

SORTA PLANNING AND OPERATIONS COMMITTEE MEETING

TUESDAY, FEBRUARY 21ST, 2023 - 9:30 A.M.
SORTA/METRO AT HUNTINGTON CENTER,
SORTA BOARD ROOM (6TH FLOOR)
525 VINE STREET,
CINCINNATI, OHIO 45202

General Items:

Call to order
Pledge of Allegiance

1. Approval of Planning and Operations Committee Minutes: January 17th, 2023

Briefing Items

2. Good News! (*John Ravasio*)
3. Metro Branding Research Recommendations (*Manny Garcia & Chelsea Roberts, GUD Marketing*)
4. Access Paratransit Update: Door to Door Service (*Lisa Aulick*)
5. 2023 Service Quality & Ridership Initiatives (*Andy Aiello*)
6. Ridership Report as of January 31st, 2023 (*Matt Moorman*)

Action Items:

7. Proposed Resolution: Authorization to Submit Letter of Intent to FTA and Approval of Project Development Funding Reserve for Bus Rapid Transit (Hamilton Avenue Corridor) (*Khaled Shammout*)
8. Proposed Resolution: Authorization to Submit Letter of Intent to FTA and Approval of Project Development Funding Reserve for Bus Rapid Transit (Reading Road Corridor) (*Khaled Shammout*)
9. Proposed Resolution: Approval of Contract for Operator Recruiting Advertisement (*John Edmondson, Dave Etienne*)
10. Proposed Resolution: Approval of Contract Modification for Bus Wash A&E Services (*John Edmondson, Jeff Mundstock*)
11. Proposed Resolution: Approval of Contract Modification to Transit Planning Software (*John Edmondson, Steve Anderson*)
12. Proposed Resolution: Approval of Contract Modification for Employee Background Checks (*John Edmondson, Adriene Hairston*)
13. Proposed Resolution: Approval of Contract Modification for Bus Shelter Installation (*John Edmondson, Steve Anderson*)
14. Proposed Resolution: Approval of Revenue Contract Award for ROW Leasing Billboard Placement (*John Edmondson, Dave Etienne*)
15. Proposed Resolution: Approval of Contract Award for Garbage Removal Services (*John Edmondson, Jeff Mundstock*)
16. Proposed Resolution: Approval of Contract Award for Right of Way Appraisal Services (*John Edmondson, Khaled Shammout*)
17. Proposed Resolution: Approval of Contract Award for Bulk Motor Oil Purchase (*John Edmondson, Jeff Mundstock*)

Other Items:

New Business

Adjournment

The next regular meeting of the Planning & Operations Committee has been scheduled for
March 21st, 2023, at 9:30 a.m.

PLANNING AND OPERATIONS COMMITTEE
TUESDAY, JANUARY 17TH, 2023 – 10:05 A.M.
SORTA/METRO AT HUNTINGTON CENTER
SORTA BOARD ROOM (6TH FLOOR)
525 VINE STREET
CINCINNATI, OHIO 45202

COMMITTEE MEMEBERS APPOINTED: *Blake Ethridge (Chair), Alyson Beridon, Gwen Robinson, Larry Thompson*

COMMITTEE/BOARD MEMBERS PRESENT: Alyson Beridon, Chelsea Clark, Blake Ethridge, Greg Keesee, and Gwen Robinson

COMMITTEE MEMBERS ABSENT: Larry Thompson

STAFF MEMBERS PRESENT: Darryl Haley, Steve Anderson, Andy Aiello, Ann Dinan, John Edmondson, Pat Giblin, Adriene Hairston, Mary Huller, Waleed Ismael, Brandy Jones, Maria Jones, Natalie Krusling, Pat LaFleur, Matt Moorman, Jeff Mundstock, Amy Rasmussen, John Ravasio, Jason Roe, Shannel Satterfield, Khaled Shammout and Tara Walker

OTHERS PRESENT: Kim Schaefer (Legal Counsel-Vorys), Jimi Mitchell (Nelson/Nygaard), Tim Reynolds (WSP), Mimi Rasor (Rasor), and Jared Love (WSP)

1. **Call to Order**

Mr. Ethridge called the meeting to order.

2. **Pledge of Allegiance**

The Pledge of Allegiance was recited.

3. **Approval of Minutes of December 6th, 2022**

Mr. Ethridge made a motion and Ms. Clark second the motion to approve the minutes of the December 6th, 2022, meeting. By voice vote the committee approved the minutes.

4. **Good News!**

The Executive Team presented the Good News report. Ms. Hairston announced the November Silver Award recipients. Mr. Ravasio congratulated Freddie Dukes on his retirement; FTA received and reviewed SORTA's responses to the FY 2022 Triennial Review Final Report; SORTA received \$1.9 million through the Diesel Emission Reduction Grant (DERG) program from ODOT and OEPA; and President Biden, Sen. Brown and other dignitaries visited the region to celebrate the \$1.3 billion in federal funding to rehabilitate and reconfigure the Brent Spence Bridge.

Ms. Jones shared SORTA participated in the 2023 MLK Coalition's 48th Annual Commemorative March for Martin Luther King Jr. Day on January 16th, 2023, and SORTA's 50th Anniversary will take place on August 15th, 2023, the agency will celebrate all year long.

Mr. Ravasio then concluded the report.

The Committee accepted the report as presented.

5. **DBE Quarterly Update: 2022**

Ms. Walker presented the Vendor Diversity and Inclusion Program quarterly update. This report included diverse spend summary for 2022, vendor events and training, implementation of diversity and inclusion software and plans for 2023

The Committee accepted the report as presented.

6. **2023 Park and Ride Update**

Mr. Shammout presented the 2023 Park and Ride update. This report includes park and rides eligible for renewal and key details such as: location, route, space, terms, and maintenance fee cost association.

The Committee accepted the report as presented.

7. **Ridership Report as of December 31st, 2022**

Ms. Rasmussen presented the December 2022 ridership reports. Total ridership for the month of December was 756,345 or 9,003 above budget.

Rasmussen presented the December 2022 ridership for Access. Total ridership for the month of December was 12,224 or 4,473 below budget.

The Committee accepted the report as presented.

8. **BRT Study Update**

Mr. Reynolds (Nelson Nygard) and Mr. Mitchell (WSP) presented the Bus Rapid Transit (BRT) Study Update. The BRT update included: a review the results of the robust Step 1 stakeholder and public outreach program; review the detailed technical analysis of the corridors; identify which two corridors will advance as SORTA's first two BRT lines; and discuss next steps and schedules. Mr. Shammout and Mr. Reynolds then announced Hamilton Avenue and Reading Road were the selected BRT corridors.

The Committee accepted the report as presented.

9. **Proposed Resolution: Approval of Adsposeure Contract Amendment**

Mr. Edmonson requested approval of an amended contract with Advertising Vehicles, Inc. dba Adsposeure on behalf of SORTA at a cost not to exceed \$900,187. This contract amendment includes consolidation of advertising services (bus and shelter) to a single contract and purchase of electronic information kiosks for installation.

The Committee accepted the report as presented.

10. **Proposal Resolution: Approval of University of Cincinnati Intergovernmental Agreement**

Mr. Edmonson requested approval of a six (6) year contract with University of Cincinnati College of Design, Art, Architecture, and Planning, School of Planning ("UC/DAAP") on behalf of SORTA at a cost not to exceed \$602,340 for ongoing bus stop evaluation and design support and customer engagement activities.

The Committee agreed to recommend the resolution to the full Board for approval on the consent agenda.

11. **Proposal Resolution: Approval of Contract with Verizon Wireless for Wi-Fi Services**

Mr. Edmonson requested approval of a two (2) year contract with Verizon Wireless on behalf of SORTA at a cost not to exceed \$672,800 for the provision of wi-fi services on all Metro revenue vehicles.

The Committee agreed to recommend the resolution to the full Board for approval on the consent agenda.

12. **Proposal Resolution: Approval of Contract for A&E Services for Perimeter Control Renovation/Replacement**

Mr. Edmonson requested approval of a one (1) year contract with Dynotec, Inc. for an amount not to exceed \$288,244 for the provision of A&E services for the renovation and replacement of the perimeter control access for the Queensgate garage.

The Committee agreed to recommend the resolution to the full Board for approval on the consent agenda.

13. **Proposed Resolution: Approval of Contract for A&E Services Task Order for Facilities Improvement Projects**

Mr. Edmonson requested approval of a two (2) year contract with Elevar Design Group, Inc. for an amount not to exceed \$1,638,000 for the provision of A&E services a series of construction projects related to facilities improvements, upgrades, and renovations

The Committee agreed to recommend the resolution to the full Board for approval as a discussion item on the agenda.

14. **Proposed Resolution: Approval of Contract for Cleaning Services at Government Square**

Mr. Edmonson requested approval of a five (5) contract with Cincinnati Center City Development Corporation ("3CDC") on behalf of SORTA at a cost not to exceed \$1,135,527 for the provision of cleaning services at Government Square.

The Committee agreed to recommend the resolution to the full Board for approval on the consent agenda.

15. **New Business**

The next regular meeting of the Planning and Operations Committee has been scheduled for **Tuesday, February 21st, 2023, at 9:30 A.M.**

16. **Adjournment**

The meeting adjourned at 11:45 A.M.



PLANNING & OPERATIONS: GOOD NEWS February 21, 2023



December Silver Award Recipients



Access/BH Maintenance
Employee of the Month
Chris Siener



Leadership
Employee of the Month
Terri Andrews



Queensgate Maintenance
Employee of the Month
Dave Olding

BRT Community Workshops



Metro will be hosting a series of workshops to gather public input on the new Bus Rapid Transit Service as part of the Step II outreach.

The sessions will focus on gathering feedback on station locations and features, connections and other transit-oriented development opportunities along Reading Rd. and Hamilton Ave. Register online for workshops at MetroBRTStudy.com.



- Feb. 21: College Hill Rec Center, 5545 Belmont Ave.
- Feb. 22: The Factory, 1546 Knowlton St.
- Feb. 23: Corryville Rec Center. 2823 Eden Ave.
- Feb. 27: Comm. Action Agency, 1740 Langdon Farm

Ohio Loves Transit Week Feb. 5-11



Thank you, Ohio for showing your love for transit!

During Ohio Loves Transit Week, systems across Ohio showcased how investing in transit benefits everyone. Join us and make a pledge to ride during Ohio Loves Transit Week!

#OhioLovesTransit

State Rep. Baker Visits Metro



Completely impressed by the great work of @cincinnati metro leading the way in public transport. Thanks for the tour!

Brandy Jones @mrsbrandyjones · Jan 20
Thank you Ohio Representative @voterachelbaker for touring @cincinnati metro facilities today and learning more the importance of investing in public transit in Southwest Ohio. Plus, we got to pose with one of our newest buses that will be on the road soon!



9:06 PM · Jan 21, 2023 from Cincinnati, OH · 447 Views

Newly elected State Representative Rachel Baker stopped by recently to learn more about Metro and took a tour of the Queensgate Operations and Maintenance Facility.

Thank you, Rep. Baker, for your recognition of the significant role Metro plays in moving our community.

...and That's the News!



Welcome to our newest class of Operators!



Rebrand Research

FEBRUARY 2023





FOR THE
GREATER

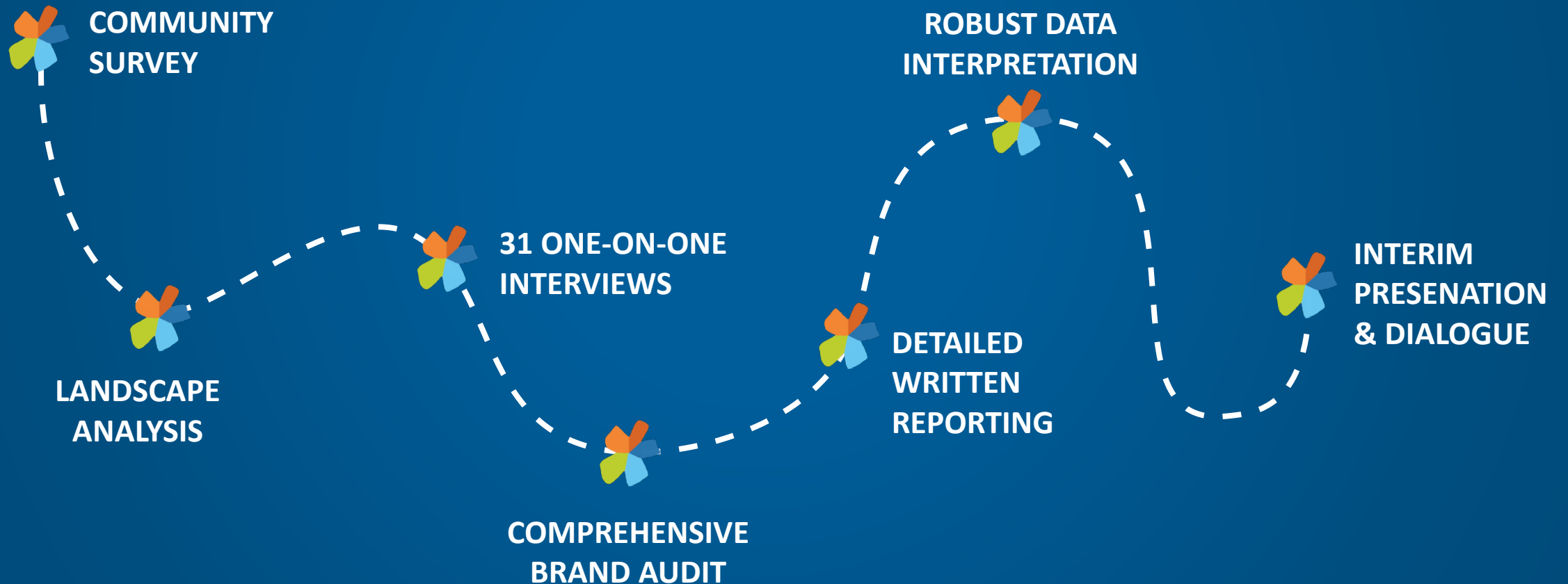
Women-owned and
disability-owned small business
in Lansing, Michigan

Deep knowledge of public
sector marketing

Successful work with public agencies
in Ohio and public
transit authorities in Michigan

Research Project Overview

October 2022-February 2023



Interview Findings

Values

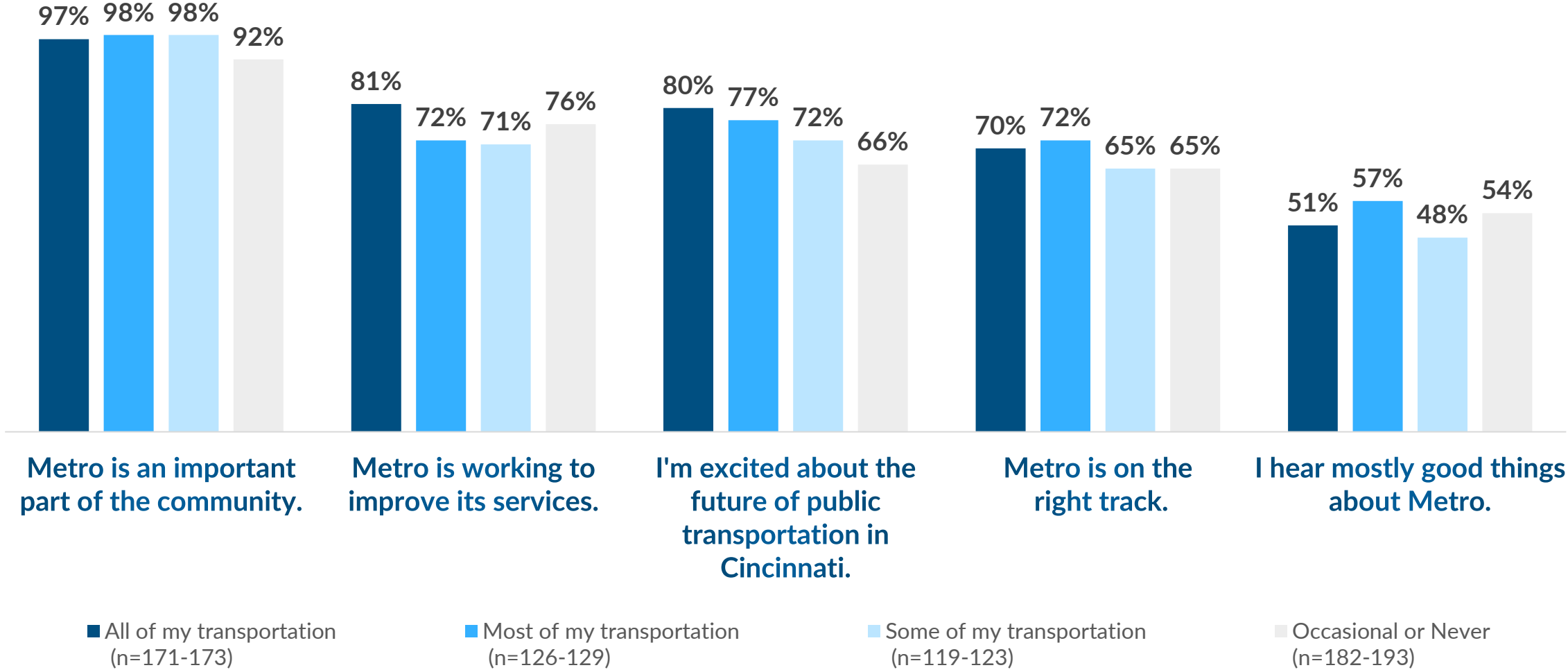
- Today: Professional, Steady, Inclusive
- Tomorrow: Trusted, Modern, Accomplished

Confidence, Despite Challenges

- Economic Driver
- Schools Decision
- Safety and Reliability



Community Survey Insights



Metro's Brand Goals

- Increase Trust

- Reliability
- Consistency

- Increase Ridership

- Shift culture
- Promote products



- Demonstrate Value(s)

- Economic, Environmental
- Trusted and Modern



Recommendations



A Brand Refresh

- Organizes your brand for clarity, increases trust
- Demonstrates your commitment to a modernized Metro
- Uses strategic messaging to build on community excitement about the future of public transit in Hamilton County



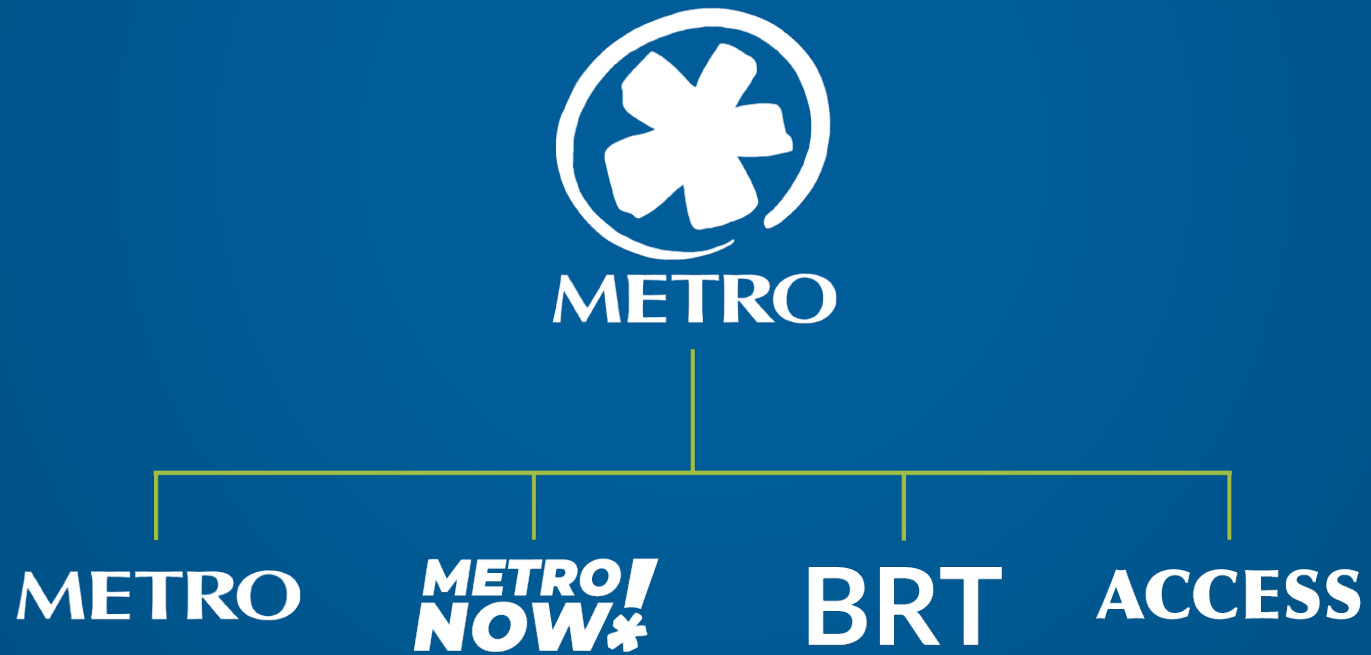
Why a Refresh, Not a Rebrand?

- Metro is exceptionally valued by your community. There is not enough evidence to support a name change.
- Updates reflect a true evolution of your values and changes to your products and services.
- A full-scale rebrand could be perceived as extravagant or reflecting a desire to fundamentally break with the past.



Keep Metro, Remove SORTA

Consolidate your brand to improve clarity and trust



Update and Iterate Your Logo

Refresh your logo with an eye toward the future



Adopt a Tagline

Add a stable message to your brand that is designed to deliver on your goals and values.



“Moving forward together”



“How life moves”



“Safe. Clean. Accessible.”



Rollout and Timing

Expect a Transition Period

- No need to rush to unveil a new logo
- Public engagement to ensure a positive reception
- Anticipate an unveiling toward the end of 2023
- Take this time to message to the public about the reasons for your refreshed brand, mitigate risk and involve stakeholders



Thank you!





Access Paratransit

February, 2023



The ADA Requirements

- Under the US Department of Transportation (DOT) Americans with Disabilities Act (ADA), complementary paratransit service for ADA paratransit eligible individuals must be “origin-to-destination” service.
- The ADA uses the terminology of “origin-to-destination” deliberately to get away from identifying the service as “curb-to-curb” or “door-to-door”.
- It is reasonable to think that service *for some individuals or locations* might be better if it is door-to-door, while curb-to-curb might be better in other instances.
- Individuals requiring additional assistance can travel with a Personal Care Attendant (PCA). A PCA is a person who is designated to assist someone with their living skills, including travel. PCAs ride free on Access when accompanying eligible passengers.

Exceptions to Door-to-Door Service

- Drivers should not leave passengers who pose a higher risk than the customer being assisted. *Many of our passengers have intellectual disabilities or other conditions in which observation is vital.*
- Vehicles that are out of sight increases vulnerability as the bus continues to run in order to maintain contact with dispatch and power the on-board surveillance system (e.g., *passengers wandering from the bus, passenger injury, theft of vehicle, etc.*).
- Drivers do not have to provide services that exceed “door-to-door” service (e.g., *going beyond the doorway of a building to assist a passenger*).
- Drivers must not take actions that would clearly be unsafe.

Potential Concerns with Door-to-Door Service



When offering **Door-to-Door** service, transit providers, assume additional liabilities such as:

- While Access is public transportation, there is still an expectation that supervision and a level of custody is maintained
- Risk of injury to customer and/or driver (slips, trips, falls in inclement weather or steps and sidewalks in disrepair).
- Inability to provide one-on-one assistance for multiple people on group trips such as day programs and activity centers.
- Some customers do not want assistance as they want to preserve their independence.



2023 Strategic Plan Update

Service Quality & Ridership | February 2023



2023 Strategic Plan Overview



Service Quality & Ridership

- Critical need to improve service reliability; retain/grow ridership
- Elevate the importance of service quality within the entire organization
- Foundation of future investment and success

Transit Service & Infrastructure Improvements (RIM)

- Continue forward with RIM, update project details and timing (Phase III, BRT, TC's, etc.)

Organizational Effectiveness & Culture

- Improve HOW we work
- Continue evolution into a world-class organization and system

Approach

Data

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
DateValue	TrapDate	r_month	TotalOps	active	acc_sick	workcomp	noclaim	fmla	sick28hr			Row Labels	Average of TotalOps	Average of active
1/1/2021	20210101	202101	487	483	0	4	0	0	0			202101	488.1290323	483.7096774
1/2/2021	20210102	202101	487	483	0	4	0	0	0			202102	488.75	483.5357143
1/3/2021	20210103	202101	487	483	0	4	0	0	0			202103	482.9677419	478.6451613
1/4/2021	20210104	202101	487	483	0	4	0	0	0			202104	480.3	476.0333333
1/5/2021	20210105	202101	487	483	0	4	0	0	0			202105	473.7096774	471.7741935
1/6/2021	20210106	202101	487	483	0	4	0	0	0			202106	473.9333333	470.4
1/7/2021	20210107	202101	487	483	0	4	0	0	0			202107	469.5806452	461.9677419
1/8/2021	20210108	202101	487	483	0	4	0	0	0			202108	463.2580645	454.4193548
1/9/2021	20210109	202101	487	483	0	4	0	0	0			202109	468.5333333	460.8333333
1/10/2021	20210110	202101	486	482	0	4	0	0	0			202110	476.2258065	469.2903226
1/11/2021	20210111	202101	487	483	0	4	0	0	0			202111	483.5666667	477.8666667
1/12/2021	20210112	202101	487	483	0	4	0	0	0			202112	479.7741935	473.1612903
1/13/2021	20210113	202101	487	483	0	4	0	0	0			202201	476.9354839	472.3548387
1/14/2021	20210114	202101	487	483	0	4	0	0	0			202202	472.1785714	468.2857143
1/15/2021	20210115	202101	487	483	0	4	0	0	0			202203	469.8064516	466.8064516
1/16/2021	20210116	202101	487	483	0	4	0	0	0			202204	469.7666667	464.2333333
1/17/2021	20210117	202101	488	484	0	4	0	0	0			202205	472.2903226	465.0645161
1/18/2021	20210118	202101	488	484	0	4	0	0	0			202206	473.4333333	464.5333333
1/19/2021	20210119	202101	488	483	0	4	0	1	0			202207	474.9677419	467.3870968
1/20/2021	20210120	202101	488	483	0	4	0	1	0			202208	473.5806452	468.6774194
1/21/2021	20210121	202101	489	484	0	4	0	1	0			202209	474.7	471.3666667
1/22/2021	20210122	202101	490	485	0	4	0	1	0			202210	479.6451613	475.3870968
1/23/2021	20210123	202101	490	485	0	4	0	1	0			202211	483.2666667	476.8333333
1/24/2021	20210124	202101	490	485	0	4	0	1	0			202212	492.0967742	485.0967742
1/25/2021	20210125	202101	490	485	0	4	0	1	0			Grand Total	476.7027397	471.1232877



Initiatives

REINVENTING METRO! With the passage of Issue 7 in 2020, Hamilton County voters approved a sales tax levy of 0.8 percent and a new funding source for Metro. With improved funding, Metro is bringing to life its **Reinventing Metro** plan, offering the Greater Cincinnati region bold, new transit innovations that will help grow the regional economy and better connect our community to jobs, education, health care and entertainment.

Level-One Implementation Tracking of Projects and Initiatives 2/9/2023

Service Quality & Ridership

Missed Trips and Interruptions	Dept	Staff Lead	Staff Support	Date
Address clerk and vault puller attendance	Ops	Bailey	Mgrs.	complete
Suspend use of operators in sub roles (dispatch, vault, etc.)	Ops	Bailey	Sr. Mgrs.	2/28/2023
Ops supervisor performance monitoring of each "focus group"	Ops	Bailey	Sr. Mgrs.	3/31/2023
Post daily KPIs at garages	Ops	Div Mgrs	Miesle	2/28/2023
Missed trip working group	Ops	Bailey	Div. Mgrs.	Underway
> initiatives to result from group determined by 2/28/2023				
Ops KPI committee, regular report of data/trends to senior staff	Ops	Bailey	Jones	3/30/2023
Review of repeat work order and QA checks	Maint	Holtman	Woulms	2/9/2023
On-board QR code for operator to report bus defect	Maint	Woulms	Belting	3/31/2023
Improve weekend maintenance coverage (2023 work pick)	Maint	Vilvens	Stidham	6/1/2023

Workforce

Increase capacity of leave admin/oversight function	HR	Hainston	Hickman	4/30/2023
Implement Exit / Stay Interviews, share findings	HR	Hainston	Byrd	3/31/2023
Operator Recruitment Marketing	ExtAff	Etienne	HR	Ongoing
Financial Wellness module in operator training program	HR	Hickman	Cole	2/28/2023
Better vending, healthy food in club rooms	Ops	Mook	Carlor	6/30/2023
Club room renovations	Ops	Mook	Williams	12/31/2023

Ridership

University (UC & Cincy State) Program Marketing	ExtAff	Rasmussen	ExtAff	Ongoing
B2B Ridership Development Engagement	ExtAff	Rasmussen	ExtAff	Ongoing
MetroNow! marketing campaign	ExtAff	Etienne	ExtAff	Ongoing
Repair customer alert for service interruptions	Ops	Bailey	Smith	2/28/2023
Targeted promotion of new service improvements	ExtAff	Jones	Etienne	Per Plan
50th Anniversary promotion	ExtAff	Jones	ExtAff	Ongoing
Summer outreach - RFP for street team, event selection	ExtAff	Etienne	ExtAff	Ongoing

OTP, Safety, Cleanliness

Weekly meetings with operators over 3% early	Ops	S Smith	Mgrs.	3/31/2023
Supervisory focus on routes with highest % late operation	Ops	S Smith	Mgrs/Sups	2/28/2023
On-Board QR code for customer feedback	Access	Calhoun	Belting	3/31/2023
Address timepoint locations with early operation 10%+	Ops	S Smith	IT/Ping	2/28/2023
Improve data reliability - audit geocodes	Ops	S Smith	IT/Ping	6/30/2023
Monthly SIP and Joint Safety meetings	Ops	Gaffey	Johnson	Underway
> initiatives to be determined by 3/31/2023				
Report and monitor OTP of general clean work orders	Maint	Holtman	Darnell	3/1/2023
Hire travel trainer - support Access customers on Metro	Access	Aulick	HR	3/31/2023

Learnings

- **Strong Alignment Around Goals**
- **Far Exceeding Performance of Peers**
- **Room To Be a More Data Driven Organization**
- Opportunities to better understand the data we have
- Opportunities to gain more experience in using data/systems
 - Set goals
 - Assess root causes
 - Track performance
- **This plan update is an important step in our growth**
 - Create a framework
 - Grow, mature, improve

KPI Goals



Metric	Baseline – 2022	Goal – end of 2023
Missed Trips (weekday avg.)	95	0
Ridership (per 2023 budget)	9,847,273	12,271,502
Total Fixed Route Operators	483	520
Operator Absenteeism	18.5%	15.0%
Operator Turnover (quarterly avg.)	17.0%	15.0%
On Time Performance	79.4%	86.5%
Miles b/w Mechanical Interruption	8,152	9,200
Preventable Accidents per 100k mi.	1.2	0.9
University Program Ridership	52,521	63,025
Business Partner Revenue	\$200,000	\$350,000

Initiatives



Missed Trips and Service Interruptions	Workforce
Ridership	On-Time Performance, Safety, Cleanliness

Some initiatives create immediate action; some create processes to collect and analyze our data.

Initiatives



Missed Trips & Interruptions	Workforce
<ul style="list-style-type: none"> • Suspend use of operators in sub roles (dispatch, vault, etc.) • Ops supervisor performance monitoring of "focus groups" • Post daily KPI's at garages • Missed trip working group in Ops, actions to follow • Ops KPI committee, report of data/trends to senior staff • Review of repeat work order and QA checks • On-board QR code for operator to report bus defect • Improve weekend maintenance coverage (2023 work pick) 	<ul style="list-style-type: none"> • Increase capacity of leave admin/oversight function • Implement Exit / Stay Interviews, share findings • Continue Operator Recruitment Marketing • Financial Wellness module in operator training program • Better vending, healthy food in club rooms • Club room renovations
Ridership	OTP, Safety, Cleanliness
<ul style="list-style-type: none"> • University (UC & Cincy State) Program Marketing • B2B Ridership Development Engagement • MetroNow! marketing campaign • Repair customer alert for service interruptions • Targeted promotion of new service improvements • 50th Anniversary promotion • Summer outreach - RFP for street team, event selection 	<ul style="list-style-type: none"> • Weekly meetings with operators over 3% early • Supervisory focus on routes with highest % late operation • On-Board QR code for customer feedback • Address timepoint locations with early operation 10%+ • Improve data reliability – audit geocodes • Monthly SIP and Joint Safety meetings, actions to follow • Report and monitor OTP of general clean work orders • Hire travel trainer – support Access customers on Metro

Initiatives – Missed Trips & Interruptions



- **Suspend Use of Operators in Sub Roles**
 - **Aim:** more operators available for service
- **Supervisor "focus groups"**
 - **Aim:** improved attendance and performance
 - Each supervisor receives detailed performance report of operators in their “focus group”
 - Coach for improvement, enforce policies, etc.
- **Post Agency KPI's at Garages**
 - **Aim:** improved attendance and performance
 - Share agency goals
 - Team effort that benefits our community



Initiatives – Ridership

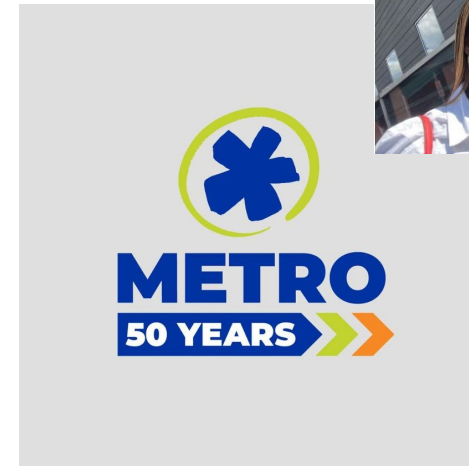


- **University Program Marketing**

- **Aim:** increase ridership
- Focused concentration of potential riders
 - This school year, 60+ on-campus events
 - Metro Mondays, tailgating, tables, giveaways, etc.
 - At each school min 2x/week

- **Implement 2023 Marketing Plan**

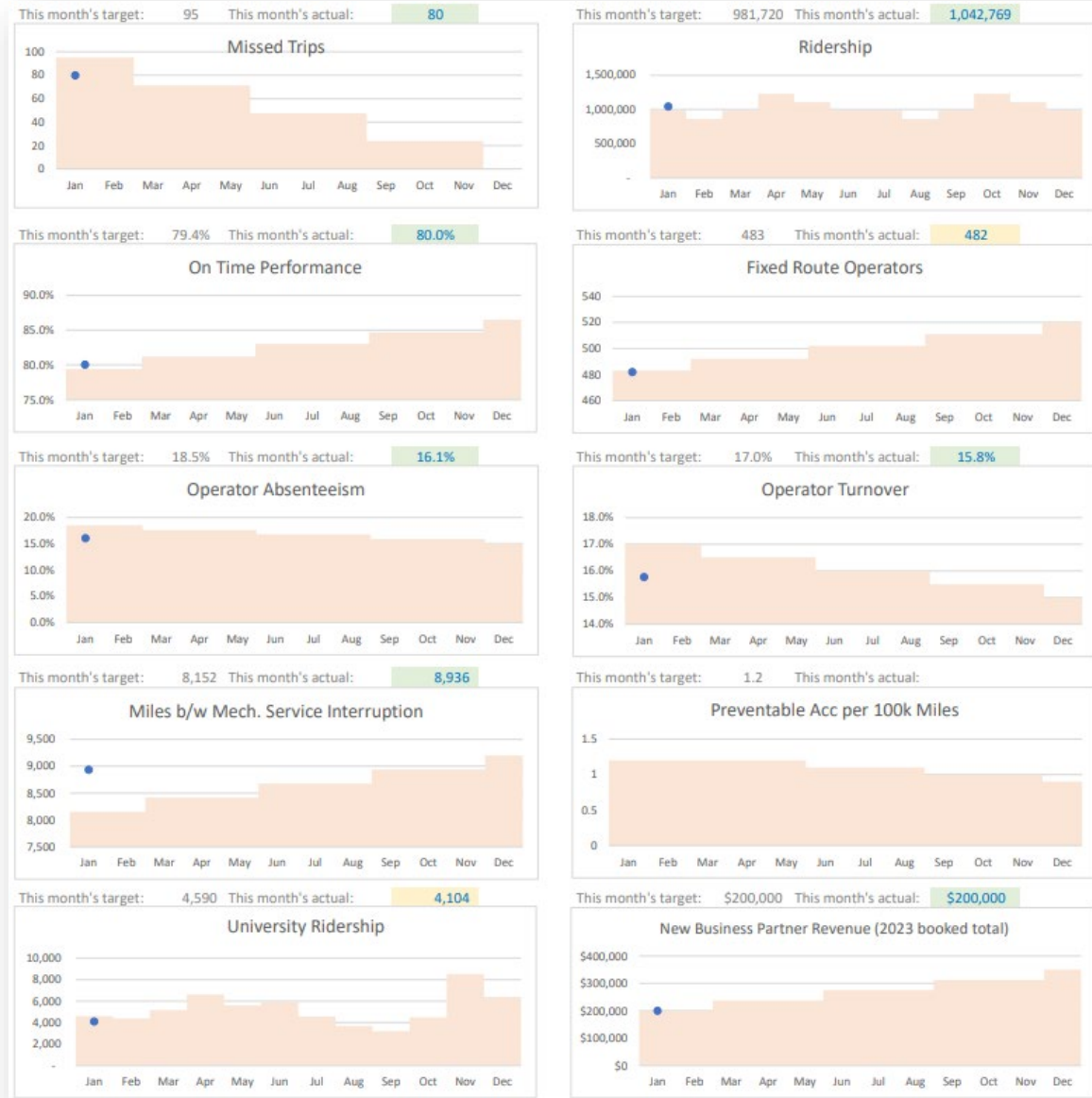
- **Aim:** increase ridership
- B2B Ridership Development
- MetroNow! launch and promotion
- 50th Anniversary community engagement
- Ongoing PR & social media to promote new service and initiatives



Dashboard

- Monthly Targets
- Annual Progression
- Monthly Actuals

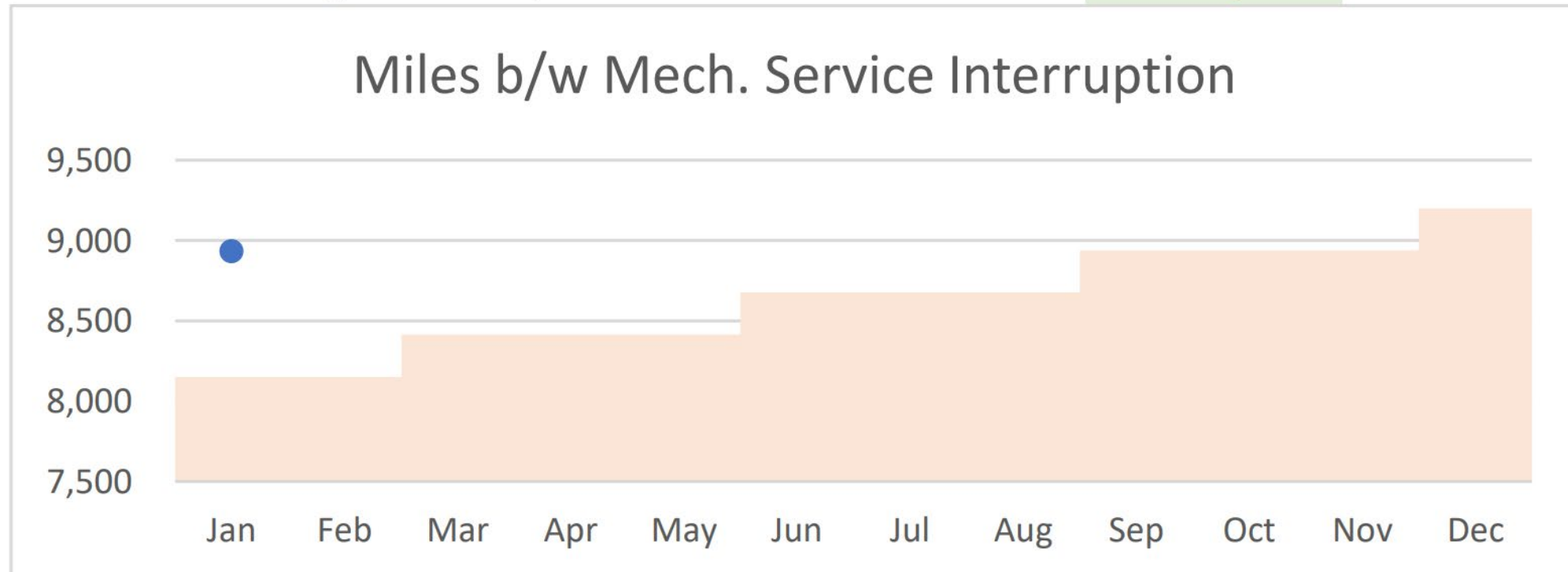
- Ahead 80
- On 80
- Behind 80



January 2023 Dashboard Results



This month's target: 8,152 This month's actual: **8,936**





Questions?





January 2023 Ridership Report

February 21, 2023 | Matt Moorman

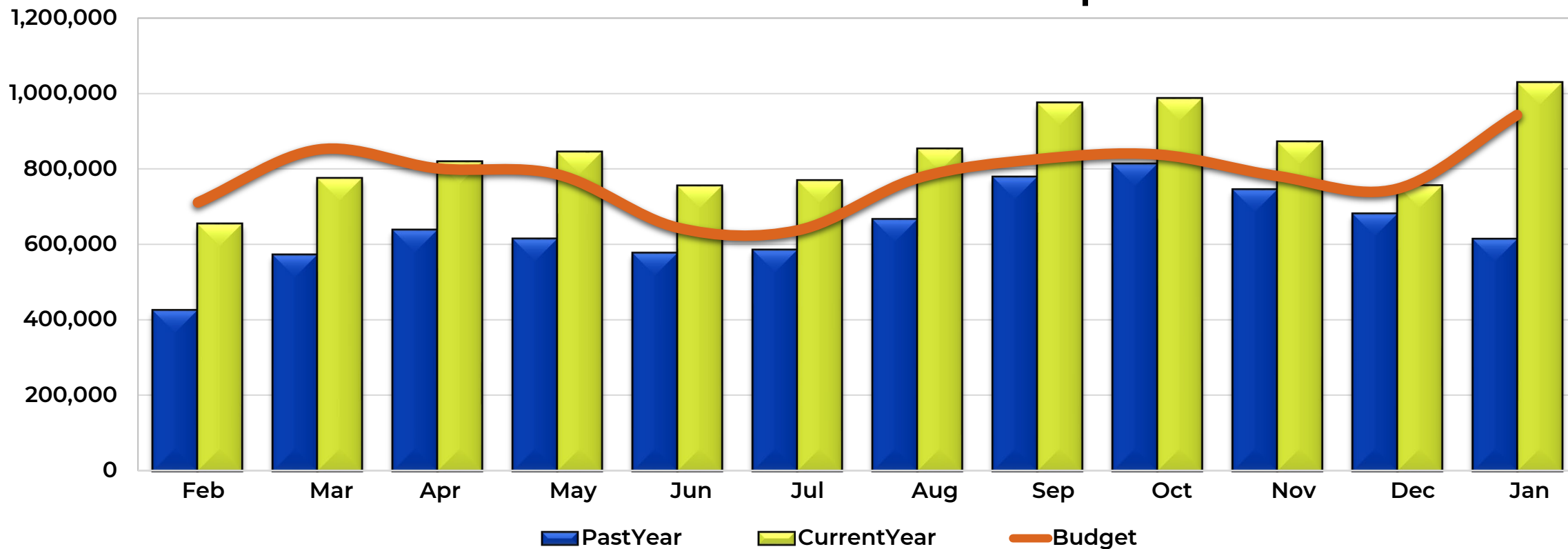




Fixed-Route Ridership



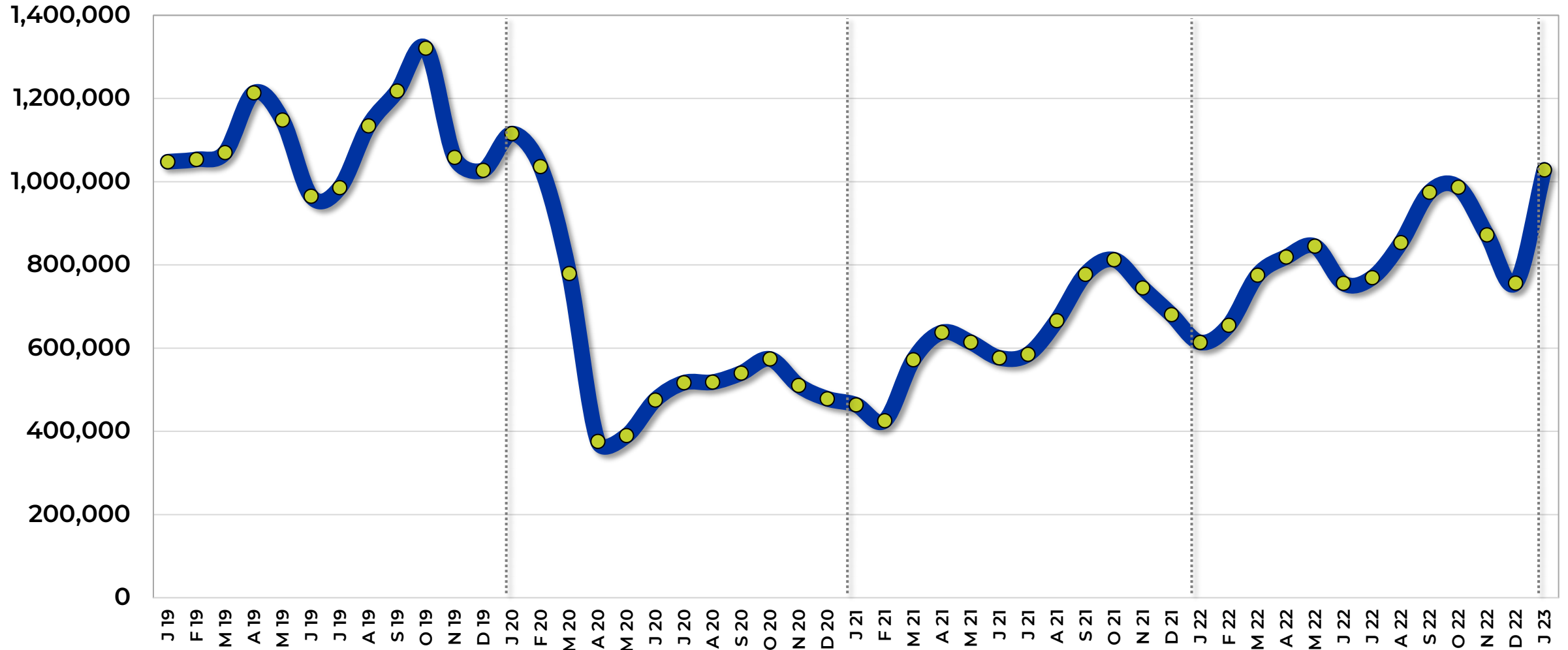
Total Fixed-Route Ridership



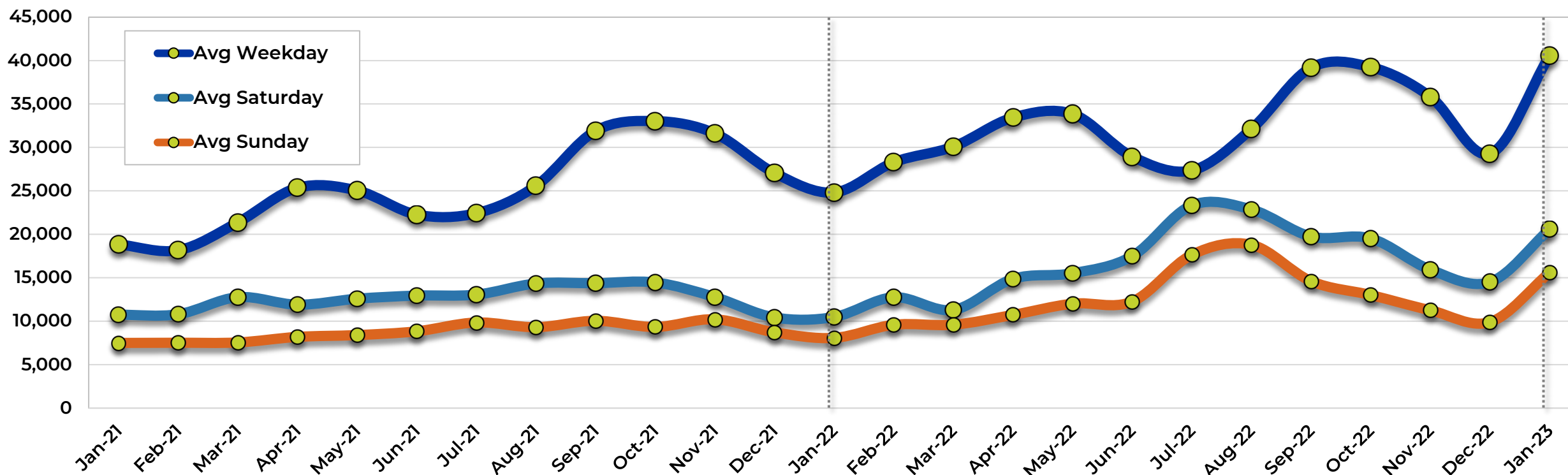
Service	Jan-23				Jan-22		
	Ridership	Budget	Budget Variance	% Budget Variance	Ridership	2022 Variance	% Variance
Local	999,440	943,181	56,259	6.0%	599,228	400,212	66.8%
Express	29,266	26,485	2,781	10.5%	14,801	14,465	97.7%
Totals	1,028,706	969,666	59,040	6.1%	614,029	414,677	67.5%
Total (YTD)	1,028,706	969,666	59,040	6.1%	614,029	414,677	67.5%

Total Fixed Route Ridership by Month

(since 2019)

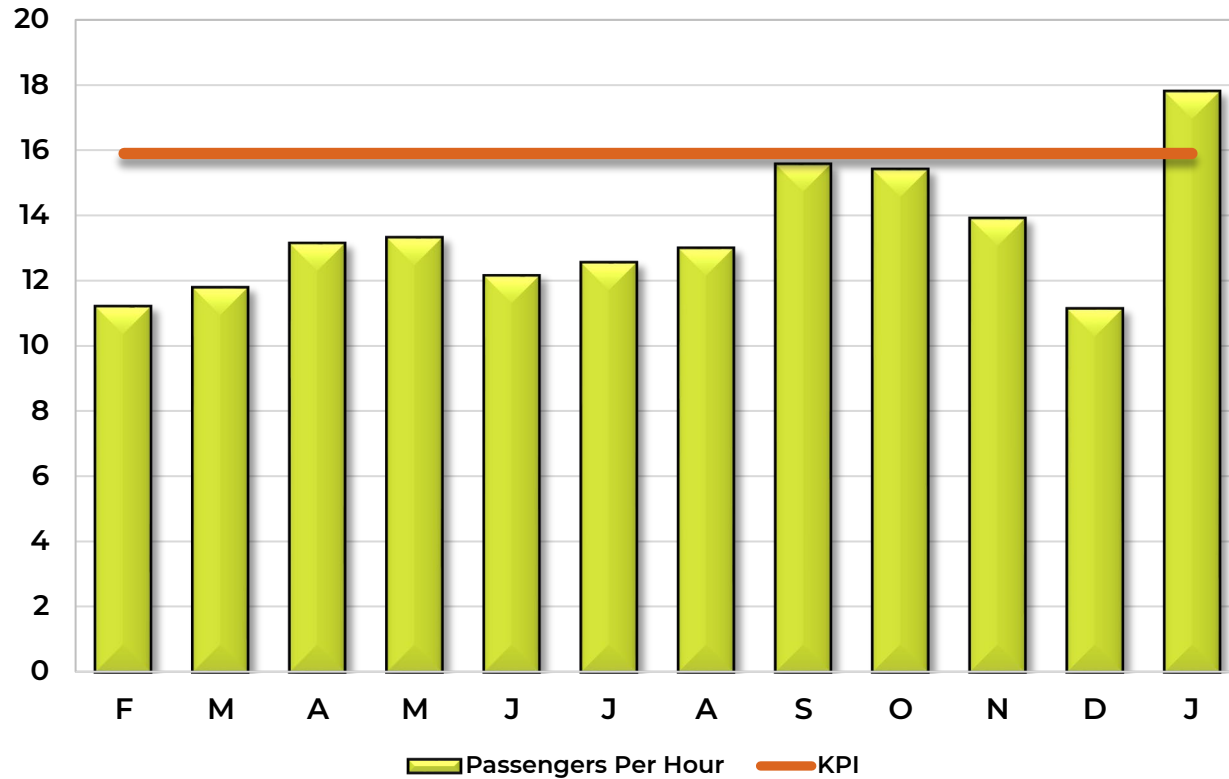


Average Daily Ridership, (Weekday, Saturday, Sunday)—since 2021

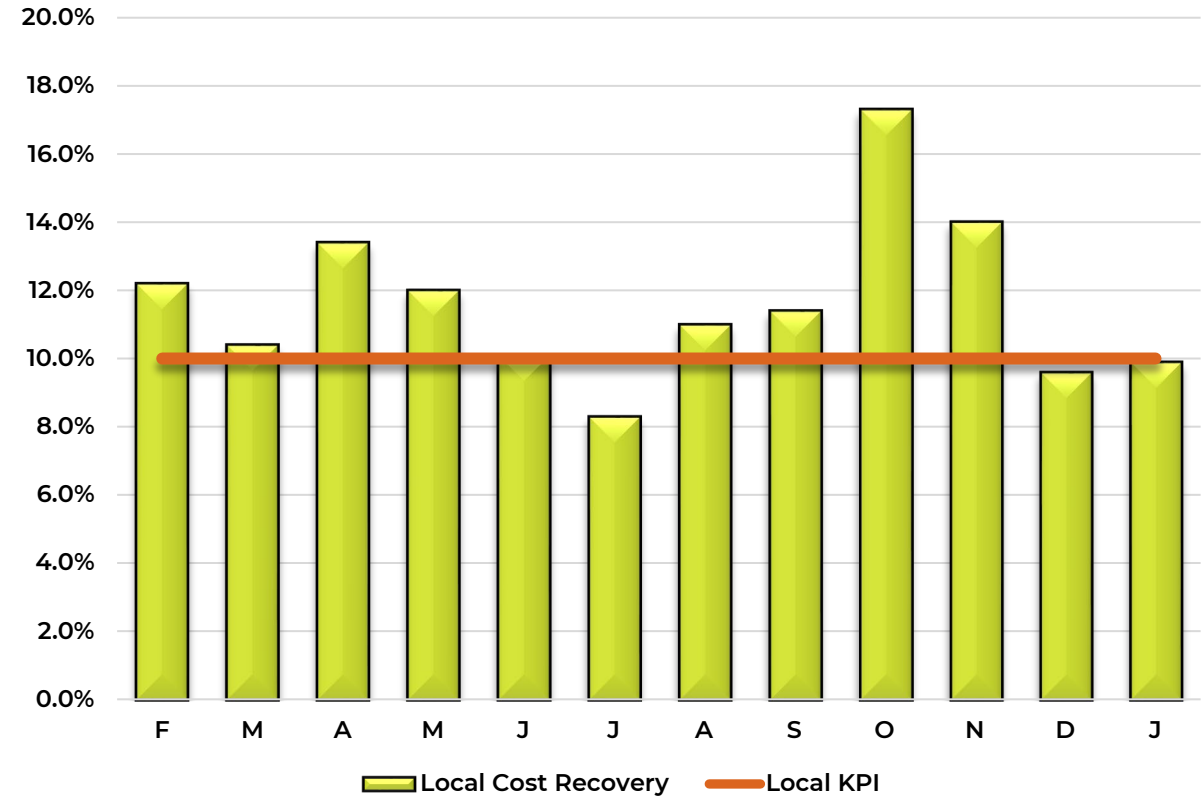


Service	Jan 2023 Avg Daily	Jan 2023 Avg Daily Budget	Budget Variance	Jan 2022 Avg Daily	Jan 22- Jan 23 Variance
WEEKDAY	40,603	38,751	4.8%	24,819	63.6%
SATURDAY	20,598	19,141	7.6%	10,482	96.5%
SUNDAY	15,609	14,233	9.7%	8,082	93.1%

Local Service – Productivity (last 12 months)

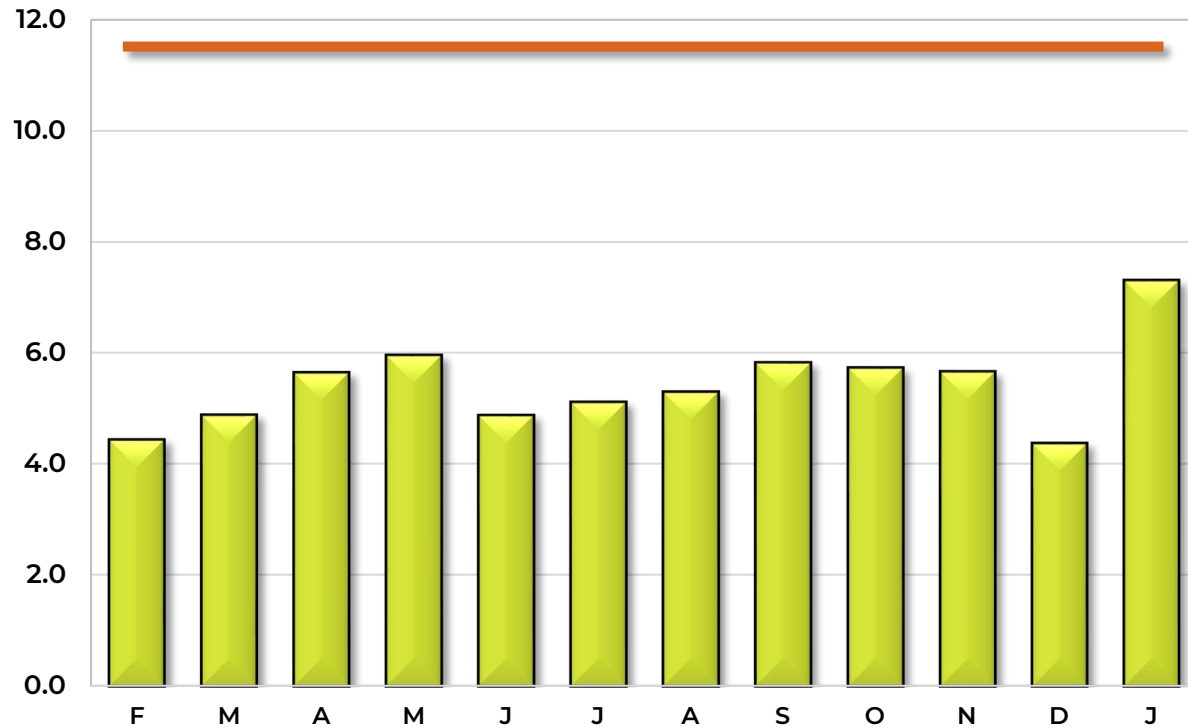


Local Service - Cost Recovery % (last 12 months)

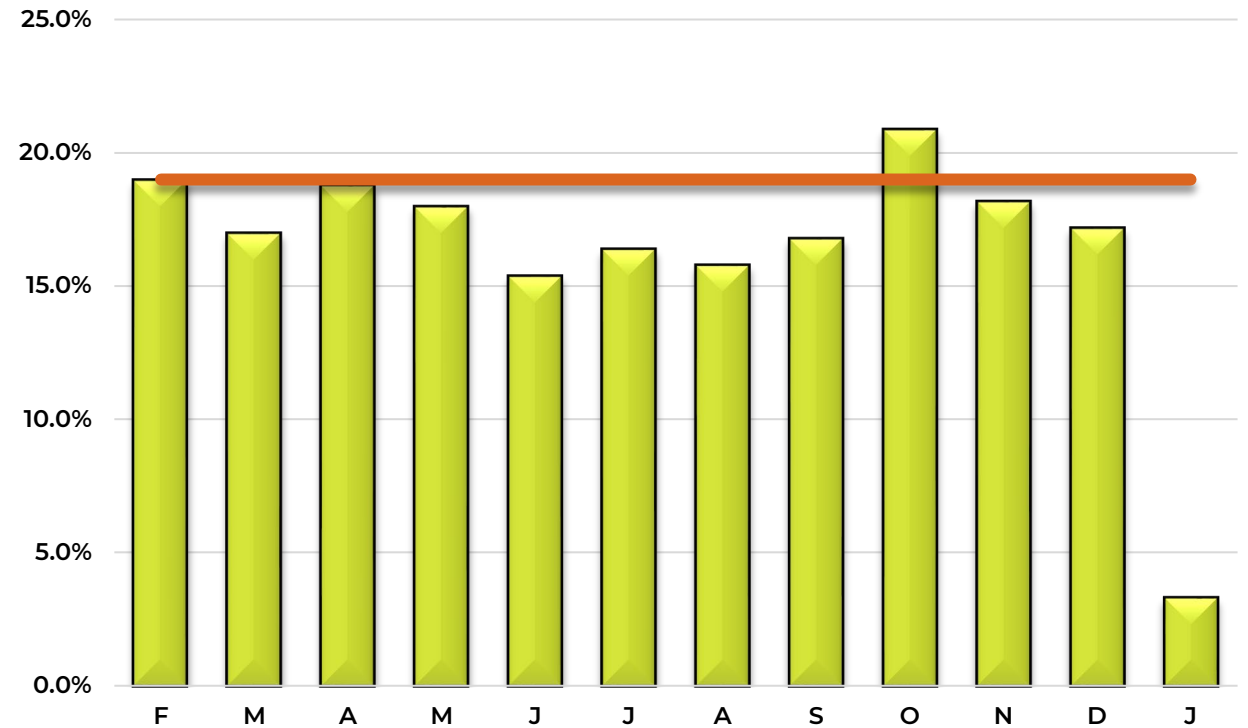


Local Service	Jan 2023 Actual KPI	Jan 2023 Budget KPI	Variance
Passengers Per Hour (PPH)	17.8	15.9	1.9
Cost Recovery	9.9%	10%	-0.1%

Express Service – Productivity (last 12 months)



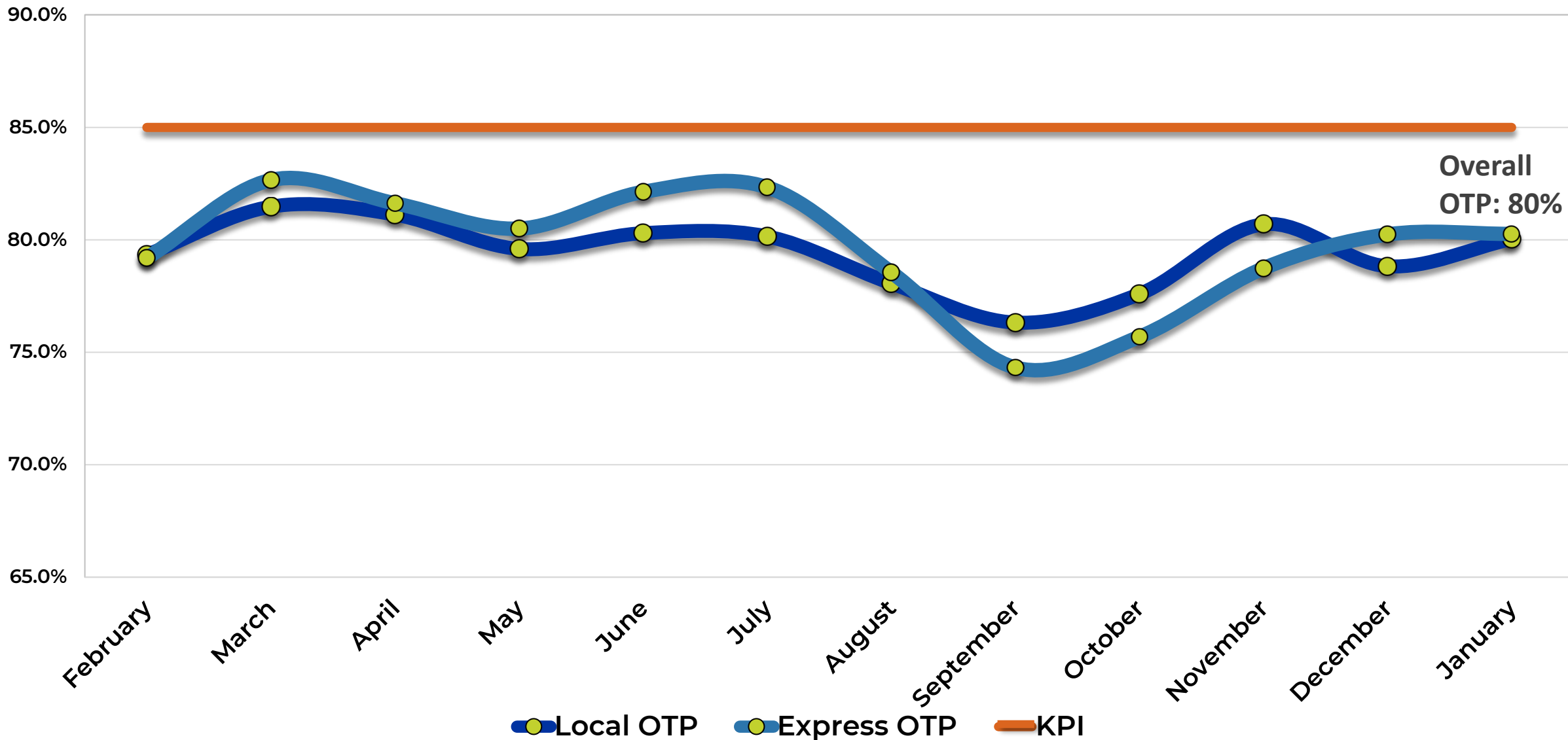
Express Service - Cost Recovery % (last 12 months)



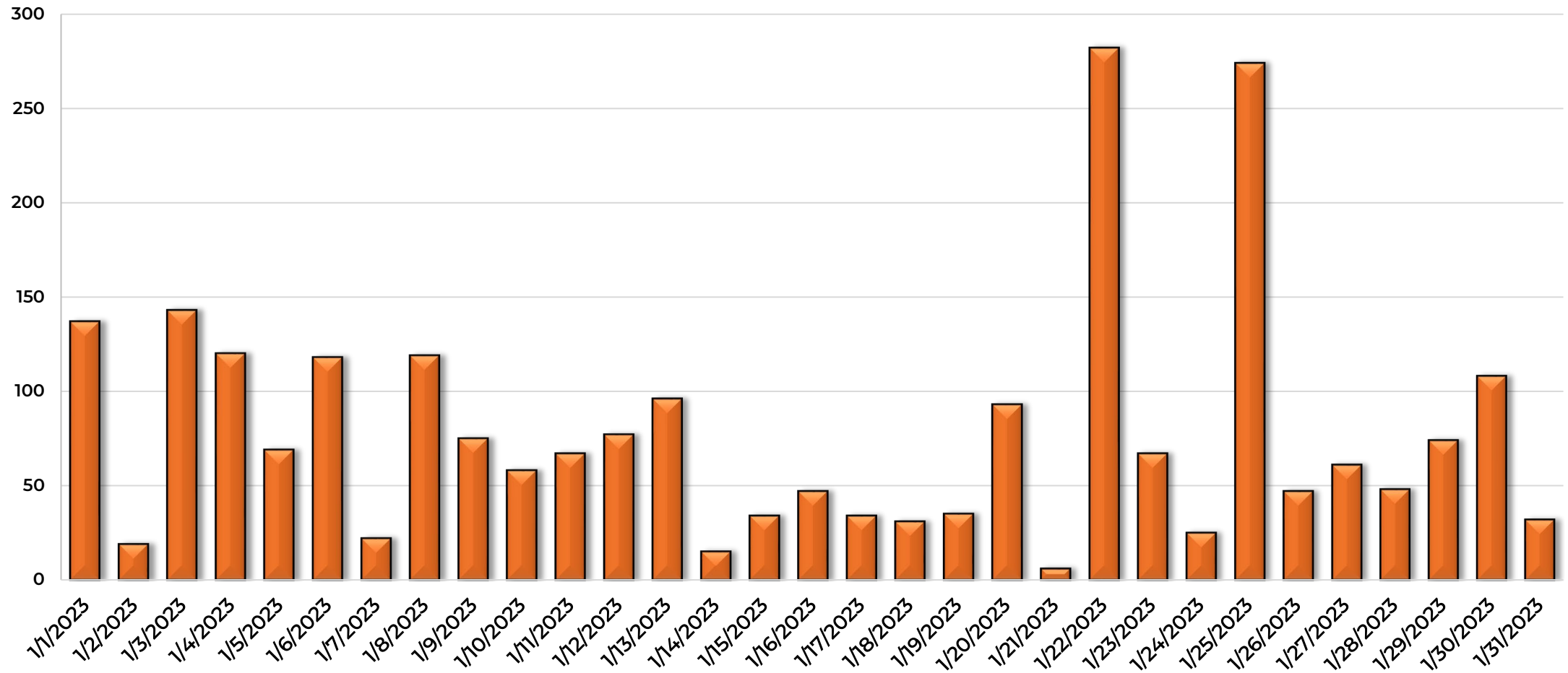
Local Service	Jan 2023 Actual KPI	Jan 2023 Budget KPI	Variance
Passengers Per Trip (PPT)	7.3	11.4	-4.1
Cost Recovery	3.3%	19.0%	-15.7%

On Time Performance – Local and Express Service

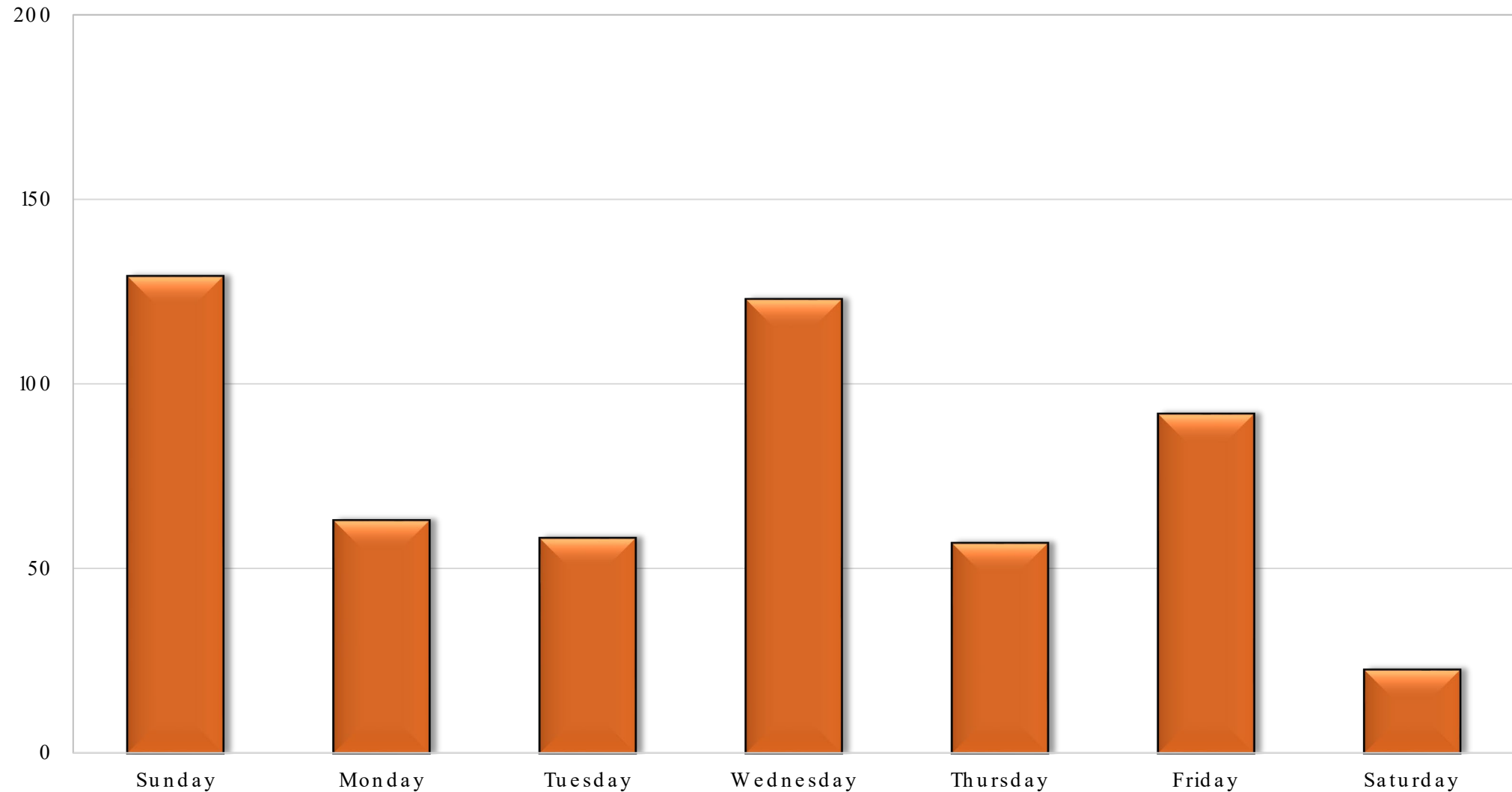
(last 12 months)



Missed Trips Due to No Operator (by Day)



Average Missed Trips by Day of Week

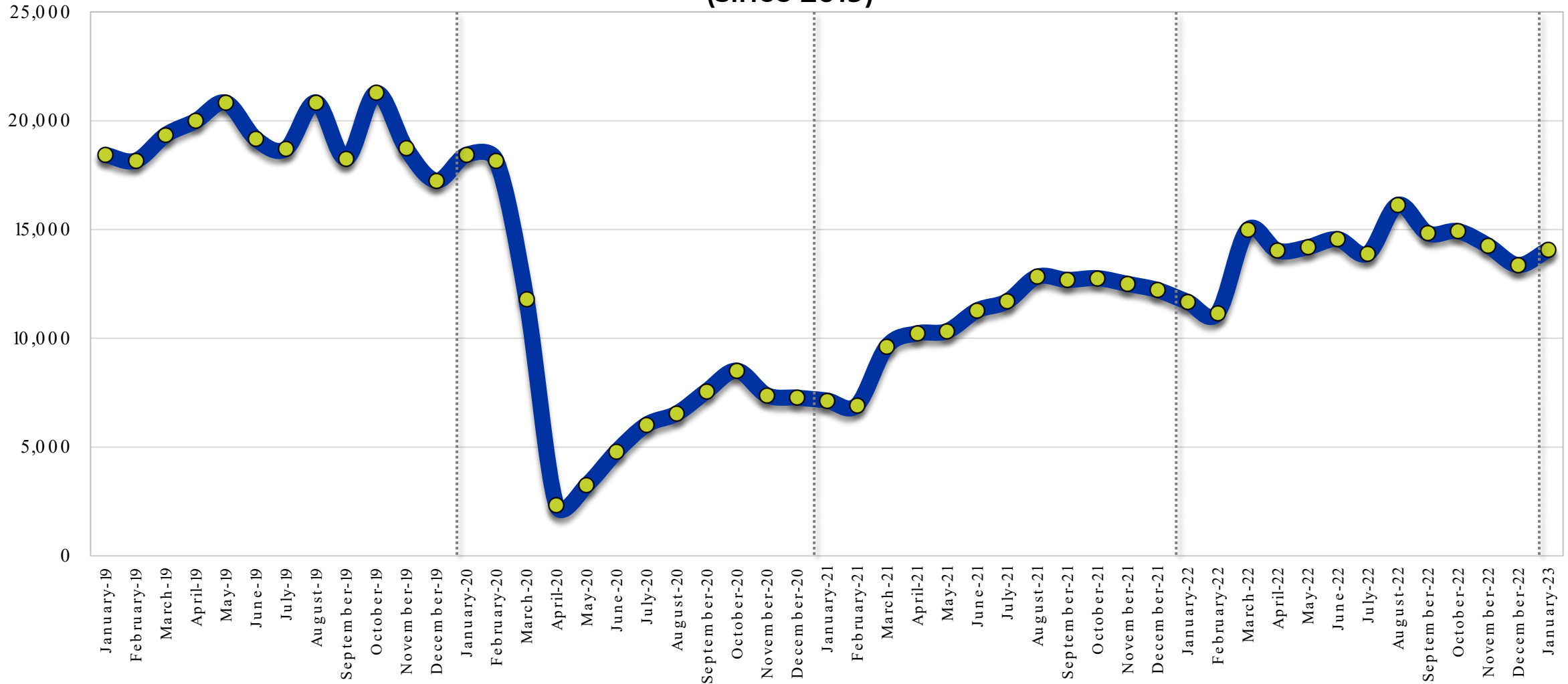




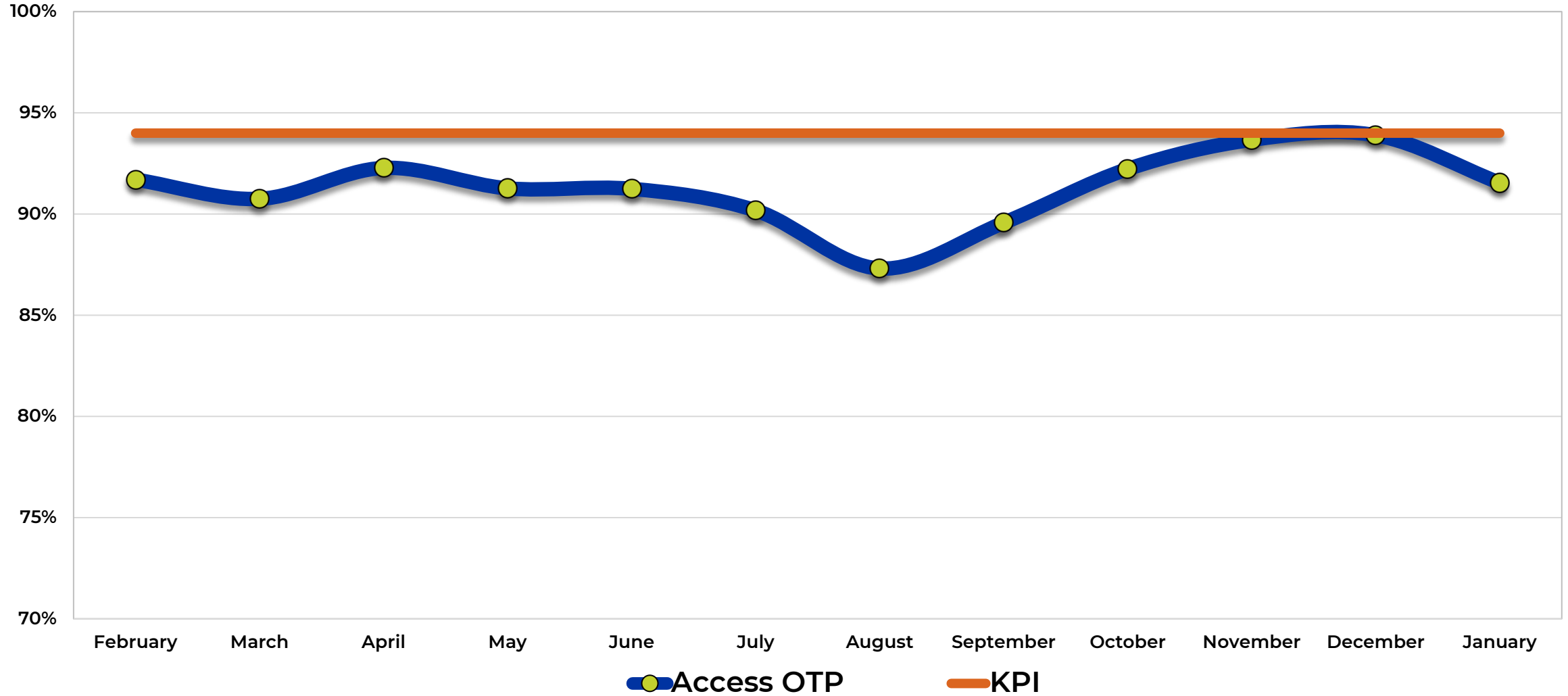
ACCESS Ridership



Total Access Ridership by Month (since 2019)



On-Time Performance - Access (last 12 months)



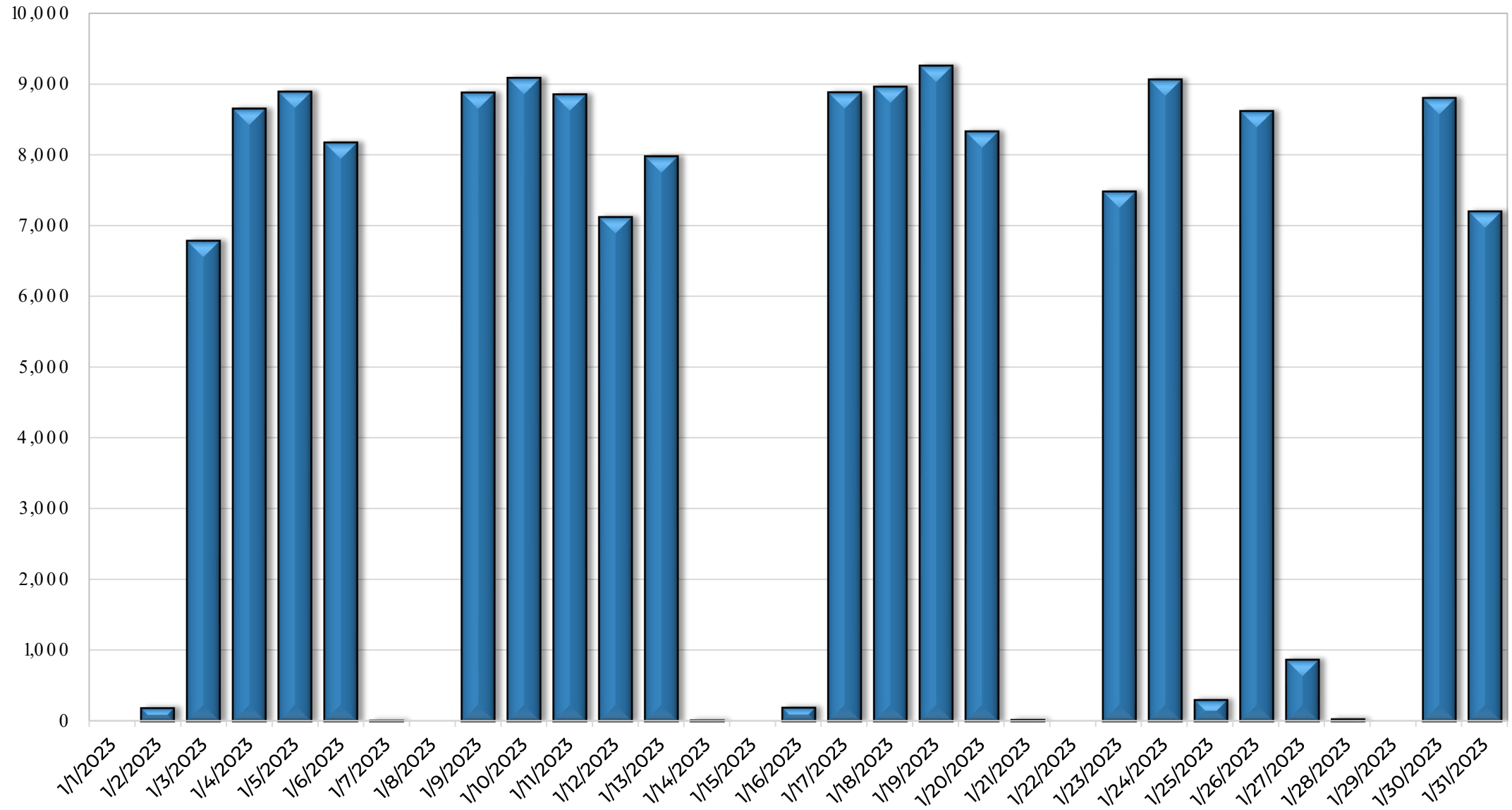


Route Level KPIs

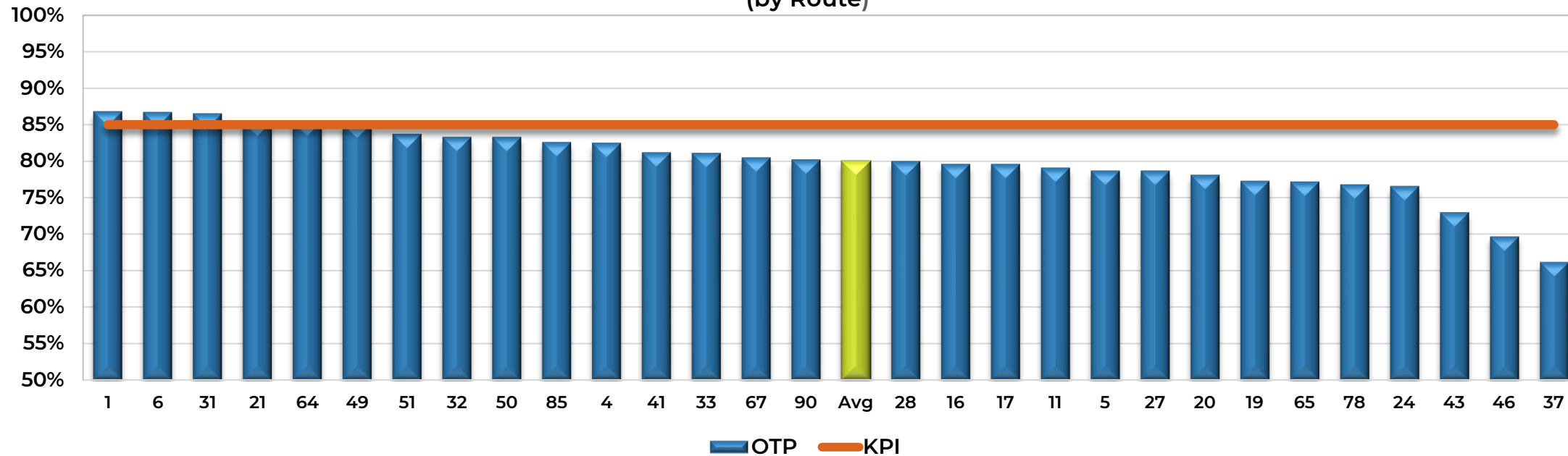
www.go-metro.com 2022

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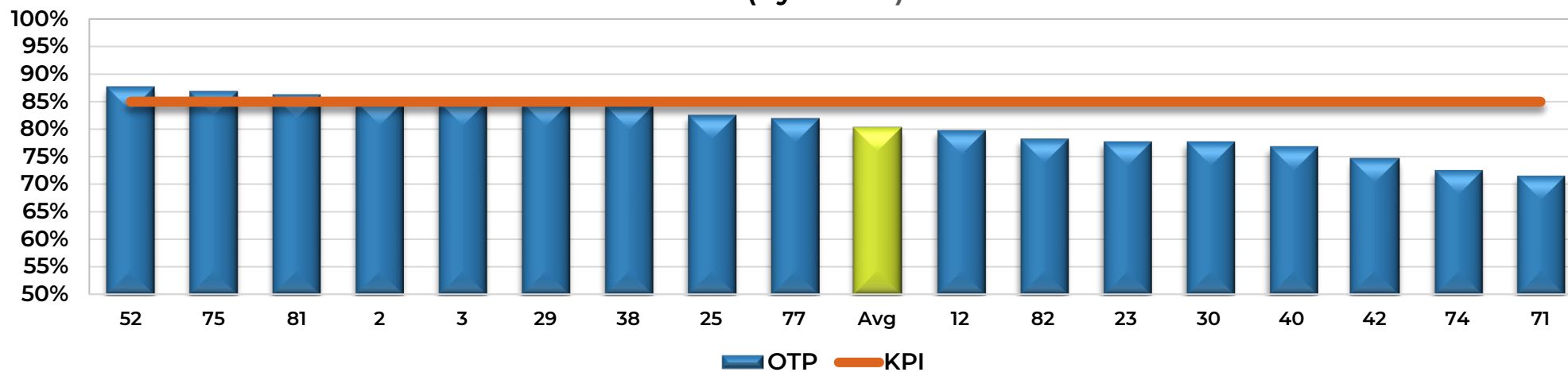
CPS Ridership



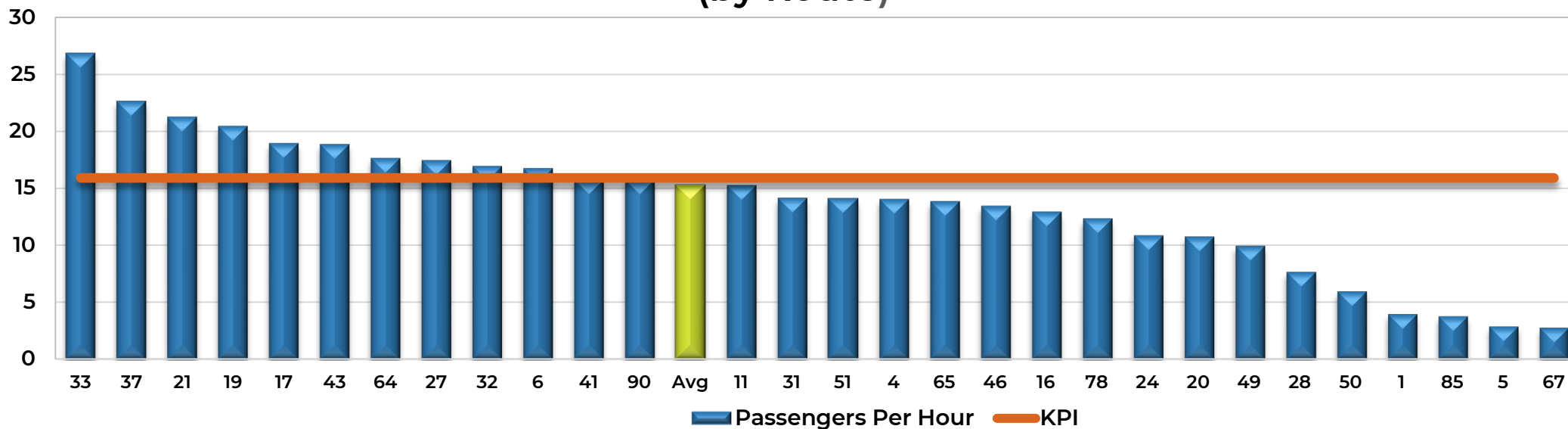
On-Time Performance - Local (by Route)



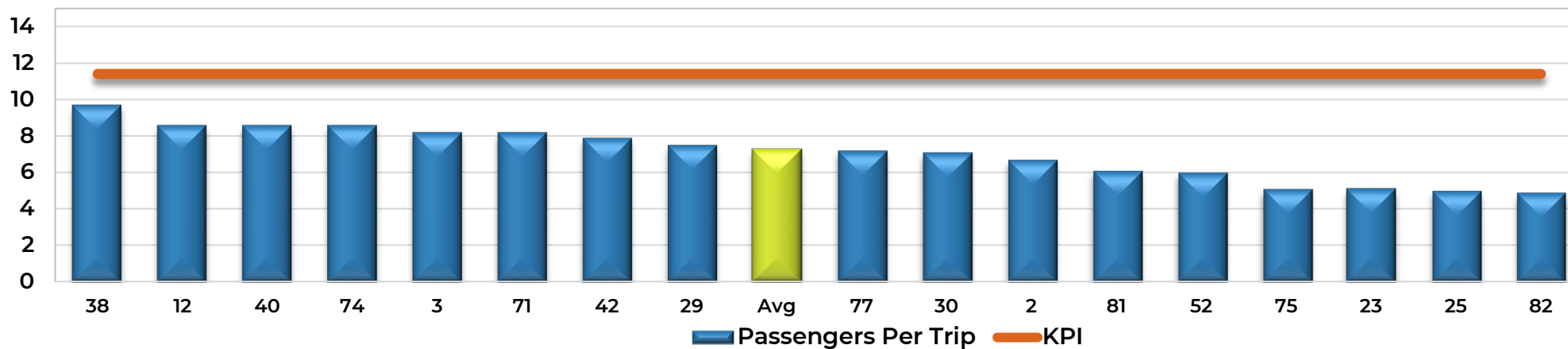
On-Time Performance - Express (by Route)



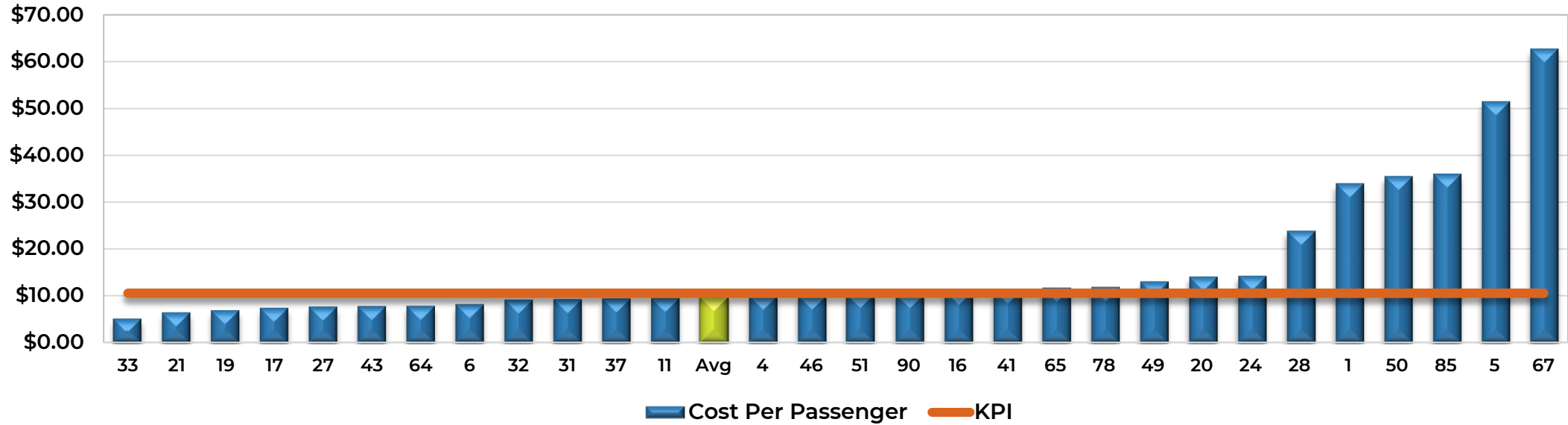
Productivity- Local (by Route)



Productivity- Express (by Route)



Cost Per Passenger - Local (by Route)



Cost Per Passenger - Express (by Route)



BOARD OF TRUSTEES
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY
RESOLUTION NO. 2023-xx

AUTHORIZATION TO SUBMIT LETTER OF INTENT TO FEDERAL TRANSIT ADMINISTRATION (FTA) AND
APPROVAL OF PROJECT DEVELOPMENT FUND RESERVE FOR BRT HAMILTON AVENUE COORIDOR

WHEREAS:

1. The passage of Issue 7 has allowed SORTA to deliver major transit system improvements to the residents of Hamilton County promised by the Reinventing Metro Plan (RIM) which included: frequency, hours of operation, overall reliability of the system, and other capital and technology projects. To further sustainable, multimodal, and regional system efforts, SORTA has expanded the mobility options such as Bus Rapid Transit (BRT).
2. By Resolution 2022-20, the SORTA Board approved professional engineering services to study its' existing transit system, corridors, and roadways in Cincinnati, Ohio to determine the paths which are best suited for bus rapid transit (BRT) development.
3. After a year of extensive corridor analysis and public outreach and involvement, SORTA has selected two (2) corridors to receive the region's first Bus Rapid Transit (BRT) services, which were identified as Hamilton Avenue and Reading Road corridors.
4. Staff recommends the SORTA Board authorizes the submittal Letter of Intent to the Federal Transit Administration (FTA) and to approve the expenditure of \$17 million for the Project Development Funding Reserve of the Bus Rapid Transit (BRT) Hamilton Avenue Corridor.

THEREFORE, BE IT RESOLVED:

5. The SORTA Board hereby authorizes and directs the CEO/General Manager/Secretary-Treasurer or their designee to submit the letter of intent to the Federal Transit Administration (FTA) for the approval of entry of the Hamilton Corridor BRT into the Project Development phase of the FTA's Section 5309 Capital Investment Grant (CIG) Program as a Small Starts project.
6. The SORTA Board hereby authorizes and approve the CEO/General Manager/Secretary-Treasurer or their designee to set-aside \$17 million for the Bus Rapid Transit (BRT) Hamilton Avenue Corridor.

February 2023

ACTION ITEM- AUTHORIZATION TO SUBMIT LETTER OF INTENT TO FTA AND APPROVAL OF PROJECT DEVELOPMENT FUNDING RESERVE FOR BUS RAPID TRANSIT (HAMILTON CORRIDOR)

STRATEGIC PLAN GOAL / OBJECTIVE

- Strategic Planning
- Operational Excellence
- Customer Experience

RECOMMENDATION

Approval of a resolution authorizing the CEO/General Manager/Secretary-Treasurer, or their designee to submit a Letter of Intent to the Federal Transit Administration (FTA) and to approve the expenditure of \$17 million to cover the Project Development Funding Reserve of the Bus Rapid Transit (BRT) Hamilton Avenue Corridor.

BACKGROUND

- The Southwest Ohio Regional Transit Authority (SORTA) is seeking the Federal Transit Administration's (FTA) approval for entry of the Hamilton Corridor BRT into the Project Development phase of the FTA's Section 5309 Capital Investment Grant (CIG) Program as a Small Starts project.
- Following a two-year public and stakeholder engagement program, SORTA is advancing its Reinventing Metro plan, adopted by the SORTA Board of Trustees in 2019. A major component of the plan is implementation of a regional BRT Network. SORTA initiated a Bus Rapid Transit Study in early 2022 which identified the region's first two BRT corridors: the Reading Road Corridor and the Hamilton Avenue Corridor.
- The 11-mile Hamilton Avenue BRT Corridor extends from the Riverfront Transit Center at Second Street in Downtown Cincinnati to the inner ring suburbs of North College Hill and Mount Healthy. The corridor runs from Downtown to the Over-the-Rhine, Mt. Auburn, Clifton Heights-University Heights neighborhoods, and Cincinnati's Uptown district. From Uptown it proceeds northwest, serving the Cincinnati neighborhoods of Heights, Clifton, Northside, and College Hill, extending north to the cities of North College Hill and Mount Healthy.
- The purpose of the Hamilton Avenue Corridor BRT is to provide an improved travel experience through frequent and reliable service between major regional travel destinations and employment, social, and economic opportunities. Project goals include: attracting riders and increasing transit mode share, improving transit speed and reliability, providing transportation network connectivity, providing equitable access to frequent service, ensuring constructability and compatibility with the built environment, and supporting economic development.
- The Hamilton Avenue Corridor BRT is currently estimated to cost \$143,600,000 in Year of Expenditure (YOE) dollars.

BUSINESS PROCESS

- N/A

FINANCIAL CONSIDERATIONS

- Once FTA approves SORTA to enter into project development phase, the \$17 million will be eligible for reimbursement through federal grants.

LEGAL CONSIDERATIONS

- N/A

SUBMITTED BY:



Darryl Haley
CEO/General Manager/Secretary-Treasurer

February 22, 2023

Ms. Felicia James, Associate Administrator for Planning and Environment
Federal Transit Administration
1200 New Jersey Avenue SE, East Building
Washington, DC 20590

Re: Request for Acceptance of the Southwest Ohio Regional Transit Authority's Hamilton Avenue Corridor Bus Rapid Transit (BRT) into Project Development

Dear Ms. James:

The Southwest Ohio Regional Transit Authority (SORTA) is seeking the Federal Transit Administration's (FTA) approval for entry of the **Hamilton Avenue Corridor BRT** into the Project Development phase of the FTA's Section 5309 Capital Investment Grant (CIG) Program as a Small Starts project.

Background

SORTA provides multimodal transportation service to Hamilton County, Ohio and its 49 cities, villages, and townships including the City of Cincinnati and adjacent portions of Butler, Clermont, and Warren counties, totaling 289 square miles. Hamilton County, with a population of 831,000, is part of the Cincinnati Metropolitan Statistical Area with a population of 2.6 million. In 2020, The City of Cincinnati had a population of 309,000, an increase of 4.2% from 2010. SORTA currently operates a fleet of 309 buses on 48 Metro routes. In 2022, SORTA carried 9,679,228 passenger trips.

Following a two-year public and stakeholder engagement program, SORTA is advancing its Reinventing Metro plan, adopted by the SORTA Board of Directors in 2019. A major component of the plan is implementation of a regional BRT Network. SORTA initiated a Bus Rapid Transit Study in early 2022 which identified the region's first two BRT corridors: the **Hamilton Avenue Corridor** and the Reading Road Corridor.

In 2020, Hamilton County voters approved an 0.8 percent sales tax to expand transit service and transit-related infrastructure improvements. The levy is expected to generate \$130 million a year, adjusted for inflation, 75 percent of which is allocated to transit operations and improvements for the next 25 years. A portion of the sales tax will be used to support the annual operational and financing expense of the BRT corridors. As a result, SORTA has secured a path forward that will accelerate the BRT project to potentially begin construction in 2026.

Sponsor and Partners

The Hamilton Avenue BRT Corridor project is sponsored by SORTA in cooperation with the City of Cincinnati, the entity that owns most of the roadways on which the Hamilton BRT corridor will operate and that will be involved in design decisions. Additional cooperative partners include Hamilton County, the Cincinnati USA Regional Chamber, and the Ohio-Kentucky Indiana Regional Council of Governments, the Metropolitan Planning Organization for the Cincinnati area.

Project Manager and Key Staff

- Darryl Haley, Chief Executive Officer dhaley@go-metro.com
- Khaled Shammout, Chief Strategic Planning, Development & innovation Officer and BRT Study Project Manager kshammout@go-metro.com
- Steve Anderson, Director of Transit Development & Innovation and BRT Study Deputy Project Manager sanderson@go-metro.com

Description of the Corridor

The 11-mile Hamilton Avenue BRT Corridor is shown in **Enclosure 1**. It extends from the Riverfront Transit Center at Second Street in Downtown Cincinnati to the inner ring suburbs of North College Hill and Mount Healthy. The corridor runs from Downtown to the Over-the-Rhine, Mt. Auburn, Clifton Heights-University Heights neighborhoods, and Cincinnati's Uptown district. From Uptown it proceeds northwest, serving the Cincinnati neighborhoods of Heights, Clifton, Northside, and College Hill, extending north to the cities of North College Hill and Mount Healthy.

The Hamilton Avenue Corridor and planned Reading Road BRT Corridor will operate along the same alignment and serve the same stations between Downtown and Uptown, the Cincinnati's region's two largest employment and activity centers, Downtown and Uptown. Several major employers are headquartered Downtown, including four Fortune 500 companies. The Uptown district is anchored by the 48,000-student University of Cincinnati and the medical center area, with 45,000 jobs and four of Cincinnati's largest employers. The portion of the corridor north of Uptown is rapidly revitalizing and the entire corridor exhibits significant redevelopment and growth potential.

The Hamilton Avenue Corridor is also heavily residential, with a total population of 148,926. The corridor is demographically diverse, with 27% of residents are identifying themselves as minority and 56% percent classified as low income. Persons aged 65 and older and with a disability each comprise 12% and 13% percent of the total population, respectively. Zero car households comprise 21% of the corridor total

Current Levels of Transit Service

The primary bus route in the corridor is Route 17 Hamilton Avenue-Mt. Healthy. It is one of the highest ridership route in the Metro system, carrying an average of 4,684 weekday riders. It operates every 15 minutes during peak periods and 10-15 minutes in the off-peak. Operating on a major travel and commuter corridor, Route 17's average speed is 14.1 mph with on-time performance of 80%. Two other routes, 46 Avondale-Winton Hills and 90 Metro*Plus, also serve the segment between Downtown and Uptown. Including activity at all stops on all routes serving a portion of the proposed alignment, 5,800 boardings occur each weekday.

Purpose and Need

The purpose of the Hamilton Avenue Corridor BRT is to provide an improved travel experience through frequent and reliable service between major regional travel destinations and employment, social, and economic opportunities. Project goals include: attract riders and increase transit mode share, improve transit speed and reliability, provide transportation network connectivity, provide equitable access to

frequent service, ensure constructability and compatibility with the built environment, and support economic development

Proposed Project

The Hamilton Avenue Corridor consists of a BRT line operating in a combination of dedicated center-running transit lanes, existing peak period curbside transit-only lanes, curbside Bus and Turn (aka Business Access and Transit, or BAT) lanes, and mixed traffic. Enclosure 2 shows the alignment and BRT treatments for each segment and lane type. Dedicated bus only lanes comprise 22% of the alignment while BAT lanes comprise 54%, resulting in bus priority lanes along 76% of the corridor. It is expected that nearly all of the BRT line will be located within existing right-of-way with minimal property acquisition. Transit signal priority (TSP) will be employed, along with queue jumps, at strategic locations.

The corridor serves the Government Square and Riverfront transit centers in downtown Cincinnati. Government Square is the largest transit hub in the region system, served by 38 Metro routes with direct connections to Transit Authority of Northern Kentucky (TANK) routes, Clermont Transportation Connection (CTC) routes, and the Cincinnati Connector streetcar line. The BRT line will operate along parallel streets one block apart, primarily along BAT lanes.

In Uptown, the BRT line will operate in dedicated center running lanes on Jefferson Avenue and a portion of Dr. Martin Luther King, Jr. Drive (MLK). The corridor continues on center running lanes on MLK and Clifton Avenue (serving TriHealth Good Samaritan Hospital and Hebrew Union College), briefly operating in mixed traffic in the Clifton Business District before resuming center lane operation on Ludlow Avenue to 10,500-student Cincinnati State Technical and Community College. It will operate in mixed traffic in Northside and serve the Northside Transit Center, the second largest Metro transfer point and largest outside downtown, providing connections to six local and crosstown routes. The remainder of the alignment is on BAT lanes along Hamilton Avenue.

Hamilton Avenue BRT will feature 20 full-size stations accommodating 60-ft. articulated, zero emission buses. Stations will be in full compliance with the Americans with Disabilities Act (ADA), accommodating level boarding and providing clear and unobstructed pathways, and visual and audio messages. Stations will also include large shelters, seating, real-time information displays, lighting, bicycle parking, landscape/streetscape enhancements, and pedestrian access improvements. A park & ride facility will be at the northern terminus of the corridor.

As part of SORTA's long term vision for a regional BRT network, the Hamilton Avenue BRT corridor will be specially branded, with a unique brand name, color and graphics scheme, unified station design theme, and features that will convey the significance of the corridor-based service and associated infrastructure apart from existing local Metro service. Service frequency will be 10 minutes during the peak and 10/15 minutes during off-peak periods. Existing underlying local service will be retained with an adjustment to frequency. SORTA's existing operating and maintenance facilities will support the new BRT buses.

Capital Cost Estimate

The Hamilton Avenue Corridor BRT is currently estimated to cost \$143,600,000 in Year of Expenditure (YOE) dollars. The estimate will be refined as the corridor advances through the Project Development phase. A detailed financial plan is currently in development and will be promptly shared with FTA. The plan will identify sources of state and local funding for capital and operations.

Prior Studies

The Hamilton Avenue Corridor BRT was identified in the **Reinventing Metro Service Implementation Study** (SORTA, 2019). Hamilton Avenue was initially identified as a potential BRT corridor in the report **Analysis of Potential Arterial Bus Rapid Transit Corridors in Cincinnati and Northern Kentucky** (City of Cincinnati, 2012).

Estimated Cost of Project Development and Funding Available and Committed

Table 1 shows the estimated cost of Project Development.

Table 1: Estimated Cost of Project Development

Environmental	\$1,564,000
Preliminary Engineering & Design	\$8,925,000
Project Management	\$1,326,000
Design Contingency	\$5,185,000
Total	\$17,000,000

The Project Development phase will be funded through the Issue 7 sales tax. **Enclosure 3** provides documentation of funding commitments as part of a SORTA Board Resolution.

Project Timeline

Enclosure 4 shows the projected timeline for completing the Hamilton Avenue Corridor BRT project. The timeline shows completion of Project Development requirements by the end of 2024 and assumes receipt of Small Starts funding in FY 2027 and FY 2028. Given its placement almost exclusively within existing public right-of-way, the project is anticipated to require a Documented Categorical Exclusion (DCE). SORTA is currently undertaking an environmental screening that will result in submittal of a class of action determination request to FTA.

Thank you for the opportunity to submit this application consideration of the project into the CIG Program. SORTA looks forward to advancing the Hamilton Avenue Corridor BRT project in full coordination with FTA. If you have any questions regarding this submission, please contact Khaled Shammout, SORTA’s Chief Planning, Development & Innovation Officer, at (513) 632-7671 or by email at kshammout@go-metro.com.

Sincerely,



Darryl Haley
Chief Executive Officer

cc: Kelly Brookins, Regional Administrator for FTA Region 5
Elizabeth Day, Director, Office of Capital Project Development

Enclosures:

Enclosure 1 – Reading Road Corridor Project Map

Enclosure 2 – Reading Road Corridor BRT Lane Treatments

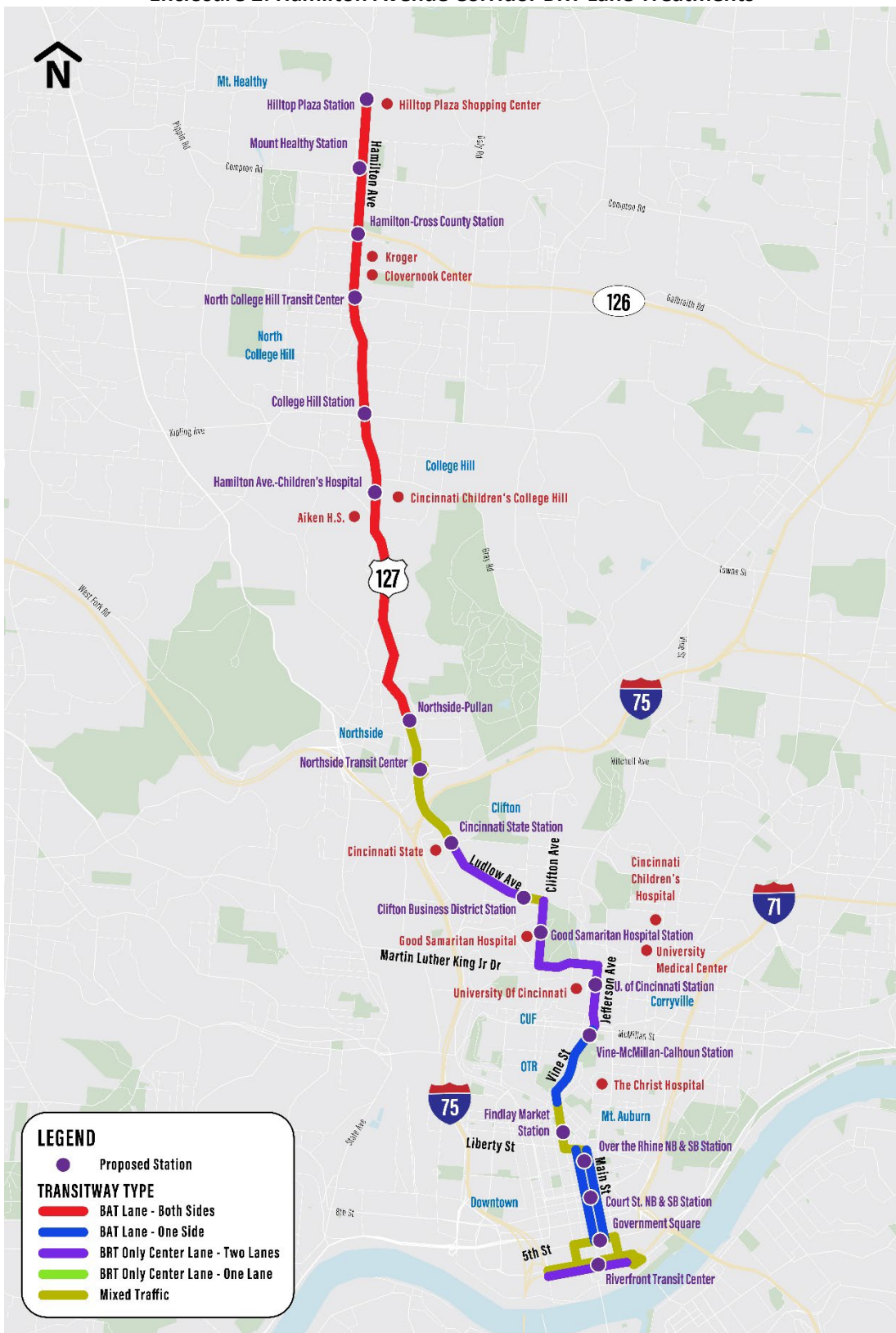
Enclosure 3 – SORTA Board Resolution and Commitment of Funds

Enclosure 4 – Project Timeline

Enclosure 1: Hamilton Avenue Corridor Project Map

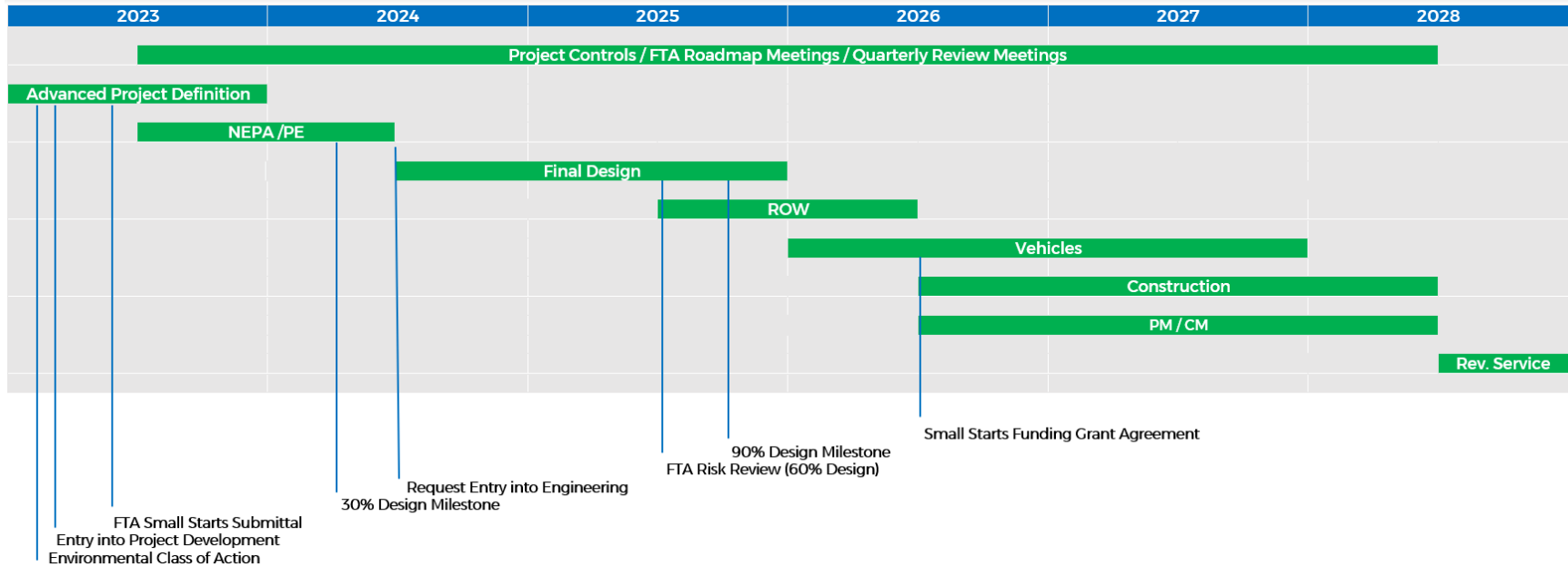


Enclosure 2: Hamilton Avenue Corridor BRT Lane Treatments



Enclosure 3: SORTA Board Resolution and Commitment of Funds

Enclosure 4: Project Timeline



BOARD OF TRUSTEES
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY
RESOLUTION NO. 2023-xx

AUTHORIZATION TO SUBMIT LETTER OF INTENT TO FEDERAL TRANSIT ADMINISTRATION (FTA) AND
APPROVAL OF PROJECT DEVELOPMENT FUND RESERVE FOR BRT READING ROAD COORIDOR

WHEREAS:

1. The passage of Issue 7 has allowed SORTA to deliver major transit system improvements to the residents of Hamilton County promised by the Reinventing Metro Plan (RIM) which included: frequency, hours of operation, overall reliability of the system, and other capital and technology projects. To further sustainable, multimodal, and regional system efforts, SORTA has expanded the mobility options such as Bus Rapid Transit (BRT).
2. By Resolution 2022-20, the SORTA Board approved professional engineering services to study its' existing transit system, corridors, and roadways in Cincinnati, Ohio to determine the paths which are best suited for bus rapid transit (BRT) development.
3. After a year of extensive corridor analysis and public outreach and involvement, SORTA has selected two (2) corridors to receive the region's first Bus Rapid Transit (BRT) services, which were identified as Hamilton Avenue and Reading Road corridors.
4. Staff recommends the SORTA Board authorizes the submittal Letter of Intent to the Federal Transit Administration (FTA) and to approve the expenditure of \$19 million for the Project Development Funding Reserve of the Bus Rapid Transit (BRT) Reading Road Corridor.

THEREFORE, BE IT RESOLVED:

5. The SORTA Board hereby authorizes and directs the CEO/General Manager/Secretary-Treasurer or their designee to submit the letter of intent to the Federal Transit Administration (FTA) for the approval of entry of the Reading Road Corridor BRT into the Project Development phase of the FTA's Section 5309 Capital Investment Grant (CIG) Program as a Small Starts project.
6. The SORTA Board hereby authorizes and approve the CEO/General Manager/Secretary-Treasurer or their designee to set-aside \$19 million for the Bus Rapid Transit (BRT) Reading Road Corridor.

February 2023

ACTION ITEM- AUTHORIZATION TO SUBMIT LETTER OF INTENT TO FTA AND APPROVAL OF PROJECT DEVELOPMENT FUNDING RESERVE FOR BUS RAPID TRANSIT (READING ROAD CORRIDOR)

STRATEGIC PLAN GOAL / OBJECTIVE

- Strategic Planning
- Operational Excellence
- Customer Experience

RECOMMENDATION

Approval of a resolution authorizing the CEO/General Manager/Secretary-Treasurer, or their designee to submit a Letter of Intent to the Federal Transit Administration (FTA) and to approve the expenditure of \$19 million to cover the Project Development Funding Reserve of the Bus Rapid Transit (BRT) Reading Road Corridor.

BACKGROUND

- The Southwest Ohio Regional Transit Authority (SORTA) is seeking the Federal Transit Administration's (FTA) approval for entry of the **Reading Corridor BRT** into the Project Development phase of the FTA's Section 5309 Capital Investment Grant (CIG) Program as a Small Starts project.
- Following a two-year public and stakeholder engagement program, SORTA is advancing its Reinventing Metro plan, adopted by the SORTA Board of Directors in 2019. A major component of the plan is implementation of a regional BRT Network. SORTA initiated a Bus Rapid Transit Study in early 2022 which identified the region's first two BRT corridors: the **Reading Road Corridor** and the Hamilton Avenue Corridor.
- The 10-mile Reading Road BRT Corridor extends from the Riverfront Transit Center at Second Street in Downtown Cincinnati to Cincinnati's Roselawn neighborhood. The corridor runs from Downtown to the Over-the-Rhine, Mt. Auburn, Clifton Heights-University Heights neighborhoods, and Cincinnati's Uptown district. From Uptown it proceeds northeast, serving the neighborhoods of Corryville, Avondale, North Avondale, Paddock Hills, Bond Hill, and Roselawn.
- The purpose of the Reading Road Corridor BRT is to provide an improved travel experience through frequent and reliable service between major regional travel destinations and employment, social, and economic opportunities. Project goals include: attracting riders and increasing transit mode share, improving transit speed and reliability, providing transportation network connectivity, providing equitable access to frequent service, ensuring constructability and compatibility with the built environment, and supporting economic development.
- The Reading Road Corridor BRT is currently estimated to cost \$149,500,000 in Year of Expenditure (YOE) dollars.

BUSINESS PROCESS

- N/A

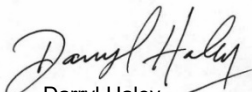
FINANCIAL CONSIDERATIONS

- Once FTA approves SORTA to enter into project development phase, the \$19 million will be eligible for reimbursement through federal grants.

LEGAL CONSIDERATIONS

- N/A

SUBMITTED BY:



Darryl Haley
CEO/General Manager/Secretary-Treasurer

February 22, 2023

Ms. Felicia James, Associate Administrator for Planning and Environment
Federal Transit Administration
1200 New Jersey Avenue SE, East Building
Washington, DC 20590

Re: Request for Acceptance of the Southwest Ohio Regional Transit Authority's Reading Road Corridor Bus Rapid Transit (BRT) into Project Development

Dear Ms. James:

The Southwest Ohio Regional Transit Authority (SORTA) is seeking the Federal Transit Administration's (FTA) approval for entry of the **Reading Corridor BRT** into the Project Development phase of the FTA's Section 5309 Capital Investment Grant (CIG) Program as a Small Starts project.

Background

SORTA provides multimodal transportation service to Hamilton County, Ohio and its 49 cities, villages, and townships including the City of Cincinnati and adjacent portions of Butler, Clermont, and Warren counties, totaling 289 square miles. Hamilton County, with a population of 831,000, is part of the Cincinnati Metropolitan Statistical Area with a population of 2.6 million. SORTA currently operates a fleet of 309 buses on 48 Metro routes. In 2022, SORTA carried 9,679,228 passenger trips.

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Sponsor and Partners

The Reading Road BRT Corridor project is sponsored by SORTA in cooperation with the City of Cincinnati, the entity that owns most of the roadways on which the Reading BRT corridor will operate and that will be involved in design decisions. Additional cooperative partners include Hamilton County, the Cincinnati USA Regional Chamber, and the Ohio-Kentucky Indiana Regional Council of Governments, the Metropolitan Planning Organization for the Cincinnati area.

Project Manager and Key Staff

- Darryl Haley, Chief Executive Officer dhaley@go-metro.com
- Khaled Shammout, Chief Strategic Planning, Development & innovation Officer and BRT Study Project Manager kshammout@go-metro.com
- Steve Anderson, Director of Transit Development & Innovation and BRT Study Deputy Project Manager sanderson@go-metro.com

Description of the Corridor

The 10-mile Reading Road BRT Corridor is shown in **Enclosure 1**. It extends from the Riverfront Transit Center at Second Street in Downtown Cincinnati to Cincinnati's Roselawn neighborhood. The corridor runs from Downtown to the Over-the-Rhine, Mt. Auburn, Clifton Heights-University Heights neighborhoods, and Cincinnati's Uptown district. From Uptown it proceeds northeast, serving the neighborhoods of Corryville, Avondale, North Avondale, Paddock Hills, Bond Hill, and Roselawn.

The Reading Road Corridor and planned Hamilton Avenue BRT Corridor will operate along the same alignment and serve the same stations between Downtown and Uptown, the Cincinnati's region's two largest employment and activity centers. Several major employers are headquartered Downtown, including four Fortune 500 companies. The Uptown district is anchored by the 48,000-student University of Cincinnati and the medical center area, with 45,000 jobs and four of Cincinnati's largest employers. The corridor exhibits significant redevelopment and growth potential.

The Reading Road Corridor is also heavily residential, with a total population of 142,868. The corridor is demographically diverse, with 26% of residents are identifying themselves as minority and 50% classified as low income. Persons aged 65 and older and with a disability each comprise 12% of the total population. Zero car households comprise 22% of the corridor total.

Current Levels of Transit Service

The primary bus route in the corridor is Route 43 Reading Road. It is the highest ridership route in the Metro system, carrying an average of 5,024 weekday riders. It operates every 15 minutes during peak periods and 10-15 minutes in the off-peak. Operating on a major travel and commuter corridor, Route 43's average speed is 14.7 mph with on-time performance of 71.0%. Two other routes, 46 Avondale-Winton Hills and 90 Metro*Plus, also serve the segment between Downtown and Uptown. Including activity at all stops on all routes serving a portion of the proposed alignment, 6,400 boardings occur each weekday.

Purpose and Need

The purpose of the Reading Road Corridor BRT is to provide an improved travel experience through frequent and reliable service between major regional travel destinations and employment, social, and economic opportunities. Project goals include: attract riders and increase transit mode share, improve transit speed and reliability, provide transportation network connectivity, provide equitable access to frequent service, ensure constructability and compatibility with the built environment, and support economic development.

Proposed Project

The Reading Road Corridor consists of a BRT line operating in a combination of dedicated center-running transit lanes, existing peak period curbside transit-only lanes, curbside Bus and Turn (aka Business Access and Transit, or BAT) lanes, and mixed traffic. Enclosure 2 shows the alignment and BRT treatments for each segment, and lane type. Dedicated bus only lanes comprise 14% of the alignment while BAT lanes comprise 68%, resulting in bus priority lanes along 82% of the corridor. It is expected that nearly all of the BRT line will be located within existing right-of-way with minimal property acquisition. Transit signal priority (TSP) will be employed, along with queue jumps, at strategic locations.

The corridor serves the Government Square and Riverfront transit centers in downtown Cincinnati. Government Square is the largest transit hub in the region, served by 38 Metro routes with direct connections to Transit Authority of Northern Kentucky (TANK) routes, Clermont Transportation Connection (CTC) routes, and the Cincinnati Connector streetcar line. The BRT line will operate along parallel streets one block apart, primarily along BAT lanes.

In Uptown, the BRT line will operate in dedicated center running lanes on Jefferson Avenue and a portion of Dr. Martin Luther King, Jr. Drive (MLK). The corridor proceeds east on MLK, north on Burnet Avenue, and east on Forest Avenue to Reading Road on BAT lanes. It will also serve the Uptown Multimodal Transit Hub, currently in development, providing direct connections to other Metro routes and the extensive shuttle systems operated by the medical and educational institutions in the area. The remainder of the BRT alignment is on BAT lanes along Reading Road.

Reading Corridor BRT will feature 15 full-size stations accommodating 60-ft. articulated, zero emission buses. Stations will be in full compliance with the Americans with Disabilities Act (ADA), accommodating level boarding and providing clear and unobstructed pathways, and visual and audio messages. Stations will also include large shelters, seating, real-time information displays, lighting, bicycle parking, landscape/streetscape enhancements, and pedestrian access improvements. A park & ride facility will be located at or near the northern terminus of the corridor.

As part of SORTA's long term vision for a regional BRT network, the Reading Road BRT corridor will be specially branded, with a unique brand name, color and graphics scheme, unified station design theme, and features that will convey the significance of the corridor-based service and associated infrastructure apart from existing local Metro service. Service frequency will be 10 minutes during the peak and 10/15 minutes during off-peak periods. Existing underlying local service will be retained with an adjustment to frequency. SORTA's existing operating and maintenance facilities will support the new BRT buses.

Capital Cost Estimate

The Reading Road Corridor BRT is currently estimated to cost \$149,500,000 in Year of Expenditure (YOE) dollars. The estimate will be refined as the corridor advances through the Project Development phase. A detailed financial plan is currently in development and will be promptly shared with FTA. The plan will identify sources of state and local funding for capital and operations.

Prior Studies

The Reading Road Corridor BRT was identified in the **Reinventing Metro Service Implementation Study** (SORTA, 2019). Reading Road was initially identified as a potential BRT corridor in the report **Analysis of Potential Arterial Bus Rapid Transit Corridors in Cincinnati and Northern Kentucky** (City of Cincinnati, 2012).

Estimated Cost of Project Development and Funding Available and Committed

Table 1 shows the estimated cost of Project Development.

Table 1: Estimated Cost of Project Development

Environmental	\$1,748,000
Preliminary Engineering & Design	\$9,975,000
Project Management	\$1,482,000
Design Contingency	\$5,795,000
Total	\$19,000,000

The Project Development phase will be funded through the Issue 7 sales tax. **Enclosure 3** provides documentation of funding commitments as part of a SORTA Board Resolution.

Project Timeline

Enclosure 4 shows the projected timeline for completing the Reading Road Corridor BRT project. The timeline shows completion of Project Development requirements by the end of 2024 and assumes receipt of Small Starts funding in FY 2026 and FY 2027. Given its placement almost exclusively within existing public right-of-way, the project is anticipated to require a Documented Categorical Exclusion (DCE). SORTA is currently undertaking an environmental screening that will result in submittal of a class of action determination request to FTA.

Thank you for the opportunity to submit SORTA’s first application to be considered into the CIG Program. SORTA looks forward to advancing the Reading Road Corridor BRT project in full coordination with FTA. If you have any questions regarding this submission, please contact Khaled Shammout, SORTA’s Chief Planning, Development & Innovation Officer, at (513) 632-7671 or by email at kshammout@go-metro.com.

Sincerely,

Darryl Haley
Chief Executive Officer

cc: Kelly Brookins, Regional Administrator for FTA Region 5
Elizabeth Day, Director, Office of Capital Project Development

Enclosures:

Enclosure 1 – Reading Road Corridor Project Map

Enclosure 2 – Reading Road Corridor BRT Lane Treatments

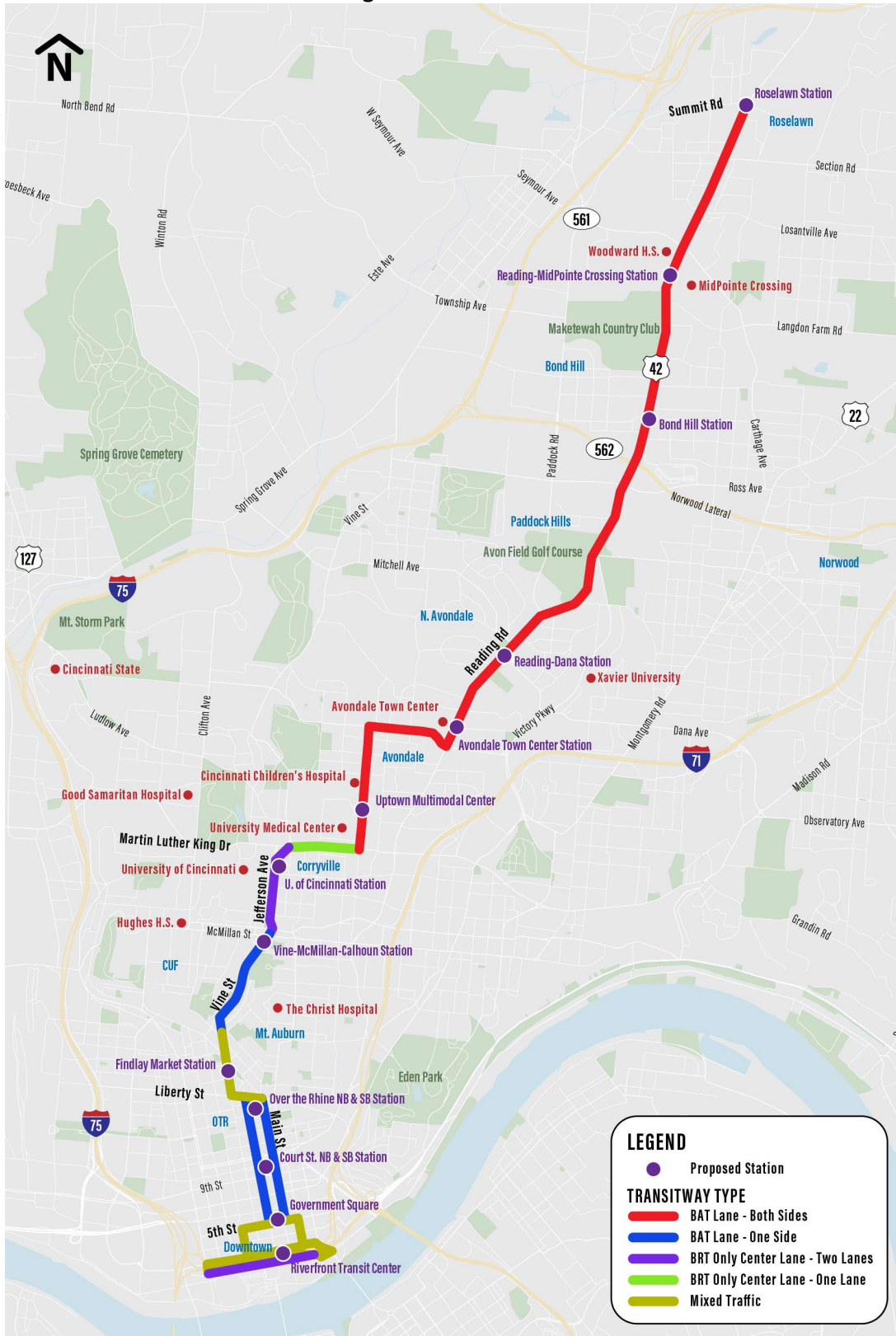
Enclosure 3 – SORTA Board Resolution and Commitment of Funds

Enclosure 4 – Project Timeline

Enclosure 1: Reading Road Corridor Project Map

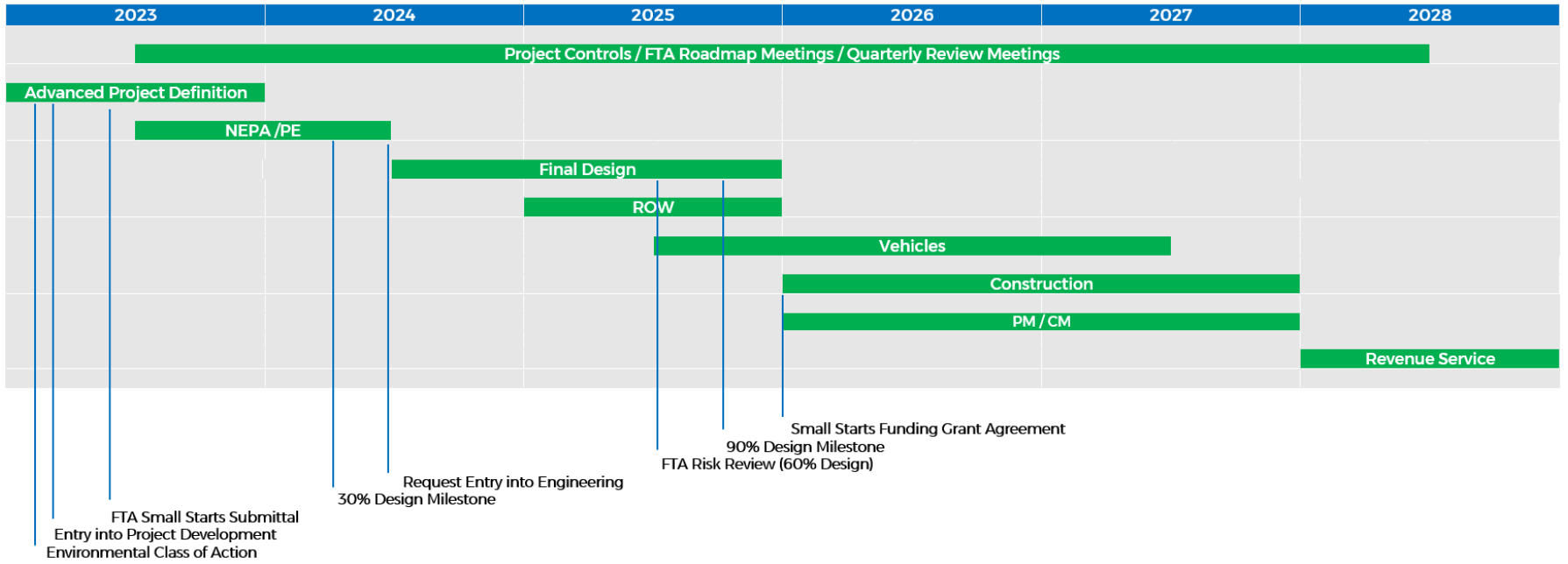


Enclosure 2: Reading Road Corridor BRT Lane Treatments



Enclosure 3: SORTA Board Resolution and Commitment of Funds

Enclosure 4: Project Timeline





BOARD ACTION ITEMS

February 21st, 2023 | John Edmondson



Award for Operator Recruiting Advertising



Challenge: Metro seeks to maximize exposure and impressions for our operator recruiting video advertisement. Several gas stations in the service area provide a medium for airing of advertising videos. ViaMedia is the sole provider of video advertising opportunities on Cincinnati area gas pumps.

Solution: Issue a sole source award to ViaMedia for placement of operator recruiting ads.

Method	Vendor	Award	Term	Diversity	Funding
Non-competitive sole source award	ViaMedia, Inc.	\$180,615	<1 year Dec 2023	0% Goal 0% Award	Local Operating
				FY23 Diversity Spend YTD \$1.8M	

Modification for A&E Services for Bus Washer



Challenge: Bus wash systems at QG and BH are beyond useful life and in need of replacement. Preliminary inspections revealed a greater degree of deterioration than originally believed, requiring additional engineering services to begin repairs.

Solution: Engage current bush washer engineering firm, R.E. Warner, to develop specifications and drawings needed for repairs.

Method	Vendor	Award	Term	Diversity	Funding
Sole source contract modification	R.E. Warner & Associates, Inc.	\$99,911 (O) <u>\$67,278 (M)</u> \$167,189	<1 year Dec 2023	0% Goal 100% Award	Local Capital
				FY23 Diversity Spend YTD \$1.8M ↑	

Modification for Employee Background Checks



Challenge: Metro recruiting has increased, resulting in the hiring of more employees across all functions. Pre-employment background checks are a requirement of the hiring process. More hiring has resulted in a quicker drawdown of approved funding for background checks.

Solution: Increase the funding for pre-employment background checks via a contract modification

Method	Vendor	Award	Term	Diversity	Funding
Sole source contract modification	ClearStar, Inc.	\$131,200 (O) <u>\$46,013 (M)</u> \$177,213	June 2023	0% Goal 0% Award	Local Operating
				FY23 Diversity Spend YTD	
				\$1.8M --	





Modification for Bus Shelter Installation

Challenge: Metro recently acquired 27 new bus shelters that need installed. Each shelter will be installed within the City of Cincinnati limits, requiring a vendor with proficiency in the RSP process. Additional funding is also needed for anti-theft bolts for bus stop benches and contingency funding to cover unforeseen circumstances.

Solution: Prus Construction is under contract for the installation of bus benches and is proficient with the RSP process, creating economies of scale for installation services and materials.

Method	Vendor	Award	Term	Diversity	Funding
Sole source contract modification	Prus Construction	\$2,135,000 (O) <u>\$512,237 (M)</u> \$2,647,237	5 years (Dec 2027)	6.13% Goal 10.54% Award	Local Capital
				FY23 Diversity Spend YTD \$1.8M --	

Revenue Contract for ROW Leasing



Challenge: Several Metro-owned right-of-way properties contain billboards that can be used for advertising. Leasing of the property to vendors owning and maintaining billboards is a revenue transaction.

Solution: Renew a 5-year contract with Norton Outdoor Advertising, the owner of the billboard structures.

<i>Method</i>	<i>Vendor</i>	<i>Award</i>	<i>Term</i>	<i>Diversity</i>	<i>Funding</i>
Sole source renewal	Norton Outdoor Advertising	\$0 expense \$23,870 per year revenue \$119,350 total revenue	5 years March 2028	0% Goal 0% Award FY23 Diversity Spend YTD \$1.8M --	Revenue contract

Contract Award for Garbage Collection



Challenge: Standard business operations requires the collection of waste and recycling materials from all Metro operating garages and transit centers.

Solution: Request for Proposals (“RFP”) issued to determine the most cost-effective service provider.

<i>Method</i>	<i>Vendor</i>	<i>Award</i>	<i>Term</i>	<i>Diversity</i>	<i>Funding</i>
RFP	Rumpke Waste & Recycling	\$268,371	5 years April 2028	0% Goal 0% Award	Local Operating
				FY23 Diversity Spend YTD \$1.8M --	



Contract Award for ROW Appraisals



Challenge: The FTA requires that Metro review and release all unused right of way property acquired with Federal financial assistance. Metro lacks the expertise to perform accurate property appraisals, a critical requirement to selling of real property for fair market value.

Solution: Issue a Request for Proposals to acquire property appraisal services.

Method	Vendor	Award	Term	Diversity	Funding
RFP	AECOM	\$562,998	<1 year July 2023	0% Goal 15.1% Award FY23 Diversity Spend YTD \$1.9M ↑	Local Capital



Contract Award for Bulk Motor Oil



Challenge: Metro requires motor oil for the operation of all fleet vehicles. Revenue vehicles require a unique formula for continued safe operation of each vehicle.

Solution: Issue an Invitation for Bids (“IFB”) to determine the acquire oil from the lowest responsive, responsible bidder.

<i>Method</i>	<i>Vendor</i>	<i>Award</i>	<i>Term</i>	<i>Diversity</i>	<i>Funding</i>
IFB	PetroChoice	\$318,184	1 year Feb 2024	0% Goal 0% Award	Local Operating
				FY23 Diversity Spend YTD \$1.9M --	



BOARD OF TRUSTEES
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY
RESOLUTION NO. 2023-xx

APPROVAL OF CONTRACT FOR OPERATOR RECRUITING VIDEO ADVERTISEMENT

WHEREAS:

1. SORTA currently is seeking to maximize exposure and impressions for our operator recruiting video advertisement.
2. This is a non-competitive sole source procurement.
3. SORTA staff recommends the Board approve a one (1) year contract with ViaMedia, Inc. for bus operator recruiting advertisement, at a total cost not to exceed \$180,615.
4. This expenditure will be funded with local operating funds.

THEREFORE, BE IT RESOLVED:

5. The SORTA Board hereby authorizes the CEO/General Manager/Secretary-Treasurer or the Senior Director of Procurement to execute a contract with ViaMedia, Inc. on behalf of SORTA, at a total cost not to exceed \$180,615.

February 2023

ACTION ITEM- APPROVAL OF CONTRACT FOR OPERATOR RECRUITING VIDEO ADVERTISEMENT

STRATEGIC PLAN GOAL / OBJECTIVE

- Operational Excellence

RECOMMENDATION

Approval of a resolution authorizing the CEO/General Manager/Secretary-Treasurer or Senior Director of Procurement to execute a contract with ViaMedia, Inc. for an amount not to exceed \$180,615.

FINANCIAL CONSIDERATIONS

- This contract will start on the date of execution, which will occur immediately following Board approval, and will expire on February 28, 2024.
- The budgeted amount will not exceed \$180,615.
- This expenditure will be funded local operating funds.

BUSINESS PURPOSE

- SORTA seeks to increase the number of impressions for our operator recruiting advertisement effort in the greater Cincinnati area.
- Video advertising on gas pumps is a highly effective way to increase exposure.
- ViaMedia is the sole provider of gas pump ads in the Metro service area.
- The 12-month engagement will provide approximately 7.2 million impressions.

PROCUREMENT CONSIDERATIONS

- This is a firm fixed price type of contract.
- This contract will remain effective February 28, 2024.
- This is a non-competitive sole source award.

D/M/WBE CONSIDERATIONS

- The contract will be issued as a Sole Source award.
- No D/M/WBE participation is possible.

LEGAL CONSIDERATIONS

- Section 306.43 of the Ohio Revised Code authorizes SORTA to contract for the provision of goods and services.

SUBMITTED BY:



Dave Etienne
Director of Marketing and Communications



Darryl Haley
CEO/General Manager Secretary-Treasurer



**PROCUREMENT SUMMARY & AWARD ANALYSIS
31-2023**

PROJECT INFORMATION

Project Number: 31-2023
Short Description: 2023 Operator Recruiting Ads
Procurement Specialist: Kay Schutte
Department: External Communications
Project Manager: Dave Etienne

PROJECT PLANNING

Long Description: 2023 Production of Video and Static Ads for Operator Recruiting on Gas Pumps for 12 months

Funding Source:	Local	Budget Year(s):	2023
Cost Estimate:	Fed 0	Budget Approved? (Y/N)	Y
	St 0		
	Loc \$180,615		
	Total \$180,615		

List of Grants (if applicable): NA

Planning Notes or Comments: ViaMedia was sole sourced for 2023 operator recruiting advertising based on past experience.

SOLICITATION INFORMATION

Solicitation Type:	Sole Source	Open Date:	N/A	Close Date:	N/A
DBE Goal %:	0	SBE Goal %:	0		
Vendor Outreach:	Total Firms: 1				
	DBE Firms: 0	SBE Firms:	0		
	Email Firms: 1	Public Purch:	0		
Vendor Responses:	Total Downloads: 1	Total Submissions:	1		
	DBE Submissions: 0	SBE Submissions:	0		
Non-responsive Submissions:	None				



**PROCUREMENT SUMMARY & AWARD ANALYSIS
31-2023**

Non-responsive Determination: None

Vendor Recommendation: VIAMEDIA

Solicitation Notes or Comments: ViaMedia was selected based on their ability to reach specific demographics and previous experience.

The 12 month cost is lower than previous Viamedia one (1) month POs in the past.

- Previous SS51-2022 – 1 month = \$20,000
800,000 impressions for a one month period
12 Months equals \$240,000
- PO 31-2023 - **12 Months = \$180,615**
 - 600,000 impressions for a one month period = \$15,000.00/M * 12 Mos \$180,000
 - Plus \$615.00 for: 15 Sec Elemental Stock Footage Spot (\$415.00); Spanish Voice Over (\$75.00) & 5 Ad Static Bundle (\$125.00)

CONTRACT AWARD INFORMATION

Vendor: VIAMEDIA

Contract Type:	Firm Fixed	Start	End
Award Amt:	Full NTE \$180,615	Full Term Period:	1/18/2023 12/31/2023
D/W/MBE Participation:	0 prime firms		
	0 subcontracting firms		
	\$0.00 award value		

Non-responsive Submissions: None

Determination of Price Reasonableness: Price has been determined to be fair and reasonable based on the cost estimate and negotiations with Viamedia.

Contract Award Notes or Comments: The rate sheet includes an accreditation that price is equal to or less than that offered to the general public.



PROCUREMENT SUMMARY & AWARD ANALYSIS
31-2023

By signing below, you affirm that you have reviewed and concur with the information contained in this Procurement Summary & Award Analysis.

Procurement Specialist: *Kay Schutte* **Date:** 1/27/2023

Project Manager: *Dave Etienne* **Date:** 1/30/2023
DocuSigned by:
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Dir. of Procurement: *Jill* **Date:** 1/30/2023
DocuSigned by:
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BOARD OF TRUSTEES
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY
RESOLUTION NO. 2023-xx

APPROVAL OF CONTRACT MODIFICATION FOR A&E SERVICES FOR BUS WASHER STATIONS

WHEREAS:

1. SORTA current bus wash systems at the Queensgate and Bond Hill facilities are beyond useful life and in need of replacement.
2. Preliminary inspection of the sites revealed a greater degree of deterioration than originally believed, calling for additional A&E inspections and drawings for needed repairs.
3. Staff recommends that the Board approve contract modifications with R.E. Warner & Associates, Inc. for architectural and engineering services required for the installation of new bush washers, at a cost not to exceed \$67,278 and a total contract amount up to \$167,189.
4. This expenditure will be funded with local capital funds.

THEREFORE, BE IT RESOLVED:

6. The Board hereby approves the contract modifications as recommended by SORTA Staff and authorizes the CEO/General Manager/Secretary-Treasurer and Senior Director of Procurement to execute such contract modifications with R.E. Warner & Associates, Inc. on behalf of SORTA, at a cost not to exceed \$67,278, for a total contract amount up to \$167,189.

February 2023

ACTION ITEM – APPROVAL OF CONTRACT MODIFICATION FOR A&E SERVICES FOR BUS WASHER STATIONS

STRATEGIC PLAN GOAL / OBJECTIVE

- Operational Excellence

RECOMMENDATION

Approval of a resolution authorizing the CEO/General Manager/Secretary-Treasurer or Senior Director of Procurement to execute a contract modification with R.E. Warner & Associates, Inc. on behalf of SORTA, increasing the not to exceed amount of the agreement to \$167,189.

FINANCIAL CONSIDERATIONS

- This contract modification will start on the date of execution, which will occur immediately following Board approval, and will end December 31, 2023. The budgeted amount for the modification estimated at \$67,278, bringing the total not to exceed budgeted amount to \$167,189.
- This expenditure will be funded with local capital funds.

BUSINESS PURPOSE

- This contract is for architectural and engineering services required for the installation of new bush washers at Metro operating facilities.
- Preliminary inspection of the sites revealed a greater degree of deterioration than originally believed, calling for additional A&E inspections and drawings for needed repairs.

PROCUREMENT CONSIDERATIONS

- This is a firm fixed price type of contract.
- This contract will remain effective until December 2023.
- No other terms or conditions are being modified.
- The contract procurement summary is attached.

D/M/WBE CONSIDERATIONS

- No DBE goal was established for the contract modification.
- R.E. Warner is a certified DBE firm.

LEGAL CONSIDERATIONS

- Section 306.43 of the Ohio Revised Code authorizes SORTA to contract for the provision of goods and services.

SUBMITTED BY:



Jeff Mundstock
Director of Fleet & Facilities



Darryl Haley
CEO/General Manager Secretary-Treasurer



PROCUREMENT SUMMARY & AWARD ANALYSIS
13-2022-2

PROJECT INFORMATION

Project Number: 13-2022
Short Description: Add Services to A&E Contract
Procurement Specialist: Kay Schutte
Department: Facilities
Project Manager: Brad Mook

PROJECT PLANNING

Long Description: Additional Costs added to A&E Consultant Services for New Bus Washer Stations for Queensgate & Bond Hill

Funding Source:	Local	0	Budget Year(s):	2023
Cost Estimate:	Fed	0	Budget Approved? (Y/N)	Y
	St	0		
	Add Loc	<u>\$67,278</u>		
	New Total	\$167,189		

List of Grants (if applicable): N/A

Planning Notes or Comments: SORTA intends to modify contract 13-2022 to add A&E Consultant Services related to Wash Bay Infrastructure Deterioration Assessment & Resolution Reports for Queensgate and Bond Hill locations.

SOLICITATION INFORMATION

Solicitation Notes or Comments: This is a modification to the existing contract to add A&E Consultant Services to the Scope of Work.

CONTRACT AWARD INFORMATION

Vendor: RE Warner
Contract Type: CPFF
Award Amt: Full NTE \$167,189



PROCUREMENT SUMMARY & AWARD ANALYSIS
13-2022-2

Performance Period: Contract modification to begin on date of execution and full delivery by 12/31/2023.

D/W/MBE Participation: 1 prime firms
0 subcontracting firms
\$167,189 award value

Award-to-Estimate Ratio (Award/Estimate): 1.0

Award-to-Proposal Ratio (Award/Proposal): 1.0

Negotiated Savings from Proposed Amount: \$0.00

Determination of Price Reasonableness: SORTA has determined price to be fair and reasonable based on past pricing for the same services on 13-2022.

Contract Award Notes or Comments: RE Warner has submitted a price that is reasonable, and the work is relative to the current contract. It is determined to be in the best interest of SORTA to modify the existing contract to include the additional A&E Consultant services necessary.

By signing below, you affirm that you have reviewed and concur with the information contained in this Procurement Summary & Award Analysis.

Procurement Specialist: Kay Schutte **Date:** 2/1/2023

DocuSigned by:

Project Manager: Brad Mook **Date:** 2/7/2023

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DocuSigned by:

Sr. Mgr. of Procurement: [Signature] **Date:** 2/7/2023

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BOARD OF TRUSTEES
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY
RESOLUTION NO. 2023-xx

APPROVAL OF CONTRACT MODIFICATION TO TRANSIT PLANNING SOFTWARE

WHEREAS:

1. By Resolution No. 2021-02, the SORTA Board approved a five (5) year contract with Urban Transportation Associates, Inc. (UTA) for APC software and maintenance services, at a total cost not to exceed \$203,250.
2. Staff has now identified cloud-based Software as a Service solutions are needed to expand Metro's ridership data collection and reporting efforts.
3. Staff recommends that the Board approve contract modifications Urban Transportation Associates, Inc. (UTA) for Software as a Service solutions services, at a cost not to exceed \$119,590 and a total contract amount up to \$322,840.
4. This expenditure will be funded with local operating funds.

THEREFORE, BE IT RESOLVED:

6. The Board hereby approves the contract modifications as recommended by SORTA Staff and authorizes the CEO/General Manager/Secretary-Treasurer and Senior Director of Procurement to execute such contract modifications with Urban Transportation Associates, Inc on behalf of SORTA, at a cost not to exceed \$119,590, for a total contract up to \$322,840.

February 2023

ACTION ITEM – APPROVAL OF CONTRACT MODIFICATION TO TRANSIT PLANNING SOFTWARE

STRATEGIC PLAN GOAL / OBJECTIVE

- Operational Excellence

RECOMMENDATION

Approval of a resolution authorizing the CEO/General Manager/Secretary-Treasurer or Senior Director of Procurement to execute a contract modification with Urban Transportation Associates, Inc. on behalf of SORTA, at a cost not to exceed \$322,840.

FINANCIAL CONSIDERATIONS

- This contract modification will start on the date of execution, which will occur immediately following Board approval, and will end January 31, 2026. The budgeted amount for the modification estimated at \$119,590, bringing the total not to exceed budgeted amount to \$322,840.
- This expenditure will be funded with local operating funds.

BUSINESS PURPOSE

- This contract is for software needed to gather and analyze ridership data collected via the automated passenger counters installed on each fixed route vehicle.
- The current software is installed on local servers, limiting critical functions such as tailored data reports, automated report deliveries, and more relevant data analysis functions.
- Cloud-based Software as a Service solutions are needed to expand Metro's ridership data collection and reporting efforts.

PROCUREMENT CONSIDERATIONS

- This is a firm fixed price type of contract.
- This contract will remain effective until January 2026.
- No other terms or conditions are being modified.
- The contract procurement summary is attached.

D/M/WBE CONSIDERATIONS

- No DBE goal was established for the contract modification.

LEGAL CONSIDERATIONS

- Section 306.43 of the Ohio Revised Code authorizes SORTA to contract for the provision of goods and services.

SUBMITTED BY:



Steve Anderson
Director of Transit Development and Innovation



Darryl Haley
CEO/General Manager Secretary-Treasurer



PROCUREMENT SUMMARY & AWARD ANALYSIS

PROJECT INFORMATION

Project Number: 45-2020 Mod 1
Short Description: UTA Cloud Upgrade for Year 2023 thru 2025
Procurement Specialist: Jason Roe
Department: Development
Project Manager: Khaled Shammout

PROJECT PLANNING

Long Description: APC Analytic reporting tool systems upgrade.
Funding Source: Local **Budget Year(s):** 2023 - 2025
Cost Estimate: Fed 0 **Budget Approved? (y/n)** Yes
 St 0
 Loc \$119,590.00
Total \$119,590.00

List of Grants (if applicable): N/A

Planning Notes or Comments: This is a modification to existing contract 45-2020. This upgrade will migrate APC reporting tools to a cloud hosted configuration. The data will be removed from SORTA servers and stored within the cloud. Data backup will be performed weekly, and analytic support is available. Reports will be scheduled and available for download in various formats.

PREVIOUS CONTRACT INFORMATION

Previous Project Number (solicitation): 45-2020
Vendor: Urban Transportation Associates, Inc.
Contract Number: 45-2020 **Start Date:** 1/20/21 **End Date:** 1/31/26
NTE Amount: \$203,250

Previous Contract Notes or Comments: Modification of the existing contract to include cloud-based services for the remainder of the term.

SOLICITATION INFORMATION

Solicitation Type: Sole Source **Open Date:** 2/10/2023 **Close Date:** 2/13/2023

DBE Goal %: 0 **SBE Goal %:** 0

Vendor Outreach: Total Firms: 1

DBE Firms: 0

SBE Firms: 0

Email Firms: 0

Public Purch.: 0

Vendor Responses: Total Downloads: N/A

Total Submissions: 1

DBE Submissions: 0 (prime) 0 (subcontractor)

SBE Submissions: 0 (prime) 0 (subcontractor)

Non-responsive Submissions: NA

Non-responsive Determination: NA

Vendor Recommendation: Urban Transportation Associates, Inc.

Solicitation Notes or Comments: NA

CONTRACT AWARD INFORMATION

Vendor: Urban Transportation Associates, Inc.

Contract Type:	Firm Fixed Price		Start	End
Award Amnt:	Full NTE	\$322,840	Full Term Period:	1/20/21 1/31/26
	<i>Base Term</i>	\$203,250	<i>Base Term</i>	1/20/21 1/31/26
	<i>Option 1</i>	\$38,500	<i>Option 1</i>	3/1/22 1/31/24
	<i>Option 2</i>	\$39,848	<i>Option 2</i>	2/1/24 1/31/25
	<i>Option 3</i>	\$41,242	<i>Option 3</i>	2/1/25 1/31/26

D/W/MBE Participation: 0 prime firms (number)

0 subcontracting firms (number)

0 award value (dollars)

Award-to-Estimate Ratio (Award/Estimate): 1.0 (\leq 1.0 goal)

Award-to-Proposal Ratio (Award/Proposal): 1.0 (\leq 1.0 goal)

Negotiated Savings from Proposed Amount: \$0.00 (\geq \$0.00 goal)

Determination of Price Reasonableness: The price proposal submitted from UTA is similar to that provided for similar transit projects for Palm Tran, Kitsap Transit and Ben Franklin Transit.

Contract Award Notes or Comments: Urban Transportation Associates, Inc. has submitted a proposal most advantageous to SORTA, cost and all other factors considered; it has the capacity to perform this contract in all respects and is recommended for award.

By signing below, you affirm that you have reviewed and concur with the information contained in this Procurement Summary & Award Analysis.

Procurement Specialist: DocuSigned by: Jason Roe . **Date:** 2/13/2023
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Project Manager: DocuSigned by: Khaled Shammout . **Date:** 2/13/2023
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Dir. of Procurement: DocuSigned by: [Signature] . **Date:** 2/14/2023
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BOARD OF TRUSTEES
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY
RESOLUTION NO. 2023-xx

APPROVAL OF CONTRACT MODIFICATION FOR PRE-EMPLOYMENT BACKGROUND CHECKS

WHEREAS:

1. By Resolution No. 2022-23, the SORTA Board approved a contract modification with ClearStar Inc. for pre-employment background check services, at a cost not to exceed \$45,500, bringing the total contract amount up to \$131,200.
2. Since then, SORTA staff has increased its recruiting efforts, therefore increasing the number of new hires that require pre-employment background check services.
3. Additional funds are needed for the balance of the contract term ending June 2023.
4. Staff recommends that the SORTA Board approve the contract modification with ClearStar Inc. for background check services, at a cost not to exceed \$46,013 and a total contract amount up to \$177,213.
5. This expenditure will be funded with local operating funds.

THEREFORE, BE IT RESOLVED:

6. The Board hereby approves the contract modifications as recommended by SORTA staff and authorizes the CEO/General Manager/Secretary-Treasurer or Senior Director of Procurement to execute such contract modifications with ClearStar Inc, Inc. on behalf of SORTA, at a cost not to exceed \$177,213.

February 2023

ACTION ITEM – APPROVAL OF CONTRACT MODIFICATION FOR PRE-EMPLOYMENT BACKGROUND CHECKS

STRATEGIC PLAN GOAL / OBJECTIVE

- Operational Excellence

RECOMMENDATION

Approval of a resolution authorizing the CEO/General Manager/Secretary-Treasurer or Senior Director of Procurement to execute a contract modification with ClearStar, Inc. on behalf of SORTA, at a cost not to exceed agreement to \$177,213.

FINANCIAL CONSIDERATIONS

- This contract modification will start on the date of execution, which will occur immediately following Board approval, and will end June 30, 2023. The unbudgeted amount for the modification estimated at \$46,013, bringing the total not to exceed contract amount to \$ 177,213.
- This expenditure will be funded with local operating funds.

BUSINESS PURPOSE

- This contract is for pre-employment background checks required as part of the Metro hiring process.
- Increased recruiting efforts has resulted in higher-than-expected employment offers across all Metro functions.
- Additional funding is needed to continue pre-employment background checks through the end of the contract term.
- One additional month is needed to complete a solicitation process for a renewal contract.

PROCUREMENT CONSIDERATIONS

- This is an indefinite delivery, indefinite quantity (IDIQ) type contract.
- This contract will remain effective until June 2023.
- The contract termination date is being extended to June 2023.
- The contract procurement summary is attached.

D/M/WBE CONSIDERATIONS

- No DBE goal was established for the contract modification.

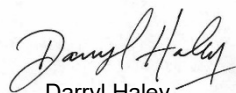
LEGAL CONSIDERATIONS

- Section 306.43 of the Ohio Revised Code authorizes SORTA to contract for the provision of goods and services.

SUBMITTED BY:



Adriene Hairston
Sr. Vice President of Human Resources



Darryl Haley
CEO/General Manager Secretary-Treasurer



PROCUREMENT SUMMARY & AWARD ANALYSIS

PROJECT INFORMATION

Project Number: 30-2018
Short Description: Pre-Employment Background Check Services
Procurement Specialist: Angela Meade
Department: Human Resources
Project Manager: Dakota Schwan

PROJECT PLANNING

Long Description: The purpose of this modification is for adding additional funds to existing contract for background check services to ensure enough funds are available to reach the end of the contract period.

Funding Source:	Local	Budget Year(s):	2023
Cost Estimate:	Fed \$0	Budget Approved?	Yes
	St \$0		
	Loc <u>\$46,013</u>		
	Total \$46,013		

List of Grants (if applicable): N/A

Planning Notes or Comments: Due to the increase in hiring there has been an increase in number of new hires that require background check services. These funds are needed to pay current outstanding invoices and fund the contract through the end of June.

PREVIOUS CONTRACT INFORMATION

Previous Project Number (solicitation): 30-2018
Vendor: Integrity Support Services (dba Employment Screening Resources)
Contract Number: 30-2018 **Start Date:** 5/22/2018 **End Date:** 5/22/23
NTE Amount: \$131,123
Contract Modifications: Four modifications have been made for a total of \$81,623.

BOARD OF TRUSTEES
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY
RESOLUTION NO. 2023-xx

APPROVAL CONTRACT MODIFICATION FOR BUS STOP BENCH AND ADA PAD SERVICES

WHEREAS:

1. By Resolution No. 2022-38, the SORTA Board approved a contract for a five (5) year contract with Prus Construction Company for the construction and repair of ADA concrete pads at approximately 250 bus stops and the procurement and installation of an additional 250 bus stop benches, at a cost not exceed \$2,135,000
2. Recently, SORTA acquired twenty-seven (27) new bus shelters that require installation. Additional funding is also needed for anti-theft bolts for bus stop benches and contingency funding to cover unforeseen circumstances.
3. SORTA staff recommends that the Board approve contract modifications with Prus Construction Company, for the installation of bus shelters and thief bolts, at a cost not to exceed \$512,237 and a total contract amount up to \$2,647,237.
4. This expenditure will be funded with local capital funds.

THEREFORE, BE IT RESOLVED:

5. The Board hereby approves the contract modifications as recommended by SORTA Staff and authorizes the CEO/General Manager/Secretary-Treasurer and Senior Director of Procurement to execute such contract modifications with Prus Construction Company on behalf of SORTA, at a cost not to exceed \$512,237, for a total contract up to \$2,647,237.

February 2023

ACTION ITEM – APPROVAL CONTRACT MODIFICATION FOR BUS STOP BENCH AND ADA PAD SERVICES

STRATEGIC PLAN GOAL / OBJECTIVE

- Operational Excellence

RECOMMENDATION

Approval of a resolution authorizing the CEO/General Manager/Secretary-Treasurer or Senior Director of Procurement to execute a contract modification with Prus Construction on behalf of SORTA, increasing the not to exceed amount of the agreement to \$2,647,237.

FINANCIAL CONSIDERATIONS

- This contract modification will start on the date of execution, which will occur immediately following Board approval, and will end December 31, 2027. The unbudgeted amount for the modification is \$512,237, bringing the total not to exceed contract amount to \$2,647,237.
- \$261,630 is needed for installation of bus stop shelters; \$9,949 is needed for installation of anti-theft bolts for bus stop benches; \$240,658 is being added for contingency funding.
- This expenditure will be funded with local capital funds.

BUSINESS PURPOSE

- This contract is for the purchase and installation of passenger benches to be installed at various Metro bus stops throughout the service area.
- Metro recently purchased 27 bus stop shelters due to termination of a separate revenue contract with Adspore.
- The installation of bus stop shelters within the City of Cincinnati is subject to the same Revocable Street Privilege (RSP) process as bus stop benches.
- Prus Construction is proficient and familiar with the RSP process and is currently supplying the materials and services for installation, creating economies of scale for bus stop amenities installation.
- Additional funding is needed so that Prus can install anti-theft bolts for all bus benches.
- The project team is also requesting to add a 10% contingency to the contract, a standard budget line item for construction contracts.

PROCUREMENT CONSIDERATIONS

- This is a firm fixed price type contract.
- This contract will remain effective until December 2027.
- No other modifications are being executed for this award.
- The contract procurement summary is attached.

D/M/WBE CONSIDERATIONS


- No DBE goal was established for the contract modification; however, a 6.13% DBE goal was included with the original solicitation.
- The original contract award included \$225,000 (10.54%) in DBE participation for installation services.

LEGAL CONSIDERATIONS

- Section 306.43 of the Ohio Revised Code authorizes SORTA to contract for the provision of goods and services.

SUBMITTED BY:


Steve Anderson
Director of Transit Development & Innovation


Darryl Haley
CEO/General Manager Secretary-Treasurer



PROCUREMENT SUMMARY & AWARD ANALYSIS

PROJECT INFORMATION

Project Number: 60-2022 – Modifications
Short Description: Bus Stop Bench and ADA Pad Installation
Purchasing Agent: Christina Harvey
Department: Development
Project Manager: Steve Anderson

PROJECT PLANNING

Long Description: Modification to add additional tasks to include installation of bus stop shelters and concrete pads. We are also upgrading the bolts and breakaway nuts as an anti-theft measure.

Funding Source:	Local	Budget Year(s):	2022-2027
Cost Estimate:	Fed \$0	Budget Approved?	Yes
	St \$0		
	Loc <u>\$512,237</u>		
Total	\$512,237		

List of Grants (if applicable): N/A

Planning Notes or Comments: Modification 1 is for additional tasks to be added to the existing contract for the installation of 27 bus shelters. Modification 2 is for the upgraded anti-theft bolts, anchors, and breakaway nuts. We are also adding a 10% contingency to be used for additional contract modifications.

SOLICITATION INFORMATION

Solicitation Type: Sole Source **Open Date:** 02/07/2023 **Close Date:** 02/07/2023
DBE Goal %: 6.13%
Vendor Outreach: Total Firms: 1
Vendor Responses: Total Downloads: 1
Total Submissions: 1
Vendor Recommendation: Prus Construction Co.

Solicitation Notes or Comments: NA

CONTRACT AWARD INFORMATION

Vendor: Prus Construction Co.

Contract Type:	Firm Fixed	Start	End
Award Amount:	Full NTE \$2,647,237	Full Term Period: 9/21/2022	12/31/2027
D/W/MBE Participation:	0 prime firm 1 subcontracting firm \$225,000 award value		

Award-to-Estimate Ratio (Award/Estimate): 1

Award-to-Proposal Ratio (Award/Proposal): 1

Negotiated Savings from Proposed Amount: \$0

Determination of Price Reasonableness: Pricing is determined to be fair and reasonable based on a negotiated 6.6% savings for the shelter installation and a 7.19% negotiated savings on the installation and equipment for the anti-theft bolts and breakaway nuts. A 10% contingency used for construction projects is standard.

Contract Award Notes or Comments: Prus Construction Co. was determined to have submitted a bid acceptable to SORTA, cost and all other factors considered. Based on the independent cost estimate provided by the project manager, the bid amount is acceptable. SORTA has modified the contract to include the installation of 27 shelters, add the installation of anti-theft bolts and breakaway nuts as well as contingency funds to cover modifications that may arise during the construction phase of this contract.

By signing below, you affirm that you have reviewed and concur with the information contained in this Procurement Summary & Award Analysis.

Procurement Specialist:	DocuSigned by: <i>Christina Harvey</i> 79CEAA836B0B4DA...	Date:	2/13/2023
Project Manager:	DocuSigned by: <i>Steve Anderson</i> FF3E81B1FA554C8...	Date:	2/13/2023
Dir. of Procurement:	DocuSigned by: <i>[Signature]</i> 14D8DB9D77554F8...	Date:	2/13/2023

BOARD OF TRUSTEES
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY
RESOLUTION NO. 2023-xx

APPROVAL OF REVENUE CONTRACT FOR ROW BILLBOARD PLACEMENT LEASE

WHEREAS:

1. Resolution No. 97-28 the SORTA Board approved a Norton Outdoor Advertising Lease ("Lease") with Norton Outdoor Advertising, Inc. ("Norton"). By Resolutions No., 2008-14, 2013-08, and 2018-03 approved a five-year lease agreement with each contract.
2. The current contract expires February 28, 2023.
3. Staff recommends the SORTA Board approve the lease contract between SORTA and Norton Outdoor Advertising, Inc. as negotiated by SORTA staff with Norton.
4. Estimated revenues to be collected for the annual lease of each property is \$23,870 per year, or \$119,350 total.

THEREFORE, BE IT RESOLVED:

5. The Board hereby approves the lease contract between SORTA and Norton Outdoor Advertising, Inc. and authorizes and directs the CEO/General Manager/Secretary-Treasurer and Senior Director of Procurement to execute such contract t on behalf of SORTA.

February 2023

ACTION ITEM – APPROVAL OF REVENUE CONTRACT FOR ROW BILLBOARD PLACEMENT LEASE

STRATEGIC PLAN GOAL / OBJECTIVE

- Financial Sustainability
- Strategic Partnering

RECOMMENDATION

Approval of a resolution authorizing the CEO/General Manager/Secretary-Treasurer or Senior Director of Procurement to execute a contract with Norton Outdoor Advertising on behalf of SORTA for the receipt of revenues totaling not less than \$119,350.

FINANCIAL CONSIDERATIONS

- This contract will start on the date of execution, which will occur immediately following Board approval, and will end February 28, 2028.
- The revenues to be collected for the annual lease of each property will be \$23,870 per year, or \$119,350 total.

BUSINESS PURPOSE

- Metro currently owns the Oasis rail right of way (ROW.)
- Metro allows Norton Outdoor Advertising, Inc. to place advertising signs on this ROW.
- Except for two locations that feature digital signs (for which SORTA receives 25 percent of sales,) the lease payments are in consideration of the space provided, not related to the revenue collected from advertising.
- Norton Outdoor Advertising, Inc. holds non-transferable permits for the placement of these advertising billboards. If they are no longer permitted to use this space, no one else can use it for advertising purposes and SORTA loses this revenue.
- Norton Outdoor Advertising, Inc. is responsible for removing or cutting brush, trees, weeds or other growth which would limit the visibility of the advertising.
- Norton Outdoor Advertising, Inc. holds SORTA harmless from any damages arising out of the existence, maintenance, construction, repair or removal of any signs/structures on this property.
- Revenue collection is used to lower annual operating costs.

PROCUREMENT CONSIDERATIONS

- This is a revenue contract and was not procured via competitive processes.
- This contract will remain effective until February 28, 2028.
- No procurement summary report is available for this award.

D/M/WBE CONSIDERATIONS

- No DBE goal was established for the contract award.

LEGAL CONSIDERATIONS

- Section 306.43 of the Ohio Revised Code authorizes SORTA to contract for the provision of goods and services.

SUBMITTED BY:



Dave Etienne
Director of Communications & Marketing



Darryl Haley
Chief Executive Officer/General Manager

BOARD OF TRUSTEES
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY
RESOLUTION NO. 2023-xx

APPROVAL OF CONTRACT FOR GARBAGE COLLECTION SERVICES

WHEREAS:

1. SORTA requires bulk waste and recycling collection at each operating facility and several transit centers.
2. A Request for Proposals (RFP) was sent to vendors within Public Purchase with relevant NAICS codes for garbage collection services.
3. SORTA staff reviewed the proposals and recommends that the Board award it a one (1) year contract to Rumpke Waste & Recycling, at a total cost not to exceed \$268,371.
4. This expenditure will be funded with local operating funds.

THEREFORE, BE IT RESOLVED:

5. The SORTA Board hereby finds the proposal of Rumpke Waste & Recycling to be the proposal most advantageous to SORTA, price and other factors considered, and awards to it a one (1) year contract for garbage collection services, at a total cost not to exceed \$268,371.
6. The CEO/General Manager/ Secretary-Treasurer or the Senior Director of Procurement shall execute the contract on behalf of SORTA.

February 2023

ACTION ITEM – APPROVAL OF CONTRACT FOR GARBAGE COLLECTION SERVICES

STRATEGIC PLAN GOAL / OBJECTIVE

- Operational Excellence

RECOMMENDATION

Approval of a resolution authorizing the CEO/General Manager/Secretary-Treasurer or Senior Director of Procurement to execute a contract with Rumpke Waste & Recycling on behalf of SORTA at a cost not to exceed \$268,371.

FINANCIAL CONSIDERATIONS

- This contract will start on the date of execution, which will occur immediately following Board approval, and will end April 30, 2028. The not to exceed amount for the contract is \$268,371 (\$53,674 per year).
- The budgeted amount for the contract was \$207,928, resulting in an unbudgeted variance of \$60,443 (22.5% unfavorable). The root cause of the variance is higher rates across all service industries and inflationary adjustments.

BUSINESS PURPOSE

- Metro requires bulk waste and recycling collection at each operating facility and several transit centers.
- This is a standard service.

PROCUREMENT CONSIDERATIONS

- Metro issued a request for proposals from qualified service providers. One vendor response was received. Per Ohio Revised Code (“ORC”) 306.43(D), “[w]here fewer than two competent proposals are received, a regional transit authority may negotiate price and terms with the sole proposer ...”
- The final price was negotiated, resulting in a cost savings of \$46,459.
- This is a firm fixed price type of contract.
- This contract will remain effective until April 30, 2028.
- The contract procurement summary is attached.

D/M/WBE CONSIDERATIONS

- No DBE goal was established for the contract award.
- No DBE firms submitted responses.

LEGAL CONSIDERATIONS

- Section 306.43 of the Ohio Revised Code authorizes SORTA to contract for the provision of goods and services.

SUBMITTED BY:



Jeff Mundstock
Director of Fleet & Facilities



Darryl Haley
CEO/General Manager Secretary-Treasurer



PROCUREMENT SUMMARY & AWARD ANALYSIS

PROJECT INFORMATION

Project Number: 95-2022
Short Description: Five (5) year Trash and Recycling Removal Services
Purchasing Agent: Christina Harvey
Department: Facilities
Project Manager: Jim Williams

PROJECT PLANNING

Long Description: Trash and recycling service for SORTA locations, Queensgate, Bond Hill, Access, and five Transit Hubs for a 5-year contract.

Funding Source:	Local	Budget Year(s):	2023
Cost Estimate:	Fed \$0	Budget Approved? (y/n)	Yes
	St \$0		
	Loc <u>\$207,928</u>		
Total	\$207,928		

List of Grants (if applicable): N/A

Planning Notes or Comments: Revisions to the scope of services from the previous contract include the addition of 5 transit hub locations, additional container service, and an increase in pickup frequency.

PREVIOUS CONTRACT INFORMATION

Previous Project Number (solicitation): 44-2019

Vendor:	Rumpke		
Contract Number:	44-2019	Start Date:	07/09/2019
		End Date:	07/31/2022
NTE Amount:	\$57,913		
Contract Spend:	\$57,913		
Unspent Balance:	\$0		

Previous Contract Notes or Comments: The previous contract was a three-year contract with base services for Queensgate, Bond Hill, and Access.

SOLICITATION INFORMATION

Solicitation Type: Firm Fixed **Open Date:** 11/16/2022 **Close Date:** 12/14/2022

DBE Goal %: 0% **SBE Goal %:** 0%

Vendor Outreach: Total Firms: 833

DBE Firms: 488

SBE Firms: 0

Email Firms: 3

Public Purch.: 342

Vendor Responses: Total Downloads: 28

Total Submissions: 1

DBE Submissions: 0 (prime) 0 (subcontractor)

SBE Submissions: 0 (prime) 0 (subcontractor)

Non-responsive Submissions: 0

Non-responsive Determination: N/A

Response Tabulation: N/A

Evaluation Committee Members: N/A

Technical Advisors: N/A

Evaluation Criteria: Lowest Price

Evaluation Tabulation: N/A

Vendor Recommendation: Rumpke

Solicitation Notes or Comments: SORTA received a single bid. Rumpke is determined to have submitted the proposal most advantageous to SORTA, cost and all other factors considered; and have the capacity to perform this contract in all respects and is recommended for award.

CONTRACT AWARD INFORMATION

Vendor: Rumpke

Contract Type:	Firm Fixed	Start	End
Award Amount:	Full NTE \$268,371	Full Term Period:	03/01/23 04/31/28
D/W/MBE Participation:	0 prime firms (number)		
	0 subcontracting firms (number)		
	0 award value (dollars)		

Award-to-Estimate Ratio (Award/Estimate): 1.29 (≤ 1.0 goal)

Award-to-Proposal Ratio (Award/Proposal): .85 (≤ 1.0 goal)

Negotiated Savings from Proposed Amount: \$46,459 (≥ \$0.00 goal)

Determination of Price Reasonableness: Price reasonableness has been determined by successful negotiations which resulted in a reduction in cost of 14.76% from the proposed price of \$314,830.

Contract Award Notes or Comments: We have had consistent fixed pricing since 2019 without a rate increase. The percentage of increase from our current base rate is 40% without the cost considerations of the scope changes. The percentage of increase for year two (2) will be 0%. The percentage of increase for year three (3) will be 3%. The percentage of increase for year four (4) and five (5) will be 5%.

EXECUTIVE LEADERSHIP REVIEW

Board Approval Required (Y/N): Yes

Action Item & Resolution Submission Date: 2/17/23

Committee Review Date: 2/21/23 **Board Review Date:** 2/28/23

By signing below, you affirm that you have reviewed and concur with the information contained in this Procurement Summary & Award Analysis.

Procurement Specialist:	DocuSigned by: <i>Christina Harvey</i> 79CEAA836B0B4DA...	Date:	1/30/2023
Project Manager:	DocuSigned by: <i>Jim Williams</i> 5B7EC531084F4E1...	Date:	1/31/2023
Dir. of Procurement:	DocuSigned by: <i>[Signature]</i> 14D8DB9D77554F8...	Date:	1/30/2023

BOARD OF TRUSTEES
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY
RESOLUTION NO. 2023-xx

APPROVAL OF CONTRACT FOR RIGHT OF WAY (ROW) APPRAISAL SERVICES

WHEREAS:

1. In the late 1990's, SORTA acquired the Oasis Trail and Blue Ash Trail, which were funded by the FTA and local funds. The Federal Transit Authority (FTA) provides guidance on sub-recipient responsibilities for maintaining a state of good repair of all assets used in the provision of public transportation and purchased with Federal funding assistance.
2. In an effort to address FTA's concerns about the status of the ROWs, a Request for Proposals (RFP) was sent to vendors within Public Purchase with relevant NAICS codes of right of way appraisal services
3. SORTA staff reviewed the proposals and recommends that the Board award it a one (1) year contract to AECOM, at a total cost not to exceed \$562,998.
4. This expenditure will be funded with local capital funds.

THEREFORE, BE IT RESOLVED:

5. The SORTA Board hereby finds the proposal of AECOM to be the proposal most advantageous to SORTA, price and other factors considered, and awards to it a one (1) year contract for right of way consultant services, at a total cost not to exceed \$562,998.
6. The Board authorizes the CEO/General Manager/Secretary-Treasurer or the CFO to execute a contract with AECOM on behalf of SORTA.

February 2023

ACTION ITEM – APPROVAL OF CONTRACT FOR RIGHT OF WAY APPRAISAL SERVICES

STRATEGIC PLAN GOAL / OBJECTIVE

- Financial Sustainability

RECOMMENDATION

Approval of a resolution authorizing the CEO/General Manager/Secretary-Treasurer or Senior Director of Procurement to execute a contract with AECOM on behalf of SORTA for a not to exceed amount of \$562,998.

FINANCIAL CONSIDERATIONS

- This contract will start on the date of execution, which will occur immediately following Board approval, and will end July 31, 2023.
- The budgeted amount for this project is \$400,000, resulting in an unfavorable budget variance of \$162,998 (29%). The root cause of the variance can be attributed to a general lack of understanding for the level of effort needed to conduct appraisals for the full portfolio of properties.
- The project will be funded with local capital funds.

BUSINESS PURPOSE

- The FTA has directed Metro to review and release all unused right of way property acquired using Federal financial assistance.
- Metro lacks the staff expertise or resources to accurately appraise each property, a critical requirement to the sale of real property at or above fair market value.

PROCUREMENT CONSIDERATIONS

- Metro issued a request for proposals and received two responses.
- This is a firm fixed price contract.
- This contract will remain effective until July 31, 2023.
- The procurement summary report is attached.


D/M/WBE CONSIDERATIONS

- No DBE goal was established for the contract award.
- \$85,000 (15.1%) will be awarded to 1 certified DBE firm.

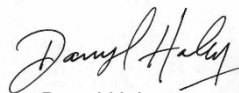
LEGAL CONSIDERATIONS

- Section 306.43 of the Ohio Revised Code authorizes SORTA to contract for the provision of goods and services.

SUBMITTED BY:



Khaled Shammout
Chief Strategic Planning, Innovation, and
Development Officer



Darryl Haley
Chief Executive Officer/General Manager



PROJECT INFORMATION

Project Number: 100-2022

Short Description: ROW APPRAISAL SERVICES

Procurement Specialist: Christina Harvey

Department: Development

Project Manager: Khaled Shammout

PROJECT PLANNING

Long Description: Appraisal Services for the valuation of Right of Way properties in accordance with FTA guidelines.

Funding Source: Local

Budget Year(s): 2023

Budget Approved? Yes

Cost Estimate:

- **Federal:** \$0
- **State:** \$0
- **Local:** \$400,000
- **Total:** \$400,000

List of Grants (if applicable): N/A

Planning Notes or Comments: N/A

PREVIOUS CONTRACT INFORMATION

There is no previous contract information related to this procurement.

SOLICITATION INFORMATION

Solicitation Type: RFP

- **Open Date:** November 21, 2022
- **Close Date:** January 10, 2023

DBE Goal %: 0

SBE Goal %: 0

Vendor Outreach:

- **XBE Firms:** 377 (D&I Provides Number)
- **Email Firms:** 0 (targeted)
- **OpenGov:** 213 (broadcast)
- **Total Firms:** 590

Vendor Responses:

- **Total Downloads:** 31
- **Total Submissions:** 2
- **DBE (XBE) Submissions:**
 - **(prime):** 0
 - **(subcontractor):** 3

Non-responsive Submissions: 0

Non-responsive Determination: N/A

Evaluation Criteria: Project Approach, Firm Qualifications, and Cost

Evaluation Tabulation:

CONSENSUS SCORECARD SUMMARY

Vendor	Project Approach Points Based 500 Points (50%)	Firm and Staff Qualifications Points Based 350 Points (35%)	Price Points Based 150 Points (15%)	Total Score (Max Score 1000)
AECOM	413.33	300	100	813.3
RMI Valuation	300	236.67	150	686.7

Solicitation Notes or Comments: AECOM is determined to have submitted a proposal that is most advantageous to SORTA.

CONTRACT AWARD INFORMATION

Vendor: AECOM

Contract Type: RFP

Award Amount:

- **Full NTE:** \$562,998.00
- **Full Term Period:** Wednesday, March 1, 2023 - July 31, 2023

D/W/MBE Participation:

- **prime firms (number):** 0
- **subcontracting firms (number):** 1
- **award value (dollars):** \$85,000

Award-to-Estimate Ratio (Award/Estimate): (≤ 1.0 goal): 1.41

Award-to-Proposal Ratio (Award/Proposal): (≤ 1.0 goal): 1

Negotiated Savings from Proposed Amount: ($\geq \$0.00$ goal): \$0

Determination of Price Reasonableness: Price is considered to be fair and reasonable based on competition and due to labor, overhead rates, and profit not exceeding the cost paid by SORTA for similar A&E projects

Contract Award Notes or Comments: AECOM was determined to have submitted the proposal that is most advantageous to SORTA. Cost and all other factors considered, and has the capacity to perform this contract in all respects and is recommended for award.

By signing below, you affirm that you have reviewed and concur with the information contained in this Procurement Summary & Award Analysis.

Procurement Specialist: _____ . **Date:** _____

Project Manager: _____ . **Date:** _____

Dir. of Procurement: _____ . **Date:** _____

BOARD OF TRUSTEES
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY
RESOLUTION NO. 2023-xx

APPROVAL OF CONTRACT FOR BULK MOTOR OIL

WHEREAS:

1. SORTA operates over 300 buses traveling approximately 9.8 million miles per year. The oil in each bus is required to be changed every 6,000 miles according to the manufacturer's requirements, which ensures FTA compliance as well.
2. An Invitation for Bid ("IFB") was sent to vendors within Public Purchase with relevant NAICS codes for motor oil.
3. SORTA staff reviewed the bids and is recommending that the Board accept the bid submitted by Petrochoice for a one (1) year contract for motor oil at a total cost not to exceed \$318,184 as the lowest responsive bid from a responsible bidder.
4. This expenditure will be funded with local operating funds.

THEREFORE, BE IT RESOLVED:

5. The Board hereby finds the bid of Petrochoice as recommended by the SORTA staff to be the lowest responsive bid from a responsible bidder, and awards to it a one-year (1) contract for motor oil, at a total cost not to exceed \$318,184.
6. The CEO/General Manager/ Secretary-Treasurer or the Senior Director of Procurement shall execute the contract on behalf of SORTA.

February 2023

ACTION ITEM- APPROVAL OF CONTRACT FOR BULK MOTOR OIL PURCHASE

STRATEGIC PLAN GOAL / OBJECTIVE

- Operational Excellence

RECOMMENDATION

Approval of a resolution authorizing the CEO/General Manager/Secretary-Treasurer or Senior Director of Procurement to execute a contract with PetroChoice on behalf of SORTA at a cost not to exceed \$318,184.

FINANCIAL CONSIDERATIONS

- The approved budget amount for the project is \$464,368.
- The not to exceed amount of the contract award is \$318,184, resulting in a favorable budget variance of \$146,184. The root cause is the drop in commodity pricing since the original estimate was created.
- The purchase will be funded from local operating funds.

BUSINESS PURPOSE

- Metro requires motor oil for all fleet vehicles.
- Revenue vehicles require a unique formula based on engine type, size, and operating miles.
- Motor Oil is a critical standard commodity that is subject to extreme market volatility and price fluctuations.

PROCUREMENT CONSIDERATIONS

- This is a firm fixed price type of contract.
- This contract was competed as an invitation to bid (IFB) and was awarded to the lowest responsive, responsible bidder.
- One vendor was determined to be nonresponsive due to the not meeting the specifications for the items to be purchased.
- The contract will remain effective until February 29, 2024.
- The contract procurement summary is attached.

D/M/WBE CONSIDERATIONS

- SORTA delivered the invitation to 11 certified DBE firms and received a response from 1.
- No D/M/WBE participation goal was established as there is limited opportunity for subcontracting work.

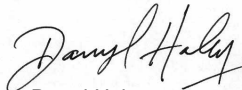
LEGAL CONSIDERATIONS

- Section 306.43 of the Ohio Revised Code authorizes SORTA to contract for the provision of goods and services.

SUBMITTED BY:



Jeff Mundstock
Director of Fleet and Facilities



Darryl Haley
CEO/General Manager Secretary-Treasurer



PROCUREMENT SUMMARY & AWARD ANALYSIS

PROJECT INFORMATION

Project Number: 01-2023
Short Description: Motor Oil
Purchasing Agent: Angela Meade
Department: Maintenance
Project Manager: Randy Stidham

PROJECT PLANNING

Long Description: 01-2023 Motor Oil
Funding Source: Local **Budget Year(s):** 2023
Cost Estimate: Fed \$0 **Budget Approved? (y/n)** Y
 St \$0
 Loc \$464,368
Total \$464,368

List of Grants (if applicable): N/A

Planning Notes or Comments: The cost estimate is based on the current contract price for 15w-40 motor oil. Due to the volatility of the market for petroleum products it is estimated that the market value of oil will go up approximately 10 percent. The cost estimate is based on a projected 30,000 gallons of 15W-40 diesel motor oil and 385 gallons of the 5W-40 full synthetic diesel motor oil.

PREVIOUS CONTRACT INFORMATION

Previous Project Number (solicitation): 06-2022

Vendor: PetroChoice
Contract Number: 120616 **Start Date:** 03/22/2022 **End Date:** 03/23/2023
NTE Amount: \$274,729.34
Contract Spend: \$202,537.90
Unspent Balance: \$72,191.44

Previous Contract Notes or Comments: Contract expires 03/23/2023, additional invoices are expected to be received and processed.

SOLICITATION INFORMATION

Solicitation Type: IFB **Open Date:** 01/05/2023 **Close Date:** 01/26/2023

DBE Goal %: 0 **SBE Goal %:** 0

Vendor Outreach: Total Firms: 306
DBE Firms: 11 (targeted)
SBE Firms: 0 (targeted)
Email Firms: 0 (targeted)
OpenGov.: 201 (broadcast)

Vendor Responses: Total Downloads: 11
 Total Submissions: 5
DBE Submissions: 1 (prime) 0 (subcontractor)
SBE Submissions: 0 (prime) 0 (subcontractor)

Non-responsive Submissions: 1

Non-responsive Determination: Bill's Battery Co. submitted a quote for a product that is no longer listed on the 200086 Cummins Approved Oil List.

Response Tabulation:

Vendor	Total
Bills Battery Co	\$307,951.75
www.petrochoice.com	\$318,183.40
Rely Supply, LLC	\$326,698.30
Glockner Oil Company	\$336,480.45
Next Generation Fuel, LLC	\$357,397.85

Vendor Recommendation: PetroChoice

Solicitation Notes or Comments: Bill's Battery quoted CAM2 Super HD Synthetic that was previously approved by Cummins but is no longer on the approved list (200086).

CONTRACT AWARD INFORMATION

Vendor: PetroChoice

Contract Type:	Firm Fixed	Start	End
Award Amount:	Full NTE \$318,184	Full Term Period:	03/01/2023 02/29/24
D/W/MBE Participation:	0 prime firms (number)		
	0 subcontracting firms (number)		
	0 award value (dollars)		

Award-to-Estimate Ratio (Award/Estimate): 0.69 (≤ 1.0 goal)

Award-to-Proposal Ratio (Award/Proposal): 1 (≤ 1.0 goal)

Negotiated Savings from Proposed Amount: 0 (≥ \$0.00 goal)

Determination of Price Reasonableness: Price reasonableness for this contract was determined by the competitive bid process. Pricing quoted by PetroChoice was approximately 11% less than the highest quote received and approximately 3.5% less than the next highest quote received.

Contract Award Notes or Comments: Quotes were received from five vendors, four were determined to meet the requirements stated in the Scope of Work. The lowest quote from Bill’s Battery was determined to be non-responsive, the product quoted did not meet the requirements.

By signing below, you affirm that you have reviewed and concur with the information contained in this Procurement Summary & Award Analysis.

Procurement Specialist:	<small>DocuSigned by: Angela R. Meade</small>	Date:	2/7/2023
Project Manager:	<small>DocuSigned by: Randy Stidham</small>	Date:	2/7/2023
Dir. of Procurement:	<small>DocuSigned by: [Signature]</small>	Date:	2/7/2023