)

Due to the suspension of fare collection in the first quarter, there is no way to measure or estimate UCSB and SBCC student ridership. Generally, these students tap their student ID on the farebox, logging their ridership in the appropriate student category. With all riders being marked “free” on the farebox, these demographics are not currently being captured.

### On-Time Performance Indicators

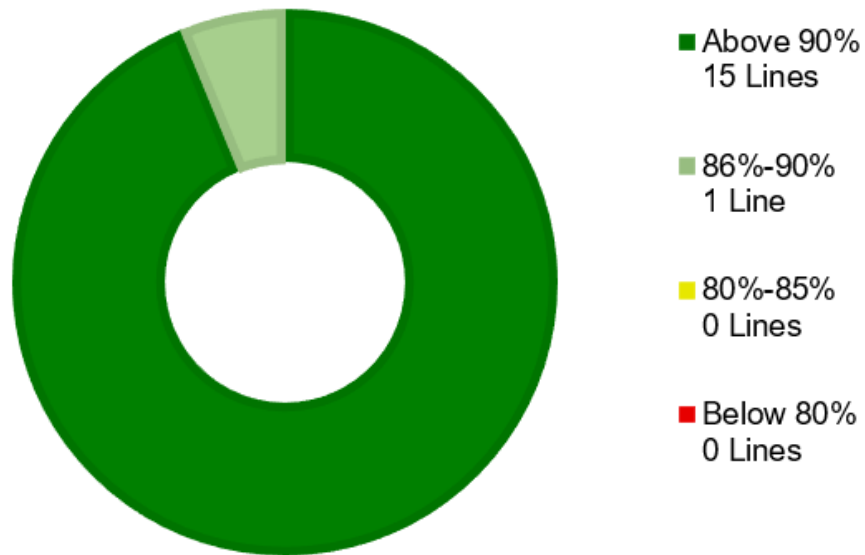
Since the acquisition and installation of the Clever Devices AVL system, Planning staff has been refining the tools used to measure on-time performance. MTD’s standard is to aim for better than 80% on-time performance. “On-time” is defined as no more than 5 minutes late and no more than 1 minute early. Timeliness is tracked at scheduled timepoints on each line. The lines included in this assessment are all of MTD’s fixed-route lines in operation during the 1<sup>st</sup> quarter of FY 2020-21.

This is the first quarter of reporting on on-time performance where not only were no lines below 80% on-time, but all were over 85%. Line 20 was the only line between 86%-90%, while all other lines had on-time performance of over 90%.

Variables that generally affect a line’s on-time performance include extended road construction projects, heavy congestion, and route detours lasting a number of days. This can vary based on time of day.

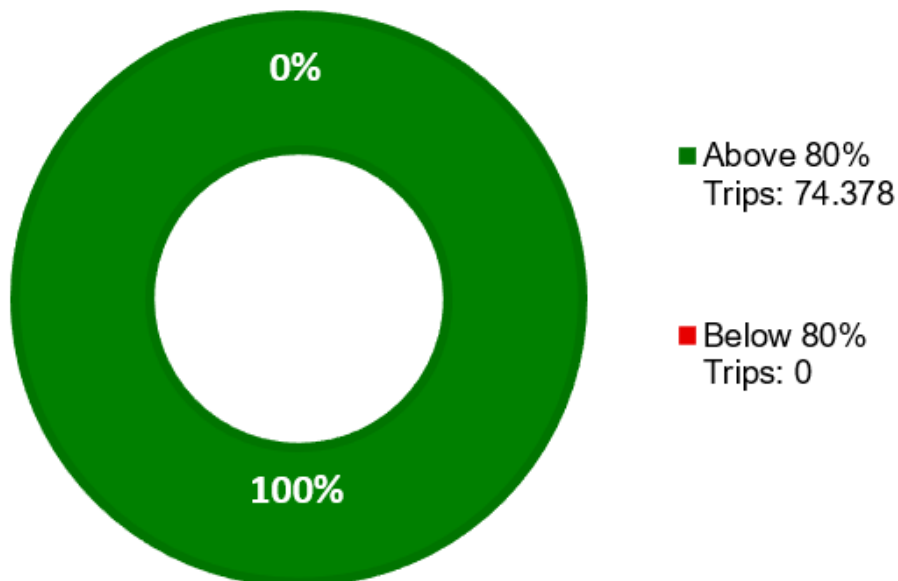


### FY 20-21 1ST QUARTER ON-TIME PERFORMANCE



When assessing the amount of service on a particular line, we can measure the number of trips that a given line takes in a quarter. The graphic below displays the amount of service provided by the lines hitting MTD's goal of 80% or higher for on-time service in the first quarter of FY 20-21.

### SYSTEMWIDE ON-TIME PERFORMANCE BY AMOUNT OF SERVICE ON LINES





## FY 2021 System Ridership Report for 1st Quarter and for the Three-Month Period Ending September 30, 2020

### Ridership by Fare Category (July 2020 – September 2020)

Fare Categories	Quarter			YTD		
	Jul 20 - Sep 20	Jul 19 - Sep 19	% Change	FY 2020 - 2021	FY2019 - 2020	% Change
General Fare	8	232,947	-100.0%	8	232,947	-100.0%
Transfers	161	121,097	-99.9%	161	121,097	-99.9%
Full Fare Prepaid <sup>1</sup>	65	299,406	-100.0%	65	299,406	-100.0%
Santa Barbara City College	69	130,763	-99.9%	69	130,763	-99.9%
Senior & Disabled Prepaid <sup>2</sup>	70	191,023	-100.0%	70	191,023	-100.0%
Shuttle	-	72,070	-100.0%	-	72,070	-100.0%
UC Santa Barbara	75	158,179	-100.0%	75	158,179	-100.0%
Youth Prepaid <sup>3</sup>	62	152,418	-100.0%	62	152,418	-100.0%
Free	543,871	30,819	1664.7%	543,871	30,819	1664.7%
Special Pass Programs	42	12,917	-99.7%	42	12,917	-99.7%
Senior Cash	1	51,297	-100.0%	1	51,297	-100.0%
Persons w ith Disabilities Cash	1	6,942	-100.0%	1	6,942	-100.0%
Tokens	-	4,878	-100.0%	-	4,878	-100.0%
<b>Total</b>	<b>544,425</b>	<b>1,464,756</b>	<b>-62.8%</b>	<b>544,425</b>	<b>1,464,756</b>	<b>-62.8%</b>

<sup>1</sup> Includes adult 10-ride and unlimited 30-day Passport use.

<sup>2</sup> Includes seniors' and persons w ith disabilities' 10-ride and unlimited 30-day Passport use.

<sup>3</sup> Includes K-12 Youth 10-ride and unlimited 30-day Passport use.

Source: MTD Passdat Program, MTD Transit Development Department, Planning Section

### Revenue Hours and Revenue Miles (July 2020 – September 2020)

Metrics	Quarter			YTD		
	Jul 20 - Sep 20	Jul 19 - Sep 19	%Change	FY 2020 - 2021	FY2019 - 2020	% Change
Passengers	544,425	1,464,756	-62.8%	544,425	1,464,756	-62.8%
Revenue Hours	43,791	55,327	-20.9%	43,791	55,327	-20.9%
Passengers per Revenue Hour	12.4	26.5	-53.0%	12.4	26.5	-53.0%
Miles	532,782	657,061	-18.9%	532,782	657,061	-18.9%
Passengers per Mile	1.0	2.2	-54.2%	1.0	2.2	-54.2%

Source: MTD Passdat Program, MTD Transit Development Department, Planning Section

## MTD System Ridership (July 2020 – September 2020)

LINE		Quarter			YTD		
		Jul 20 - Sep 20	Jul 19 - Sep 19	% Change	FY 2020 - 2021	FY2019 - 2020	% Change
1	West Santa Barbara	48,954	81,347	-39.8%	48,954	81,347	-39.8%
2	East Santa Barbara	71,327	125,370	-43.1%	71,327	125,370	-43.1%
3	Oak Park	22,299	49,593	-55.0%	22,299	49,593	-55.0%
4	Mesa / SBCC	13,956	32,760	-57.4%	13,956	32,760	-57.4%
5	Mesa / La Cumbre	14,397	32,780	-56.1%	14,397	32,780	-56.1%
6	Goleta	77,293	148,264	-47.9%	77,293	148,264	-47.9%
7	County Health / Fairview	36,864	75,577	-51.2%	36,864	75,577	-51.2%
10	Cathedral Oaks	-	4,823	-100.0%	-	4,823	-100.0%
11	UCSB	101,714	225,588	-54.9%	101,714	225,588	-54.9%
12x	Goleta Express	20,706	48,311	-57.1%	20,706	48,311	-57.1%
14	Montecito	11,851	19,525	-39.3%	11,851	19,525	-39.3%
15x	SBCC / UCSB Express	-	39,344	-100.0%	-	39,344	-100.0%
16	City College Shuttle	-	17,447	-100.0%	-	17,447	-100.0%
17	Lower West / SBCC	14,340	33,175	-56.8%	14,340	33,175	-56.8%
20	Carpinteria	59,505	97,311	-38.9%	59,505	97,311	-38.9%
23	Winchester Canyon	4,355	11,856	-63.3%	4,355	11,856	-63.3%
24x	UCSB Express	27,651	137,144	-79.8%	27,651	137,144	-79.8%
25	Elwood	7,987	18,285	-56.3%	7,987	18,285	-56.3%
27	Isla Vista Shuttle	11,226	33,077	-66.1%	11,226	33,077	-66.1%
28	UCSB Shuttle	-	58,496	-100.0%	-	58,496	-100.0%
36	Seaside Shuttle	-	18,378	-100.0%	-	18,378	-100.0%
37	Crosstown Shuttle	-	23,188	-100.0%	-	23,188	-100.0%
90	West Goleta Amtrak Shuttle	-	2,790	-100.0%	-	2,790	-100.0%
91	East Goleta Amtrak Shuttle	-	1,140	-100.0%	-	1,140	-100.0%
92	Santa Barbara Amtrak Shuttle	-	963	-100.0%	-	963	-100.0%
	Booster Services	-	41,296	-100.0%	-	41,296	-100.0%
<b>System Subtotal</b>		<b>544,425</b>	<b>1,377,828</b>	<b>-60.5%</b>	<b>544,425</b>	<b>1,377,828</b>	<b>-60.5%</b>
<i>Downtown Waterfront Shuttles</i>							
30	Downtown Shuttle	-	68,369	-100.0%	-	68,369	-100.0%
34	Waterfront Shuttle	-	18,559	-100.0%	-	18,559	-100.0%
<i>Unknown</i>							
		-			-		
<b>System Total</b>		<b>544,425</b>	<b>1,464,756</b>	<b>-62.8%</b>	<b>544,425</b>	<b>1,464,756</b>	<b>-62.8%</b>
<i>Related Routes</i>							
11, 24x, 27, 28 UCSB Lines		140,591	454,305	-69.1%	140,591	454,305	-69.1%
1, 2, 37 East/West & Crosstown		120,281	229,905	-47.7%	120,281	229,905	-47.7%
4, 5, 15x, 16, 17 Mesa Lines		42,693	155,506	-72.5%	42,693	155,506	-72.5%
6, 11 State/Hollister		179,007	373,852	-52.1%	179,007	373,852	-52.1%

Source: MTD Passdat Program, MTD Transit Development Department, Planning Section

## MTD Passengers per Revenue Hour (July 2020 – September 2020)

LINE		Quarter			YTD		
		Jul 20 - Sep 20	Jul 19 - Sep 19	% Change	FY 2020 - 2021	FY2019 - 2020	% Change
1	West Santa Barbara	17.1	28.8	-40.7%	17.1	28.8	-40.7%
2	East Santa Barbara	16.0	28.5	-43.8%	16.0	28.5	-43.8%
3	Oak Park	9.1	20.4	-55.4%	9.1	20.4	-55.4%
4	Mesa / SBCC	12.0	28.1	-57.1%	12.0	28.1	-57.1%
5	Mesa / La Cumbre	8.0	18.3	-56.3%	8.0	18.3	-56.3%
6	Goleta	15.1	28.9	-47.7%	15.1	28.9	-47.7%
7	County Health / Fairview	9.4	19.4	-51.4%	9.4	19.4	-51.4%
10	Cathedral Oaks	-	11.0	-100.0%	-	11.0	-100.0%
11	UCSB	13.0	29.0	-55.1%	13.0	29.0	-55.1%
12x	Goleta Express	11.3	26.0	-56.6%	11.3	26.0	-56.6%
14	Montecito	9.2	15.3	-39.5%	9.2	15.3	-39.5%
15x	SBCC / UCSB Express	-	25.7	-100.0%	-	25.7	-100.0%
16	City College Shuttle	-	43.6	-100.0%	-	43.6	-100.0%
17	Lower West / SBCC	16.6	39.4	-58.0%	16.6	39.4	-58.0%
20	Carpinteria	12.7	20.9	-39.5%	12.7	20.9	-39.5%
23	Winchester Canyon	7.2	19.7	-63.4%	7.2	19.7	-63.4%
24x	UCSB Express	8.8	43.7	-79.9%	8.8	43.7	-79.9%
25	Elwood	11.5	26.4	-56.5%	11.5	26.4	-56.5%
27	Isla Vista Shuttle	10.1	27.3	-63.2%	10.1	27.3	-63.2%
28	UCSB Shuttle	-	36.7	-100.0%	-	36.7	-100.0%
36	Seaside Shuttle	-	17.2	-100.0%	-	17.2	-100.0%
37	Crosstown Shuttle	-	14.8	-100.0%	-	14.8	-100.0%
90	West Goleta Amtrak Shuttle	-	82.3	-100.0%	-	82.3	-100.0%
91	East Goleta Amtrak Shuttle	-	33.6	-100.0%	-	33.6	-100.0%
92	Santa Barbara Amtrak Shuttle	-	19.3	-100.0%	-	19.3	-100.0%
	Booster Services	-	90.2	-100.0%	-	90.2	-100.0%
<b>System Subtotal</b>		<b>12.4</b>	<b>26.2</b>	<b>-52.6%</b>	<b>12.4</b>	<b>26.8</b>	<b>-54.1%</b>
<i>Downtown Waterfront Shuttles</i>							
30	Downtown Shuttle	-	21.3	-100.0%	-	21.3	-100.0%
34	Waterfront Shuttle	-	14.9	-100.0%	-	14.9	-100.0%
<i>Unknown</i>							
		-	-	0.0%	-	-	0.0%
<b>System Total</b>		<b>12.4</b>	<b>26.5</b>	<b>-53.0%</b>	<b>12.4</b>	<b>26.2</b>	<b>-53.0%</b>
<i>Related Routes</i>							
11, 24x, 27, 28 UCSB Lines		11.7	33.1	-64.8%	11.7	33.1	-64.8%
1, 2, 37 East/West & Crosstown		16.4	26.2	-37.1%	16.4	26.2	-37.1%
4, 5, 15x, 16, 17 Mesa Lines		11.2	27.1	-58.8%	11.2	27.1	-58.8%
6, 11 State/Hollister		13.9	29.0	-52.2%	13.9	29.0	-52.2%

Source: MTD Passdat Program, MTD Transit Development Department, Planning Section

**MTD “At Capacity” Loads \* (July 2020 – September 2020)**

LINE	Quarter			YTD			
	Jul 20 - Sep 20	Jul 19 - Sep 19	% Change	FY 2020 - 2021	FY2019 - 2020	% Change	
1	West Santa Barbara	4	16	-75.0%	4	16	-75.0%
2	East Santa Barbara	11	21	-47.6%	11	21	-47.6%
3	Oak Park	-	11	-100.0%	-	11	-100.0%
4	Mesa / SBCC	1	1	0.0%	1	1	0.0%
5	Mesa / La Cumbre	1	14	-92.9%	1	14	-92.9%
6	Goleta	6	46	-87.0%	6	46	-87.0%
7	County Health / Fairview	1	2	-50.0%	1	2	-50.0%
10	Cathedral Oaks	-	1	-100.0%	-	1	-100.0%
11	UCSB	13	87	-85.1%	13	87	-85.1%
12x	Goleta Express	1	17	-94.1%	1	17	-94.1%
14	Montecito	4	2	100.0%	4	2	100.0%
15x	SBCC / UCSB Express	-	36	-100.0%	-	36	-100.0%
16	City College Shuttle	-	3	-100.0%	-	3	-100.0%
17	Lower West / SBCC	1	1	0.0%	1	1	0.0%
20	Carpinteria	13	41	-68.3%	13	41	-68.3%
23	Winchester Canyon	-	2	-100.0%	-	2	-100.0%
24x	UCSB Express	-	89	-100.0%	-	89	-100.0%
25	Elwood	-	2	-100.0%	-	2	-100.0%
27	Isla Vista Shuttle	1	46	-97.8%	1	46	-97.8%
28	UCSB Shuttle	-	7	-100.0%	-	7	-100.0%
36	Seaside Shuttle	-	5	-100.0%	-	5	-100.0%
37	Crosstown Shuttle	-	2	-100.0%	-	2	-100.0%
90	West Goleta Amtrak Shuttle	-	-	0.0%	-	-	0.0%
91	East Goleta Amtrak Shuttle	-	-	0.0%	-	-	0.0%
92	Santa Barbara Amtrak Shuttle	-	-	0.0%	-	-	0.0%
	Booster Services	-	129	-100.0%	-	129	-100.0%
System Subtotal		57	581	-90.2%	57	581	-90.2%
<i>Downtown Waterfront Shuttles</i>							
30	Downtown Shuttle	-	20	-100.0%	-	20	-100.0%
34	Waterfront Shuttle	-	5	-100.0%	-	5	-100.0%
<i>Related Routes</i>							
11, 24x, 27, 28 UCSB Lines		14	229	-93.9%	14	229	-93.9%
1, 2, 37 East/West & Crosstown		15	39	-61.5%	15	39	-61.5%
4, 5, 15x, 16, 17 Mesa Lines		3	55	-94.5%	3	55	-94.5%
6, 11 State/Hollister		19	133	-85.7%	19	133	-85.7%
<i>Unknown/Miscellaneous</i>							
		-	-	0.0%	-	-	0.0%
System Total		57	606	-90.6%	57	606	-90.6%

\*Classified as a 30-foot vehicle with 10 or more standees, or a **40-foot vehicle with 20 or more**.  
Source: GFI Genfare, MTD Transit Development Department, Planning Section

**MTD "Too Full to Board" Loads \* (July 2020 – September 2020)**

LINE	Quarter			YTD			
	Jul 20 - Sep 20	Jul 19 - Sep 19	% Change	FY 2020 - 2021	FY2019 - 2020	% Change	
1	West Santa Barbara	69	1	6800.0%	69	1	6800.0%
2	East Santa Barbara	273	8	3312.5%	273	8	3312.5%
3	Oak Park	68	1	6700.0%	68	1	6700.0%
4	Mesa / SBCC	9	-	100.0%	9	-	100.0%
5	Mesa / La Cumbre	22	4	450.0%	22	4	450.0%
6	Goleta	453	15	2920.0%	453	15	2920.0%
7	County Health / Fairview	49	2	2350.0%	49	2	2350.0%
10	Cathedral Oaks	-	5	-100.0%	-	5	-100.0%
11	UCSB	557	68	719.1%	557	68	719.1%
12x	Goleta Express	22	46	-52.2%	22	46	-52.2%
14	Montecito	82	1	8100.0%	82	1	8100.0%
15x	SBCC / UCSB Express	-	47	-100.0%	-	47	-100.0%
16	City College Shuttle	-	10	-100.0%	-	10	-100.0%
17	Lower West / SBCC	11	2	450.0%	11	2	450.0%
20	Carpinteria	347	4	8575.0%	347	4	8575.0%
23	Winchester Canyon	7	-	100.0%	7	-	100.0%
24x	UCSB Express	7	228	-96.9%	7	228	-96.9%
25	Elwood	6	1	500.0%	6	1	500.0%
27	Isla Vista Shuttle	4	51	-92.2%	4	51	-92.2%
28	UCSB Shuttle	-	29	-100.0%	-	29	-100.0%
36	Seaside Shuttle	-	2	-100.0%	-	2	-100.0%
37	Crosstown Shuttle	-	-	0.0%	-	-	0.0%
90	West Goleta Amtrak Shuttle	-	-	0.0%	-	-	0.0%
91	East Goleta Amtrak Shuttle	-	-	0.0%	-	-	0.0%
92	Santa Barbara Amtrak Shuttle	-	-	0.0%	-	-	0.0%
	Booster Services	-	77	-100.0%	-	77	-100.0%
System Subtotal		1,986	602	229.9%	1,986	602	229.9%
<i>Downtown Waterfront Shuttles</i>							
30	Downtown Shuttle	-	45	-100.0%	-	45	-100.0%
34	Waterfront Shuttle	-	5	-100.0%	-	5	-100.0%
<i>Related Routes</i>							
11, 24x, 27, 28 UCSB Lines		568	376	51.1%	568	376	51.1%
1, 2, 37 East/West & Crosstown		342	9	3700.0%	342	9	3700.0%
4, 5, 15x, 16, 17 Mesa Lines		42	63	-33.3%	42	63	-33.3%
6, 11 State/Hollister		1,010	83	1116.9%	1,010	83	1116.9%
<i>Unknown/Miscellaneous</i>							
		-	1	-100.0%	-	1	-100.0%
System Total		1,986	653	204.1%	1,986	653	204.1%

\* Indicates that passengers were refused service because a vehicle was too full to safely board.  
Source: GFI Genfare, MTD Transit Development Department, Planning Section

## MTD Bicycles Carried (July 2020 – September 2020)

LINE		Quarter			YTD		
		Jul 20 - Sep 20	Jul 19 - Sep 19	% Change	FY 2020 - 2021	FY2019 - 2020	% Change
1	West Santa Barbara	640	588	8.8%	640	588	8.8%
2	East Santa Barbara	1,513	1,321	14.5%	1,513	1,321	14.5%
3	Oak Park	223	325	-31.4%	223	325	-31.4%
4	Mesa / SBCC	393	315	24.8%	393	315	24.8%
5	Mesa / La Cumbre	587	593	-1.0%	587	593	-1.0%
6	Goleta	3,797	3,228	17.6%	3,797	3,228	17.6%
7	County Health / Fairview	1,547	1,600	-3.3%	1,547	1,600	-3.3%
10	Cathedral Oaks	-	149	-100.0%	-	149	-100.0%
11	UCSB	5,186	4,480	15.8%	5,186	4,480	15.8%
12x	Goleta Express	1,638	1,585	3.3%	1,638	1,585	3.3%
14	Montecito	420	291	44.3%	420	291	44.3%
15x	SBCC / UCSB Express	-	633	-100.0%	-	633	-100.0%
16	City College Shuttle	-	148	-100.0%	-	148	-100.0%
17	Low er West / SBCC	245	276	-11.2%	245	276	-11.2%
20	Carpinteria	2,586	2,244	15.2%	2,586	2,244	15.2%
23	Winchester Canyon	185	171	8.2%	185	171	8.2%
24x	UCSB Express	2,400	2,593	-7.4%	2,400	2,593	-7.4%
25	Elw ood	364	385	-5.5%	364	385	-5.5%
27	Isla Vista Shuttle	144	282	-48.9%	144	282	-48.9%
28	UCSB Shuttle	-	511	-100.0%	-	511	-100.0%
36	Seaside Shuttle	-	2	-100.0%	-	2	-100.0%
37	Crosstow n Shuttle	-	2	-100.0%	-	2	-100.0%
90	West Goleta Amtrak Shuttle	-	2	-100.0%	-	2	-100.0%
91	East Goleta Amtrak Shuttle	-	3	-100.0%	-	3	-100.0%
92	Santa Barbara Amtrak Shuttle	-	-	0.0%	-	-	0.0%
	Booster Services	-	47	-100.0%	-	47	-100.0%
System Subtotal		21,868	21,774	0.4%	21,868	21,774	0.4%
<i>Downtown Waterfront Shuttles</i>							
30	Dow ntown Shuttle	-	-	0.0%	-	-	0.0%
34	Waterfront Shuttle	-	-	0.0%	-	-	0.0%
<i>Related Routes</i>							
11, 24x, 27, 28 UCSB Lines		7,730	7,866	-1.7%	7,730	7,866	-1.7%
1, 2, 37 East/West & Crosstow n		2,153	1,911	12.7%	2,153	1,911	12.7%
4, 5, 15x, 16, 17 Mesa Lines		1,225	1,965	-37.7%	1,225	1,965	-37.7%
6, 11 State/Hollister		8,983	7,708	16.5%	8,983	7,708	16.5%
<i>Unknown/Miscellaneous</i>							
		2	-	100.0%	2	-	100.0%
System Total		21,870	21,774	0.4%	21,870	21,774	0.4%

<sup>1</sup> MTD electric shuttles cannot carry bicycles.

Source: GFI Genfare, MTD Transit Development Department, Planning Section

## MTD Wheelchairs Boarded (July 2020 – September 2020)

LINE	Quarter			YTD		
	Jul 20 - Sep 20	Jul 19 - Sep 19	% Change	FY 2020 - 2021	FY2019 - 2020	% Change
1 West Santa Barbara	282	434	-35.0%	282	434	-35.0%
2 East Santa Barbara	600	393	52.7%	600	393	52.7%
3 Oak Park	118	207	-43.0%	118	207	-43.0%
4 Mesa / SBCC	37	63	-41.3%	37	63	-41.3%
5 Mesa / La Cumbre	34	220	-84.5%	34	220	-84.5%
6 Goleta	332	425	-21.9%	332	425	-21.9%
7 County Health / Fairview	328	508	-35.4%	328	508	-35.4%
10 Cathedral Oaks	-	11	-100.0%	-	11	-100.0%
11 UCSB	418	535	-21.9%	418	535	-21.9%
12x Goleta Express	105	156	-32.7%	105	156	-32.7%
14 Montecito	43	30	43.3%	43	30	43.3%
15x SBCC / UCSB Express	-	1	-100.0%	-	1	-100.0%
16 City College Shuttle	-	96	-100.0%	-	96	-100.0%
17 Lower West / SBCC	14	58	-75.9%	14	58	-75.9%
20 Carpinteria	353	406	-13.1%	353	406	-13.1%
23 Winchester Canyon	1	11	-90.9%	1	11	-90.9%
24x UCSB Express	70	125	-44.0%	70	125	-44.0%
25 Elwood	13	29	-55.2%	13	29	-55.2%
27 Isla Vista Shuttle	10	3	233.3%	10	3	233.3%
28 UCSB Shuttle	-	10	-100.0%	-	10	-100.0%
36 Seaside Shuttle	-	3	-100.0%	-	3	-100.0%
37 Crosstown Shuttle	-	40	-100.0%	-	40	-100.0%
90 West Goleta Amtrak Shuttle	-	-	0.0%	-	-	0.0%
91 East Goleta Amtrak Shuttle	-	-	0.0%	-	-	0.0%
92 Santa Barbara Amtrak Shuttle	-	-	0.0%	-	-	0.0%
Booster Services	-	1	-100.0%	-	1	-100.0%
<b>System Subtotal</b>	<b>2,758</b>	<b>3,765</b>	<b>-26.7%</b>	<b>2,758</b>	<b>3,765</b>	<b>-26.7%</b>
<i>Downtown Waterfront Shuttles</i>						
30 Downtown Shuttle	-	220	-100.0%	-	220	-100.0%
34 Waterfront Shuttle	-	44	-100.0%	-	44	-100.0%
<i>Related Routes</i>						
11, 24x, 27, 28 UCSB Lines	498	673	-26.0%	498	673	-26.0%
1, 2, 37 East/West & Crosstown	882	867	1.7%	882	867	1.7%
4, 5, 15x, 16, 17 Mesa Lines	85	438	-80.6%	85	438	-80.6%
6, 11 State/Hollister	750	960	-21.9%	750	960	-21.9%
<i>Unknown/Miscellaneous</i>						
	-	-	0.0%	-	-	0
<b>System Total</b>	<b>2,758</b>	<b>4,029</b>	<b>-31.5%</b>	<b>2,758</b>	<b>4,029</b>	<b>-31.5%</b>

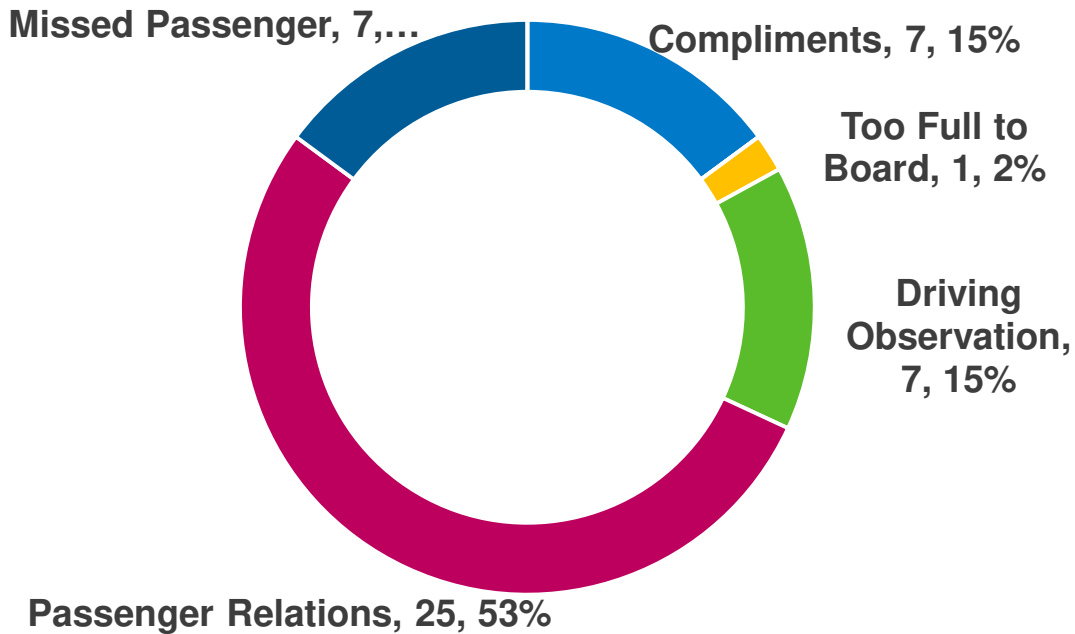
Source: GFI Genfare, MTD Transit Development Department, Planning Section



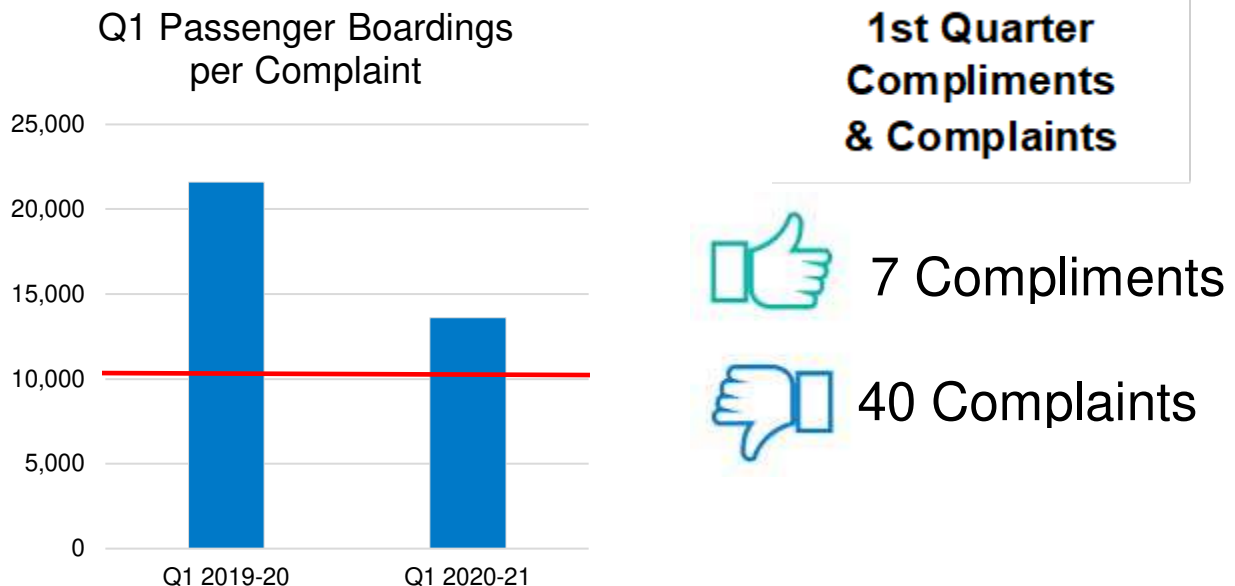
FY 2020-21 FIRST QUARTER PERFORMANCE REPORTS

## Customer Service Report

For the Three-Month Period Ending September 30, 2020



**MTD Performance Standard:** Passenger complaints shall average no more than 1 complaint per 10,000 MTD passenger boardings.



**Compliments:** Documented praise of MTD Employee's action; **On-Time Performance:** Complaints about buses running late; **Too Full to Board:** Complaints from passengers that could not board the bus; **Driving Observations:** Concerns regarding driving safety; **Passenger Relations:** Perceived negative treatment of passengers by an MTD Employee; **Missed Passengers:** Complaints that passengers were passed up at MTD authorized stops; **Missed Stop:** Complaint from passenger on board a bus where the driver did not stop at requested stop.



FY 2020-21 FIRST QUARTER PERFORMANCE REPORTS

## Fleet Maintenance Report

For the Three-Month Period Ending September 30, 2020

Fleet	FY 2021 Q1 Totals						FY 2020 Q1 Totals						Change	
	Miles	MPG	Fuel/Oil	Parts	Labor	Total Cost per Mile	Miles	MPG	Fuel/Oil	Parts	Labor	Total Cost per Mile	Total Cost per Mile	
Gillig 40'	463,297	4.77	234,988	109,040	85,472	\$0.93	518,488	4.59	289,959	114,733	85,775	\$0.95	-\$0.02	-2.0%
Gillig 29'	51,061	5.05	24,258	35,058	17,430	\$1.50	62,112	4.88	32,136	36,135	11,738	\$1.29	\$0.21	16.7%
Nova Articulated	209	0.84	745	1,695	2,305	\$22.70	39,785	4.62	21,680	9,768	3,660	\$0.88	\$21.82	2472.7%
<b>Diesel Fleet:</b>	<u>514,567</u>	<u>3.55</u>	<u>\$259,991</u>	<u>\$145,793</u>	<u>\$105,207</u>	<u>\$0.99</u>	<u>620,385</u>	<u>4.70</u>	<u>\$343,775</u>	<u>\$160,636</u>	<u>\$101,173</u>	<u>\$0.98</u>	<u>\$0.02</u>	<u>1.7%</u>
Fleet	Miles	MPG	Fuel/Oil	Parts	Labor	Total Cost per Mile	Miles	MPG	Fuel/Oil	Parts	Labor	Total Cost per Mile	Total Cost per Mile	
Gillig 29' Hybrid	18,645	4.73	9,214	2,190	5,171	\$0.89	16,314	4.54	9,186	1,435	3,084	\$0.84	\$0.05	5.8%
Gillig 40' Hybrid	69,042	5.01	32,965	54,550	19,572	\$1.55	66,759	4.62	36,428	45,008	20,101	\$1.52	\$0.03	2.0%
<b>Hybrid Fleet:</b>	<u>87,687</u>	<u>4.87</u>	<u>\$42,179</u>	<u>\$56,740</u>	<u>\$24,743</u>	<u>\$1.41</u>	<u>83,073</u>	<u>4.58</u>	<u>\$45,614</u>	<u>\$46,443</u>	<u>\$23,185</u>	<u>\$1.39</u>	<u>\$0.02</u>	<u>1.7%</u>
Fleet	Miles	MPKW	Elec Cost	Parts	Labor	Total Cost per Mile	Miles	MPKW	Elec Cost	Parts	Labor	Total Cost per Mile	Total Cost per Mile	
Ebus EV's	FLEET RETIRED - NO DATA						10,538	0.67	5,671	2,981	4,255	\$1.22	\$1.22	N/A
BYD EV's	4,027	0.39	3,714	360	4,186	\$2.05	42,445	0.68	22,533	756	4,652	\$0.66	\$1.39	211.6%
<b>Electric Fleet:</b>	<u>4,027</u>	<u>0.39</u>	<u>\$3,714</u>	<u>\$360</u>	<u>\$4,186</u>	<u>\$2.05</u>	<u>52,983</u>	<u>0.67</u>	<u>\$28,204</u>	<u>\$3,737</u>	<u>\$8,907</u>	<u>\$0.77</u>	<u>\$1.28</u>	<u>166.1%</u>
<b>Totals:</b>	<u>606,281</u>		<u>\$305,884</u>	<u>\$202,893</u>	<u>\$134,136</u>	<u>\$1.06</u>	<u>756,441</u>		<u>\$417,592</u>	<u>\$210,816</u>	<u>\$133,265</u>	<u>\$1.01</u>	<u>\$0.05</u>	<u>5.3%</u>



FY 2020-21 FIRST QUARTER PERFORMANCE REPORTS

## Road Calls Report

**FY 2021 National Transit Database Road Calls ("Mechanical System Failures")  
For the Three-Month Period Ending September 30, 2020**

Fleet Category	All Reportable Mechanical System Failures	Fiscal YTD Miles	Miles Between All Reportable Mechanical System Failures
Electric Vehicles (BYD's 30-43)	4	4,027	1,007
400 Gillig's (Units 434-450)	10	91,688	9,169
600 Gillig's (Units 600-652)	29	371,609	12,814
700 Gillig's (Units 700-713)	8	51,061	6,383
700 Gillig Hybrid's (Units 715-717)	7	18,645	2,664
900 Gillig Hybrid's (Units 900-915)	11	69,042	6,277
1000 Nova's (Units 1001-1003)	0	209	
<b>System Total Excluding EV's</b>	<b>65</b>	<b>602,254</b>	<b>9,265</b>
<b>System Total All Vehicles</b>	<b>69</b>	<b>606,281</b>	<b>8,787</b>



<b>FY 2020-21 FIRST QUARTER PERFORMANCE REPORTS</b>
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## Liability Report

**Reportable to National Transit Database  
For the Three-Month Period Ending September 30, 2020**

Fiscal Year End June 30	2021	2020	20169	2018	2017
1st Quarter: July - September	0	1	0	1	1
Fiscal Year to Date:	0	1	0	1	1

The NTD defines a Reportable Event (Major Incident) as a safety or security event occurring on transit right-of-way, in a transit revenue facility, in a transit maintenance facility, or involving a transit revenue vehicle meeting the following criteria:

- An evacuation for life safety reasons
- Estimated property damage equal to or exceeding \$25,000
- Fatality confirmed within 30 days
- Immediate transport away from the scene for medical attention, except illnesses requiring transport for medical attention
- Collisions involving transit vehicles that require towing away of a transit roadway vehicle or other non-transit roadway vehicle

## Workers' Compensation Claims Report

Fiscal Year End June 30	2021	2020	2019	2018	2017
1st Quarter: July - September	0	0	4	3	4
Fiscal Year to Date:	0	0	4	3	4



FY 2020-21 FIRST QUARTER PERFORMANCE REPORTS

## Transit Finance Compliance Report

For the Three-Month Period Ending September 30, 2020

As a recipient of Federal funds from the Federal Transit Administration (FTA), the Santa Barbara Metropolitan Transit District (MTD) is subject to a number of rules and regulations. This report describes actions taken between July 1 and September 30, 2020, to address these requirements.

### MTD Compliance Actions

Submitted MTD monthly National Transit Database Safety and Security reports to FTA, as required.

Submitted MTD monthly National Transit Database Ridership reports to FTA, as required.

Submitted quarterly Milestone Progress Reports and Federal Financial Reports for MTD's FTA grants.

Submitted final report to the California Department of Transportation (Caltrans) for MTD's last open grant funded by Proposition 1B - Public Transportation Modernization, Improvement, and Service Enhancement Account (PTMISEA).

Submitted Corrective Action Report to Caltrans for MTD's FY 2018-19 Low Carbon Transit Operations Program (LCTOP) grant to roll the funds into the FY 2019-20 project.

Continued to monitor all FTA compliance areas and ensure that MTD is in compliance, including the Americans with Disabilities Act (ADA) complementary paratransit service that is operated by Easy Lift Transportation for MTD. *(MTD is responsible for this service, and must ensure that it complies with all FTA requirements.)*

**OLIVIA RODRIGUEZ**  
BOARD DIRECTOR

**DICK WEINBERG**  
BOARD DIRECTOR

**BILL SHELOR**  
SECRETARY

**DAVE DAVIS**  
CHAIR

**DAVE TABOR**  
VICE CHAIR

**CHUCK MCQUARY**  
BOARD DIRECTOR

**PAULA PEROTTE**  
BOARD DIRECTOR

**JERRY ESTRADA**  
GENERAL MANAGER

**CHRISTINA PERRY**  
ADMINISTRATIVE ASSISTANT  
(CLERK OF THE BOARD)

**RENEE KEEFOVER**  
ADMINISTRATIVE ASSISTANT

**BRAD DAVIS**  
DIRECTOR OF FINANCE &  
ADMINISTRATION  
\*AGM - PROCUREMENT OFFICER

**THAIS SAYAT**  
FINANCE MANAGER

**CHERIE ALVAREZ**  
ASSISTANT  
FINANCE MANAGER

**DIANA FLORES**  
ACCOUNTING ASSISTANT

**VACANT**  
ACCOUNTING ASSISTANT

**TOM SHELDON**  
IT MANAGER

**PABLO ZUNIGA**  
IT SUPPORT TECHNICIAN

**VALERIE WHITE**  
PURCHASING  
AGENT

**JUAN PEREZ**  
FARE REVENUE COLLECTION  
TECHNICIAN - LEAD

**JOSH MARTINEZ**  
FARE REVENUE COLLECTION  
TECHNICIAN

**NOLAN ROBERTSON**  
FLEET & FACILITIES MANAGER

**MIKE CARDONA**  
SUPERINTENDENT  
OF MAINTENANCE

**RODGER STEVENS**  
FLEET MAINTENANCE  
SUPERVISOR

**MECHANICS - 13**  
**UTILITY - 13**

**STEVE HAHN**  
ASSISTANT SUPERINTENDENT  
OF MAINTENANCE

**JOHN HERRERA**  
PARTS CLERK

**DAVID MYERS**  
MAINTENANCE DATA  
ANALYST

**FRANK REYNOSO**  
FACILITIES SPECIALIST

**HILLARY BLACKERBY**  
PLANNING & MARKETING  
MANAGER

**MARK CLYDE**  
TRANSIT PLANNER

**JENNIFER TANNER**  
ROUTE SCHEDULER

**BOB OLIVERA**  
BUS STOP MAINTENANCE  
SPECIALIST

**TONY MENDIBLES**  
PLANNING & MARKETING  
COORDINATOR

**LILLY GOMEZ**  
MARKETING & COMMUNITY  
RELATIONS COORDINATOR

**JOSE BAUTISTA**  
PT - ADVERTISING INSTALLER

**CUSTOMER SERVICE  
REPRESENTATIVES**

**RYAN GRIPP**  
CAPITAL PROJECTS MANAGER

**STEVE MAAS**  
GRANTS & COMPLIANCE  
MANAGER  
\*DBELO OFFICER

**BILL MORRIS**  
OPERATIONS MANAGER

**DAVE MORSE**  
SUPERINTENDENT  
OF OPERATIONS

**MANNY CASTANON**  
SAFETY & TRAINING  
ADMINISTRATOR

**OPERATIONS  
SUPERVISORS - 13**  
**DRIVERS - 150**

**MARY GREGG**  
DIRECTOR OF HUMAN  
RESOURCES & RISK  
\*CHIEF SAFETY & EEO OFFICER

**VACANT**  
HR MANAGER

**RAFAEL CORTEZ**  
RISK ADMINISTRATOR

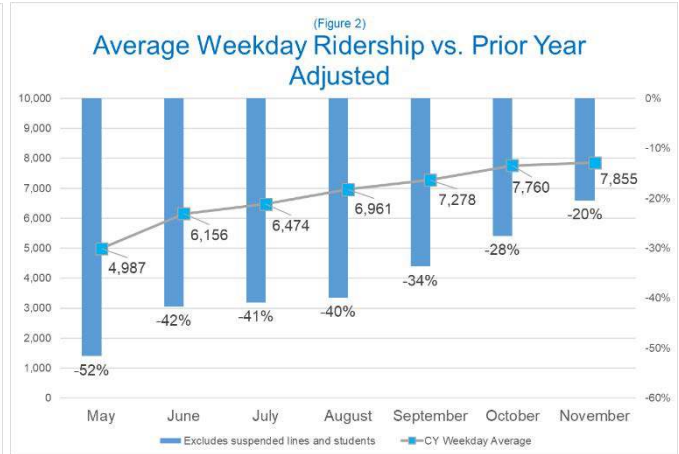
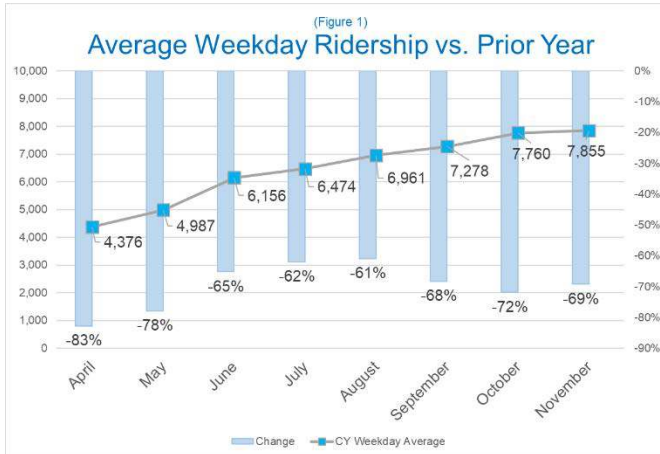
**LYNROSE PARAS-DIMA-  
LANTA**  
HR SPECIALIST

# SANTA BARBARA MTD ORGANIZATIONAL CHART

\*Designated Roles Report directly  
to General Manager

Updated: 05/05/2020

To: MTD Board of Directors  
 From: Jerry Estrada, General Manager  
 Date: December 8, 2020  
 Subject: General Manager's Report



The average weekday ridership figure increased slightly from October (7,760) to November (7,855). During the first few weeks of November, ridership continued to increase at a rate similar to previous months but slowed considerably in the latter half of the month. We believe this was due in large part to the fact that Santa Barbara County regressed to the purple Covid-19 tier toward the end of the month. Additionally, ridership typically decreases around holidays such as Thanksgiving.

Figure 1 above illustrates an improvement from a 72% reduction in the average weekday ridership for October to a 69% decrease in November versus prior year results. Figure 2, which adjusts prior year ridership statistics to reflect the suspension of routes and lack of on campus instruction for our local schools, indicates an improvement from 28% to 20% reduction in average daily ridership.

Manny Castanon, our Safety and Training Administrator, is attending a weeklong training/certification program in the Sacramento area, to allow our agency to become authorized in the California DMV Employer Testing Program (ETP). This program authorizes qualified commercial employers to administer the drive test portion of DMV's commercial driver license requirements for commercial driver licenses (CDLs). We used to be a part of this program some years ago; when the DMV changed the number of testing thresholds that had to be maintained, we opted out of the program. Criteria has changed, so we are seeking reentry.

Staff received the Pre-Award Buy America Audit Report from MTD's third-party auditor indicating that New Flyer is in compliance with the Federal Transit Administration's Buy America requirements. The foregoing allows MTD to issue a purchase order for the four forty foot electric buses.

Staff submitted MTD's California Energy Commission Blueprints for Medium- and Heavy-Duty Zero-Emission Vehicle Infrastructure (GFO-20-601) grant application on November 12. It is anticipated that proposed awards will be announced sometime this month.

A new bid began on November 30, 2020 and is scheduled to extend to February 28, 2021. Planning and Marketing Manager Hillary Blackerby was asked to serve on Santa Barbara Unified School District's Superintendent's Re-Entry Advisory Task Force and has been participating in meetings. With COVID-19 numbers on the rise locally and across the country, plans to return secondary students to campuses are uncertain at this time. MTD is working closely with SBUSD, UCSB, and SBCC to prepare for different scenarios should campuses re-open.

Staff listened in on American Public Transportation Association (APTA) webinar "Safety Spotlight Monthly Webinar Series" on November 19 for information regarding certification of MTD's Public Transportation Agency Safety Plan (PTASP), as required by the Federal Transit Administration.

FTA has originally scheduled MTD's Triennial Review (TR) for spring 2020. FTA postponed the TR due to the pandemic, and has now rescheduled the TR for spring 2021. MTD's reviewer has requested additional information, due by December 18. Staff is preparing the requested information for submittal.

Revision 1 to MTD's FY 2020 National Transit Database (NTD) Annual Report has been submitted to FTA. The Revision addressed various questions asked by the NTD analyst. It is typical for the NTD Annual Report to go through two or three cycles before "closeout" by FTA.

Earlier this year, I was invited to participate on a front-end Advisory Panel for California Integrated Travel Project (Cal-ITP) to improve the current mobility system by engaging in an initiative to facilitate easy and accessible travel planning and payment across California. MTD has been offered the opportunity to participate in a pilot project testing a contactless payment solution on-board MTD services. Project details are still being worked out but MTD will likely test the contactless payment system on the Lines 12x and 24x during the first half of 2021. Additionally, Planning and Marketing Manager Hillary Blackerby has been participating in other aspects of the project. She is a member of a peer-working group on a variety of transit technology solutions related to trip and operational data.