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| <b>BOARD OF DIRECTORS AGENDA</b> |
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**REGULAR MEETING**  
of the  
**BOARD OF DIRECTORS**  
of the  
**SANTA BARBARA METROPOLITAN TRANSIT DISTRICT**  
A Public Agency  
**Tuesday, April 18, 2023**  
**8:30 AM**  
**John G. Britton Auditorium**  
550 Olive Street, Santa Barbara, CA 93101

1. **CALL TO ORDER**
2. **ROLL CALL OF THE BOARD MEMBERS**  
Dave Davis (Chair), David Tabor (Vice Chair), Jen Lemberger (Secretary), Paula Perotte (Director), Arjun Sarkar (Director), Alberto Lapuz (Director), Monica Solorzano (Director).
3. **REPORT REGARDING THE POSTING OF THE 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 March 21, 2023.
5. **CASH REPORTS - (ACTION MAY BE TAKEN)**  
The Board of Directors will be asked to review and approve the Cash Reports from March 11, 2023 through March 24, 2023 and March 25, 2023 through April 7, 2023.

**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, please complete and deliver to the MTD Board Clerk a "Request to Speak" form that includes both a description of the subject you wish to address and, if applicable, the agenda item number for which you would like to comment. Additional public comment will be allowed during each agenda item, including closed session items. Forms are available at [www.sbmtd.gov](http://www.sbmtd.gov) and at MTD Administrative offices.

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| <b>BOARD OF DIRECTORS AGENDA</b> |
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**7. PROCUREMENT PROTEST- 3 POSITION TRANSIT BICYCLE RACKS – (ACTION MAY BE TAKEN – ATTACHMENTS)**

Staff is requesting that the MTD Board of Directors reject the Protest of the contract award to Midwest Bus Corporation and their Byk-Rak brand for three-position transit bike racks, which shall be considered final in accordance with the MTD Procurement Manual.

**8. ZERO-EMISSION BUS ROLLOUT PLAN – (ACTION MAY BE TAKEN – ATTACHMENT)**

Staff recommends that the Board adopt the Resolution 2023-05 approving the attached Zero-Emission Bus (ZEB) Rollout Plan, as required by the Innovative Clean Transit (ICT) regulation of the California Air Resources Board (CARB).

**9. GENERAL MANAGER'S REPORT– (INFORMATIONAL)**

The General Manager will report on any updates to district activities.

**10. OTHER BUSINESS AND REPORTS – (INFORMATIONAL)**

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

**11. 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.



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| <b>BOARD OF DIRECTORS DRAFT MINUTES</b> |
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**REGULAR MEETING**  
of the  
**BOARD OF DIRECTORS**  
of the  
**SANTA BARBARA METROPOLITAN TRANSIT DISTRICT**  
A Public Agency  
**Tuesday, March 21, 2023**  
**8:30 AM**  
**John G. Britton Auditorium**  
550 Olive Street, Santa Barbara, CA 93101

1. **CALL TO ORDER**  
Vice Chair Tabor called the meeting to order at 8:30 AM.
2. **ROLL CALL OF THE BOARD MEMBERS**  
Vice Chair Tabor reported that all members were present with the exception of Director Solorzano, Director Perotte, and Chair Davis.
3. **REPORT REGARDING POSTING OF AGENDA**  
Evelyn Orozco, Human Resources Assistant reported that the agenda was posted on Friday, March 17, 2023 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 - (ATTACHMENT - ACTION MAY BE TAKEN)**  
The Board of Directors was asked to approve the draft minutes for the meeting of March 7, 2023.
5. **CASH REPORT - (ATTACHMENT - ACTION MAY BE TAKEN)**  
The Board of Directors was asked to review and approve the Cash Report from February 25, 2023 through March 10, 2023.

Secretary Lemberger moved to approve the consent calendar. Director Lapuz seconded the motion. Vice Chair Tabor held a roll call vote and the consent calendar was approved unanimously with three absent.

**THIS CONCLUDES THE CONSENT CALENDAR**

6. **PUBLIC COMMENT**  
No public comments were made.
7. **DRAFT SERVICE FOR FY- 2023-24– (INFORMATIONAL)**  
On behalf of Hillary Blackerby, Planning and Marketing Manager – General Manager Estrada presented proposed service changes for August 2023.

**8. RESOLUTION FOR FISCAL YEAR 2023-24 TRANSPORTATION DEVELOPMENT ACT CLAIM - (ACTION MAY BE TAKEN)**

On behalf of Thais Hernandez-Sayat, Finance Manager -- General Manager Estrada requested the Board adopt Resolution 2023-03 authorizing him to claim the Transportation Development Act (TDA) funds apportioned to Santa Barbara Metropolitan Transit District for FY 2023-24.

Director Sarkar moved to approval the resolution. Director Lapuz seconded the motion. Vice Chair Tabor held a roll call vote. The motion was approved unanimously with three absent.

**9. COMMERCIAL AUTO AND GENERAL LIABILITY INSURANCE RENEWAL – (ACTION MAY BE TAKEN)**

Mieko Gray, Human Resources and Risk Manager recommended renewal of the additional \$5,000,000 Commercial Auto and General Liability Insurance coverage with National Interstate Insurance Company (NIIC) effective April 1, 2023 – April 1, 2024.

Secretary Lemberger moved to approve the renewal. Director Lapuz seconded the motion. Vice Chair Tabor held a roll call vote. The motion was approved unanimously with three absent.

**10. LOW CARBON TRANSIT OPERATIONS PROGRAM RESOLUTION (ACTION MAY BE TAKEN –ATTACHMENT)**

Steve Maas, Grants and Compliance Manager recommended that the Board adopt the Resolution 2023-04 authorizing General Manager Estrada to execute all required documents for an application to the California Department of Transportation (Caltrans) for FY 2023 California cap-and-trade funds from the Low Carbon Transit Operations Program (LCTOP).

Director Lapuz moved to approve the adoption of resolution. Director Sarkar seconded the motion. The motion was approved unanimously with three absent.

**11. OTHER BUSINESSES AND REPORTS – (INFORMATIONAL)**

No other business was discussed.

**12. ADJOURNMENT**

The meeting was adjourned at 9:05 AM.

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**Santa Barbara Metropolitan Transit District**  
**Cash Report**  
**Board Meeting of April 4, 2023**  
**For the Period March 11, 2023 through March 24, 2023**

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**MONEY MARKET**

**Beginning Balance March 11, 2023** **\$5,431,758.41**

|                       |                   |
|-----------------------|-------------------|
| Passenger Fares       | 90,872.18         |
| Accounts Receivable   | 16,404.40         |
| Prepays & Advertising | 1,630.00          |
| Miscellaneous Income  | 121.78            |
| <b>Total Deposits</b> | <b>109,028.36</b> |

|                            |                       |
|----------------------------|-----------------------|
| Miscellaneous Transfers    | (1,326.43)            |
| 401(k)/Pension Transfer    | (34,113.64)           |
| Workers' Compensation      | (76,240.40)           |
| Payroll Taxes              | (160,887.36)          |
| Payroll                    | (370,064.26)          |
| Accounts Payable           | (1,100,267.35)        |
| <b>Total Disbursements</b> | <b>(1,742,899.44)</b> |

**Ending Balance** **\$3,797,887.33**

**CASH INVESTMENTS**

|                      |                |
|----------------------|----------------|
| LAIF Account         | \$5,953,733.70 |
| Money Market Account | 3,797,887.33   |

**Total Cash Balance** **\$9,751,621.03**

**SELF INSURED LIABILITY ACCOUNTS**

|                         |                  |
|-------------------------|------------------|
| WC / Liability Reserves | (\$4,473,892.04) |
|-------------------------|------------------|

**Working Capital** **\$5,277,728.99**

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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>      |
|---|----------------------------|----------------------|--------------------|
| 3/15/2023   | Mental Wellness Center     | Advertising on Buses | 532.00             |
| 3/21/2023   | City of SB Creeks Division | Advertising on Buses | 300.00             |
| 3/21/2023   | Moonlight Graphics/Mktg    | Advertising on Buses | 5,364.00           |
| 3/24/2023   | SB School District         | Passes/Token Sales   | 8,250.00           |
| 3/24/2023   | Wells Marketing, LLC       | Advertising on Buses | 1,958.40           |
| <b>Total Accounts Receivable Paid During Period</b> |                            |                      | <b>\$16,404.40</b> |

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**Santa Barbara Metropolitan Transit District**  
**Accounts Payable**

| Check # | Date      | Company                       | Description                   | Amount     | Voids |
|---------|-----------|-------------------------------|-------------------------------|------------|-------|
| 131691  | 3/2/2023  | MIEKO GRAY                    | PER DIEM                      | 265.50     | V     |
| 131811  | 3/16/2023 | ABC BUS COMPANIES INC         | BUS PARTS                     | 1,655.75   |       |
| 131812  | 3/16/2023 | ADVANCED CABLE SYSTEMS COR    | EV CHARGER DATA NETWORK       | 180.00     |       |
| 131813  | 3/16/2023 | ASBURY ENVIRONMENTAL SERVI    | WASTE OIL RECYCLER            | 235.00     |       |
| 131814  | 3/16/2023 | BYD COACH & BUS LLC           | BUS PARTS                     | 683.34     |       |
| 131815  | 3/16/2023 | BYD MOTORS LLC                | CAPITAL LEASE PAYMENT         | 31,625.22  |       |
| 131816  | 3/16/2023 | CALIFORNIA ELECTRIC SUPPLY, I | SHOP/B&G SUPPLIES             | 52.20      |       |
| 131817  | 3/16/2023 | CITY OF CARPINTERIA           | CHARGING STATION ELECTRICITY  | 9.32       |       |
| 131818  | 3/16/2023 | CENTRAL COAST CIRCULATION, L  | BUS BOOK DISTRIBUTION         | 627.00     |       |
| 131819  | 3/16/2023 | COMPLETE COACH WORKS          | FLEET RENEWAL CAMPAIGN        | 532,992.97 |       |
| 131820  | 3/16/2023 | CINTAS CORPORATION            | FIRST AID SUPPLIES            | 452.89     |       |
| 131821  | 3/16/2023 | COX COMMUNICATIONS, CORP.     | INTERNET & CABLE TV           | 537.08     |       |
| 131822  | 3/16/2023 | CUMMINS SALES & SERVICE dba   | BUS PARTS & REPAIRS           | 267.08     |       |
| 131823  | 3/16/2023 | DEPARTMENT OF LABOR & INDUS   | WA STATE DEPARTMENT - WC INS  | 43.14      |       |
| 131824  | 3/16/2023 | DENMUN OFFICE SOLUTIONS DB    | IT CONTRACT SERVICES          | 8,265.00   |       |
| 131825  | 3/16/2023 | GENFARE LLC                   | FAREBOX PARTS/SOFTWARE SUPPOR | 34,175.88  |       |
| 131826  | 3/16/2023 | GILLIG LLC                    | BUS PARTS                     | 2,039.74   |       |
| 131827  | 3/16/2023 | GOLD COAST TRANSPORT REFRIG   | BUS A/C MAINTENANCE           | 866.55     |       |
| 131828  | 3/16/2023 | GOODYEAR TIRE & RUBBER CO     | BUS TIRE LEASE                | 277.93     |       |
| 131829  | 3/16/2023 | GRAPHICINK                    | PRINTING SERVICES             | 158.78     |       |
| 131830  | 3/16/2023 | GRAINGER, INC.                | SHOP/B&G SUPPLIES             | 129.00     |       |
| 131831  | 3/16/2023 | HAYWARD LUMBER                | SHOP/B&G SUPPLIES             | 133.03     |       |
| 131832  | 3/16/2023 | HOME IMPROVEMENT CTR.         | SHOP/B&G SUPPLIES             | 335.01     |       |
| 131833  | 3/16/2023 | INTELLICORP RECORD INC.       | PRE-EMPLOYMENT CHECK          | 96.95      |       |
| 131834  | 3/16/2023 | JANEK CORP                    | BUS PARTS                     | 1,984.69   |       |
| 131835  | 3/16/2023 | LANSPEED DBA                  | IT SERVICES                   | 2,982.25   |       |
| 131836  | 3/16/2023 | LARRY'S 8 DAY AUTO PARTS      | BUS PARTS                     | 36.28      |       |
| 131837  | 3/16/2023 | MARTIN AUTO COLOR, INC.       | BUS SUPPLIES                  | 534.84     |       |
| 131838  | 3/16/2023 | MAYAN LANDSCAPING             | LANDSCAPE MAINTENANCE SERVICE | 3,420.00   |       |
| 131839  | 3/16/2023 | MC CORMIX CORP. (OIL)         | LUBRICANTS                    | 3,241.14   |       |
| 131840  | 3/16/2023 | MOHAWK MFG. AND SUPPLY CO.    | BUS PARTS                     | 156.65     |       |
| 131841  | 3/16/2023 | MOUNTAIN SPRING WATER         | SHOP & OFFICE SUPPLIES        | 1,009.20   |       |
| 131842  | 3/16/2023 | NATIONAL TESTING NETWORK, I   | DRIVER TRAINING               | 135.00     |       |
| 131843  | 3/16/2023 | O'REILLY AUTO PARTS DBA       | BUS/SERVICE VEHICLE PARTS     | 67.99      |       |
| 131844  | 3/16/2023 | DAVID PENTLAND                | DMV-VTT REIMBURSEMENT         | 55.00      |       |
| 131845  | 3/16/2023 | ROBERT HALF                   | TEMPORARY LABOR               | 3,243.47   |       |
| 131846  | 3/16/2023 | SANSUM CLINIC                 | MEDICAL EXAMS                 | 576.00     |       |
| 131847  | 3/16/2023 | SET SOLUTIONS, INC.           | IT SERVICES                   | 2,417.80   |       |

| Check # | Date      | Company                      | Description                    | Amount     | Voids |
|---------|-----------|------------------------------|--------------------------------|------------|-------|
| 131848  | 3/16/2023 | SO. CAL. EDISON CO.          | UTILITIES                      | 4,945.89   |       |
| 131849  | 3/16/2023 | STAPLES CONTRACT & COMMERC   | OFFICE SUPPLIES                | 376.23     |       |
| 131850  | 3/16/2023 | SB CITY OF-REFUSE/WATER      | UTILITIES                      | 1,933.48   |       |
| 131851  | 3/16/2023 | TEAMSTERS MISC SECURITY TRU  | UNION MEDICAL INSURANCE        | 186,970.00 |       |
| 131852  | 3/16/2023 | TAC ENERGY LLC               | RENEWABLE DIESEL               | 30,454.42  |       |
| 131853  | 3/16/2023 | J.C.M. AND ASSOCIATES INC.   | UNIFORMS                       | 485.92     |       |
| 131854  | 3/16/2023 | VALLEY POWER SYSTEMS, INC.   | BUS PARTS                      | 235.59     |       |
| 131855  | 3/16/2023 | VEHICLE MAINTENANCE PROGRA   | BUS PARTS                      | 754.55     |       |
| 131856  | 3/16/2023 | VERIZON WIRELESS             | WIRELESS PHONES & AIM CELLULAR | 1,350.80   |       |
| 131857  | 3/16/2023 | WAXIE SANITARY SUPPLY DBA    | JANITORIAL SUPPLIES            | 611.53     |       |
| 131858  | 3/16/2023 | SB COUNTY FIRE DEPARTMENT    | SITE MITIGATION                | 536.00     |       |
| 131859  | 3/24/2023 | ABC BUS COMPANIES INC        | BUS PARTS                      | 1,435.95   |       |
| 131860  | 3/24/2023 | AMERICAN MOVING PARTS, LLC   | BUS PARTS                      | 1,493.05   |       |
| 131861  | 3/24/2023 | ASBURY ENVIRONMENTAL SERVI   | WASTE OIL RECYCLER             | 95.00      |       |
| 131862  | 3/24/2023 | AUTOZONE STORES LLC          | BUS/SERVICE VEHICLE PARTS      | 60.42      |       |
| 131863  | 3/24/2023 | CHARGEPOINT, INC.            | CHARGE READY BRIDGE PROJECT    | 346.00     |       |
| 131864  | 3/24/2023 | COMPLETE COACH WORKS         | FLEET RENEWAL CAMPAIGN         | 23,064.96  |       |
| 131865  | 3/24/2023 | CUMMINS SALES & SERVICE dba  | BUS PARTS & REPAIRS            | 4,699.88   |       |
| 131866  | 3/24/2023 | CROSSLINE SUPPLY LLC         | BUS PARTS                      | 3,835.75   |       |
| 131867  | 3/24/2023 | ALLIANT POWER DBA            | BUS PARTS                      | 6,777.64   |       |
| 131868  | 3/24/2023 | DOCUPRODUCTS CORPORATION     | COPIER MAINTENANCE/SUPPLIES    | 394.74     |       |
| 131869  | 3/24/2023 | EASY LIFT TRANSPORTATION, IN | MONTHLY ADA SUBSIDY            | 88,399.00  |       |
| 131870  | 3/24/2023 | ECO-T TIRE & RETREADING, LLC | BUS TIRE MOUNTING              | 705.02     |       |
| 131871  | 3/24/2023 | JERRY ESTRADA                | REIMBURSEMENT                  | 782.65     |       |
| 131872  | 3/24/2023 | EVERSHADE LLC DBA            | STEAM CLEANING TC/EXPRESS ZONE | 2,900.00   |       |
| 131873  | 3/24/2023 | STATE OF CALIFORNIA          | PAYROLL RELATED                | 1,850.89   |       |
| 131874  | 3/24/2023 | FRONTIER CALIFORNIA INC.     | TELEPHONE SERVICE              | 2,173.71   |       |
| 131875  | 3/24/2023 | GIBBS INTERNATIONAL INC      | BUS PARTS                      | 916.76     |       |
| 131876  | 3/24/2023 | GILLIG LLC                   | BUS PARTS                      | 3,668.95   |       |
| 131877  | 3/24/2023 | GOLD COAST TRANSPORT REFRIG  | BUS A/C MAINTENANCE            | 795.67     |       |
| 131878  | 3/24/2023 | GOODYEAR TIRE & RUBBER CO    | BUS TIRE LEASE                 | 10,852.21  |       |
| 131879  | 3/24/2023 | GRAINGER, INC.               | SHOP/B&G SUPPLIES              | 33.67      |       |
| 131880  | 3/24/2023 | STEPHEN HAHN                 | TRAVEL REIMBURSEMENT           | 122.29     |       |
| 131881  | 3/24/2023 | HOME IMPROVEMENT CTR.        | SHOP/B&G SUPPLIES              | 457.75     |       |
| 131882  | 3/24/2023 | JOY EQUIPMENT PROTECTION, IN | SERVICING FIRE EXTINGUISHERS   | 386.07     |       |
| 131883  | 3/24/2023 | LENZ PEST CONTROL DBA        | FUMIGATION SERVICES            | 70.00      |       |
| 131884  | 3/24/2023 | MC CORMIX CORP. (GAS)        | FUEL-SERVICE VEHICLES          | 1,896.74   |       |
| 131885  | 3/24/2023 | MOHAWK MFG. AND SUPPLY CO.   | BUS PARTS                      | 277.86     |       |
| 131886  | 3/24/2023 | MOTION INDUSTRIES, INC.      | BUS PARTS                      | 86.13      |       |
| 131887  | 3/24/2023 | NATIONAL DRIVE               | PAYROLL DEDUCTION              | 22.00      |       |
| 131888  | 3/24/2023 | NEOPART TRANSIT LLC          | BUS PARTS                      | 142.94     |       |



| Check # | Date      | Company                      | Description                    | Amount                                    | Voids                 |
|---------|-----------|------------------------------|--------------------------------|---|-----------------------|
| 131889  | 3/24/2023 | NEW PIG CORP.                | BUS CLEANING SUPPLIES          | 1,747.98                                  |                       |
| 131890  | 3/24/2023 | O'REILLY AUTO PARTS DBA      | BUS/SERVICE VEHICLE PARTS      | 70.42                                     |                       |
| 131891  | 3/24/2023 | OILFIELD ELECTRIC & MOTOR DB | EMERGENCY ELECTRICAL REPAIRS   | 915.00                                    |                       |
| 131892  | 3/24/2023 | POWERSTRIDE BATTERY CO.      | BATTERIES                      | 824.19                                    |                       |
| 131893  | 3/24/2023 | ROBERT HALF                  | TEMPORARY LABOR                | 1,698.58                                  |                       |
| 131894  | 3/24/2023 | SANSUM CLINIC                | MEDICAL EXAMS                  | 165.00                                    |                       |
| 131895  | 3/24/2023 | SB COUNTY FEDERAL CREDIT UNI | PAYROLL DEDUCTION              | 260.00                                    |                       |
| 131896  | 3/24/2023 | SO. CAL. EDISON CO.          | UTILITIES                      | 4,653.73                                  |                       |
| 131897  | 3/24/2023 | SOCALGAS                     | UTILITIES                      | 2,715.48                                  |                       |
| 131898  | 3/24/2023 | STANTEC ARCHITECTURE INC.    | FACILITIES A&E SERVICES        | 4,635.75                                  |                       |
| 131899  | 3/24/2023 | STANTEC CONSULTING SERVICES  | CONSULTING SERVICES            | 2,528.00                                  |                       |
| 131900  | 3/24/2023 | STAPLES CONTRACT & COMMERC   | OFFICE SUPPLIES                | 416.61                                    |                       |
| 131901  | 3/24/2023 | STARWIND SOFTWARE, INC.      | COMPUTER SUPPLIES              | 4,500.33                                  |                       |
| 131902  | 3/24/2023 | T&H COMPRESSOR REPAIR CO, IN | COMPRESSOR REPAIRS             | 1,363.06                                  |                       |
| 131903  | 3/24/2023 | TEAMSTERS UNION LOCAL NO. 18 | UNION DUES                     | 680.00                                    |                       |
| 131904  | 3/24/2023 | TRISTAR RISK MANAGEMENT      | WORKERS COMPENSATION ADMINIS   | 15,932.75                                 |                       |
| 131905  | 3/24/2023 | TAC ENERGY LLC               | RENEWABLE DIESEL               | 30,417.94                                 |                       |
| 131906  | 3/24/2023 | UNITED WAY OF SB             | PAYROLL DEDUCTION              | 30.00                                     |                       |
| 131907  | 3/24/2023 | VALLEY POWER SYSTEMS, INC.   | BUS PARTS                      | 2,688.25                                  |                       |
| 131908  | 3/24/2023 | VERIZON WIRELESS             | WIRELESS PHONES & AIM CELLULAR | 514.87                                    |                       |
| 131909  | 3/24/2023 | WAXIE SANITARY SUPPLY DBA    | JANITORIAL SUPPLIES            | 638.16                                    |                       |
| 131910  | 3/24/2023 | YACO SCHOLARSHIP FUND        | PAYROLL DEDUCTION              | 35.00                                     |                       |
| 131911  | 3/24/2023 | FRONTIER CALIFORNIA INC.     | TELEPHONE SERVICE              | 4.47                                      |                       |
|         |           |                              |                                | <b>1,100,532.85</b>                       |                       |
|         |           |                              |                                | <b>Current Cash Report Voided Checks:</b> | 0.00                  |
|         |           |                              |                                | <b>Prior Cash Report Voided Checks:</b>   | 265.50                |
|         |           |                              |                                | <b>Grand Total:</b>                       | <b>\$1,100,267.35</b> |



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**Santa Barbara Metropolitan Transit District**  
**Cash Report**  
**Board Meeting of April 18, 2023**  
**For the Period March 25, 2023 through April 7, 2023**

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**MONEY MARKET**

**Beginning Balance March 25, 2023** **\$3,797,887.33**

|                       |                     |
|-----------------------|---------------------|
| Accounts Receivable   | 2,595,380.73        |
| Passenger Fares       | 135,948.13          |
| Prepays & Advertising | 6,380.40            |
| Interest Income       | 1,955.03            |
| Miscellaneous Income  | 290.72              |
| Measure A Transfer    | 5.16                |
| <b>Total Deposits</b> | <b>2,739,960.17</b> |

|                            |                       |
|----------------------------|-----------------------|
| Bank & Credit Card Fees    | (4,641.93)            |
| Miscellaneous Transfers    | (15,322.09)           |
| 401(k)/Pension Transfer    | (34,464.93)           |
| Payroll Taxes              | (153,924.79)          |
| Payroll                    | (347,922.03)          |
| Accounts Payable           | (541,224.21)          |
| <b>Total Disbursements</b> | <b>(1,097,499.98)</b> |

**Ending Balance** **\$5,440,347.52**

**CASH INVESTMENTS**

|                      |                |
|----------------------|----------------|
| LAIF Account         | \$5,953,733.70 |
| Money Market Account | 5,440,347.52   |

**Total Cash Balance** **\$11,394,081.22**

**SELF INSURED LIABILITY ACCOUNTS**

|                         |                  |
|-------------------------|------------------|
| WC / Liability Reserves | (\$4,473,892.04) |
|-------------------------|------------------|

**Working Capital** **\$6,920,189.18**

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

| <b>Date</b>   | <b>Company</b>                 | <b>Description</b>                     | <b>Amount</b>         |
|---|--------------------------------|--|-----------------------|
| 3/27/2023   | Montecito Bank & Trust         | Advertising on Buses                   | 2,722.00              |
| 3/27/2023   | Montecito Bank & Trust         | Advertising on Buses                   | 2,722.00              |
| 3/30/2023   | College of Law                 | Advertising on Buses                   | 6,998.40              |
| 3/30/2023   | SB School District             | Passes/Token Sales                     | 4,125.00              |
| 3/31/2023   | Federal Transit Administration | FTA Operating Assistance CRRSAA Reimb  | 278,082.00            |
| 3/31/2023   | Federal Transit Administration | FTA Operating Assistance ARPA Reimb    | 432,802.00            |
| 3/31/2023   | Federal Transit Administration | FTA Operating Assistance 5339(a) Reimb | 865,233.00            |
| 4/4/2023  | UCSB - Parking Services-7001   | Passes/Passports Sales                 | 2,888.00              |
| 4/5/2023  | County of Santa Barbara        | Passes/Token Sales                     | 1,040.00              |
| 4/5/2023  | Local Transportation Fund      | SB 325 - Mach 2023                     | 772,322.29            |
| 4/5/2023  | Measure A, Section 3 LSTI      | Measure A Funds - March 2023           | 222,321.04            |
| 4/6/2023  | SB School District             | Passes/Token Sales                     | 4,125.00              |
| <b>Total Accounts Receivable Paid During Period</b> |                                |  | <b>\$2,595,380.73</b> |

**Santa Barbara Metropolitan Transit District**  
**Accounts Payable**

| Check # | Date      | Company                      | Description                     | Amount     | Voids |
|---------|-----------|------------------------------|---------------------------------|------------|-------|
| 131912  | 3/30/2023 | ABC BUS COMPANIES INC        | BUS PARTS                       | 1,090.93   |       |
| 131913  | 3/30/2023 | AMERICAN MOVING PARTS, LLC   | BUS PARTS                       | 94.95      |       |
| 131914  | 3/30/2023 | AUTOZONE STORES LLC          | SERVICE VEHICLE PARTS           | 28.25      |       |
| 131915  | 3/30/2023 | MONICA BASSETT               | REIMBURSEMENT                   | 172.40     |       |
| 131916  | 3/30/2023 | CALSTART, INC.               | MEMBERSHIP                      | 1,950.00   |       |
| 131917  | 3/30/2023 | COMPLETE COACH WORKS         | FLEET RENEWAL CAMPAIGN          | 22,639.53  |       |
| 131918  | 3/30/2023 | CINTAS CORPORATION           | FIRST AID SUPPLIES              | 315.67     |       |
| 131919  | 3/30/2023 | CUMMINS SALES & SERVICE dba  | FLEET RENEWAL CAMPAIGN          | 4,867.18   |       |
| 131920  | 3/30/2023 | DIVERSIFIED TRANSPORTATION S | FREIGHT CHARGES                 | 200.78     |       |
| 131921  | 3/30/2023 | DOCUPRODUCTS CORPORATION     | COPIER MACHINE                  | 16,163.50  |       |
| 131922  | 3/30/2023 | EDM TECHNOLOGY, INC          | BUS PASS PRINTING               | 3,000.00   |       |
| 131923  | 3/30/2023 | FAST UNDERCAR                | EV BUS PARTS                    | 617.25     |       |
| 131924  | 3/30/2023 | FGL ENVIRONMENTAL, INC       | STORMWATER TEST                 | 215.00     |       |
| 131925  | 3/30/2023 | GILLIG LLC                   | BUS PARTS                       | 3,256.16   |       |
| 131926  | 3/30/2023 | GRAINGER, INC.               | BUS CLEANING SUPPLIES           | 86.00      |       |
| 131927  | 3/30/2023 | HOME IMPROVEMENT CTR.        | SHOP/B&G SUPPLIES               | 102.63     |       |
| 131928  | 3/30/2023 | IAN'S TIRE AND AUTO REPAIR D | SERVICE VEHICLE TIRES & REPAIRS | 962.19     |       |
| 131929  | 3/30/2023 | JANEK CORP                   | BUS PARTS                       | 978.75     |       |
| 131930  | 3/30/2023 | LAWSON PRODUCTS INC          | SHOP SUPPLIES                   | 1,160.01   |       |
| 131931  | 3/30/2023 | MARBORG INDUSTRIES (INC)     | HAZMAT DISPOSAL                 | 303.80     |       |
| 131932  | 3/30/2023 | MC CORMIX CORP. (OIL)        | LUBRICANTS                      | 5,300.10   |       |
| 131933  | 3/30/2023 | MCMaster-CARR SUPPLY CO.     | SHOP/B&G SUPPLIES               | 374.31     |       |
| 131934  | 3/30/2023 | MOHAWK MFG. AND SUPPLY CO.   | BUS PARTS                       | 172.67     |       |
| 131935  | 3/30/2023 | MOTION INDUSTRIES, INC.      | BUS PARTS                       | 64.73      |       |
| 131936  | 3/30/2023 | MUNOZ JANITORIAL             | JANITORIAL/DISINFECTANT SERVICE | 19,585.00  |       |
| 131937  | 3/30/2023 | NATIONAL INTERSTATE INS INC. | LIABILITY INSURANCE             | 128,582.25 |       |
| 131938  | 3/30/2023 | O'REILLY AUTO PARTS DBA      | BUS/SERVICE VEHICLE PARTS       | 101.91     |       |
| 131939  | 3/30/2023 | PITNEY BOWES INC             | POSTAGE METER QTRLY CHARGES     | 146.81     |       |
| 131940  | 3/30/2023 | SILVAS OIL CO., INC.         | LUBRICANTS                      | 883.05     |       |
| 131941  | 3/30/2023 | SM TIRE, CORP.               | BUS TIRE MOUNTING               | 441.10     |       |
| 131942  | 3/30/2023 | SO. CAL. EDISON CO.          | UTILITIES                       | 4,767.88   |       |
| 131943  | 3/30/2023 | SOUTHLAND PRINTING           | BUS INSPECTION FORMS            | 2,997.02   |       |
| 131944  | 3/30/2023 | SOCALGAS                     | UTILITIES                       | 159.27     |       |
| 131945  | 3/30/2023 | STAPLES CONTRACT & COMMERC   | OFFICE SUPPLIES                 | 314.42     |       |
| 131946  | 3/30/2023 | SB CITY OF-REFUSE/WATER      | UTILITIES                       | 785.53     |       |
| 131947  | 3/30/2023 | THE MEDCENTER                | MEDICAL EXAMS                   | 1,650.00   |       |
| 131948  | 3/30/2023 | TAC ENERGY LLC               | RENEWABLE DIESEL                | 60,808.19  |       |
| 131949  | 3/30/2023 | J.C.M. AND ASSOCIATES INC.   | UNIFORMS                        | 1,583.55   |       |

| Check # | Date      | Company                        | Description                     | Amount    | Voids |
|---------|-----------|--------------------------------|---------------------------------|-----------|-------|
| 131950  | 3/30/2023 | U.S. BANK CORP. PAYMENT SYST   | CREDIT CARD PURCHASES           | 5,901.21  |       |
| 131951  | 3/30/2023 | VALLEY POWER SYSTEMS, INC.     | BUS PARTS                       | 6,434.66  |       |
| 131952  | 3/30/2023 | WURTH USA WEST INC.            | SHOP SUPPLIES                   | 64.87     |       |
| 131953  | 4/3/2023  | CITY OF GOLETA                 | BUILDING PERMIT FEE             | 2,319.00  |       |
| 131954  | 4/7/2023  | ABC BUS COMPANIES INC          | BUS PARTS                       | 2,055.23  |       |
| 131955  | 4/7/2023  | AMERICAN MOVING PARTS, LLC     | BUS PARTS                       | 868.66    |       |
| 131956  | 4/7/2023  | ASBURY ENVIRONMENTAL SERVI     | WASTE OIL RECYCLER              | 190.00    |       |
| 131957  | 4/7/2023  | JOSE BARRAGAN                  | TOOL ALLOWANCE                  | 1,100.00  |       |
| 131958  | 4/7/2023  | BNS ELECTRONICS, INC.          | SANTA YNEZ SITE RENTAL          | 345.19    |       |
| 131959  | 4/7/2023  | BYD COACH & BUS LLC            | BUS PARTS                       | 610.93    |       |
| 131960  | 4/7/2023  | COBOS FIRE & SAFETY DBA        | ANNUAL AMEREX INSPECTION        | 2,760.00  |       |
| 131961  | 4/7/2023  | COMMUNITY RADIO, INC.          | GIBRALTAR SITE RENTAL           | 304.70    |       |
| 131962  | 4/7/2023  | COMPLETE COACH WORKS           | FLEET RENEWAL CAMPAIGN          | 49,255.42 |       |
| 131963  | 4/7/2023  | CINTAS CORPORATION             | FIRST AID SUPPLIES              | 226.90    |       |
| 131964  | 4/7/2023  | COTTAGE HEALTH SYSTEM          | EMPLOYEE ASSISTANCE PROGRAM     | 4,936.40  |       |
| 131965  | 4/7/2023  | COX COMMUNICATIONS, CORP.      | INTERNET & CABLE TV             | 155.44    |       |
| 131966  | 4/7/2023  | CUMMINS SALES & SERVICE dba    | FLEET RENEWAL CAMPAIGN          | 9,000.00  |       |
| 131967  | 4/7/2023  | CROSSLINE SUPPLY LLC           | BUS PARTS                       | 353.44    |       |
| 131968  | 4/7/2023  | DAVID DAVIS JR.                | DIRECTOR FEES                   | 300.00    |       |
| 131969  | 4/7/2023  | ECO-T TIRE & RETREADING, LLC   | BUS TIRE MOUNTING               | 705.02    |       |
| 131970  | 4/7/2023  | EMERGENCY DRAIN SERVICES DB    | B&G REPAIRS & SUPPLIES          | 777.37    |       |
| 131971  | 4/7/2023  | FAST UNDERCAR                  | EV BUS PARTS                    | 229.21    |       |
| 131972  | 4/7/2023  | FEDEX dba                      | FREIGHT CHARGES                 | 34.78     |       |
| 131973  | 4/7/2023  | FIDELITY SECURITY LIFE INS. CO | VISION INSURANCE                | 427.00    |       |
| 131974  | 4/7/2023  | FGL ENVIRONMENTAL, INC         | STORMWATER TEST                 | 387.00    |       |
| 131975  | 4/7/2023  | FOODBANK OF SANTA BARBARA      | REIMBURSEMENT                   | 1,982.00  |       |
| 131976  | 4/7/2023  | STATE OF CALIFORNIA            | PAYROLL RELATED                 | 2,106.31  |       |
| 131977  | 4/7/2023  | GIBBS INTERNATIONAL INC        | BUS PARTS                       | 768.51    |       |
| 131978  | 4/7/2023  | GILLIG LLC                     | BUS PARTS                       | 3,183.36  |       |
| 131979  | 4/7/2023  | GOLD COAST TRANSPORT REFRIG    | BUS A/C MAINTENANCE             | 1,105.07  |       |
| 131980  | 4/7/2023  | GOLETA WATER DISTRICT          | UTILITIES                       | 215.80    |       |
| 131981  | 4/7/2023  | MIEKO GRAY                     | REIMBURSEMENT                   | 484.91    |       |
| 131982  | 4/7/2023  | GUARDIAN-APPLETON (DENTAL I    | DENTAL INSURANCE                | 4,793.01  |       |
| 131983  | 4/7/2023  | GUARDIAN-APPLETON (LIFE INS)   | LIFE INSURANCE                  | 1,034.05  |       |
| 131984  | 4/7/2023  | HOME IMPROVEMENT CTR.          | SHOP/B&G SUPPLIES               | 10.60     |       |
| 131985  | 4/7/2023  | IAN'S TIRE AND AUTO REPAIR D   | SERVICE VEHICLE TIRES & REPAIRS | 838.00    |       |
| 131986  | 4/7/2023  | IMPULSE ADVANCED COMMUNIC      | INTERNET                        | 400.00    |       |
| 131987  | 4/7/2023  | JOHNSON CONTROLS FIRE PROTE    | FIRE ALARM SERVICES             | 899.28    |       |
| 131988  | 4/7/2023  | JOY EQUIPMENT PROTECTION, IN   | SERVICING FIRE EXTINGUISHERS    | 184.43    |       |
| 131989  | 4/7/2023  | ALBERTO LAPUZ                  | DIRECTOR FEES                   | 180.00    |       |
| 131990  | 4/7/2023  | JENNIFER LEMBERGER             | DIRECTOR FEES                   | 180.00    |       |

| Check # | Date     | Company                      | Description                   | Amount                                    | Voids               |
|---------|----------|------------------------------|-------------------------------|---|---------------------|
| 131991  | 4/7/2023 | MAYAN LANDSCAPING            | LANDSCAPE MAINTENANCE SERVICE | 4,740.00                                  |                     |
| 131992  | 4/7/2023 | MOUNTAIN SPRING WATER        | SHOP & OFFICE SUPPLIES        | 1,311.60                                  |                     |
| 131993  | 4/7/2023 | NFI PARTS DBA                | BUS PARTS                     | 810.54                                    |                     |
| 131994  | 4/7/2023 | O'REILLY AUTO PARTS DBA      | BUS/SERVICE VEHICLE PARTS     | 22.82                                     |                     |
| 131995  | 4/7/2023 | PAULA A. PEROTTE             | DIRECTOR FEES                 | 120.00                                    |                     |
| 131996  | 4/7/2023 | BELLA ESPERANZA RODRIGUEZ    | REIMBURSEMENT DMV/VT          | 63.00                                     |                     |
| 131997  | 4/7/2023 | ROBERT HALF                  | TEMPORARY LABOR               | 1,672.73                                  |                     |
| 131998  | 4/7/2023 | SAFETY-KLEEN CORPORATION     | SHOP SUPPLIES                 | 518.74                                    |                     |
| 131999  | 4/7/2023 | SANSUM CLINIC                | MEDICAL EXAMS                 | 813.00                                    |                     |
| 132000  | 4/7/2023 | SARKAR, ARJUN                | DIRECTOR FEES                 | 120.00                                    |                     |
| 132001  | 4/7/2023 | SB COUNTY FEDERAL CREDIT UNI | PAYROLL DEDUCTION             | 260.00                                    |                     |
| 132002  | 4/7/2023 | SO. CAL. EDISON CO.          | UTILITIES                     | 6,851.31                                  |                     |
| 132003  | 4/7/2023 | SOAP MAN DISTRIBUTIN DBA     | BUS CLEANING SUPPLIES         | 201.19                                    |                     |
| 132004  | 4/7/2023 | MONICA JUANITA SOLORZANO     | DIRECTOR FEES                 | 120.00                                    |                     |
| 132005  | 4/7/2023 | SPECIALTY TOOL & BOLT, LTD   | SHOP SUPPLIES                 | 82.00                                     |                     |
| 132006  | 4/7/2023 | STAR-TAM, INC.               | B&G REPAIRS & SUPPLIES        | 286.33                                    |                     |
| 132007  | 4/7/2023 | SB CITY OF-REFUSE/WATER      | UTILITIES                     | 4,818.90                                  |                     |
| 132008  | 4/7/2023 | DAVID T. TABOR               | DIRECTOR FEES                 | 360.00                                    |                     |
| 132009  | 4/7/2023 | TEAMSTERS PENSION TRUST      | UNION PENSION                 | 81,890.07                                 |                     |
| 132010  | 4/7/2023 | TEAMSTERS UNION LOCAL NO. 18 | UNION DUES                    | 9,470.00                                  |                     |
| 132011  | 4/7/2023 | TAC ENERGY LLC               | RENEWABLE DIESEL              | 30,528.41                                 |                     |
| 132012  | 4/7/2023 | UNITED PARCEL SERVICE, INC.  | FREIGHT CHARGES               | 583.08                                    |                     |
| 132013  | 4/7/2023 | J.C.M. AND ASSOCIATES INC.   | UNIFORMS                      | 403.41                                    |                     |
| 132014  | 4/7/2023 | VALLEY POWER SYSTEMS, INC.   | BUS PARTS                     | 146.55                                    |                     |
|         |          |                              |                               | <b>541,224.21</b>                         |                     |
|         |          |                              |                               | <b>Current Cash Report Voided Checks:</b> | 0.00                |
|         |          |                              |                               | <b>Prior Cash Report Voided Checks:</b>   | 0.00                |
|         |          |                              |                               | <b>Grand Total:</b>                       | <b>\$541,224.21</b> |







## BOARD OF DIRECTORS REPORT

**DATE:** APRIL 18, 2023 AGENDA ITEM #7  
**DEPARTMENT:** PROCUREMENT  
**TYPE:** ACTION ITEM  
**PREPARED BY:** NANCY TILLIE  
VALERIE WHITE \_\_\_\_\_  
Signature  
**APPROVED BY:** GENERAL MANAGER \_\_\_\_\_  
Signature  
**SUBJECT:** PROCUREMENT PROTEST – 3 POSITION TRANSIT BICYCLE RACKS

### RECOMMENDATION

Staff is requesting that the MTD Board of Directors reject the Protest of the contract award to Midwest Bus Corporation and their Byk-Rak brand for three-position transit bike racks, which shall be considered final in accordance with the MTD Procurement Manual.

Protests of MTD procurements filed by interested parties shall be considered in two general categories: 1) those filed prior to award, and; 2) protests occurring after award has been made. This protest is the latter. The basis for protest is restricted to specific circumstances. The only applicable alleged circumstance is a "Failure to adhere to evaluation criteria set forth in solicitation documents, or use of additional criteria not so published." After investigation and analysis of the Protest filed, staff was unable to find a "Failure to adhere to evaluation criteria set forth in solicitation documents, or use of additional criteria not so published."

### BACKGROUND

On December 14, 2022, MTD issued a formal *Invitation for Bids(IFB) for Three-Position Transit Bike Racks*. The opportunity was publicly announced in the VC Star, Santa Barbara News-Press, and MTD's website. The bid packet was also directly sent to 14 potential sources.

During the solicitation process, a question was submitted regarding if "a rugged 360-degree rotating arm with a marine grade weatherproof, sealed gas shock, which easily positions over the top of the front wheel to firmly lock the bicycle tire onto the mounting rails for safe, secure and reliable transportation" was acceptable. By description alone, Staff did not acknowledge this as a conflict and responded in Addendum 3 simply stating:

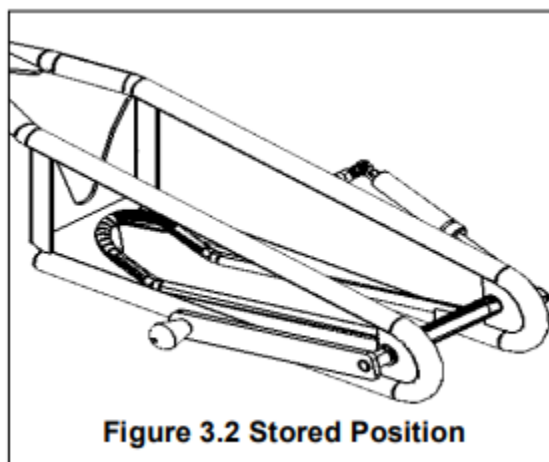
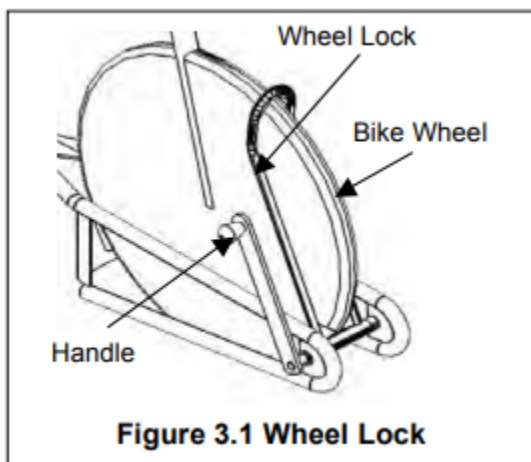
*"All vendors that meet the technical specifications in the Statement of Work, as modified by this addendum, are invited to submit a bid. As described in the Solicitation Instructions, responsive bids will include product information (technical description or brochure) and the following forms fully completed..."*

In total three (3) addendums addressing requests for clarification and changes were issued prior to the bid opening on January 12, 2023. **The bid tabulation results were:**

| Bidder                            | Bid          |
|-----------------------------------|--------------|
| Midwest Bus Corporation (Byk-Rak) | \$157,060.00 |
| Sportworks Global LLC             | \$160,224.60 |

## BID EVALUATION

During the bid evaluation period, Staff reviewed Midwest Bus Corporation's Byk-Rak manual submitted with the bid, depicting:



MTD Staff further investigated the features of the bike rack, which included checking Midwest Bus's work references with Orange County Transit Authority (OCTA), San Bernardino Valley's OmniTrans, and Complete Coach Works (CCW) and learned the Midwest Bus with their Byk-Rak brand was satisfactory, met CHP inspections, Caltrans requirements, and the Federal Motor Vehicle Safety Standards (FMVSS). Therefore, Midwest Bus was deemed a responsible bid.

In turn, MTD's General Manager awarded the contract to Midwest Bus Corporation on March 2, 2023. The decision was based on Staff identifying Midwest Bus as **the lowest responsible and responsive bidder, whose bid is determined to comply with the bid specifications, terms, and conditions.**

## PROTEST AND ANALYSIS

On March 6, 2023, the non-awarded bidder submitted the attached formal protest, claiming MTD failed to adhere to the evaluation criteria set forth in solicitation documents. Specifically, the claim was that the awarded bidder's product did not meet the *Statement of Work* requirement:

*"The bike rack must be designed for use on the front of commercial transit buses. Loading and unloading of bikes from the rack must be able to be accomplished from either the curbside or the front of the vehicle. Bike rack height shall not impede the 'line-of-sight' of the operator, the operation of the windshield wiper, or any other mechanical or safety feature of the coach. When the bus is in a kneeled position, no parts shall extend below the rack frame, which could impede loading or unloading."*

Once the protest was received, all procurement activity was suspended in accordance with the MTD Protest Procedures. The General Manager reviewed staff analysis subsequent to their investigation and held staff's recommendation of no finding for the "Failure to adhere to evaluation criteria set forth in solicitation documents, or use of additional criteria not so published." He communicated that to the originating party accompanied with a request for written withdrawal of their protest within 20 days. Having received no written protest withdrawal, in accordance with the MTD Procurement Manual "the General Manager shall forward the matter to the MTD Board of Directors for resolution." All supporting references to the claims made regarding this specification were addressed. The attached "Protest Letter Response" references Staff's finding in review of the *Statement of Work*, the manual, and multiple videos of agencies utilizing the bike rack.

Staff continued to review the IFB requirement specifically analyzing the claim and further reached out for expertise from California transit agencies to specifically determine if the parts could impede loading and unloading. The responses were as follows:

| Transit Property                       | Contact Title                         | Quoted Feedback   |
|--|---------------------------------------|---|
| <b>City of Torrance</b>                | Transit Administration Manager        | Highly recommend Byk-Rak; always passed CHP inspections.  |
| <b>Foothill Transit</b>                | Director, Maintenance & Vehicle Tech. | Foothill Transit is not familiar nor aware of any parts below the rack frame issue. Foothill Transit has never had any issues with the 3 position Byk-Rak and is completely satisfied with Byk-Rak. |
| <b>GTRANS</b>                          | Maintenance Manager                   | Satisfied. We have not seen this issue.   |
| <b>Los Angeles Metro</b>               | Senior Engineer, Vehicle Technology   | Satisfied. We have not observed this concern.   |
| <b>OmniTrans</b>                       | Maintenance Manager                   | Recommend Byk-Rak; we started purchasing Byk Rak with new bus purchases.  |
| <b>Orange County Transit Authority</b> | Senior Fleet Analyst                  | Yes, we are satisfied with them and continue to outfit them on new bus procurements.  |
| <b>Sacramento RTD</b>                  | Director of Bus Maintenance           | I haven't heard about loading issues with Byk-Rak's design  |
| <b>San Diego MTS</b>                   | Maintenance Quality Assurance Supv.   | Satisfied. MTS had to modify the initial mounting, so the wheel securements arms did not hit the ground.  |

In addition, MTD Staff visited LA Metro's operations and inspected the Byk-Rak brand in person. The finding was evidential: no parts extended below the bike rack frame; when loading there is a support arm that can be raised up or raised below (it is a 360 rotating arm than maneuvers clockwise or counterclockwise); and it neither impedes loading or unloading of the bikes. Thus, Staff deems there are inadequate grounds for a protest. The contract award followed MTD procurement policies: the Midwest Bus bid was the lowest responsive and responsible bidder.

## PROTEST DETERMINATION

The MTD Board may deny the protest, whereas MTD Staff shall proceed with the procurement process; or

The MTD Board may uphold the protest, then MTD Staff shall proceed pursuant to Board direction:

- Consider Rejection of lowest bid, cancel the contract award, begin evaluation of next lowest bidder to determine **lowest responsible and responsive bidder, whose bid is determined to comply with the bid specifications, terms, and conditions, or**
- Consider Canceling solicitation completely and re-perform solicitation with less restrictive specification.

March 6, 2023

Santa Barbara Metropolitan Transit District  
Attn: Valerie White, Senior Purchasing Agent  
550 Olive Street  
Santa Barbara CA 93101  
Email: [vwhite@sbmtd.gov](mailto:vwhite@sbmtd.gov)

Re: Invitation for Bids for Three-Position Transit Bike Racks

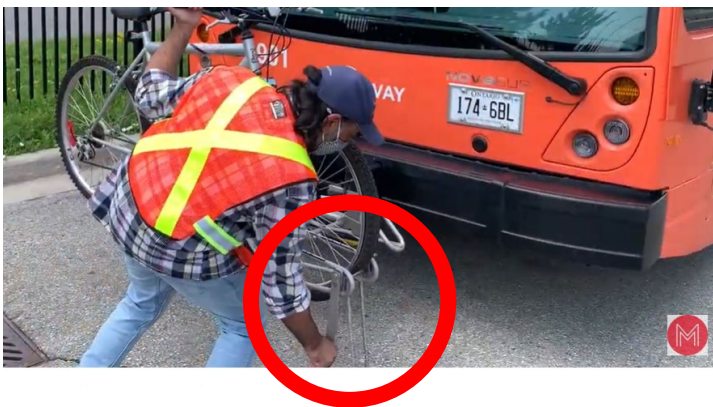
Dear Ms. White,

I am in receipt of your email dated March 2, 2023, indicating that the project titled: "Invitation for Bids for Three-Position Transit Bike Racks" will be awarded to Midwest Bus Corporation for their Byk-Rak product.

The purpose of this letter is to formally protest the award decision of this bid, based upon: **(d) Failure to adhere to evaluation criteria set forth in solicitation documents, or use of additional criteria not so published;**<sup>1</sup>

The invitation for bid solicitation document issued by MTD, dated Wednesday, December 14, 2022 states: **"The contract award shall be accomplished by issuing an MTD Purchase Order to the lowest responsive and responsible Bidder whose bid meets the requirements and criteria."** The statement of work contained in the same document, lists the requirements and criteria. The Byk-Rak product does not meet the requirements and criteria, as follows:

1. **"...no parts shall extend below the rack frame, which could impede loading or unloading."**  
The Byk-Rak rack does not meet this requirement, as the support arm mechanism extends below the frame. This is noted in the use instructions on page 29 of the Byk-Rak parts manual<sup>2</sup>: **"Swing the wheel lock around (from under the Byk-Rak) and on top of the front wheel."** A video demonstration on a MiWay bus also demonstrates this: <https://youtu.be/xYkRux2laQg>. The image below is a screen shot obtained from this video, showing the support arm rotating under the rack. This can cause the support arm to get stuck – impeding loading or unloading of bikes, or cause damage to the rack, particularly when the bus is in a kneeled position. During the video demonstration, at approximately 00:20 you can see the rotation of the support arm stop briefly as the user has to exert force to move the support arm across the ground.



**"...no parts shall extend below the rack frame, which could impede loading or unloading."**

<sup>1</sup> Santa Barbara Metropolitan Transit District PROCUREMENT PROTEST PROCEDURES: <https://sbmtd.gov/wp-content/uploads/2017/12/MTD-Protest-Procedures-FTA-Projects20081101.pdf>

<sup>2</sup> <https://www.bykrak.com/wp-content/uploads/2022/01/Byk-Rak-2022-Parts-Manual3440.pdf>

2. **“The bike rack shall be equipped with an injected molded ergonomic handle to facilitate easy stowing and deployment.”**

The Byk-Rak rack is not equipped with an injected molded ergonomic handle. It is constructed of metal and non-ergonomic. A video from Byk-Rak’s website: <https://www.bykrak.com/3-position/> shows the metal handle, with a screen shot supplied below.



“...The bike rack shall be equipped with an injected molded ergonomic handle to facilitate easy stowing and deployment.”

Considering the non-compliances outlined herein, **“the lowest responsive and responsible Bidder whose bid meets the requirements and criteria”** is Sportworks. The Sportworks rack proposed is compliant or exceeds all the requirements in the scope of work supplied by MTD, as evidenced in the submitted proposal.

Sportworks’ proposal is just 2% higher than the proposal supplied by Midwest Bus, an immaterial amount when considering the design and construction non-compliances, and how they will adversely affect operations and rider experience.

We therefore ask, respectfully, that MTD re-consider the award based upon the information provided in this letter, and honor the award criteria established for this procurement.

Best regards,



April Johnson  
Vice President of Sales and Marketing  
Tel: 425-483-7000  
Email: [aprilj@sportworks.com](mailto:aprilj@sportworks.com)



March 14, 2023

*Delivered via email*

April Johnson  
Vice President of Sales and Marketing  
Sportworks  
15540 Woodinville-Redmond Rd. NE, A-200  
Woodinville, WA 98072  
Email: aprilj@sportworks.com

Re: Invitation for Bids for Three-Position Transit Bike Racks – Notice of Protest

Dear Ms. Johnson:

The Santa Barbara Metropolitan Transit District (MTD) appreciates your participation in its *Invitation for Bids for Three-Position Transit Bike Racks* (IFB). MTD's overarching goal with this IFB was to (1) ensure full, open, and fair competition in the procurement of 100 quantity three-position bike racks, (2) ensure that bike racks are obtained only from a responsible, qualified vendor having the capacity to perform successfully under the terms and conditions of the IFB; and (3) ensure full and complete compliance with MTD's procurement policies.

MTD's procurement process also includes a directive to resolve procurement disputes and protests fairly and equitably. MTD would like to recognize Sportworks' acknowledgment and professional response in following MTD's protest procedures. Despite any outcome, MTD values Sportworks' contributions and hopes to see Sportworks participate in future contracting opportunities.

MTD Staff has reviewed the Sportworks post-award protest letter, dated March 6, 2023; the claims have been investigated and the findings are listed below:

Claim #1

Midwest Bus Corporation's Byk-Rak product does not meet the IFB requirement:

**"...no parts shall extend below the rack frame, which could impede loading or unloading."**

Investigation and Response

The complete *Statement of Work* reference for context:

*The bike rack must be designed for use on the front of commercial transit buses. Loading and unloading of bikes from the rack must be able to be accomplished from either the curbside or the front of the vehicle. Bike rack height shall not impede the "line-of-sight" of the operator, the operation of the windshield wiper, or any other mechanical or safety feature of the coach. When the bus is in a kneeled position, no parts shall extend below the rack frame, which could impede loading or unloading.*

When MTD evaluated Byk-Rak's compliance with the *Statement of Work* specifications, it found that regardless of any combination of (a) in use with 0,1,2 or 3 bikes loaded or (b) folded away with no bikes loaded, and (c) if the bus was in a driving position or (d) the bus was in a lowered (kneeled position), the bike rack itself **did not impede the "line-of-sight" over the windshield, nor did it touch the ground or have parts below the rack frame.**

In reference to the Byk-Rak part manual, page 29:

When MTD evaluated Byk-Rak's compliance with the *Statement of Work* specifications, it was found that the support arm mechanism is either on top of the bike tires when in use or when not in use, **the wheel lock folds into the center of the bike rack automatically (spring-loaded), so it will not position itself below the rack frame – it folds away when stored.**

From the referenced Byk-Rak part manual, page 5 (which included images):

***Convenient, secure Wheel Lock** The Byk-Rak employs the use of a Wheel Lock that secures the bike after it is put in the Byk-Rak. The pedals do not have to be oriented to miss the frame. After the bike is put in, the rider conveniently swings the Wheel Lock around to the top of the front wheel. This action is assisted with a spring-loaded lever that creates a positive locking system. **This same lever holds the Wheel Lock in a stored position while not in use.***

In reference to the MiWay Bus YouTube video:

MTD yields that the Byk-Rak support arm mechanism is a 360-degree rotating arm. And while the user in the video rotates it below the rack frame to secure their bike, it **does not appear to impede the loading and unloading.** For verification MTD found three other videos featuring the Byk-Rak three-position transit bike rack:

San Francisco Municipal Transportation Agency (Muni)

<https://youtu.be/xIbwOEyUJsU>

The Capital Metropolitan Transportation Authority (CapMetro)

[https://youtu.be/ERDa0\\_0GiFQ](https://youtu.be/ERDa0_0GiFQ)

Omnitrans

<https://youtu.be/1u1lGmKUo04>

After thorough assessment, MTD staff determined that the **support arm mechanism does not impede, slow down or obstruct the loading and unloading functions.**

In addition, during the bid evaluation period, MTD reached out to the following California transit agencies and a transit-serving business to ensure Midwest Bus was a responsible firm. **No agency indicated that the Byk-Rak support arm mechanism impeded the loading and unloading function.**

- Orange County Transit Authority (OCTA) worked with Midwest Bus for Byk-Rak three-position bicycle racks on over 600 New Flyer and Gillig buses.
- Omnitrans (San Bernardino) recommended the Midwest Bus Byk-Rak brand. Midwest Bus provided over 150 three-position bike racks for their New Flyers and cutaways.



- Complete Coach Works (CCW) indicated they had installed the three-position Midwest Bus Byk-Rak in several different style vehicles for various agencies, including 484 conversions from 2-position Sportworks to 3-position Byk-Rak.

Additional locations Byk-Raks are installed and in use:

- LA Metro
- San Francisco MTA
- Sacramento RTD
- GTRANS
- City of Torrance
- San Diego MTS
- Foothill Transit

## Claim #2

Midwest Bus, Byk-Rak product does not meet the IFB requirement:

**“The bike rack shall be equipped with an injected molded ergonomic handle to facilitate easy stowing and deployment.”**

## Investigation and Response

The original paragraph from MTD’s *Statement of Work* issued on December 14, 2022, did require an injected molded ergonomic handle. However, during the solicitation process, Midwest Bus submitted a request for change to this handle. MTD staff determined this specification was too specific and limited competition. MTD accepted the change and issued Addendum Number 2 on January 5, 2023. Sportworks acknowledged receipt of this addendum and submitted with their bid a signed *Acknowledgement of Addenda* form, dated January 9, 2023. The Addendum stated:

*Q3 – Is the injected molded ergonomic handle required?*

*A3 – No. The bike rack handle does not have to be “injected molded” but shall be effective and “user-friendly”. The Statement of Work requirements (technical specifications) is updated to “The bike rack shall be equipped with an ergonomic handle to facilitate easy stowing and deployment. The weight to lift and stow the rack must be less than 25 pounds.”*

Staff defined an “ergonomic handle” as one that is easy to use, safe, in an obvious place, and does not require an awkward posture, high force, or a combination of forces to use. The videos listed above can again be reviewed to reflect MTD’s finding that **the Byk-Rak handle meets the IFB criteria for submitting a bid.**

In conclusion, Midwest Bus was the lowest responsive and responsible bidder meeting the requirements and criteria. MTD respectfully asks Sportworks to withdraw the protest in writing within 20 days of the date of this letter. If the written withdrawal is not received, the matter will be forwarded to the MTD Board of Directors for resolution at a public meeting.

Sincerely,



Jerry Estrada  
General Manager



**Santa Barbara Metropolitan Transit District**  
**PROCUREMENT PROTEST PROCEDURES<sup>1</sup>**

**Revised November 1, 2008**

### **9.1 Purpose and Applicability**

The procedures described in this section have been established to ensure uniform, timely, and equitable consideration of all complaints received by MTD concerning its procurement activities. The Procurement Officer shall be responsible for the conduct and administration of procurement protests pursuant to the procedures established in this Section and Section 7.0 of [the MTD Procurement Manual]. The following protest procedures shall be employed for procurements conducted by MTD. Such protests shall be applicable only to procurements wherein MTD requests bids, proposals or offers for goods or services financed in whole or in part by public funds. Procurements involving FTA funds are subject to additional protest procedures established by that agency. Procedures applicable to FTA funded procurements are so identified.

### **9.2 Definitions**

The following definitions apply to terms used in this section:

Days: Unless otherwise specified, refers to MTD working days.

File or Submit: Refers to the date of receipt by MTD.

Interested Party: All bidders or proposers involved in an MTD procurement. This may also include a subcontractor or supplier who shows substantial economic interest in a provision of the IFB or RFP, or in the interpretation of such provision.

Bid: Refers to and includes: i) the terms “offer” and “proposal” as employed in this document; ii) sealed bids; iii) competitive negotiation, and; iv) non-competitive negotiation.

### **9.3 Bases for Protest**

If in the course of a procurement action an interested party has reason to believe that: a) free and open competition does not exist, or; b) MTD solicitation documents contain restrictive specifications, such party may file a protest in accordance with the procedures described herein.

In addition to the above, protests may be filed based upon the following factual or alleged circumstances:

- (a) Violation of federal, state or local law or regulation;
- (b) Sole source procurements;
- (c) Award made to other than the low bidder;
- (d) Failure to adhere to evaluation criteria set forth in solicitation documents, or use of additional criteria not so published;
- (e) Changes to evaluation criteria made during the evaluation process;
- (f) Local or DBE preferences;

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<sup>1</sup> Excerpted from Chapter 9 of the MTD *Procurement Manual* as revised in March 2003 and amended in April 2003.

- (g) Solicitation advertising violating applicable laws or regulations;
- (h) Conduct of negotiations after bid opening in sealed bid procurements;
- (i) Provision of inadequate time to prepare a bid or proposal.

Protests of MTD procurements filed by interested parties shall be considered in two general categories: 1) those filed prior to award, and; 2) protests occurring after award has been made.

## **9.4 Pre-Award Protests**

The following procedures shall be followed for all protests filed prior to award:

1. Protests must be filed no later than ten (10) days prior to the date established in the solicitation for receipt of bids or proposals.
2. Protests must be submitted in writing to the attention of the Procurement Officer. The written protests shall include:
  - (a) The name, address, and telephone number of the protestor;
  - (b) The MTD solicitation number and project description;
  - (c) A statement of the grounds for the protest, accompanied by all supporting documentation. All grounds must be fully supported with documentation;
  - (d) The resolution sought from MTD by the protestor.
3. The Procurement Officer shall receive the protest and issue written notification to the protestor within five days that the matter is undergoing review. Notice of the protest shall be given in writing to all known recipients of solicitation documents.
4. Procurement activity shall be suspended pending resolution of a protest unless one or more of the following conditions exists:
  - (a) The goods or services being procured are urgently required;
  - (b) Delivery or performance will be unduly delayed by failure to make an award promptly;
  - (c) Failure to make prompt award will result in termination of a critical MTD function or activity or otherwise cause undue harm to the District, or;
  - (d) The General Manager prepares a written finding that such protest is clearly frivolous in nature, and therefore does not warrant a disruption of the procurement process.

The Procurement Officer shall be responsible for making a written determination that circumstances require MTD to proceed with a procurement during a pending protest. Unless such determination is made the procurement shall be suspended pending resolution of the protest. All parties known to have received solicitation documents shall be notified in writing of such suspension by the Procurement Officer.

5. All protests received within the specified period shall be examined by the Procurement Officer who shall evaluate the matter and, within five (5) days, forward a recommendation concerning its disposition to the General Manager. No additional material shall be accepted for consideration during the protest review unless specifically requested in writing by MTD.
6. The General Manager may attempt to resolve the protest with the affected party. If: a) within five (5) days after receipt of recommendations from the Procurement Officer the General Manager elects not to attempt such resolution, or; b) if resolution is attempted but not achieved within twenty (20) days after

receipt of the aforementioned recommendations, the General Manager shall forward the matter to the MTD Board of Directors (hereinafter “Board”) for resolution. For these purposes “resolution” shall mean the written withdrawal of a protest by the originating party.

7. The MTD Board shall formally consider the protests at a public meeting within fourteen (14) calendar days after the date on which the matter is forwarded by the General Manager. Protesting parties shall be notified in writing of the date on which their matters shall be considered by the MTD Board. Such parties shall be afforded an opportunity to present their case at the Board meeting.

8. The MTD Board shall then make a formal decision on such protests at a public meeting. The decision of the Board, along with a formal record of the protest, shall become a matter of public record, and shall be considered final. The Procurement Officer shall notify protesting parties in writing of any protest decision made by the Board. Except under conditions described in #4 above, such decision by the MTD Board shall be made prior to award of any contract related to the subject procurement.

9. Should the Board deny the protest, MTD shall proceed with the procurement process. In the case of FTA funded procurements no contract shall be awarded within five (5) days following the Board’s decision unless such award is necessary due to circumstances described in #4 above. If the decision of the Board is to uphold the protest, then MTD shall proceed pursuant to Board direction.

## 9.5 Post-Award Protests

Protests received after award of contract shall be considered only if received within five (5) days following the date on which such award is made. Post-award protests received after that time shall not be considered. Post-award protests shall be processed in the same fashion as that employed for pre-award protests. However, the award shall remain valid and procurement activities shall continue unless the General Manager determines in writing that suspension of such award is necessary pending protest resolution. In that event the awardee shall be so notified in writing, and the Procurement Officer shall effect an agreement with the Contractor for suspension of activity.

## 9.6 FTA Protest Review Procedures<sup>2</sup>

The FTA has developed an appeals process for reviewing protests of MTD’s procurement decisions.

1. Requirements for the Protester. The protester must:

- (a) Qualify as an “Interested Party.” Only an “interested party” qualifies for the FTA review of its appeal. An “interested party” is a party that is an actual or prospective bidder or offeror whose direct economic interest would be affected by the award or failure to award the third party contract at issue.
  - (1) Subcontractors. A subcontractor does not qualify as an “interested party” because it does not have a direct economic interest in the results of the procurement.
  - (2) Consortia/Joint Ventures/Partnerships/Teams. An established consortium, joint venture, partnership, or team that is an actual bidder or offeror and is acting in its entirety, would qualify as an “interested party” because it has a direct economic interest in the results of the procurement. An individual member of a consortium, joint venture, partnership, or

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<sup>2</sup> Excerpted from Chapter VII of Federal Transit Administration Circular 4220.1F *Third Party Contracting Guidance* issued November 1, 2008.

team, acting solely in its individual capacity, does not qualify as an “interested party” because it does not have a direct economic interest in the results of the procurement.

- (3) Associations or Organizations. An association or organization that does not perform contracts does not qualify as an “interested party,” because it does not have a direct economic interest in the results of the procurement.
- (b) Exhaust Administrative Remedies. The protester must exhaust its administrative remedies by pursuing MTD’s protest procedures to completion before appealing the recipient’s decision to the FTA.
- (c) Appeal Within Five Days. The protester must deliver its appeal to the FTA Regional Administrator for the region administering its project or the FTA Associate Administrator for the program office administering its project within five (5) working days of the date when the protester has received actual or constructive notice of MTD’s final decision. Likewise, the protester must provide its appeal to the FTA Regional Administrator for the region administering its project or the FTA Associate Administrator for the program office administering its project within five (5) working days of the date when the protester has identified other grounds for appeal to the FTA. For example, other grounds for appeal include MTD’s failure to have or failure to comply with its protest procedures or failure to review the protest.

2. Extent of FTA Review. As provided in the Common Grant Rule for governmental recipients, the FTA will limit its review of third party contract protests as follows:

- (a) MTD’s Procedural Failures. The FTA will consider a protest if MTD:
  - (1) Does not have protest procedures, or
  - (2) Has not complied with its protest procedures, or
  - (3) Has not reviewed the protest when presented an opportunity to do so.
- (b) Violations of Federal Law or Regulations. The FTA will not consider every appeal filed by a protestor of MTD’s protest decision merely because a Federal law or regulation may be involved. Instead, the FTA will exercise discretionary jurisdiction over those appeals involving issues important to the FTA’s overall public transportation program. The FTA will refer violations of Federal law for which it does not have primary jurisdiction to the Federal authority having proper jurisdiction.
- (c) Violations of State or Local Law or Regulations. The FTA will refer violations of State or local law to the State or local authority having proper jurisdiction.

3. FTA Determinations to Decline Protest Reviews. The FTA’s determination to decline jurisdiction over a protest does not mean that FTA approves of or agrees with MTD’s decision or that the FTA has determined the contract is eligible for Federal participation. The FTA’s determination means only that the FTA does not consider the issues presented to be sufficiently important to the FTA’s overall program that the FTA considers a review to be required.

**SANTA BARBARA METROPOLITAN TRANSIT DISTRICT**  
***Invitation for Bids for Three-Position Transit Bike Racks***  
**STATEMENT OF WORK**

**Background**

The technical specifications herein provide the minimum requirements of the Santa Barbara Metropolitan Transit District (MTD) for three-position transit bike racks. Through a pilot program, MTD successfully tested the Sportworks Apex 3 RL - Reduced Length, 3-Position Bicycle Rack and is interested in deploying such 3-position bike racks of equivalent and salient characteristics throughout the entire fleet.

**Bike Racks**

The bike rack must hold up to 3 bicycles while the vehicle is in motion. The bike rack must accommodate various non-motorized bicycle models with wheel diameters over 20 inches, at least 3-inch tires, and up to 55 pounds.

The bike rack must be designed for use on the front of commercial transit buses. Loading and unloading of bikes from the rack must be able to be accomplished from either the curbside or the front of the vehicle. Bike rack height shall not impede the “line-of-sight” of the operator, the operation of the windshield wiper, or any other mechanical or safety feature of the coach. When the bus is in a kneeled position, no parts shall extend below the rack frame, which could impede loading or unloading.

The transit bike racks shall comply with all state and local rules, laws, and regulations in force at the time of delivery, including the State of California (Caltrans) length restrictions for vehicles 40 foot and over (36-inch bike rack).

The bike rack must be “user-friendly” so that the passengers can load and unload bikes independently without removing any other bicycle. There shall be a form of symbols/images/directions/indicators for passengers to quickly identify how to secure their bike with no belts, straps, or cords required. Any written instructions or warning labels must be in English and Spanish.

The bike rack shall be equipped with an injected molded ergonomic handle to facilitate easy stowing and deployment. The weight to lift and stow the rack must be less than 25 pounds.

All exposed edges shall be smooth and rounded. A properly used bike rack will not cut, scrape or pinch. A properly installed bike rack shall not damage a mechanical bus washer.

The bike rack shall be durable and capable of withstanding the coastal climate of Santa Barbara County. All parts of the moving portion of the bike rack shall be made of stainless steel, aluminum, or other corrosion-resistant materials to extend the service life of the rack.

**Vehicles & Installation**

Vendor shall supply three-position transit bike racks with the necessary mounting brackets, hardware, installation kits, and templates necessary for MTD Maintenance Staff to install. The necessary pivot plates, standoff brackets wiring harnesses for the telltale lights and the switches must be provided for each MTD bus model. A mounting template and any hole saws, drill extensions, or other special tooling required for installation, not typical to transit repair shops, will be included in sufficient quantities to complete this project. Installation guides and resources must be included.

The racks provided will meet the design requirements for the following MTD fleet:

| Quantity | Bus Year | Bus Make             | Bus Model                   |
|----------|----------|----------------------|-----------------------------|
| 14       | 2017     | BYD COACH & BUS LLC  | 2017 BYD ELECTRIC BUS 30 FT |
| 3        | 2014     | NOVA BUS CORPORATION | LFS ARTICULATED 60-FT       |
| 17       | 2003     | GILLIG CORPORATION   | 40' LOW-FLOOR BUS           |
| 8        | 2004     | GILLIG CORPORATION   | 40' LOW-FLOOR BUS           |
| 3        | 2007     | GILLIG CORPORATION   | 40' LOW-FLOOR BUS           |
| 7        | 2007     | GILLIG CORPORATION   | 40' LOW-FLOOR BUS HYBRID    |
| 3        | 2009     | GILLIG CORPORATION   | 29' LOW-FLOOR HYBRID BUS    |
| 7        | 2011     | GILLIG CORPORATION   | 40' LOW-FLOOR BUS           |
| 7        | 2011     | GILLIG CORPORATION   | 40' LOW-FLOOR BUS HYBRID    |
| 13       | 2013     | GILLIG CORPORATION   | 40' LOW-FLOOR BUS           |
| 5        | 2016     | GILLIG CORPORATION   | 40' LOW-FLOOR BUS           |
| 3        | 2017     | GILLIG CORPORATION   | 40' LOW-FLOOR BUS           |
| 10       | 2019     | GILLIG CORPORATION   | 40' LOW-FLOOR BUS           |

In total, 100 quantity, three-position transit bike racks will be procured. All mounting kits shall be specifically designed to attach to MTD's identified fleet.

All parts and accessories needed to make products fully functional and available for immediate use by MTD shall be included in the contracted bid price. All parts and accessories shall be new; no after-market items are allowed.

### **Vendor**

Vendor must have experience in the manufacturing, distribution, and/or provision of three-position transit bike racks, with evidence of satisfactory delivery and performance on similar commercial transit bus fleets by submitting work references.

Vendor shall provide complete parts and service manuals, including preventative maintenance schedules. Parts must be readily available for delivery for ten years after purchase. Parts shall be available at the subcomponent level without purchasing a complete new assembly.

### **Delivery**

Any freight and delivery charges shall have been already included in the Vendor's bid price and shall not be paid otherwise by MTD.

All items provided shall be delivered FOB Santa Barbara to 550 Olive Street, Santa Barbara, CA 93101. To access the MTD delivery point at the mechanic shop on site, enter through the back driveway at 550 East Cota Street, Santa Barbara, CA 93101. Delivery shall be during regular business hours, 8:00 AM to 4:00 PM, Monday through Friday, excluding holidays. Vendor shall contact MTD's Fleet & Facilities Manager prior to making a delivery



in order to make final arrangements. The Fleet & Facilities Manager's contact information shall be provided by MTD at the time of Purchase Order issuance.

MTD is subject to applicable California Sales Tax for Santa Barbara County, which shall be included in the Vendor's bid price and on the Vendor's invoice (8.75%)

Delivery shall not constitute acceptance. MTD reserves the right to inspect any and all items and services upon delivery to comply with the specifications outlined in this bid package. MTD shall inspect such deliverables no later than forty-five (45) calendar days after said deliverables have been received, and, if applicable installed or otherwise set up for usage by MTD. Any item or service not meeting MTD's approval shall be replaced or completed at no additional cost to MTD. If found in conformance with IFB, MTD shall approve the Vendor's invoice for payment, thereby constituting acceptance.

All equipment purchased must come with a warranty provision and shall be further subject to warranty requirements of MTD as set forth in the purchase order terms and conditions. In addition to other remedies which may be available, MTD may, at its option, return any non-conforming or defective items to the Vendor and/or require correction or replacement of said item when a defect is discovered, all at the Vendor's risk and expense.

**End of Statement of Work**





## BOARD OF DIRECTORS REPORT

**MEETING DATE:** APRIL 18, 2023 **AGENDA ITEM: #8**  
**DEPARTMENT:** CAPITAL PROJECTS  
**TYPE:** ACTION ITEM  
**PREPARED BY:** RYAN GRIPP & STEVE MAAS \_\_\_\_\_  
*Signature*  
**REVIEWED BY:** GENERAL MANAGER \_\_\_\_\_  
*Signature*  
**SUBJECT:** ZERO-EMISSION BUS ROLLOUT PLAN

### RECOMMENDATION:

Staff recommends that the Board adopt Resolution 2023-05 approving the attached Zero-Emission Bus (ZEB) Rollout Plan, as required by the Innovative Clean Transit (ICT) regulation of the California Air Resources Board (CARB).

### DISCUSSION:

#### ICT-Compliant ZEB Rollout Plan

The ICT regulation requires all public transit agencies operating buses in California to gradually transition to a completely ZEB fleet by 2040. This regulation is in accordance with preceding state policies SB375 and SB350. SB375, the Sustainable Communities and Climate Protection Program, creates initiatives for increased development of transit-oriented communities, better-connected transportation, and active transportation. Relatedly, SB350 supports widespread transportation electrification through collaboration between CARB and the California Public Utilities Commission (CPUC).

The ICT regulation also states that transit agencies are required to produce a ZEB Rollout Plan that describes how the agency is planning to achieve a full transition to a 100 percent ZEB fleet by 2040, as well as outlining reporting and record-keeping requirements. Small transit agencies, like MTD, are required to submit a ZEB Rollout Plan to CARB by June 30, 2023. The specific elements required to be addressed in the plan are:

- An explanation of how the agency will transition to an all-ZEB fleet by 2040.
- Identification of the ZEB technology the agency intends to deploy.
- A discussion of how the agency will deploy ZEBs in disadvantaged communities.
- Identification of potential funding sources for the ZEB transition.
- A training plan for ZEB operators and maintenance staff.
- Schedules for ZEB purchases and/or leases.
- Discussion of the plan for construction of associated facilities and infrastructure.

## BOARD OF DIRECTORS REPORT

The foregoing elements are broken out into nine sections by CARB, which form the major components of the attached plan and include:

- Section A: Transit Agency Information
- Section B: Rollout Plan General Information
- Section C: Technology Portfolio
- Section D: Current Bus Fleet Composition and Future Bus Purchases
- Section E: Facilities and Infrastructure Modifications
- Section F: Providing Service in Disadvantaged Communities
- Section G: Workforce Training
- Section H: Potential Funding Sources
- Section I: Start-Up and Scale-Down Challenges

The attached document that the Board is asked to adopt is compliant with the requirements listed above. Staff believes that it is important to provide CARB with a focused document that satisfies the requirements without extraneous, albeit important, elements beyond the CARB-required scope. Such approach allows for a more streamlined compliance review by CARB personnel. It also provides MTD with the freedom to develop an internal fleet electrification plan that includes additional information and is structured in a manner that provides the greatest utility to MTD. Thus, MTD's consultant, Stantec, is also in the process of developing the MTD Fleet Electrification Plan (FEP). That document will provide additional detail about MTD's transition to a 100 percent battery-electric bus fleet.

### MTD Fleet Electrification Plan

MTD's FEP, which is anticipated to be complete by Quarter 3 of this year, will serve as a blueprint for MTD's transition to a 100 percent electric fleet. The FEP will build upon the elements of the ICT-Compliant ZEB Rollout Plan and include additional resources and information critical to MTD's transition to a ZEB fleet.

Topics and information covered in the FEP beyond those addressed in the ICT-Compliant ZEB Rollout Plan include:

- Detailed evaluation of existing conditions related to MTD's current fleet and infrastructure to set a baseline for the plan.
- Holistic look at existing ZEB technologies in the marketplace, including vehicles, supporting equipment, and infrastructure. The analysis will also explore which technologies are most appropriate for MTD given existing conditions (i.e. – current bus operations and maintenance, existing and planned facilities, and current fleet composition).
- In-depth facilities planning to include site plans for Terminals 1 and 2 detailing location and type of EV infrastructure and equipment. It will also include phasing detail that breaks deployment of infrastructure into smaller projects that are timed in accordance with the acquisition and deployment of BEBs.
- Resiliency planning for grid independence which serves several key functions for MTD: alternate to utility-provided power to serve as a back-up in the event of a planned or

## BOARD OF DIRECTORS REPORT

unexpected utility outage; self-generation of renewable energy for true 'well to wheel' zero-emission operations; and peak shaving and load shifting to mitigate energy costs.

- Comprehensive cost estimating and financial analysis covering all elements of MTD's transition to a ZEB fleet, giving stakeholders a reliable understanding of the financial impacts of MTD's fleet electrification efforts. Such analysis will look at capital and operating costs as well as any potential offsets.
- Implementation and phasing plan that will break down the steps and stages of MTD's transition to a ZEB fleet to ensure it is executed in a comprehensive and deliberate manner. The guidance will also be sufficiently flexible so it can be updated to adapt to the everchanging and complex landscape of zero-emission transportation technologies.

The FEP will be a critical tool for advancing MTD's fleet electrification evolution. As an early adopter of electric vehicle technology, MTD has accumulated decades of experience and knowledge. Past successes and failures continue to inform MTD's fleet electrification journey and have played a significant role in the development of the FEP.

### ATTACHMENTS:

- ICT-Compliant ZEB Rollout Plan
- Resolution 2023-05



# Zero-Emission Bus Rollout Plan

## Section A: Transit Agency Information

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*Please provide the following information regarding your agency.*

### **Santa Barbara Metropolitan Transit District (SBMTD)**

SBMTD is part of the Santa Barbara County Air Pollution Control District and is within the South Central Air Basin.

Peak Vehicles (NTD, 2022): 80

Population (2020): 202,197

SBMTD is not part of a Joint Zero-Emission Bus Group.

### **Contact Information:**

Jerry Estrada

General Manager

805.963.3364 x232

Jestrada@sbmtd.gov

SBMTD provides public transportation services to the residents of, and visitors to, the South Coast of Santa Barbara County. The District's boundaries correspond closely to the Santa Barbara urbanized area (UZA), including the cities of Santa Barbara, Carpinteria, and Goleta, and several unincorporated communities. The Santa Barbara UZA was historically a "small UZA" of fewer than 200,000 persons, and qualified as a small transit-intensive city (STIC), as defined by the Federal Transit Administration (FTA). However, the FTA now classifies the Santa Barbara UZA as a large UZA, due to the population exceeding 200,000 persons as of the 2020 Census. Due to this change in status, SBMTD will no longer be eligible for the additional FTA funding available through the STIC program.

SBMTD has a long and storied history of fleet electrification. In 1989, the City of Santa Barbara required an innovative downtown circulation system. In response, SBMTD designed and developed the 100% battery-electric Downtown Waterfront Electric Shuttle. The groundbreaking service spawned similar transit programs in Chattanooga, Tennessee and Miami Beach, Florida. The early adoption of battery-electric propulsion systems by SBMTD and other agencies accelerated the commercialization of electric drive and hybrid technology. Over time, SBMTD had one of the largest battery-electric bus fleets in the country, with 23 at its peak.

Today, SBMTD operates 14 battery-electric buses (BEBs), with nine more in production, and 14 battery-electric sedan service vehicles using 14 light-duty and 15 heavy-duty electric vehicle (EV) chargers (with 14 more heavy-duty chargers in progress). SBMTD has also recently procured three battery-electric vans for use in its upcoming microtransit service. SBMTD's commitment to electrification has led to projects supported by private industry, government entities, and the local electric utility, Southern California Edison (SCE).

In response to the State of California's mandate to adopt a fully zero-emission bus (ZEB) fleet by 2040, SBMTD has developed this ZEB rollout plan that is compliant with the State's Innovative Clean Transit (ICT) regulation.

As a community focused on continued investment in public transit and cleaner air, SBMTD:

- Has promulgated a unanimous Board of Directors goal in November 2018 to adopt a 100% ZEB fleet by the year 2030, a decision that was met with wide community support;
- Operates 14 30-ft BEBs from BYD in revenue service and 14 battery-electric Chevrolet Bolt non-revenue service vehicles;
- Purchased nine 40-ft BEBs from New Flyer of America for deployment in early 2023;
- Recently took possession of three Ford Transit passenger vans with Lightning eMotors electric propulsion systems for its soon-to-launch on-demand curb-to-curb microtransit service;
- Received funding from Cycle 5 of the California State Transportation Agency's (CalSTA's) Transit and Intercity Rail Capital Program (TIRCP) for the purchase of eight additional BEBs and three additional electric microtransit vans;
- Is drafting a plan to develop a microgrid at its Terminal 1 facility through a California Energy Commission Blueprint Grant;
- Intends to purchase only ZEBs going forward; and,
- Has developed this robust ZEB rollout plan in accordance with California state regulations that will lay the groundwork and chart a path toward the 100% ZEB goal.

Continuing to pursue a cleaner fleet, SBMTD has requested funding from various sources for BEBs and chargers to replace diesel buses that are beyond their useful life. SBMTD's Federal Transit Administration ZE Transition Plan, required for applications for zero-emission project funds from Section 5339(c) Low or No Emission Vehicle Program and Section 5339(b) Buses and Bus Facilities Program, captures the six elements that will guide SBMTD's transition to a greener fleet.





## Section B: Rollout Plan General Information

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1. *Does your transit agency's Rollout Plan have a goal of full transition to zero-emission technologies by 2040 that avoids early retirement of conventional transit buses?*  
Yes, the goal is for a full transition without early retirement.
2. *The ICT regulation requires 100% ZEB purchases in 2029. Conventional transit buses that are purchased in 2028 could be delivered in or after 2029. Please explain how your transit agency plans to avoid potential early retirement of conventional buses in order to meet the 2040 goal.*  
The Santa Barbara community is strongly committed to environmental sustainability, and SBMTD's Board of Directors established a goal of reaching 100% ZEB by 2030. A 2030 milestone would require early retirement of ten 40-ft diesel buses at 11 years of age. To avoid any early retirements, SBMTD's plan is to naturally replace buses as they reach ~14-years of age and therefore would achieve a 100% zero-emission fleet by 2035, only 5 years after the Board's stated goal of 2030.
3. *When did your transit agency's board or governing body approve the Rollout Plan?*
  - a. Approval date (MM/DD/YYYY)
  - b. Resolution number (optional)
  - c. *Is a copy of the board approved resolution attached to the Rollout Plan submitted to CARB? Yes (required)*
4. *Contact information for follow-up on details of the Rollout Plan (optional)*

- a. Jerry Estrada
  - b. General Manager
  - c. 805.963.3364 x232
  - d. jestrada@sbmtd.gov
- 5. *Who created the rollout plan?* A consultant
  - a. *If consultant, please identify the company name:* Stantec Consulting Services, Inc.
- 6. *Cost for Rollout Plan creation* (optional)
- 7. *How many person-hours did it take to create the Rollout Plan?* (optional)

## Section C: Technology Portfolio

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*What type(s) of zero-emission bus technologies (e.g., battery electric and fuel cell electric buses) does your transit agency plan to deploy through 2040?*

SBMTD plans to deploy battery electric buses (BEBs).

SBMTD is currently operating BEBs and has committed to purchase an additional 17 40-ft BEBs, as well as procuring additional electric vans for the Wave microtransit service and electric sedans for its non-revenue fleet.

Fuel cell electric buses (FCEBs) are a viable, albeit maturing, ZEB technology. However, when considering the trade-offs for SBMTD, at this juncture, hydrogen technology presents a less than compelling case.

First, SBMTD is already investing in electrical upgrades and infrastructure for BEBs. To deploy FCEBs, SBMTD would need to invest in hydrogen fueling equipment, which beyond representing a steep fixed cost, would also consume valuable real estate which is severely limited at SBMTD's two terminals. If FCEBs were to be pursued, SBMTD would have to explore off-site hydrogen fueling. Unfortunately, hydrogen fueling stations are rare in Santa Barbara County, and would not have enough capacity to fuel SBMTD's entire fleet<sup>1</sup>. Furthermore, offsite fueling adds to deadheading and can increase labor costs, as maintenance staff who refuel vehicles would need to take vehicles offsite to fuel, and then return to the yard for further servicing and parking. Hydrogen fueling would also require significant mechanical system upgrades to all of SBMTD's maintenance, service, and storage buildings and structures where buses are present. Conversely, building modifications are not required for BEBs.

Transit agencies typically turn to FCEBs when their routes and operating profiles exceed the operating ranges of BEBs. From the modeling and analysis of SBMTD's operating profile, BEBs can generally replace SBMTD's diesel vehicles in a one-to-one manner. However, re-blocking will be needed to overcome particularly long blocks. Also, deadhead will be reduced because a portion of service will be deployed out of Terminal 2. SBMTD's operations do not generally require the extended ranges that FCEBs would provide. Moreover, FCEBs are currently nearly 30-50% more expensive than BEBs, a major drawback when considering the capital outlay.

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<sup>1</sup> <https://www.h2stationmap.com/stationmap>

Taken together, when considering SBMTD's current fleet, financial elements, and SBMTD's operating profile, the zero-emission technology that best suits SBMTD is BEB technology.

This plan is intended to be a living document which is subject to change as zero emission bus technology and infrastructure mature. As such, SBMTD will continue to monitor technology maturation to understand future opportunities for ZEB technologies.

## Section D: Current Bus Fleet Composition and Future Bus Purchases

*Please complete Table 2 regarding expected future bus purchases, including the number of buses in total expected to be purchased or leased in the year of purchase. Identify the number and percentage of ZEBs of the total bus purchases each year, as well as bus types and fuel types. Identify the same type of information for purchases of conventional buses. Bus types include standard, articulated, over-the-road, double decker, and cutaway buses. For zero-emission technologies, identify the fuel type as diesel, CNG, LNG, diesel hybrid (dHEB), gasoline hybrid (gHEB), propane, or gasoline.*

1. SBMTD currently has a fleet of 113 buses, including diesel, diesel hybrid electric, and BEBs (Table 1). SBMTD's Transit Asset Management Plan calls for a total fleet size of 100 buses of various lengths to accommodate the different service profiles of SBMTD's bus network; thus, SBMTD is planning to reduce its total fleet size from 113 buses to 100 buses.

Table 1: Individual Bus Information of Current Bus Fleet

| Make              | Year | Power    | Length (feet) | Number in Fleet | Rider Seats | Age (years) |
|-------------------|------|----------|---------------|-----------------|-------------|-------------|
| Nova Diesel       | 2015 | Diesel   | 60            | 3               | 55          | 8           |
| Gillig Diesel     | 2003 | Diesel   | 40            | 17              | 36          | 20          |
| Gillig Diesel     | 2004 | Diesel   | 40            | 13              | 37          | 19          |
| Gillig Diesel     | 2011 | Diesel   | 40            | 7               | 38          | 12          |
| Gillig Diesel     | 2013 | Diesel   | 40            | 13              | 38          | 10          |
| Gillig Diesel     | 2016 | Diesel   | 40            | 5               | 38          | 7           |
| Gillig Diesel     | 2017 | Diesel   | 40            | 3               | 38          | 6           |
| Gillig Diesel     | 2019 | Diesel   | 40            | 10              | 38          | 4           |
| Gillig Hybrid     | 2007 | Hybrid   | 40            | 7               | 38          | 16          |
| Gillig Hybrid     | 2011 | Hybrid   | 40            | 7               | 38          | 12          |
| Gillig Diesel     | 2004 | Diesel   | 29            | 8               | 26          | 19          |
| Gillig Diesel     | 2006 | Diesel   | 29            | 3               | 28          | 17          |
| Gillig Hybrid     | 2009 | Hybrid   | 29            | 3               | 28          | 14          |
| BYD Electric      | 2017 | Electric | 30            | 14              | 22          | 6           |
| <b>Total/Avg.</b> |      |          |               | <b>113</b>      | <b>35</b>   | <b>12.8</b> |

2. Table 2 represents the anticipated revenue service vehicles that will be purchased in the future. Years denote the year of purchase—delivery can be expected 18-24 months later.

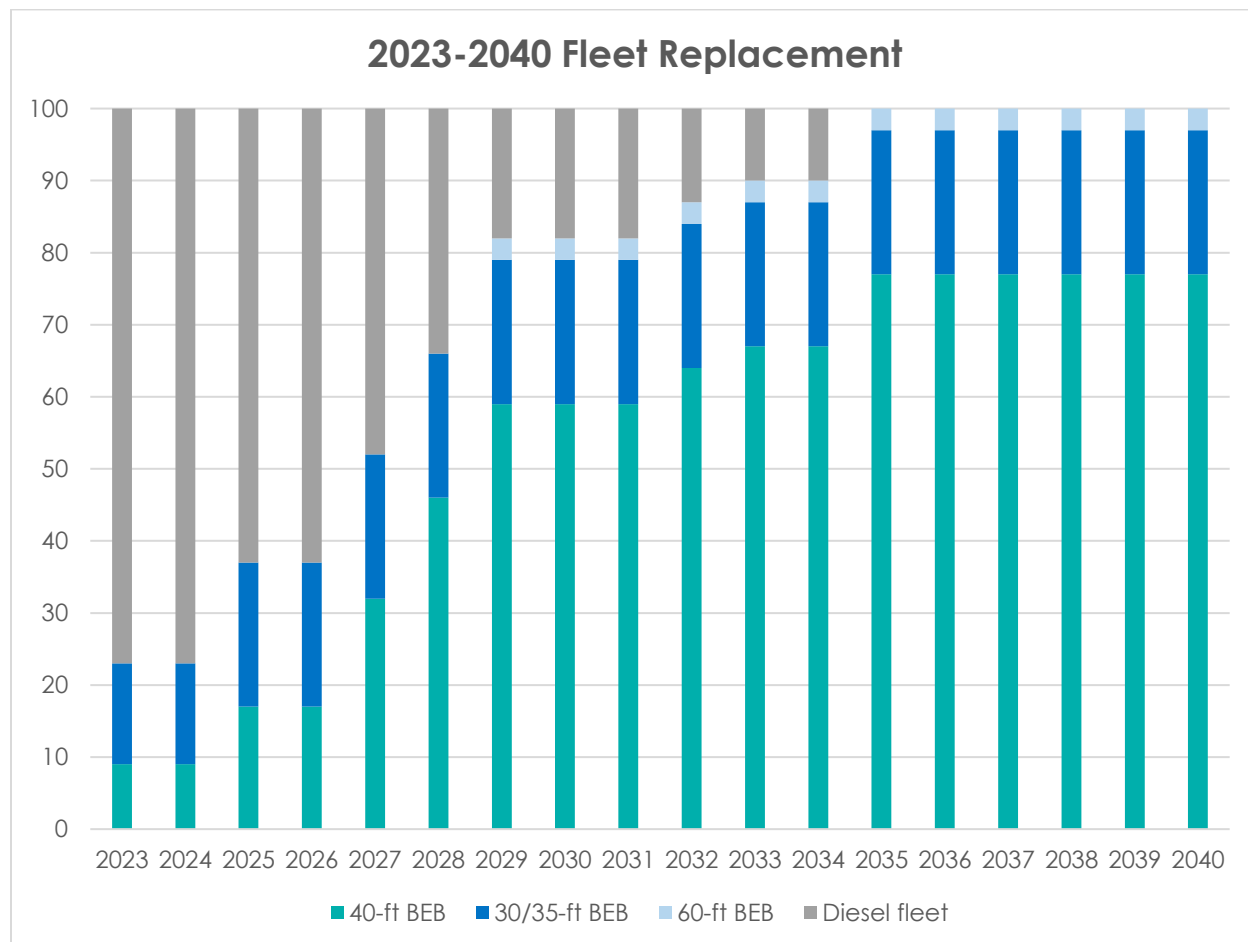
Table 2: Future Vehicle Purchases (Required) – Year of purchase

| <u>Timeline (Year)</u> | <u>Total # of Buses to Purchase</u> | <u># of ZEB Purchases</u> | <u>% of Annual ZEB Purchases</u> | <u>ZEB Bus Type(s)</u>              | <u>ZEB Fuel Type(s)</u> | <u># of Conv. Bus Purchases</u> | <u>% of Annual Conv. Bus Purchases</u> | <u>Type(s) of Conv. Buses</u> | <u>Fuel Type(s) of Conv. Buses</u> |
|------------------------|-------------------------------------|---------------------------|----------------------------------|-------------------------------------|-------------------------|---------------------------------|--|-------------------------------|------------------------------------|
| 2023                   | 14                                  | 14                        | 100%                             | 8 40-ft. buses<br>6 30/35-ft. buses | Battery Electric        | 0                               | 0%                                     | N/A                           | N/A                                |
| 2024                   | 0                                   | 0                         | N/A                              | N/A                                 | N/A                     | 0                               | 0%                                     | N/A                           | N/A                                |
| 2025                   | 15                                  | 15                        | 100%                             | 15 40-ft. buses                     | Battery Electric        | 0                               | 0%                                     | N/A                           | N/A                                |
| 2026                   | 14                                  | 14                        | 100%                             | 14 40-ft. buses                     | N/A                     | 0                               | 0%                                     | N/A                           | N/A                                |
| 2027                   | 16                                  | 16                        | 100%                             | 13 40-ft. buses<br>3 60-ft. buses   | Battery Electric        | 0                               | 0%                                     | N/A                           | N/A                                |
| 2028                   | 14                                  | 14                        | 100%                             | 14 30/35-ft. buses                  | Battery Electric        | 0                               | 0%                                     | N/A                           | N/A                                |
| 2029                   | 0                                   | 0                         | 100%                             | N/A                                 | N/A                     | 0                               | 0%                                     | N/A                           | N/A                                |
| 2030                   | 5                                   | 5                         | 100%                             | 5 40-ft. buses                      | Battery Electric        | 0                               | 0%                                     | N/A                           | N/A                                |
| 2031                   | 3                                   | 3                         | 100%                             | 3 40-ft. buses                      | Battery Electric        | 0                               | 0%                                     | N/A                           | N/A                                |
| 2032                   | 0                                   | 0                         | N/A                              | N/A                                 | N/A                     | 0                               | 0%                                     | N/A                           | N/A                                |
| 2033                   | 10                                  | 10                        | 100%                             | 10 40-ft. buses                     | Battery Electric        | 0                               | 0%                                     | N/A                           | N/A                                |
| 2034                   | 0                                   | 0                         | 100%                             | N/A                                 | N/A                     | 0                               | 0%                                     | N/A                           | N/A                                |
| 2035                   | 6                                   | 6                         | 100%                             | 6 30/35-ft. buses                   | Battery Electric        | 0                               | 0%                                     | N/A                           | N/A                                |
| 2036                   | 9                                   | 9                         | 100%                             | 9 40-ft. buses                      | Battery Electric        | 0                               | 0%                                     | N/A                           | N/A                                |
| 2037                   | 8                                   | 8                         | 100%                             | 8 40-ft. buses                      | Battery Electric        | 0                               | 0%                                     | N/A                           | N/A                                |
| 2038                   | 15                                  | 15                        | 100%                             | 15 40-ft. buses                     | Battery Electric        | 0                               | 0%                                     | N/A                           | N/A                                |

3. Table 3 – Range and estimated costs of Future ZEB purchases (optional)

| <b>Timeline<br/>(Year)</b> | <b># of ZEB<br/>Purchases</b> | <b>ZEB Bus<br/>Type(s)</b>          | <b>ZEB Fuel<br/>Type(s)</b> | <b>Required BEB<br/>Range</b> | <b>Estimated Cost<br/>of Each Bus</b> |
|----------------------------|-------------------------------|-------------------------------------|-----------------------------|-------------------------------|---------------------------------------|
| <b>2023</b>                | 14                            | 8 40-ft. buses<br>6 30/35-ft. buses | Battery Electric            | 150 miles and<br>greater      | \$800,000-<br>\$1,200,000             |
| <b>2024</b>                | 0                             | N/A                                 | N/A                         | N/A                           | N/A                                   |
| <b>2025</b>                | 15                            | 15 40-ft. buses                     | Battery Electric            | 150 miles and<br>greater      | \$800,000-<br>\$1,200,000             |
| <b>2026</b>                | 14                            | 14 40-ft. buses                     | Battery Electric            | 150 miles and<br>greater      | \$800,000-<br>\$1,200,000             |
| <b>2027</b>                | 16                            | 13 40-ft. buses<br>3 60-ft. buses   | Battery Electric            | 150 miles and<br>greater      | \$800,000-<br>\$1,200,000             |
| <b>2028</b>                | 14                            | 14 30/35-ft.<br>buses               | Battery Electric            | 150 miles and<br>greater      | \$1,200,000+                          |
| <b>2029</b>                | 0                             | N/A                                 | N/A                         | N/A                           | N/A                                   |
| <b>2030</b>                | 5                             | 5 40-ft. buses                      | Battery Electric            | 150 miles and<br>greater      | \$800,000-<br>\$1,200,000             |
| <b>2031</b>                | 3                             | 3 40-ft. buses                      | Battery Electric            | 150 miles and<br>greater      | \$800,000-<br>\$1,200,000             |
| <b>2032</b>                | 0                             | N/A                                 | N/A                         | N/A                           | N/A                                   |
| <b>2033</b>                | 10                            | 10 40-ft. buses                     | Battery Electric            | 150 miles and<br>greater      | \$800,000-<br>\$1,200,000             |
| <b>2034</b>                | 0                             | N/A                                 | N/A                         | N/A                           | N/A                                   |
| <b>2035</b>                | 6                             | 6 30/35-ft. buses                   | Battery Electric            | 150 miles and<br>greater      | \$800,000-<br>\$1,200,000             |
| <b>2036</b>                | 9                             | 9 40-ft. buses                      | Battery Electric            | 150 miles and<br>greater      | \$800,000-<br>\$1,200,000             |
| <b>2037</b>                | 8                             | 8 40-ft. buses                      | Battery Electric            | 150 miles and<br>greater      | \$800,000-<br>\$1,200,000             |
| <b>2038</b>                | 15                            | 15 40-ft. buses                     | Battery Electric            | 150 miles and<br>greater      | \$800,000-<br>\$1,200,000             |

The chart below demonstrates graphically the proportion of conventional buses and ZEBs over the course of the plan horizon. The chart below shows the anticipated delivery/operational date, which is assumed to be 18-24 months after a bus purchase. As per the plan, by 2035, 100% of the fleet will be ZEBs, with 77 40-ft buses, 20 35/30-ft buses, and 3 60-ft buses. Microtransit vehicles are not shown here but will be ZE from the first procurement.



4. *Is your transit agency considering converting some of the conventional buses in service to zero-emission buses?* SBMTD is not currently considering converting conventional buses to zero-emission buses.

## Section E: Facilities and Infrastructure Modifications

1. *Please complete Table 5 with names, locations, and main functions of transit agency divisions or facilities that would be involved in deploying and maintaining zero-emission buses. Please limit the facilities to bus yards and facilities with maintenance, fueling, and charging functions, and exclude other operational functions like training centers, information and trip planning offices, and administrative buildings.*

1. SBMTD is actively modifying its facilities, including reactivating a currently unused operations and maintenance facility to accommodate the transition to BEBs. Below is a table of facilities and infrastructure modifications.

Table 5: Facilities Information and Construction Timeline (Required)

| <u>Division/<br/>Facility<br/>Name</u> | <u>Address</u>                              | <u>Main<br/>Function(s)</u>  | <u>Type(s) of Infrastructure</u>   | <u>Service<br/>Capacity</u> | <u>Needs<br/>Upgrade<br/>?<br/>(Yes/No)</u> | <u>Estimated<br/>Construction<br/>Timeline</u> |
|--|---|--|--|-----------------------------|---|--|
| Terminal 1<br>Santa<br>Barbara         | 550 Olive St,<br>Santa Barbara,<br>CA 93101 | Administration,<br>Operations,<br>Maintenance,<br>Training,<br>Fueling | New charging equipment,<br>electrical utility upgrades, site<br>improvements (pavement<br>repairs and safety upgrades),<br>new overhead canopy<br>structures for EV dispensing,<br>flood plain mitigations | 75<br>revenue<br>vehicles   | Yes   | 2022 – 2030                                    |
| Terminal 2<br>Goleta                   | 5353 Overpass<br>Rd, Goleta, CA<br>93111    | Operations,<br>Maintenance,<br>Fueling                                 | New charging equipment,<br>electrical utility upgrades, site<br>improvements (pavement<br>repairs and safety upgrades),<br>overhead canopy structure<br>replacement  | 25<br>revenue<br>vehicles   | Yes   | 2023 – 2030                                    |

Additional charging equipment and electrical service infrastructure will be required for the remainder of SBMTD's fleet to ultimately be operated out of Terminal 1. Overhead canopies or support structures will be considered for charging equipment implementation due to space constraints as well as flood plain mitigation concerns and contaminated soils at this location. In addition, these structures will likely be planned for photovoltaic systems to aid in offsetting electrical utility demands.

Improvements to the maintenance, fuel, wash, and administration buildings are not currently planned but modifications to these buildings will likely be required to accommodate the evolving fleet. Onsite diesel fueling and maintenance fluids will eventually be decommissioned once the fleet fully transitions to BEBs in the future. Maintenance bays will be outfitted as necessary with diagnostic equipment for the servicing of the electric vehicle fleet.

Since no electric vehicle infrastructure currently exists at the Terminal 2 facility, extensive modifications will be required to provide sufficient power capacity to the facility and install charging equipment. Currently planned in Phase 2 of facility improvements is the replacement of existing canopies that cover the vehicle parking with new canopy structures that can support photovoltaic panels, charging equipment, and the necessary support infrastructure such as lighting, Wi-Fi, and security cameras. The current canopies are in poor condition and lack the structural capacity to support rooftop photovoltaic systems.

Phase 2 of work at this facility is also anticipated to include replacement of the existing maintenance building due to its current condition and limitations for renovation because of structural capacity issues. A new building will allow the facility to adequately service the evolving fleet of electric vehicles with appropriately designed maintenance bays and support spaces.

*Questions 2 through 5 are optional.*

6. *Please identify the electric utilities in your transit agency's service area.*

SBMTD is in Southern California Edison (SCE) territory, but the local utilities relevant for SBMTD are the community choice aggregators (CCAs): Santa Barbara Clean Energy in the City of Santa Barbara, and Central Coast Community Energy (3CE) in Goleta. While SCE provides energy, continuing to own and operate the electrical grid, CCAs set local rates for different energy portfolios. SBMTD and SCE have partnered in the past and are currently collaborating to deploy vehicle chargers and related infrastructure at Terminal 1 in Santa Barbara through SCE's Charge Ready Transport Program.

Santa Barbara Clean Energy offers customers access to a 100% renewable energy portfolio which customers are automatically enrolled in (opted-in). Santa Barbara Clean Energy's published rates are overall more expensive than SCE for the 100% renewable energy portfolio; Santa Barbara Clean Energy also offers time-of-use rates. Santa Barbara Clean Energy is unlikely to provide incentive programs (such as for vehicles and infrastructure) but has indicated a willingness to work with SBMTD regarding rates and rate structure.

3CE provides electrical service to SBMTD's Terminal 2 facility in Goleta, offering a 100% renewable energy option as well as a 30% renewable energy option. In addition to generally lower energy rates than SCE, 3CE is looking into the possibility of developing programs and incentives to support EV conversion and has engaged directly with SBMTD on this subject.

## Section F: Providing Service in Disadvantaged Communities

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The ICT utilizes information provided by CalEnviroScreen to identify disadvantaged communities. The ICT regulation defines CalEnviroScreen as a mapping tool that is developed by the Office of Environmental Health Hazard Assessment (OEHHA) at the request of the California Environmental Protection Agency (CalEPA) to identify California's most pollution-burdened and vulnerable communities based on geographic, socioeconomic, public health, and environmental hazard criteria.

CalEnviroScreen evaluates the burden of pollution from multiple sources in communities while accounting for potential vulnerability to the adverse effects of pollution to identify disadvantaged communities from a wide variety of factors to comprehensively assess the overall health of communities, down to the census tract level. Specifically, CalEnviroScreen identifies disadvantaged communities as census tracts that scored in the top 25% based on the factors used by CalEnviroScreen to assess pollution burden and vulnerability.

Within SBMTD's service area, there is one disadvantaged community as defined by CalEnviroScreen 4.0. This census tract is in Goleta, with Lines 6, 7, 11, 12x, and 24x traveling through it. The census tract has a CalEnviroScreen percentile score of 77%, with an overall pollution burden of 85% and 70% of residents living in the census tract identifying as non-White or of Hispanic origin. Terminal 2 is also located within this census tract.



Figure 1: CalEnviroScreen Disadvantaged Communities in the SBMTD service area

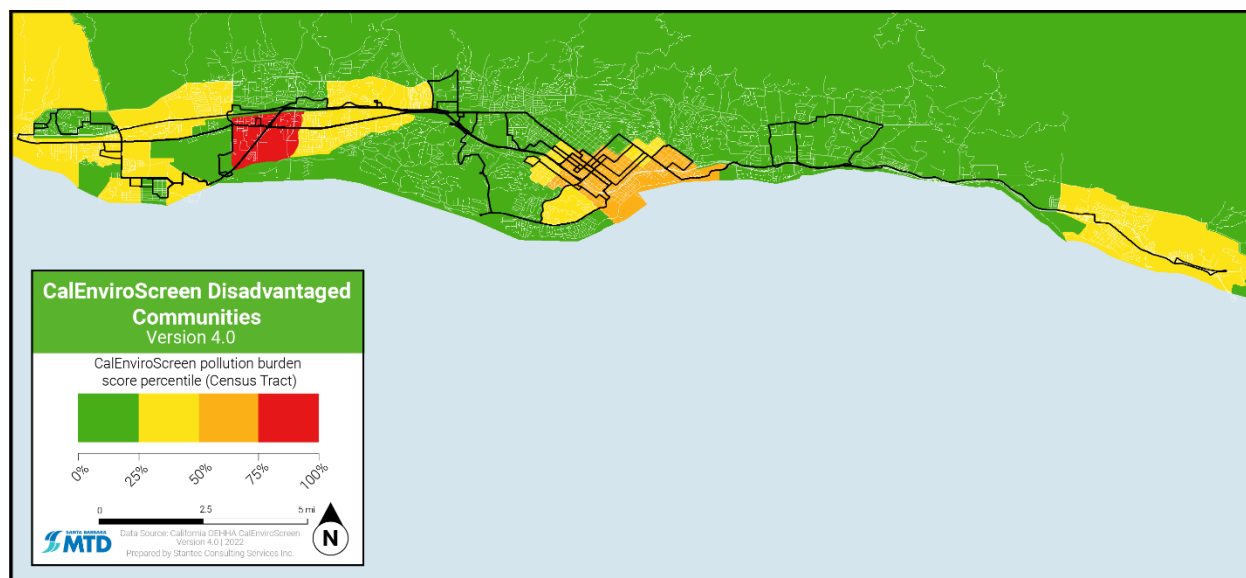


Table 7: Service in Disadvantaged Communities (Optional)

| Census Tract ID | Community | Route(s)           |
|-----------------|-----------|--------------------|
| 6083003001      | Goleta    | 6, 7, 11, 12x, 24x |

## Section G: Workforce Training

*Describe your transit agency's plan and schedule for the training of bus operators and maintenance and repair staff on zero-emission bus technologies. (Required)*

With SBMTD's goal to move to a 100% ZE fleet, there are additional skill sets required to assure that the staff is fully trained on the unique aspects of BEBs and associated charging equipment. For all staff, it will be critical to assure that this training includes safety protocols. Maintenance staff will need to be provided with all of the appropriate equipment including items such as fall protection when working at heights on roof-mounted equipment (e.g., batteries) and with overhead charging; SBMTD currently has one maintenance bay with fall protection.

As the fleet continues to transition to BEBs, SBMTD will need to:

- Enhance standard operating procedures/policies for training on BEBs and related equipment (including but not limited to chargers, tools, software, etc.) to fully document the current equipment and procedures; ensure that all staff have relevant manuals and other necessary documentation; and make procedure handbooks readily available;
- Confirm and document standard operating procedures/policies, as well as provide and mandate use of appropriate personal protection equipment associated both with an industrial work place and with handling high voltage components;

- Arrange for courses on basic electricity fundamentals for any non-BEB shop staff that may be in the work area; and
- Post illustrated warning signage at entrances to shop areas and enforce the safety policies on visitors. Warning signs include the federally or state mandated workplace requirements as well as anything related to high voltage electrical equipment; for instance, personal protective equipment must be worn when handling high voltage vehicle components.

The required overall skill sets/knowledge areas on BEBs include:

- **Maintenance Staff**
  - Safety protocols for high-voltage, batteries and chargers
  - Preventive maintenance – buses, vans, and sedans
  - Onboard diagnostic systems
  - Multiplexing
  - HVAC
  - Brake systems
  - Energy Storage System, lithium-ion battery and energy management hardware and software
  - Electric propulsion
  - Monitoring alerts and necessary updates to maintenance management software
  - Charging dispensers
    - Preventative maintenance
    - Charger diagnosis and repair
    - Smart Charger software
- **Bus Operators**
  - BEB driving techniques, including methods to maximize range and battery life
  - BEB vehicle and associated systems orientation including onboard diagnostics
  - Safety protocols
- **First Responders**
  - Training on layout, componentry, safety devices, and other BEB features
- **Planning/Scheduling/Dispatching Staff**
  - Training on BEB-specific features that impact operating parameters
- **Towing Staff/Contractors**
  - Schedule and test towing training with staff and any contractors who will tow the BEBs for each type of BEB

*Table 8: Potential training methods (Optional)*

## Section H: Potential Funding Sources

*Please identify all potential funding sources your transit agency expects to use to acquire zero-emission technologies (both vehicles and infrastructure).*

SBMTD has been successful at competing for discretionary grants to begin deploying ZEBs and associated infrastructure, including:

- FTA Section 5339(b)
- TIRCP
- HVIP
- VW Mitigation
- SBCAPCD – Carl Moyer

The table below shows all potential funding sources SBMTD will explore to use to acquire zero-emission technologies.

Table 9: Potential Funding Sources (Optional)

| Type    | Agency                               | Fund/Grant/Program                                    | Description   | Applicability & Details  |
|---------|--------------------------------------|---|---|--|
| Federal | Federal Transit Administration (FTA) | Low or No Emission Program (Low-No Program) (5339(c)) | <p>Low-No provides competitive funding for the procurement of low or no emission vehicles, including the leasing or purchasing of vehicles and related supporting infrastructure.</p> <p>This has been an annual program under the FAST Act since FY2016 and is a subprogram of the Section 5339 Grants for Buses and Bus Facilities.</p> <p>There is a stipulation for a 15% to 20% local match.</p> | <p>In FY2022 the FTA awarded \$1.6 billion to 150 projects for the Low-No program.<sup>2</sup> In FY2022, Gold Coast Transit District received \$12 million for the procurement of FCEBs, construction of a permanent hydrogen fueling station to support its electric bus operations, and completion of upgrades to its maintenance facility.<sup>3</sup> \$1.7 billion has been announced for FY2023 projects.<sup>4</sup></p> |

<sup>2</sup> <https://www.transit.dot.gov/funding/grants/fy22-fta-bus-and-low-and-no-emission-grant-awards>

<sup>3</sup> <https://www.transit.dot.gov/funding/grants/fy22-fta-bus-and-low-and-no-emission-grant-awards>

<sup>4</sup> <https://www.transit.dot.gov/about/news/biden-harris-administration-announces-availability-nearly-17-billion-modernize-fleets>

| Type  | Agency   | Fund/Grant/Program  | Description   | Applicability & Details  |
|-------|--|---|---|--|
|       |  | Buses and Bus Facilities Program (5339(a) formula, 5339(b) competitive)   | Grants applicable to rehab buses, purchase new buses, and invest and renovate related equipment and facilities for low or no emission vehicles or facilities. A 15% to 20% local match is required.   | FY2022 5339 funding totaled \$372 million in grants. \$469.4 million has been announced for FY2023 grants. <sup>5</sup>  |
|       |  | Urbanized Area Formula Grants (5307)                                      | 5307 grant funding makes federal resources available to urbanized areas for transit capital and operating assistance. Eligible activities include capital investments in buses and bus-related activities such as replacement, overhaul and rebuilding of buses. The federal share is not to exceed 80% to 85% of the net project cost for capital expenditures. The federal share may be 90% of the cost of vehicle-related equipment attributable to compliance with the Clean Air Act. | The “designated recipient” of FTA formula funds for the urbanized area allocates these funds to the appropriate agency. The agency can utilize these funds for the purchase of ZEBs.   |
|       | United States Department of Transportation (USDOT) | Rebuilding American Infrastructure with Sustainability and Equity (RAISE) | Previously known as BUILD and TIGER, RAISE is a discretionary grant program aimed to support investment in infrastructure. RAISE funding supports planning and capital investments in roads, bridges, transit, rail, ports, and intermodal transportation. A local match is required. <sup>6</sup>  | FY2022 provided \$2.2 billion in RAISE grants to 166 projects with a stipulation requiring 50% of funding for projects in rural areas. In FY2023, \$1.5 billion in funding was announced for the RAISE Grant Program. <sup>7</sup> |
| State | California Air Resources Board (CARB)              | Hybrid and Zero-Emission Truck and Bus Voucher Incentive Program (HVIP)   | Voucher program created in 2009 aimed at reducing the purchase cost of zero-emission vehicles.<br><br>A transit agency would decide on a vehicle, contact the vendor directly, and then the vendor would apply for the voucher.   | \$65 million in transit funding for the FY22-23 year was announced in November 2022. <sup>9</sup><br><br>Hydrogen fuel cell vehicles are eligible for HVIP but must not have plug-in capacity. <sup>10</sup>                       |

<sup>5</sup> <https://www.transit.dot.gov/bus-program>

<sup>6</sup> <https://www.transportation.gov/RAISEgrants/about>

<sup>7</sup> [RAISE Discretionary Grants | US Department of Transportation](https://www.transportation.gov/RAISEgrants/about)

<sup>9</sup> <https://californiahvip.org/funding/>

<sup>10</sup> <https://californiahvip.org/wp-content/uploads/2022/03/HVIP-FY21-22-Implementation-Manual-03.15.22.pdf>

| Type | Agency | Fund/Grant/Program   | Description   | Applicability & Details  |
|------|--------|--|---|--|
|      |        |  | Voucher rebates vary by vehicle type and model. <sup>8</sup>  |  |
|      |        | Carl Moyer Memorial Air Quality Standards Attainment Program | The Carl Moyer Program provides funding to help procure low-emission vehicles and equipment. It is implemented as a partnership between CARB and local air districts.   | Transit buses are eligible for up to \$80,000 funding.   |
|      |        | Low Carbon Fuel Standard (LCFS) Program                      | LCFS credits are not necessarily funding to be applied for; rather, they are generated credits which can be sold on the LCFS market. The program is based upon carbon intensity standards set by CARB and the LCFS program which allows users who incur a deficit from polluting above the standard can purchase credits from those users operating below the standard. | Chargers or equipment for hydrogen production must be registered with the LCFS program to be eligible for credit generation. The CARB set price of \$221.76 per credit in 2021 has created a price ceiling with most credits trading around \$200 per credit. Both hydrogen and electricity used as fuels are eligible for LCFS credits. |
|      |        | Volkswagen Environmental Mitigation Trust Funding            | VW's settlement provides nearly \$130 million for zero-emission transit, school, and shuttle bus replacements.  | Transit may be eligible for up to \$65 million. Applications are open for transit agencies and are processed on a first come, first served basis. Maximum: \$400,000 per FCEB and maximum of \$3,250,000 total funding per agency. <sup>11</sup>   |

<sup>8</sup> <https://californiahvip.org/vehiclecatalog/>

<sup>11</sup> <http://vwbusmoney.valleyair.org/documents/FAQ.pdf>

| Type | Agency   | Fund/Grant/Program                               | Description   | Applicability & Details  |
|------|--|--|---|--|
|      |  | Sustainable Transportation Equity Project (STEP) | STEP was a pilot that took a community-based approach to overcoming barriers to clean transportation. The future of STEP is currently being determined by CARB and stakeholder groups through the FY22-23 Funding Plan and Three-Year Plan for Clean Transportation Incentives. <sup>12</sup>   | There are two different grant types: Planning and Capacity Building Grants (up to \$1.75 million for multiple grantees) and Implementation Grants (up to \$17.75 million for between one and three grantees). Lead applicants must be a CBO, federally-recognized tribe, or local government representing a public transit agency. Award amounts ranged from \$184,000 to a maximum of over \$7 million. <sup>13</sup> |
|      | California Transportation Commission (CTC)         | SB1 Local Partnership Program (LPP)              | The Local Partnership Program provides funding to counties, cities, districts and regional transportation agencies to improve aging infrastructure, road conditions, active transportation, transit and rail, and health and safety benefits. Funds are distributed through competitive and formulaic components. <sup>14</sup>                         | To be eligible, counties, cities, districts, and regional transportation agencies must have approved fees or taxes dedicated solely to transportation improvements. \$200 million is available annually. <sup>15</sup>   |
|      |  | Solutions for Congested Corridors Program (SCCP) | The SCCP includes programs with both formula and competitive funds. Funding is available to projects that make specific performance improvements and are a part of a multimodal comprehensive corridor plan designed to reduce congestion in highly traveled corridors by providing more transportation choices for residents, commuters, and visitors. | Improvements to transit facilities are eligible projects. Cycle 2 funding of \$500 million covers two years (FY2022 and FY2023). To submit a SCCP application, the applicant needs to know exactly what sources will be funding the project and when the funds will be used, as well as which project phase they will be used for. Total estimated funding: \$500 million for FY22-23 <sup>16</sup>                    |
|      | California Department of Transportation (Caltrans) | SB1 State of Good Repair (SGR)                   | SGR funds are formula funds eligible for transit maintenance, rehabs, and capital programs. Agencies receive yearly SB1 SGR funding through their MPO, based on population and farebox revenues.  | Agencies can decide to devote its portion of SB 1 funds to ZEB transition.   |

<sup>12</sup> <https://ww2.arb.ca.gov/lcti-step>

<sup>13</sup> <https://ww2.arb.ca.gov/news/grant-awards-announced-new-195-million-pilot-funding-equitable-clean-transportation-options>

<sup>14</sup> <https://catc.ca.gov/programs/sb1/local-partnership-program>

<sup>15</sup> <https://www.vcstar.com/story/news/local/2021/10/22/group-proposing-transit-sales-tax-measure-countys-2022-ballot/5988391001/>

<sup>16</sup> <https://www.grants.ca.gov/grants/solutions-for-congested-corridors-program/>

| Type | Agency | Fund/Grant/Program   | Description   | Applicability & Details  |
|------|--------|--|---|--|
|      |        | Low Carbon Transit Operations Program (LCTOP)                      | LCTOP provides operating and capital assistance to transit agencies in order to reduce greenhouse gas emissions and improve mobility. 5% of the annual Cap and Trade auction proceeds fund this program.  | Many agencies are already recipients of these funds and can use these funds to purchase ZEBs and related equipment.  |
|      |        | Transit and Intercity Rail Capital Program (TIRCP)                 | TIRCP was created to fund capital improvements that reduce emissions of greenhouse gases, vehicle miles traveled, and congestion through modernization of California's rail, bus, and ferry transit systems. <sup>17</sup>  | The five cycles of TIRCP funding have awarded \$6.6 billion in funding to nearly 100 projects throughout California. In 2022, SBMTD received \$14.5 million to procure 8 battery electric buses and 3 electric micro transit vans as well as fund for general transit improvements and facility improvements at two terminals. <sup>18</sup> |
|      |        | State Transportation Improvement Program (STIP)                    | The STIP is a five-year plan for future allocations of certain state transportation funds including state highway, active transportation, intercity rail, and transit improvements. The STIP is updated biennially in even-numbered years. <sup>19</sup>          | ZEB procurement could compete for STIP funding. The 2022 STIP was adopted in March 2022 and included \$796 million in available funding. <sup>20</sup> Funding is distributed via formula for a variety of projects.   |
|      |        | Transportation Development Act (Mills-Alquist-Deddeh Act (SB 325)) | The TDA law provides funding to improve existing public transportation services and encourage regional transportation coordination. There are two funding sources: the Local Transportation Fund (LTF) and the State Transit Assistance (STA) fund. <sup>21</sup> | Funding opportunities include transportation program activities, pedestrian and bike facilities, community transit services, public transportation, and bus and rail projects.   |

<sup>17</sup> <https://calsta.ca.gov/subject-areas/transit-intercity-rail-capital-prog>

<sup>18</sup> <https://calsta.ca.gov/-/media/calsta-media/documents/tircp---program-of-projects-as-of-july-2022---cycle-5-only-a11y.pdf>

<sup>19</sup> <https://catc.ca.gov/programs/state-transportation-improvement-program>

<sup>20</sup> <https://catc.ca.gov/-/media/ctc-media/documents/programs/stip/2022-stip/2022-adopted-stip-32522.pdf>

<sup>21</sup> <https://dot.ca.gov/programs/rail-and-mass-transportation/transportation-development-act>

| Type | Agency  | Fund/Grant/Program   | Description  | Applicability & Details  |
|------|---|--|--|--|
|      | California Energy Commission                    | Clean Transportation Program (Alternative and Renewable Fuel and Vehicle Technology Program) | The California Energy Commission's Clean Transportation Program provides funding to support innovation and acceleration of development and deployment of zero-emission fuel technologies. A local match is often required.   | <p>The Clean Transportation Program provides up to \$100 million annually for a variety of renewable and alternative fuel transportation projects throughout the state, including specific projects for heavy-duty public transit buses.</p> <p>Current program funding is being allocated for FY22-23 and the first half of FY23-24.</p> <p>In 2021, between \$4 million and \$6 million were awarded to the following transit agencies to assist with zero-emission transit fleet infrastructure deployment: Anaheim Transportation Network (\$5 million), LADOT (\$6 million), Sunline Transit (\$5 million), and North County Transit District (\$4 million)</p> |
|      | Department of Housing and Community Development | Affordable Housing and Sustainable Communities Program (AHSC)                                | The AHSC Program funds land use, housing, and transportation projects to support development that reduces GHG emissions. The program provides both grants and loans that reduce GHG emissions and benefit disadvantaged communities through increasing accessibility via low-carbon transportation. \$405 million in available funds was announced in 2021. <sup>22</sup> The maximum award amount is not to exceed \$30 million per project, with a minimum award of \$1 million. <sup>23</sup> | Sustainable transportation infrastructure projects, transportation-related amenities, and program costs (including transit ridership) are eligible activities. Agencies can use program funds for assistance in construction or modification of infrastructure for ZEB conversion as well as new vehicle purchases.  |
|      | California Climate Investments                  | Clean Mobility Options (CMO) Voucher Pilot Program   | CMO awards up to \$1 million vouchers to develop and launch zero-emission mobility projects including the purchase of zero-emission vehicles, infrastructure, planning, outreach, and operations projects in low-income and disadvantaged communities. <sup>24</sup> Funding is limited.   | In 2020, the CMO Voucher Pilot Program awarded \$20 million in mobility project vouchers, with \$18 million going to eligible under-resourced communities. For example, the City of Chula Vista received funding to launch an on-demand community shuttle service in northwest Chula Vista using four electric vehicles. Also, Fresno County Rural Transit Agency is on a wait list to potentially receive \$36,885 in funding.  |

<sup>22</sup> [https://www.hcd.ca.gov/grants-funding/active-funding/ahsc/docs/final\\_ahsc\\_nofa\\_round\\_6.pdf](https://www.hcd.ca.gov/grants-funding/active-funding/ahsc/docs/final_ahsc_nofa_round_6.pdf)

<sup>23</sup> [https://www.hcd.ca.gov/affordable-housing-and-sustainable-communities#:~:text=Communities%20Program%20\(AHSC\)-,Affordable%20Housing%20and%20Sustainable%20Communities%20Program%20\(AHSC\),\(%22GHG%22\)%20emissions.](https://www.hcd.ca.gov/affordable-housing-and-sustainable-communities#:~:text=Communities%20Program%20(AHSC)-,Affordable%20Housing%20and%20Sustainable%20Communities%20Program%20(AHSC),(%22GHG%22)%20emissions.)

<sup>24</sup> <https://cleanmobilityoptions.org/about/#>



| Type | Agency   | Fund/Grant/Program  | Description  | Applicability & Details  |
|------|--|---|--|--|
|      | California Pollution Control Financing Authority (CPCFA) | Medium-Heavy-Duty (MHD) Zero Emission Vehicle Financing Program | The CPCFA is developing a purchasing assistance program for MHD ZEV fleets. This will provide financial support and technical assistance to fleet managers deploying ZEV fleets. The program will be established by January 1, 2023. <sup>25</sup> | CPCFA will designate high priority fleets based on implications for climate change, pollution, environmental justice, and post-COVID economic recovery. A minimum of 75% of financing must be directed towards fleets that directly impact or operate in underserved communities.  |
|      |  | Transportation Development Credits                              | Although they are not funds for projects, Transportation Development Credits, also called “Toll Credits”, satisfy the federal government requirement to match federal funds. <sup>26</sup>   | Toll credits provide a credit toward a project’s local share for certain expenditures with toll revenues. FHWA oversees the toll credits within each state. <sup>27</sup>  |
|      | Southern California Edison (SCE)                         | Charge Ready Transport (CRT)                                    | SCE provides utility distribution service upgrades to support the installation of charging equipment and provides rebates to participants for the purchase and installation of approved EV charging equipment.                                     | SCE customers must lease or purchase a minimum of two EVs, purchase and install SCE-approved charging equipment, and maintain charging equipment for at least five to ten years. Data sharing requirement for five years as well as grant easements depending on the build option. |
| Tax  | Santa Barbara County Association of Governments (SBCAG)  | Santa Barbara County Measure A                                  | Santa Barbara County Measure A – a 2008 measure to provide \$1 billion in estimated sales tax revenue for transportation projects in Santa Barbara County over 30 years.   | Measure A funding can be used as local matches for infrastructure grant applications.  |

<sup>25</sup> <https://afdc.energy.gov/laws/12858>

<sup>26</sup> <https://dot.ca.gov/-/media/dot-media/programs/rail-mass-transportation/documents/f0010121-toll-credit-fact-sheet.pdf>

<sup>27</sup> <https://dot.ca.gov/-/media/dot-media/programs/rail-mass-transportation/documents/f0009899-2-toll-credits-fact-sheet-a11y.pdf>

## Section I: Start-up and Scale-up Challenges

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Prior to creation of this ICT-compliant ZEB Rollout Plan, the SBMTD Board of Directors adopted a goal for full transition to ZE technologies by 2030. While the 2030 goal would complete SBMTD's fleet transition to BEBs well in advance of the ICT mandate, early retirement of vehicles would be required to achieve that goal. In addition to the ICT stipulation to avoid retiring vehicles before the end of their useful lives, SBMTD would be required to reimburse the FTA portion of the capital cost of vehicles that are retired early. Taken together, based on natural attrition of diesel and hybrid buses and replacement with BEBs, SBMTD plans to achieve a 100% ZEB fleet by 2035.

**DRAFT**



## Attachment

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Board Resolution



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

IN THE MATTER OF APPROVAL OF THE  
SANTA BARBARA METROPOLITAN TRANSIT  
DISTRICT ZERO-EMISSION BUS ROLLOUT  
PLAN COMPLIANT WITH THE INNOVATIVE  
CLEAN TRANSIT REGULATION OF THE  
CALIFORNIA AIR RESOURCES BOARD

**RESOLUTION NO. 2023-05**

**WHEREAS**, California Code of Regulations Title 13, Division 3, Chapter 1, Article 4.3, Part 2023.1(d) Zero Emissions Bus Rollout Plan Requirements requires that a transit agency Zero-Emission Bus Rollout Plan must be approved by its governing Board; and

**WHEREAS**, the Zero-Emission Bus Rollout Plan sets forth the Santa Barbara Metropolitan Transit District's (District's) plan which meets the following requirements:

- A goal of full transition to zero-emission buses by no later than 2040 with careful planning that avoids early retirement of conventional internal combustion engine buses;
- Identification of the types of zero-emission bus technologies District is planning to deploy;
- A schedule for zero-emission bus purchases;
- A schedule for construction of facilities and infrastructure modifications or upgrades, including charging, fueling, and maintenance facilities, to deploy and maintain zero-emission buses;
- Explanation of how District plans to deploy zero-emission buses in Disadvantaged Communities;
- A training plan for zero-emission bus operators and maintenance staff; and
- Identification of potential funding sources;

**NOW, THEREFORE, BE IT RESOLVED** that the Board of Directors of the Santa Barbara Metropolitan Transit District hereby approves the District's Zero-Emission Bus Rollout Plan as set forth in full; and

**BE IT FURTHER RESOLVED** that insofar as the provisions of any Ordinance, Resolution, document, or previous action of the Board and/or the General Manager, prior to the date of this Resolution, are inconsistent with the provisions of this Resolution or any policy adopted by this Resolution, this Resolution and the Board Policies adopted herein shall control.

**PASSED AND ADOPTED** by the Board of Directors of the Santa Barbara Metropolitan Transit District this 18<sup>th</sup> day of April, 2023 by the following vote:

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

\_\_\_\_\_  
Chair, Board of Directors

ATTEST:  
  
\_\_\_\_\_  
Secretary, Board of Directors

To: MTD Board of Directors  
From: Jerry Estrada, General Manager  
Date: April 12, 2023  
Subject: GM Report

Operator in Training Alan Martinez successfully completed all his licensing and training requirements, and, has been released for revenue service. Our newest Operator in Training, Vaden Anderson, started a couple of weeks ago, and is proceeding along well with our Training Department.

We had another rainstorm recently and Operations followed our preemptive protocols to plan for potential changes to service coverage, as well as staged a bus in Carpinteria to respond to any potential evacuation needs. Detours, extra coverage, extra available drivers and staff, evacuation plans, etc., were ready to go. Luckily, our area got the extra moisture, but nothing dramatic came our way.

Dave Morse, Superintendent of Operations, attended a three-day Federal Transit Administration (FTA) Drug and Alcohol Program National Conference in San Diego in mid-March. Mr. Morse serves as MTD's Drug and Alcohol Program Manager (DAPM). This conference was well attended, and, provided a unique opportunity to hear from federal and industry experts. These programs are vital, and required, to maintain an alcohol and drug free workforce. There are many facets of this training, which includes, but is not limited to random testing, post-accident testing, reasonable suspicion, and FTA audits.

Operations has received the next bid from our Planning Department for service changes effective June 12. After evaluation, we will commence our bidding process, which will probably start in a couple of weeks, and, will be completed, generally, in approximately 3-4 weeks.

At the request from the Santa Barbara Police Department, Operations staged one of our buses at our other terminal yard, on Overpass Road, for their annual SWAT training.

Southern California Edison (SCE) is preparing for the next phase of construction at Terminal 1 for the Charge Ready Project. On April 10, SCE affiliates took soil samples along the trench path that SCE's remediation contractor will dig to connect the new transformer to the new switchgear. The trench will travel across MTD's driveway, under the maintenance canopy with raised roof, and terminate just outside of the maintenance manager's office. Soil samples were collected to ensure proper characterization, handling, and disposal of the material due to the heterogeneous nature of contaminants

at the site. The testing also included moisture content and saturation level to determine the presence of shallow groundwater. The purpose of the preceding is to determine whether dewatering is necessary during the trench work.

MTD's California Energy Commission (CEC) Blueprint Grant Project team is working with a design consultant, Anser Advisory, to develop a single line diagram, conceptual design, and phasing for MTD's microgrid at Terminal 1. Team members from Anser Advisory have been gathering data from MTD, including during a recent site visit, for their microgrid design.

The Fleet Renewal Campaign continues to move forward on a regular schedule. To date, 26 buses have been completed with 6 more currently at CCW in process.

With the completion of the third quarter of FY 2022-2023, Accounting/Finance Staff are working on completion of financial statements, tax filings and grant reports all due by the end of April 2023. The Local Transportation Fund claim for 2023/2024 has been filed.

Staff attended Zoom meetings of the Santa Barbara County Association of Governments' (SBCAG's) Technical Transportation Advisory Committee (TTAC) and Joint Technical Advisory Committee (JTAC) on April 6. TTAC recommended that the SBCAG Board approve revisions to the Measure A Audit review process that are intended to ensure that the Measure A Citizen's Oversight Committee received the required information in a timely fashion, and that the Board approve a professional services agreement with Replica for a web-based service subscription, training, and technical support for understanding regional travel patterns. TTAC also received updates on recent activities of the California Transportation Commission and on state funding programs. JTAC recommended that the SBCAG Board approve SBCAG's FY 23-24 Overall Work Program.

Planning staff have begun outreach and engagement for the annual proposed service changes process, having published a survey, and hosted a meeting in Santa Barbara and a virtual webinar thus far. Four more presentations will take place in April—Carpinteria Library, Isla Vista Community Services District meeting, Goleta City Hall, and at a virtual meeting of MOVE Santa Barbara County's Advocacy Committee. Details can be found at [sbmtd.gov/servicechanges](http://sbmtd.gov/servicechanges)