



NOTICE OF COMMISSION MEETING AND AGENDA

DES MOINES AREA REGIONAL TRANSIT AUTHORITY

DART MULTIMODAL ROOM, 620 CHERRY STREET/[ZOOM](#)

Dial In - +1-312-626-6799/Access Code – 811 2037 6459/Passcode - 887444

AUGUST 2, 2022 – 12:00 PM

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1. CALL TO ORDER	
2. ROLL CALL AND ESTABLISHMENT OF QUORUM	
3. NOTICE OF MEETING	
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14. NEXT MEETING – Regular DART Meeting – Tuesday, September 6, 2022 – 12:00 P.M.	
15. ADJOURN	

Language, visual, hearing and transportation services are available at meetings upon request. For requests, please call DART at 515.283.8100 at least 48 hours in advance of the meeting.



6: Transit Riders Advisory Committee Update

Resource: *Carrie Kruse, TRAC Chair*

A hybrid meeting of the Transit Riders Advisory Committee was held on Wednesday, July 12 and a quorum was met.

- **TRAC Meeting Structure:** Mobility Coordinator Catlin Curry lead a discussion with TRAC members on the mission and goals of the Transit Riders Advisory Committee, engagement with members and potential changes to the structure of committee meetings.
- **West Des Moines DART on Demand Proposal:** Chief Planning Officer Luis Montoya provided an overview of an updated proposal for DART on Demand Service in WDM as well as information related to the proposed fare structure for DART on Demand.
- **Operator Barriers:** Chief Operations Officer Amanda Wanke updated the committee on the timeline of purchase and instillation of operator barriers in DART's fleet of buses.

The next hybrid TRAC meeting is currently scheduled for Wednesday, September 14, 2022.



**DES MOINES AREA REGIONAL TRANSIT AUTHORITY
COMMISSION MEETING MINUTES
MEETING HOSTED IN-PERSON AND VIRTUALLY
620 CHERRY STREET – DES MOINES, IOWA 50309
JULY 12, 2022**



(Meeting was held in a hybrid format)

ROLL CALL

Commissioners/Alternates Present and Voting:

Vern Willey, Kelly Whiting, Doug Elrod, Michael McCoy, Srikant Mikkilineni, Josh Mandelbaum, Ross Grooters, Bridget Montgomery, Russ Trimble (left at 1.15pm), and Joseph Jones

Commissioners Absent:

Andrew Borcharding, Paula Dierenfeld and Steve Van Oort

CALL TO ORDER

Chair, Doug Elrod called the meeting to order at 12:03 p.m. Roll call was taken, and a quorum was present.

Notice of the meeting was duly published.

APPROVAL OF AGENDA

Chair, Doug Elrod requested a motion to approve the agenda as presented.

It was moved by Russ Trimble and seconded by Kelly Whiting to approve the July 12, 2022, agenda. The motion carried unanimously.

PUBLIC COMMENT

Ms. Armstrong from Des Moines complimented DART staff member, Francine in DART Customer Service for assisting customers during the small fire at DART Central Station June. In addition, Ms. Armstrong suggested some changes to Route six to accommodate riders going to the park nearby.

Mr. Garland from Des Moines requested extended hours on DART routes, especially to accommodate those who have shift work, using the Des Moines airport shift workers as an example.

6. CONSENT ITEMS

6A – Commission Meeting Minutes – June 7, 2022

6B – State Lobbying Services Contract

**DES MOINES AREA REGIONAL TRANSIT AUTHORITY
COMMISSION MEETING MINUTES – JULY 12, 2022**



6C – FY2023 Des Moines Public Schools Contract Pricing

6D – FY2023 Iowa Clean Air Attainment Program (ICAAP) Grant Application

6E - May 2022 Financials

It was moved by Michael McCoy and seconded by Ross Grooters to approve the consent items. The motion carried unanimously.

7. ACTION ITEMS

7A – Vanpool Management System Contract

Matt Harris, Business & Community Partnerships Manager and Mike Tiedens, Procurement Manager shared that DART has been seeking a firm to provide a vanpool management system that provides continuity, efficiency, and flexibility to the vanpool department and DART's customers. DART has been using Iowa RideShark through the Iowa DOT for more than five years. This contract is ending December 31, 2022. As the primary user of Iowa RideShark, DART and the DOT decided it would be best for DART to lead the procurement, with input from the DOT, for a new vanpool management system with hopes of identifying a vendor that could meet DART's specific program needs as well as the DOT's needs for ride matching and supporting vanpooling throughout the state. The functionality of the system was outlined. The procurement timeline and selection factors were outlined and the funding resources for this system identified.

It was moved by Josh Mandelbaum and seconded by Russ Trimble to approve a contract with QRyde/HBSS to provide a vanpool management platform. The contract will be five (5) years with two (2) individual one (1) year options, Not to Exceed = \$1,250,000. The motion carried unanimously.

7B – August 2022 Service Change

Tony Filippini, Senior Planner, updated the Commission on the August 2022 Service changes, resuming Des Moines Public Schools trips in addition to any additional service reflected in the contract.

It was moved by Vern Willey and seconded by Kelly Whiting to approve the proposed August 2022 Service Change. The motion carried unanimously.

7C – Driver Barrier Purchase Installation and Contract

Amanda Wanke, Chief Operating Officer, provided an update on the installation of the barriers on all its heavy-duty vehicles. The barriers will serve as a physical divider between bus operators and boarding passengers, providing protection and safety for operators as well as a high-quality experience for DART customers. The barriers shall not inhibit the safety functions of the bus or the operator. Key functions were identified, and the procurement/evaluation summary were shared.

It was moved by Bridget Montgomery and seconded by Vern Willey to approve of a contract with The Aftermarket Parts Company (a division of New Flyer) to provide and install driver barriers for the Not to Exceed Amount of \$950,000. The motion carried unanimously.



8. DISCUSSION ITEMS

8A – ADA Paratransit Program Update

Amanda Wanke, Chief Operating Officer provided an update on changes being considered to DART's ADA Complementary Program (Bus Plus). The presentation and discussion were a follow-up to previous Commission discussions about potential changes to the certification, eligibility, and boundaries of DART's Bus Plus program. The discussion provided direction for DART Staff to move forward with the potential changes that the Commission wants to bring to the public for input.

8B – TOS Implementation Update

Luis Montoya, Chief Planning Officer, provided an overview of progress implementing initial recommendations from the Transit Optimization Study. The presentation included results from the first 6 months operating the DART On Demand pilot in Ankeny and a recommendation for establishing a fare structure for DART On Demand.

8C – Marketing Update

Due to time, Chair, Doug asked DART staff to email information on this agenda item to the DART Commission. Information was also provided in the packets.

8D – Performance Report – May 2022

Due to time, Chair, Doug deferred the Commission to their packets to review this agenda item.

9. DEPARTMENTAL MONTHLY REPORTS (BY EXCEPTION)

10A - Operations

None

10B – Planning

None

10C - External Affairs

None

10D – Finance/IT/Procurement

None

10E – Human Resources

None

10F – Chief Executive Officer

**DES MOINES AREA REGIONAL TRANSIT AUTHORITY
COMMISSION MEETING MINUTES – JULY 12, 2022**



Due to time, no update was provided beyond what was provided in the packet.

10. FUTURE AGENDA ITEMS

None

11. COMMISSIONER ITEMS

None

12. NEXT MEETING:

Regular DART Meeting - Tuesday, August 2, 2022 – 12:00 P.M.

13. ADJOURN

Chair, Doug Elrod, adjourned the meeting at 1:45 pm.

*****OFFICIAL NOTICE OF THE NEXT DART COMMISSION MEETING DATE IS HEREBY PUBLISHED:**

The next regular DART monthly Commission Meeting is scheduled for Tuesday, August 2, 2022, at 12:00 p.m. in the DART Multimodal Room at 620 Cherry Street, Des Moines, Iowa. Pursuant to Iowa Code section 21.8, the DART Commission has determined that it is still impractical or impossible to require all Commission members, staff, and the public to be physically present for this Commission meeting. Accordingly, both in-person and virtual options for attendance of the August 2, 2022 Commission meeting will be offered as follows: (1) Commission members, staff, and the public will be allowed to attend this Commission meeting in person in the DART Multimodal Room at 620 Cherry Street, Des Moines, Iowa; and (2) Commission members, staff, and the public will be allowed to attend this Commission meeting via a virtual platform such as Zoom. Participation directions for such virtual meeting option are as follows:

<https://ridedart.zoom.us/j/81120376459?pwd=US9NbmZUc3lmcjJlNGprbXlrSUVldz09>

Meeting ID: 811 2037 6459 Passcode: 887444

Chair

Clerk

Date



ACTION ITEM



7B: DART Advertising Policy

Action: Approve the Policies and Standards for Advertising on or within DART Transit Facilities as presented.

Staff Resource: Erin Hockman, Chief External Affairs Officer

Background:

- DART's advertising policy was established by the DART Commission in 2009 and has been modified by the Commission twice since then, in 2017 and 2019.
- Most recently, the Commission discussed DART's advertising policy in the spring and summer of 2019. The conversation focused on what types of advertising should be excluded in order to:
 - minimize DART's legal risk;
 - maximize advertising revenue;
 - minimize potentially objectionable material; and
 - maintain and enhance relationships with partner organizations.
- As a result of these discussions and in close consultation with DART's legal counsel, the Commission adopted a revised advertising policy in August of 2019 that excluded religious advertising, with a request that the policy be revisited annually moving forward.
- The Commission re-approved the policy with no changes in August 2020 and August 2021.
- Brick Gentry conducted a review of applicable case law that may impact DART's Advertising Policy in June and July 2022 and has recommended no changes to DART's current policy. However, Brick Gentry did advise the trend of court cases appears to be moving in the direction of more courts rejecting transit advertising restrictions, in particular, religious restrictions. As a result, DART should continue to review its policy on an annual basis and may be required to modify its policy in the future.
- Given no current staff, legal counsel or Commission concerns with the advertising policy, staff is not recommending any changes to the policy at this time. The Policies and Standards for Advertising on or within DART Transit Facilities is attached as a reference.

Recommendation:

- Approve the Policies and Standards for Advertising on or within DART Transit Facilities as presented.



Policies and Standards for Advertising on or within DART Transit Facilities



Scope:	DART Employees and Contractors
Responsible Department:	External Affairs
Effective Date:	October 1, 2019
Approved By:	DART Commission – August 3, 2021

The Des Moines Area Regional Transit Authority (“DART”) is a regional transit system created under section 28M of the Code of the State of Iowa. DART owns and operates buses, bus shelters, a garage and other properties (collectively referred to as “Transit Facilities”) in conjunction with its regional transit system. It is in the public interest to make advertising space available on certain designated transit facilities to generate revenue and help fund the operation of the regional transit system.

I. PURPOSE

1.01 Nonpublic Forum; Commercial / Proprietary Functions. DART will make space on its transit facilities available for limited types of Permitted Advertising (defined in Section 2.02 below) in accordance with the policies and standards contained herein (this “Policy”). By allowing Permitted Advertising on or within its designated Transit Facilities, DART does not intend to create a public forum for public discourse or expressive activity, or to provide a forum for all types of advertisements. The display of Permitted Advertising on designated Transit Facilities is intended only to supplement fare revenue, tax proceeds and other income that fund the regional transit system.

1.02 Intent of Limits on Advertising. By placing reasonable limits on Permitted Advertising displayed on or within its Transit Facilities, and by not accepting Excluded Advertising (defined in Section 2.01 below), DART’s intention is to:

- (a) maintain an image of professionalism and decorum;
- (b) maintain a professional advertising environment that maximizes advertising revenues and minimizes interference or disruption of the commercial aspects of its regional transit system;
- (c) maintain and portray an image of neutrality on political matters and other noncommercial issues that may be the subject of public debate and concern;
- (d) foster a safe and secure environment on or within DART Transit Facilities;
- (e) avoid subjecting its passengers and other members of the public to material that may discourage them from using regional transit services, and avoid any decrease in transit ridership;
- (f) avoid displaying content that is not suitable for minors; and
- (g) preserve and augment revenues by attracting and maintaining the patronage of passengers.

Policies and Standards for Advertising on or within DART Transit Facilities

Effective Date: October 1, 2019

Approved By: DART Commission – August 3, 2021



II. ADVERTISING POLICIES, STANDARDS, AND RESTRICTIONS

2.01 Excluded Advertising. For the purposes of this Policy, the advertising described in this Section 2.01 is "Excluded Advertising." DART will not accept the following Excluded Advertising for display, posting or placement on or within its Transit Facilities:

- (a) **Alcoholic Beverages.** Advertising, soliciting or promoting the direct sale or use of alcoholic beverages with the exception of the following: images of beer or wine (including logos), which said images may be displayed within advertising that primarily promote eating establishments, grocery or convenience stores, or specific events, festivals or attractions, provided however, any such advertising shall contain a responsible drinking message.
- (b) **Tobacco Products.** Advertising, soliciting or promoting the sale or use of tobacco products including, but not limited to, cigarettes, cigars, and smokeless tobacco.
- (c) **Advertisements Affecting Image or Operation.** Advertising that threatens or adversely affects DART's public image; DART'S ability to operate its Transit Facilities; or DART'S ability to attract and maintain the patronage of passengers.
- (d) **Religious Advertising.** Advertising that promotes or opposes any religion, religious practice, religious belief or lack of religious beliefs.
- (e) **False, Misleading, Deceptive or Disrespectful Advertising.** Advertising or any material or information in the advertising that is false, misleading or deceptive, or that is intended to be (or reasonably could be interpreted as being) disparaging, disreputable or disrespectful to persons, groups, businesses or organizations, including but not limited to advertising that portrays individuals as inferior, evil or contemptible because of their race, color, creed, gender, pregnancy, age, religion, ancestry, national origin, marital status, disability, affectional or sexual orientation, or any other characteristic protected under federal, state or local law.
- (f) **Unauthorized Endorsement.** Advertising that implies or declares that DART endorses a product, service, point-of-view, event or program. The prohibition against endorsement does not apply to advertising for a service, event or program for which DART is an official sponsor, co-sponsor or participant, provided DART's Chief Executive Officer or other designated representative gives prior written approval of the endorsement.
- (g) **Obscene or Offensive Material.** Advertising that contains obscene or offensive materials. "Obscene materials" for purposes of this Policy are material(s) that display information that, taken as a whole, appeals to the prurient interest in sex and depicts or describes, in a patently offensive manner, sexual conduct and which, taken as a whole, does not have serious literary, artistic, political, or scientific value, or otherwise qualifies as "obscene material" as that phrase is defined in the Iowa Code section 728.1 (5). "Offensive materials" for purposes of this Policy means displays or information that would be offensive to a reasonably prudent person of average sensitivity in the community, including but not limited to advertising that contains derisive, distorted, immoral, profane or disreputable language or impressions.

Policies and Standards for Advertising on or within DART Transit Facilities

Effective Date: October 1, 2019

Approved By: DART Commission – August 3, 2021



- (h) **Unlawful Goods or Services.** Advertising or any material or information in the advertising that depicts, promotes or reasonably appears to encourage the use or possession of unlawful or illegal goods or services.
- (i) **Unlawful Conduct.** Advertising or any material or information in the advertising that: depicts, promotes or reasonably appears to encourage unlawful or illegal behavior or conduct, including but not limited to unlawful behavior of a violent or antisocial nature; is libelous or an infringement of copyright; is otherwise unlawful or illegal; or is likely to subject DART to liability.
- (j) **Adult Entertainment.** Advertising that promotes or displays content associated with adult bookstores, adult video stores, nude dance clubs and other adult entertainment establishments, adult telephone services, adult internet sites or escort services.
- (k) **Graffiti.** Advertising that uses images or symbols that depict or represent graffiti.
- (l) **Firearms and Weapons.** Advertising that contains images or depictions of firearms or other weapons, or the use of firearms or other weapons.
- (m) **Internet Addresses and Telephone Numbers.** Advertising that directs viewers to internet addresses or telephone numbers that contain materials, images or information that would violate this Policy if the materials, images or information were contained in advertising displayed or posted on or within DART Transit Facilities.
- (n) **Distractions and Interference.** Advertising that incorporates or displays any rotating, revolving, or flashing devices or other moving parts or any word, phrase, symbol or character, any of which are likely to interfere with, mislead or distract traffic or conflict with any traffic control device or motor vehicle regulation.

2.02 Permitted Advertising. Subject to the viewpoint-neutral standards in this Policy, DART will accept Permitted Advertising for play, display, or placement on or within designated DART Transit Facilities. For the purposes of this Policy, Permitted Advertising is advertising that:

- (a) Does not qualify as Excluded Advertising under Section 2.01;
- (b) Generally relates to the economic interests of the advertiser and its audience or is a type of advertising set forth in Section 2.03 or 2.04 below;
- (c) Is paid advertising; and
- (d) Is delivered through electronic, audio, and printed media.

2.03 Political or “Issues” Advertising. In addition to the requirements of Section 2.02 above and the other terms of this Policy, DART has the following disclaimer requirements for the types of Permitted Advertising listed below. The disclaimer must be placed on each advertisement and be legible five (5) feet from the advertisement.

- (a) **Political Candidates.** On an advertisement that is authorized and paid for by a candidate or his/her campaign committee, the disclaimer must identify who paid for the advertisement.
- (b) **Political Candidate Advertisement Paid by a Different Party.** On an advertisement that is authorized by a candidate or his/ her campaign committee, but is paid for by a third party the disclaimer notice must:

Policies and Standards for Advertising on or within DART Transit Facilities

Effective Date: October 1, 2019

Approved By: DART Commission – August 3, 2021



- Identify who paid for the advertisement.
- Indicate that the candidate authorized the message.

(c) **Political Advertisement Not For Political Candidate.** On an advertisement that is not authorized by a particular candidate or his/her campaign committee, the disclaimer notice must:

- Identify who paid for the advertisement.
- State that the advertisement was not authorized by any candidate or candidate's campaign committee.
- List the permanent address, telephone number or world wide web address of the third party who paid for the advertisement.

(d) **Political Issue or Other Non-Commercial Issue Advertisements.** The disclaimer notice must:

- Identify who paid for the advertisement.
- List the permanent address, telephone number or web address of the party that paid for the advertisement.

2.04 Public Service Announcements. DART may make advertising space available for Permitted Advertising proposed by governmental entities, academic institutions or tax-exempt, 501(c)3 nonprofit organizations (examples include: advertisements focusing on personal health or wellness issues, or advertisements informing the public about programs, services or events). In addition to the requirements of Section 2.02 above and the other terms of this Policy, the types of Permitted Advertising under this section must comply with the requirements in this section. Nonprofit entities must confirm and/or verify their IRS tax exempt status. Costs associated with the design, production, installation and removal of public service announcements are the responsibility of the group or organization requesting the public service announcement. Unless the source of the advertising or public service announcement is obvious from the content or copy, the advertisement or public service announcement must specifically identify the sponsor of the advertisement or public service announcement.

2.05 Prohibitions on Literature or Product Distribution and Leafleting. DART'S purpose in operating a regional transit system is to meet the public's need for efficient, effective and safe public transportation. DART Transit Facilities are not intended to be public forums for public discourse or expressive activity. Literature or product distributions, leafleting and similar activities can disrupt or delay passengers who are boarding and exiting buses and other transit vehicles, distract passengers, distract bus operators, cause maintenance issues, and otherwise create safety issues for passengers, operators and surrounding traffic. Accordingly, political campaign activities, distribution of political or issues campaign literature, leafleting, and other informational or campaign activities are prohibited on or within DART Transit facilities. Notwithstanding the provisions of this Policy that allow Permitted Advertising on designated DART Transit Facilities, nothing in this Policy authorizes or permits advertisers to distribute literature, leaflets, coupons, products, samples or other items on or within DART Transit Facilities.

Policies and Standards for Advertising on or within DART Transit Facilities

Effective Date: October 1, 2019

Approved By: DART Commission – August 3, 2021



On a limited basis and provided DART's Chief Executive Officer or other designated representative has given prior written approval, DART may allow an advertiser to distribute Permitted Advertising on or within DART Transit Facilities. Any distribution of literature, leaflets, coupons, products, samples or other items must comply strictly with terms and conditions established by DART.

2.06 Space Availability. DART limits the amount of space on or within its Transit Facilities available for advertising and does not represent that it can accommodate all requests for advertising space. Advertising space will be made available only on DART Transit Facilities designated by DART. No advertising, signs and other types of postings or messages may be played, displayed, posted or placed on or within any other DART Transit Facilities.

2.07 Reservation of Rights. This Policy may be reviewed by the DART Commission on an annual basis. Notwithstanding the foregoing, DART reserves the right to amend this Policy at any time. Subject to any then existing contractual obligations, DART reserves the right to discontinue any or all advertising on or within DART Transit Facilities. DART reserves the right to limit the availability of advertising space on or within its Transit Facilities and remove advertising that does not comply with this Policy, subject to any contractual obligations.

III. ADVERTISING PROGRAM AND ADMINISTRATION

3.01 Advertising Contractor. DART shall, from time to time, select an "Advertising Contractor" who shall be responsible for the administration of DART's advertising program, in a manner consistent with this Policy and the terms of its agreement with DART. The advertising program shall include, but not be limited to, promotion, solicitation, sales, accounting, billing, collections, fabrication, posting of advertising displays, and playing of audio advertisements on or within DART Transit Facilities.

(a) DART will designate a DART staff person to be the primary contact for the Advertising Contractor. Questions regarding the terms, provisions, and requirements of this Policy shall be addressed initially to the designated DART staff person.

(b) The Advertising Contractor shall provide, or shall subcontract for, all employees and equipment necessary to perform the work and provide the services required by DART.

(c) The Advertising Contractor shall comply with this Policy and shall review all proposed advertising with reference to the standards set forth herein. The Advertising Contractor shall make all initial decisions whether to accept or reject proposed advertising in accordance with this Policy. If the Advertising Contractor has any question(s) regarding application of the terms, provisions, and/or requirements of this Policy to any proposed advertising, the Advertising Contractor shall present such proposed advertising to the designated DART staff person for review. In any such case, the designated DART staff person shall work with the Advertising Contractor to resolve the Advertising Contractor's question(s), and the Advertising Contractor shall determine whether the proposed advertising will be accepted.

IV. APPEAL OF ADVERTISING DECISIONS

4.01 Initial Reviews. As set forth in Paragraph 3.01 above, DART's Advertising Contractor will make all initial decisions about accepting or rejecting all proposed advertising in

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Effective Date: October 1, 2019

Approved By: DART Commission – August 3, 2021



accordance with this Policy. DART's Advertising Contractor will work with advertisers to resolve issues about advertisements that do not comply with this Policy and the procedures contained herein. Resolution may include modification of the art, copy, or both.

4.02 Appeals to Advertising Review Committee. An advertiser may appeal a decision to reject or remove an advertisement by filing a written request with the Advertising Review Committee (defined below) within ten (10) business days after the rejection or removal decision. The advertiser's request must state why the advertiser disagrees with the decision in light of this Policy. The "Advertising Review Committee" consists of the following DART personnel: DART's Marketing and Communications Manager, DART's Chief External Affairs Officer, and DART's Chief Operations Officer. The Advertising Review Committee may consult with DART'S legal counsel. The Advertising Review Committee will review the basis for the rejected or removed advertisement and will consider the advertiser's reasons for filing the request. The Advertising Review Committee will make a decision on the request and will notify the advertiser of its decision in writing within fifteen (15) business days of receipt of the advertiser's request.

4.03 Further Review by Chief Executive Officer. An advertiser who disagrees with a decision of the Advertising Review Committee may request DART'S Chief Executive Officer to review the Advertising Review Committee's decision. The advertiser's written request for further review must be received within five (5) business days after receipt of the Advertising Review Committee's adverse decision. The Chief Executive Officer may accept, reject or modify the Advertising Review Committee's decision and will notify the advertiser of the Chief Executive Officer's decision within five (5) business days after the Chief Executive Officer receives the advertiser's request for further review. The Chief Executive Officer's decision is final.



CONSENT ITEM



7C: Quarterly Investment Report

Action: Approve the recommended quarterly investment report for the fourth quarter of Fiscal Year 2022.

Staff Resource: Amber Dakan, Finance Manager

Background:

- DART began investing its reserve dollars in April 2016 with the intent to maximize the value of our assets.
- The 4th quarter of FY2022 (April 1 – June 30, 2022) ended with \$5,602,078.76 in our investment portfolio.
- The current quarterly statement recognized \$8,889.30 in interest income, an improvement from \$2,723.52 in interest from the prior quarter.
- Portfolio assets are primarily held in a market-based savings deposit account. The quarter ended with a 1.35% interest rate. The Finance Staff continue to work with PMA to maximize earning interest vehicles.
- Attached within the packet is DART's Quarterly Investment Report.

Recommendation:

- Approve the recommended quarterly investment report for the fourth quarter of Fiscal Year 2022 (April 1 – June 30, 2022).



PMA Quarterly Statement

(39427-101) Investment Account

Statement Period

Apr 1, 2022 to Jun 30, 2022

Statement for the Account of:

Des Moines Area Regional Transit Authority

Des Moines Area Regional Transit Authority

Amber Dakan

620 Cherry Street

Des Moines, IA 50309

(39427-101) Investment Account | Page 1 of 5



Des Moines Area Regional Transit Authority

Statement Period

Apr 1, 2022 to Jun 30, 2022

SDA / MMA TRANSACTION ACTIVITY

FEDERATED FUNDS			BEGINNING BALANCE			\$87,107.33
Transaction	Date		Deposits	Withdrawals	Interest / Adjust	Balance
21206	04/26/22	Withdrawal		(\$83.33)		\$87,024.00
21221	04/30/22	Interest			\$13.19	\$87,037.19
21240	05/25/22	Withdrawal		(\$83.33)		\$86,953.86
21259	05/31/22	Interest			\$43.22	\$86,997.08
21278	06/27/22	Withdrawal		(\$83.33)		\$86,913.75
21290	06/30/22	Interest			\$72.72	\$86,986.47
TOTALS FOR PERIOD			\$0.00	(\$249.99)	\$129.13	
			ENDING BALANCE			\$86,986.47

BANK IOWA			BEGINNING BALANCE			\$5,506,332.12
Transaction	Date		Deposits	Withdrawals	Interest / Adjust	Balance
254137	04/30/22	Interest			\$1,719.90	\$5,508,052.02
255556	05/31/22	Interest			\$2,888.21	\$5,510,940.23
258060	06/30/22	Interest			\$4,152.06	\$5,515,092.29
TOTALS FOR PERIOD			\$0.00	\$0.00	\$8,760.17	
			ENDING BALANCE			\$5,515,092.29

Questions? Please call 630 657 6400

(39427-101) Investment Account | Page 2 of 5



Des Moines Area Regional Transit Authority

Statement Period

Apr 1, 2022 to Jun 30, 2022

FIXED INCOME INVESTMENTS

INTEREST

Type	Holding ID	Transaction Date	Description	Interest
MMA	21221	04/30/22	Federated Funds	\$13.19
SDA	254137	04/30/22	Savings Deposit Account - BANK IOWA	\$1,719.90
MMA	21259	05/31/22	Federated Funds	\$43.22
SDA	255556	05/31/22	Savings Deposit Account - BANK IOWA	\$2,888.21
MMA	21290	06/30/22	Federated Funds	\$72.72
SDA	258060	06/30/22	Savings Deposit Account - BANK IOWA	\$4,152.06
Totals for Period:				\$8,889.30



Des Moines Area Regional Transit Authority

Statement Period
Apr 1, 2022 to Jun 30, 2022

CURRENT PORTFOLIO

Type	Code	Holding ID	Trade	Settle	Maturity	Description	Cost	Rate	Face/Par	Market Value
MMA		21290-1		06/30/22		Federated - Government Obligations Fund	\$86,986.47	1.367%	\$86,986.47	\$86,986.47
SDA	CC	258060-1		06/30/22		Savings Deposit Account - BANK IOWA	\$5,515,092.29	1.350%	\$5,515,092.29	\$5,515,092.29
Totals for Period:							\$5,602,078.76		\$5,602,078.76	\$5,602,078.76

Deposit Codes:
5) Promontory

Weighted Average Portfolio Yield: 0.000 %
Weighted Average Portfolio Maturity: 0.00 Days

Portfolio Summary:

Type	Allocation (%)	Allocation (\$)	Description
MMA	1.55%	\$86,986.47	Money Market Account
SDA	98.45%	\$5,515,092.29	Savings Deposit Account

Note: Weighted Yield & Weighted Average Portfolio Maturity are calculated using "Market Value" and are only based on the fixed rate investments (excluding SDA Investments).

"Cost" is comprised of the total amount you paid for the investment including any fees and commissions.

"Rate" is the Net Yield to Maturity.

"Face/Par" is the amount received at maturity.

"Market Value" reflects the market value as reported by an independent third-party pricing service. Certificates of Deposit and Commercial Paper and other assets for which market pricing is not readily available from a third-party pricing service are listed at "Cost".

Questions? Please call 630 657 6400

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Quarterly Statement

About Your Account and Statement

Securities and municipal advisory brokerage services (investments purchased with proceeds from a municipal securities issuance), and investments cleared through our clearing firm, Pershing LLC, are offered through PMA Securities LLC, a broker-dealer and municipal advisor registered with the SEC and MSRB, and a member of FINRA and SIPC. All other products and brokerage services are generally provided by PMA Financial Network LLC. Thus, certificates of deposit ("CD"), savings deposit accounts ("SDA") and commercial paper ("CP") may be executed through either PMA entity, as applicable, depending on whether the investment was purchased with proceeds derived from municipal securities. PMA Securities, LLC and PMA Financial Network, LLC operated under common ownership and are affiliated with Prudent Man Advisors, LLC.

Fixed Rate Investment Activity

This section shows all of the fixed term investments purchased and sold, maturities, interest received, and activity. This will include all CD, SDA, CP, securities and money market funds purchased through PMA Financial Network, LLC or PMA Securities, LLC as applicable. It also shows the approximate market value of each security whose price is obtained from an independent source believed to be reliable. However, PMA cannot guarantee their accuracy. This data is provided for informational purposes only. Listed values should not be interpreted as an offer to buy or sell at a specific price. CD's and CP are listed at their original cost. Redemption of a CD prior to maturity may result in early withdrawal penalties. Market values are based on the last day of the month for which this report date range is ending. If the run date of this report is prior to the end of the current month, the market values are listed as equivalent to the cost values.

Money Market Fund

The Rate shown for the money market fund represents the average net interest rate over the previous month which is then annualized. Information regarding the money market fund's investment objectives, risks, changes and expenses can be found in the money market fund's prospectus, which can be obtained by calling PMA at the phone numbers listed. The performance data featured represents past performance, which is no guarantee of future results. Investment returns will fluctuate. Current performance may be higher or lower than the performance data quoted. Please call PMA for the most recent performance figures.

The performance data featured represent past performance, which is no guarantee of future results. Investment returns will fluctuate. Current performance may be higher or lower than the performance data quoted. Please call PMA for the most recent performance figures.

Additional Disclosures

All funds, and/or securities are located and safe kept in an account under the client's name at their custodial bank. Any certificates of deposit listed are located in the client's name at the respective bank. Any money market fund shares are held directly with the money market fund. It is recommended that any oral communications be re-confirmed in writing to further protect your rights, including rights under the Securities Investor Protection Act.

Debt Securities

Some debt securities are subject to redemption prior to maturity. In the event of a partial or whole call of a security, the securities call will be automatically selected on a random basis as is customary in the securities industry. The probability that your securities will be selected is proportional to the amount of your holdings relative to the total holdings. Redemption prior to maturity could affect the yield represented. Additional information is available upon request.

A financial statement of PMA Securities, LLC is available for inspection at its office or a copy will be mailed to you upon written request.

PLEASE ADVISE PMA AND OUR CLEARING FIRM, PERSHING LLC, IMMEDIATELY OF ANY INACCURACY OR DISCREPANCY ON YOUR STATEMENT. FOR A CHANGE OF ADDRESS OR QUESTIONS REGARDING YOUR ACCOUNT, PLEASE NOTIFY YOUR PMA REPRESENTATIVE. ANY ORAL COMMUNICATIONS SHOULD BE RE-CONFIRMED IN WRITING.

How to Contact PMA

Please call (630)657-6400 or write to us at PMA, 2135 CityGate Lane, 7th Floor, Naperville, IL 60563.

How to Contact Pershing, LLC

Please call (201)413-3330 or write to Pershing LLC, One Pershing Plaza, Jersey City, New Jersey, 07399.

In accordance with FINRA Rule 2267, PMA Securities, LLC is providing the following information in the event you wish to contact FINRA. You may call (301)590-6500 or write to FINRA at 1735 K Street NW, Washington, D.C. 20006-1500. In addition to the public disclosure number (800) 289-9999. FINRA provides an investor brochure which describes their Public Disclosure Program. Additional information is also available at www.finra.org.

Questions? Please call 630 657 6400

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ACTION ITEM



8A: State Lobbying Services Contract

Action: Approve a three (3) year contract with two (2) individual, one (1) year options for State Lobbying Services.

Staff Resource: Erin Hockman, Chief External Affairs Officer

Background:

- DART is seeking a qualified consultant to provide legislative services at the state level. Services include, but are not limited to:
 - Representation to the state legislature, including monitoring of state legislative issues and priorities
 - Advisory services to DART staff and the DART Commission
 - Drafting agreed upon legislation on behalf of DART
 - Coordination of meetings with legislators, legislative staff, and other pertinent public transportation groups and associations, and preparation of DART positions to be presented to legislators

Procurement:

- DART conducted a Request for Proposals (RFP) the project. The RFP was published on July 12, 2022, and proposals were due on July 26, 2022.
- DART is conducting on-site interviews with all respondents on August 1, 2022, with the intent of bringing a recommendation and updated action for to the Commission to approve at the meeting.

Award:

- Staff will present a recommendation for a new lobbying services contract at the Commission meeting.



ACTION ITEM



8B: Funding Study Advisory Committee Recommendation

Action: Approve the recommended individual for DART's appointment to the funding study advisory committee

Staff Resource: *Erin Hockman, Chief External Affairs Officer*

Background:

- Diversifying funding away from property taxes has been DART's top legislative priority during the 2021 and 2022 Legislative Sessions.
- In May, the Iowa Legislature passed House File 2579 [the Rebuild Iowa Infrastructure Fund bill \(RIIF\)](#), which was signed by the Governor in June and included a provision requiring the Iowa Department of Transportation to complete a study to determine alternate ways to increase DART funding without increasing property taxes.
<https://www.legis.iowa.gov/legislation/BillBook?ga=89&ba=HF2579>
- Under the bill, the Legislature directs that an advisory committee be formed to oversee the study and submit a report containing its findings and recommendations no later than December 15, 2022.
- The advisory committee will be comprised of 5 voting members, including:
 - Department of Transportation Director (or designee)
 - Department of Revenue Director (or designee)
 - A Polk County Supervisor, appointed by the Governor
 - A City Council member from within DART's service area, appointed by the Governor
 - A representative appointed by the DART Commission
- The advisory committee will also have four nonvoting members, including:
 - Two state representatives, one appointed by the Speaker and one appointed by the minority leader
 - Two state senators, one appointed by the majority leader and one appointed by the minority leader

Funding Advisory Committee Appointments:

- The Governor has asked the following local elected officials to serve on the committee as her appointments:
 - **Member of a City Council in Polk County** – Kelly Whiting, Ankeny City Councilperson
 - **Polk County Supervisor** – Steve Van Oort
- Based on DART Executive Committee discussions the recommended appointment to fill DART's representative on the Committee is Paula Dierenfeld, Mayor of Johnston. Paula has been a commissioner or alternate on the DART Commission for more than 10 years.

Recommendation:

- Approve the recommended appointment to be DART's representative on the Funding Study Advisory Committee.



ACTION ITEM



8C:	Housekeeping Services Contract
Action:	Approve a three (3) year contract with Heritage Building Maintenance for Housekeeping Services for the amount Not to Exceed \$2,025,700.

Staff Resource: *Amanda Wanke, Chief Operations Officer*

Background:

- DART is seeking a qualified firm to provide housekeeping and cleaning services at DART Central Station and 1100 DART Way. The services will ensure the cleanliness of the interior and exterior of the facility. Service times are 16 hours per weekday at DCS and 10 hours per weekday at 1100 DART Way. There is also service on the weekend with reduced hours.
- Cleaning services include (but are not limited to):
 - Cleaning and maintenance of all surfaces, windows, and floors
 - Picking up trash and debris on DART property
 - Heavy cleaning of the administration areas several times per week
 - Light cleaning throughout the daytime hours
 - Periodic special needs and events
 - Special services available related to COVID-19 pandemic
- The current housekeeping contract was awarded in 2020 to Marsden Building Maintenance with a two-year contract that expires on 8/31/2022.

Procurement:

- DART conducted a Request for Proposals (RFP) the project. The RFP was published on June 15, 2022 and proposals were due on July 8, 2022.
- Two (2) proposals were received, and they were ranked in the following order:
 1. Heritage Building Maintenance
 2. MetroClean Solutions
- Contract term will be three (3) years with two additional one (1) year options, for a maximum of 5 years. At the end of the initial term, staff will request approval from the Commission if it desires to move forward with the options.

Heritage Building Maintenance Background / Differentiating Factors:

- Have been in janitorial/custodial business since 2011 and have a local presence in the central Iowa area.
- Demonstrated sustainability and environmental cleaning practices, including LEED compliance and green chemicals.



ACTION ITEM

8C: Housekeeping Services Contract

- Local customers include Iowa Department of Administrative Services, Heartland AEA, Meredith and Wellmark.
- Lowest cost proposal of the two bidders.

Price Proposal:

Year 1 - \$340,000
Year 2 - \$353,600, 4% increase
Year 3 - \$367,750, 4% increase
Year 4 – Renewal option 1: \$382,460, 4% increase*
Year 5 – Renewal option 2: \$397,750, 4% increase*
10 % Contingency - \$184,150
Total Contract - \$2,025,700

**Assuming no unprecedented economic changes*

Funding:

- Funding will come from budgeted operating funds. Price proposal is within budget for Year 1.
- Staff have compared the budget to bringing housecleaning services in-house and external housekeeping services are the most cost-effective option.
- DART is asking for contingency to have the contractor potentially provide extra services related to COVID-19 or other situations (such as extra cleaning needed after the recent fire) that may arise.

Recommendation:

- Approval of a three-year contract with two one-year renewal options in years four and five with Heritage Building Maintenance for Housekeeping Services for the amount Not to Exceed \$2,025,700.



ACTION ITEM



8D:	DART On Demand Fare Policy
Action:	<p>Approve the following actions related to DART's half fare program and Opportunities Thru Transit (OTT) fare program:</p> <ul style="list-style-type: none"> • Approve the Title VI Fare Equity Analysis documenting the impacts of establishing a DART On Demand fare policy. • Approve a DART On Demand base fare of \$1.75, with all local route pass products and reduced fares applicable.

Staff Resource: *Luis Montoya, Chief Planning Officer*

Background:

- DART launched its first microtransit pilot, branded as DART On Demand, in November 2021.
- The first DART On Demand deployment in Ankeny was identified as a pilot project in the Transit Optimization Study as a way to increase mobility and local access.
- The DART On Demand pilot launched with a \$1 promotional fare to help garner interest in the new service and incentivize new ridership.
- Since DART On Demand is a new service type, DART needs establish fare policies that govern a base fare for the program as well as what pass products and eligible discounted rates would apply.

Proposed DART On Demand Fare Structure:

- Staff recommends that the base fare for DART On Demand be \$1.75 and that all local route passes, reduced fares and fare policies apply for the following reasons:
 - To create incentives for ridership which maximizes efficiency and value by keeping the vehicles busy
 - To account for potential scenarios where we replace a fixed route with DART On Demand and we don't wish to disenfranchise existing riders of the route to be discontinued
 - To ensure that our fare policies are easy to understand and that methods of fare payment are seamless. For example, so that the same fare media can be used to transfer between DART On Demand and local fixed routes.
- In addition to all of the normal ways of paying for fixed route service applying to DART On Demand, customers would also have the option of paying to ride through the Via mobile app which they use for booking their trip.

Public Feedback:

- Information about this proposal was shared with existing DART On Demand riders via messages on board the bus, and a virtual public meeting was held on June 23rd. No negative feedback was received.



ACTION ITEM

8D: DART On Demand Fare Policy

- Additional external communication will be conducted in accordance with DART's Public Participation Plan as part of the implementation of the proposed fare policy.

Title VI Fare Equity Analysis:

- The proposed changes were evaluated for potential disproportionate negative impacts on racial minority or low-income customers according to DART's Fare Equity Policy and Federal regulations.
- This analysis centered on evaluating the proposed base fare as well as methods of payment.
- The proposed DART On Demand fare structure would cost less for customers relative to the previously available On Call service and would not constitute a disparate impact on minority individuals.
- The proposed DART On Demand fare structure would maintain the \$0.75 half fare and Ride to Thrive rate, which many low-income riders qualify for, and would therefore not result in a disproportionate burden on low-income customers.
- The addition of the option to pay on the Via mobile app is similar to how customers can use a credit card to pay the fare on the MyDART app, and overall, the addition of fare payment options as a result of the proposed policy would increase the number of applicable payment methods for customers.

Recommendation:

Approve the following actions related to DART On Demand Fare Policy:

- Approve the Title VI Fare Equity Analysis documenting the impacts of the establishment of a DART On Demand Fare Policy
- Approve a DART On Demand base fare of \$1.75, with all local route pass products, methods of payment and reduced fares eligible, in addition to the new fare payment method of paying through the Via mobile app.



Title VI Fare Equity Analysis

DART On Demand Fare Policy

July 2022



Background

In November 2021 a pilot microtransit service was launched in the City of Ankeny called DART On Demand. Microtransit is a type of mobility on demand (MOD) service that utilizes a DART vehicle and DART driver, equipped with a mobile ride booking and dispatch app, to transport customer point to point within a defined zone.

DART On Demand was identified in the Transit Optimization Study, DART's long range service planning document, as a way to provide flexible travel but still maintain quality control and full ADA accessibility. Prior to DART On Demand, Ankeny was served by an On-Call service that required day-ahead booking through DART customer service and cost \$3.50 to ride.

The goals of the DART On Demand pilot in Ankeny are to:

- Provide local transit in response to significant public feedback in Ankeny
- Improve the quality and convenience of the rider experience
- Pilot an innovative service delivery model to consider how to potentially apply it in other parts of the region

DART On Demand initially launched with a promotional fare of \$1 in order to incentivize early adoption and keep barriers to trying to use the new service very low. DART proposes to create a fare structure for this new service type that balances the need to collect revenue with the desire to make the service accessible to the maximum number of people and compatible with fixed route service.

Proposed Fare Structure

DART proposes to establish a base fare for DART On Demand of \$1.75, which is the same as a local fixed route fare. DART also proposes that all local fixed route pass products and eligible forms of payment and reduced fares be accepted for DART On Demand. Additionally, customers could choose to pay using the Via mobile app that is also used to reserve and summon a trip.

This recommended fare structure is intended to:

- Create incentives for ridership, which maximizes efficiency and value by keeping the microtransit vehicles busy
- Account for potential scenarios where DART would replace a fixed route with DART On Demand and we don't wish to create a cost burden on existing riders of the route to be discontinued
- Ensure that DART's fare policies are easy to understand and that methods of fare payment are seamless between services.



Public Outreach

The proposed fare structure for DART On Demand was shared with existing DART On Demand customers through on-board and electronic communications. A virtual public meeting was also held on June 23rd 2022, which had been published on-board DART On Demand vehicles and electronically. No negative comments were received.

Relevant Policies

Title VI of the Civil Rights Act of 1964 states that no person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance. The Federal Transit Administration (FTA) has several requirements to ensure that transit agencies comply with Title VI, among them the requirement to analyze changes to transit service or fares to determine whether changes are being applied equitably to minority and low-income communities.

All changes to fare cost and payment methods are subject to this analysis and reporting, excluding temporary or promotional fares lasting 12 months or less.

DART's Disparate Impact Policy provides a threshold which identifies when adverse effects of a fare change are borne disproportionately by minority populations. DART will consider a proposed fare rate or media change to have a disparate impact if the proportion of minority customers likely to be negatively affected is more than 5 percentage points greater than the overall proportion of DART customers likely to be affected.

DART's Disproportionate Burden Policy provides a threshold which identifies when adverse effects of a fare change are borne disproportionately by low-income populations. DART will consider a proposed fare rate or media change to have a disproportionate burden if the proportion of low-income customers likely to be negatively affected is more than 5 percentage points greater than the overall proportion of DART customers likely to be affected.



Impact Analysis

DART On Demand Ridership

Ordinarily DART would analyze demographic information about riders of the service in order to study the potential impacts of fare changes. However, since DART On Demand is a pilot project and DART has not yet conducted an in-depth customer satisfaction survey to collect rider demographic information, such an analysis cannot be done at this time.

Fare Change Analysis

The following analysis focuses on the impacts of the proposed fare structure by comparing the pricing for the previously available On-Call service to the proposed pricing for DART On Demand.

The proposed DART On Demand fare structure would result in a fare decrease relative to the previously available service in Ankeny as shown below.

Fare Type	Cost		Change	
	On- Call	DART On Demand	Absolute	Percentage
Base Fare	\$3.50	\$1.75	(\$1.75)	-50%
Half- fare and Ride to Thrive	\$0.75	\$0.75	0	0%

While there are not any designated pass products for the On-Call service, customers can use any local route pass product or fare media and pay an additional \$1.75 upcharge when boarding the bus.

Fare Media Changes

The proposed DART On Demand fare policy would be to accept all eligible forms of local fixed route fare payment, plus the additional fare payment method of the Via mobile app. DART already has a similar mobile ticketing solution that allows customers to use a credit card on their smart phone, so the addition of the option to pay on the Via app is not materially different than what is already offered.

Because all local fixed route fare media could be used to pay for DART On Demand, customers will have more pass options than with the previous On Call service, which did not have dedicated pass products and required customers to pay an upcharge if they used fixed route pass products.

Findings

This analysis indicates that the proposed changes would not have a disproportionate negative impact on minority or low-income customers.

- The proposed DART On Demand fare structure would cost less for customers relative to the previously available On Call service and would not constitute a disparate impact on minority individuals.
- The proposed DART On Demand fare structure would maintain the \$0.75 half fare and Ride to Thrive rate, which many low-income riders qualify for, and would therefore not result in a disproportionate burden on low-income customers.

Conclusions

The proposed DART On Demand fare structure does not raise any Title VI concerns because the price will be lower than the On Call system that it replaces, and customers will have more options for how to pay their fare due to the applicability of local fixed route pass products and fare media.



ACTION ITEM



8E:	<p>Principal Foundation Grant Pilot Programs and Establishment of Community Foundation Fund</p> <p>Approve the following actions:</p> <ul style="list-style-type: none"> • A pilot program, funded by the Principal Foundation, providing free transportation to all students at Harding Middle School and North High School
Action:	<ul style="list-style-type: none"> • A pilot service, funded by the Principal Foundation, providing weekend transit service along Merle Hay Road. • Establishment of a Community Betterment Fiscal Sponsorship Fund to accept Principal Foundation grant award

Staff Resource: *Luis Montoya, Chief Planning Officer*

Background:

- The Principal Foundation invited DART to apply for a grant in May 2022 after the Foundation expressed interest in evaluating ways to improve transportation access for lowans struggling to achieve financial stability.
- DART staff submitted two grant applications:
 - The first application, requesting \$150,000, focused on addressing weekend transit deserts in low income, higher minority areas and eliminating transportation barriers for high school students by providing free transportation for all students of a select high school in the Des Moines Public School District.
 - The second application, requesting \$500,000, was for the establishment of an on-demand zone in a low-income neighborhood in order to enhance transportation access.

Principal Foundation Grant Award:

- DART was notified by The Principal Foundation it was awarded \$250,000 to fund the entire cost of first grant application and to partially fund the second grant application. This funding is for one-year with the ability to apply for another year of assistance. It is the expectation of the Principal Foundation that if the pilots are successful then DART fund these initiatives on a more permanent basis.
- **Reducing Barriers to Education** - The Principal Foundation, DART and DMPS identified Harding Middle School and North High School as the best schools to provide free school transportation to all students.
 - The district's transportation policy is that middle school students who live within two miles and high school students who live within three miles of their school do not receive free transportation to and from school through the district. All DMPS middle and high school students can ride DART for free after 4:30 p.m. on weekdays, anytime on weekends or days when school is not in session as part of the district's Unlimited Access agreement with DART.



ACTION ITEM

8E: Principal Foundation Grant Pilot Programs and Establishment of Community Foundation Fund

- The Principal Foundation grant will fund free transportation for these students who would not normally qualify for free school transportation.
- DART will track ridership and DMPS will track attendance and student achievement to assess the impact of free transportation to school.
- Pending Commission approval, the pilot will begin with the start of the 2022-2023 school year.
- If the pilot is successful, DART would work with DMPS on a funding partnership to support the additional service access.
- **Addressing Weekend Transit Deserts** - The Principal Foundation was interested in funding the weekend on-demand zone along Merle Hay Road, in part, because it will help support the success of formerly homeless individuals who will be living in the Anawim Housing project on Merle Hay Road.
 - Pending Commission approval, DART will conduct public input this fall to get a more in-depth understanding of the weekend transportation needs in the area.
 - The input will be used to design the on-demand zone, which DART hopes to have operating before the end of the year to align with the opening of the Anawim Housing project.
- **Enhancing transportation access with on-demand service** - DART and The Principal Foundation have identified the 50314-zip code as an area to target for enhanced on-demand transportation service. This area has the lowest median household income in the region, and a majority of individuals living in the area are of historically underrepresented racial backgrounds.
 - DART staff will begin identifying opportunities to solicit feedback and input from residents in this neighborhood to better understand their transportation barriers in order to design an on-demand zone that will improve their access to transportation and more opportunities overall.
 - DART staff have identified several other potential partners donors who may be interested in helping fund the full cost of the on-demand zone and will begin discussing with key stakeholders in the coming weeks. Staff will seek Commission approval of the on-demand zone when it knows the final funding available and can design the service according to the budget and transportation needs of residents in the 50314 neighborhood.

Community Foundation Fund

- DART staff is proposing the establishing of a Community Betterment Fiscal Sponsorship Fund to accept the Principal grant award. The fund type:
 - Is short-term in nature and facilitates tax-deductible contributions with the Community Foundation as the fiscal agent
 - Can accept contributions from other funders to help close the funding gap
 - Is separate from, but identical to, the fund type being used for art shelters
 - Requires DART to enter into a fund agreement with the Community Foundation



ACTION ITEM

8E: Principal Foundation Grant Pilot Programs and Establishment of Community Foundation Fund

Recommendation:

Approve the following actions related to the Principal Foundation grant award and Community Foundation fund:

- Approve a pilot providing free school transportation for students of Harding Middle School and North High School who do not currently qualify for free school transportation per the district's policy.
- Approve the creation of a weekend on-demand transit zone along Merle Hay Road.
- Approve fund agreement to establish a Fiscal Sponsor Community Betterment Fund with the Community Foundation of Greater Des Moines to accept pilot project funding awarded by the Principal Foundation.

**COMMUNITY FOUNDATION OF GREATER DES MOINES
COMMUNITY BETTERMENT FISCAL SPONSORSHIP FUND AGREEMENT**

THIS AGREEMENT is made by and between the Community Foundation of Greater Des Moines (the “Community Foundation”) and Des Moines Area Regional Transit Authority (DART) (the “Project Representative”).

WHEREAS, the Community Foundation is an Iowa nonprofit corporation organized and operated as a “publicly supported community trust” within the meaning of Treasury Regulation §170A-9(f)(11), and is a publicly supported charity described in Sections 501(c)(3), 509(a)(1) and 170(b)(1)(A)(vi) of the Internal Revenue Code;

WHEREAS, the Project Representative desires that the Community Foundation act as their fiscal sponsor during the period that the Community Betterment Project (the “Project”) is active; and

WHEREAS, the Community Foundation desires to create a new component fund, to be established with an initial contribution to be held and administered pursuant to the provisions of this Agreement. The very nature of fiscal sponsorship funds is that they are short-term, temporary funds and therefore will be reviewed for viability on an annual basis;

NOW, THEREFORE, the Community Foundation and the Project Representative hereby agree as follows:

1. ESTABLISHMENT OF A CHARITABLE FUND: A component charitable fund of the Community Foundation is hereby created and shall be known as the “DART Pilot Project Fund” (the “Fund”). The Fund shall be a community betterment fiscal sponsorship fund and shall support the Project as defined in the Project’s submitted documentation. Project Representative must provide to the Community Foundation documents including project description, project timeline, project budget and advisory committee. Project Representative shall notify the Community Foundation immediately of any change in project description, timeline, budget or advisory committee. Unless anonymity is requested by the Project, the Fund will be listed in any Community Foundation published fund lists.

2. CONTRIBUTIONS TO THE FUND: All donors to the Fund and the Project Representative hereby irrevocably assign, convey, transfer and deliver to the Community Foundation all rights, titles and interests in any assets given as contributions to the Fund; an initial minimum contribution of \$2,500 is required to establish the Fund. The Fund Property shall be comprised of the initial contribution to the Fund, any income to arise from the Fund, and any additional contributions, subject to the provisions of this Agreement.

Project Representative may solicit gifts, contributions and grants to the Community Foundation, designated for the Fund. Project Representative will adhere to the Community Foundation’s Donor-Initiated Fundraising Policy. Project Representative's choice of funding sources to be approached and the text of Project's fundraising and marketing materials are subject to the Community Foundation's prior approval. All grant agreements, pledges, or other commitments with funding sources to support this Fund must be executed by the Community Foundation. The Project Representative will be responsible for completing all funding reporting as required; the cost of any reports or other compliance measures required by such funding sources shall be borne by the Project.

3. FUND A COMPONENT PART OF THE COMMUNITY FOUNDATION: The Community Foundation will maintain the Fund as a component part of the Community Foundation, subject to the terms of this

Agreement and governed by the Community Foundation's articles and bylaws and the Community Foundation's then-current policies and procedures. Control over the administration, investment and distribution of Fund Property shall be exercised exclusively by the Community Foundation, and no provision herein shall be administered or construed to constitute a material restriction or condition.

- 4. PROVISIONS RELATED TO FUND ADVISORS:** The Fund Advisors shall be: the DART Chief Planning Officer, DART Chief Financial Officer, and DART Chief External Affairs Officer. Upon the occurrence of a vacancy in the Fund Advisors, a replacement Fund Advisor will be named by the Project's advisory committee. The Advisory Period shall expire upon the death, resignation or incapacity of the Fund Advisors.

During the Advisory Period, the Fund Advisors shall provide nonbinding advice to the Community Foundation regarding Fund distributions and shall have the authority, with the Community Foundation, to amend this Agreement as set forth in the section entitled Amendments.

- 5. DISTRIBUTIONS FROM THE FUND:** The Project Representative desires that the Fund Property shall be available for distribution to support the Project. Project Representative will ensure the distributions support the Project as defined in the Project's submitted documentation and solely for the purposes provided in the supporting documents requesting the distribution. Requests for distributions to pay expenses, vendors, etc. must be accompanied by the appropriate receipts or invoices. Distributions will adhere to the Community Foundation's Donor-Initiated Fundraising Policy.

Project Representative shall repay to the Community Foundation any portion of the amount distributed which is not used for the stated mission. Any changes in the purposes for which distributed funds are spent must be approved in writing by the Community Foundation before implementation. If Project Representative breaches this Agreement, or if Project Representative's conduct jeopardizes the Community Foundation's legal or tax status, the Community Foundation may withhold, withdraw, or demand immediate return of distributed funds. Any tangible or intangible property, including copyrights, obtained or created by Project Representative as part of this project shall remain the property of Project Representative.

Distributed funds are not to be used in any attempt to influence legislation within the meaning of Internal Revenue Code (IRC) Section 501(c)(3). Project Representative shall not use any portion of the funds to participate or intervene in any political campaign on behalf of or in opposition to any candidate for public office, to induce or encourage violations of law or public policy, to cause any private inurement or improper private benefit to occur, nor to take any other action inconsistent with IRC Section 501(c)(3).

- 6. VARIANCE POWER:** In accordance with the Community Foundation's legal variance power, its Board of Directors has the power to modify any restriction or condition on the distribution of funds for any specified charitable purpose or to any specified charitable organization if, in the sole judgment of the governing body, the restriction or condition becomes in effect, unnecessary, incapable of fulfillment, or inconsistent with the charitable needs of the community.

In addition, if any administrative provision outlined in this Agreement becomes impractical or impairs the effective administration of the Fund, the Community Foundation may modify such provision.

7. FUND INVESTMENT: The Fund Property shall be held and invested by the Community Foundation pursuant to its then-current investment policy. Due to the short-term nature of the Fund, the investment selection for the Fund Property shall be cash or cash equivalent.

The Fund Property may be segregated by the Community Foundation or held with other Community Foundation assets as a single fund for joint investment and management without physical segregation allocating a proportionate share of income, gain and/or loss and fees to the Fund.

8. FUND ADMINISTRATION AND REPORTING: The Community Foundation shall assess a fee for administering this Fund based on the Community Foundation's Donor-Initiated Fundraising Policy. This Fund will be defined as Type 1A for fee purposes. The administrative fee will be deducted from the Fund Property quarterly. Notice of an increase in the administrative fee shall be provided to the Fund Advisors no later than thirty (30) days prior to implementation of such change.

All actions of the Community Foundation with respect to the Fund shall be taken either directly by its Board of Directors, or by its employees, subject to the oversight of the Community Foundation's Board of Directors. Nothing in this Agreement shall constitute the naming of Project Representative or Fund Advisors as an agent or legal representative of the Community Foundation for any purpose whatsoever except as specifically and to the extent set forth herein. This Agreement shall not be deemed to create any relationship of agency, partnership, or joint venture between the parties hereto, and Project Representative and/or Fund Advisors shall make no such representation to anyone.

The Community Foundation may retain attorneys, accountants, custodians, investment managers, consultants and such other agents whose services may be necessary for the administration of the Fund. Expenses of such agents shall be deducted from the Fund Property. Notice regarding extraordinary services, such as attorney, CPA, and/or consultant fees, will be provided prior to being incurred.

The Community Foundation will furnish to the Fund Advisors a written statement of performance and activity of the Fund quarterly no later than thirty (30) days after the end of each quarter.

Project Representative and Fund Advisors hereby irrevocably and unconditionally agree, to the fullest extent permitted by law, to defend, indemnify and hold harmless the Community Foundation, its officers, directors, trustees, employees and agents, from and against any and all claims, liabilities, losses and expenses (including reasonable attorneys' fees) directly, indirectly, wholly or partially arising from or in connection with any act or omission of the Project, its employees or agents, in applying for or accepting the distributions, in expending or applying the funds furnished pursuant to the distributions or in carrying out the Project to be funded or financed by the Fund, except to the extent that such claims, liabilities, losses or expenses arise from or in connection with any act or omission of the Community Foundation, its officers, directors, trustees, employees or agents.

9. AMENDMENTS: This Agreement shall be governed by Iowa law and represents the complete understanding between the parties relating to the subject matter hereof, and may not be amended except by writing by the Community Foundation and the Project Representative.

IN WITNESS WHEREOF, this Agreement has been executed on behalf of the Project Representative and on behalf of the Community Foundation on the day and year written below.

BY: _____
DART Chief Executive Officer

DATE: _____

BY: _____
Community Foundation Officer

DATE: _____

Staff:
Approved (initial & date) KG 7/14/2022
Approved (initial & date) kjw 7.14.22

I have received and understand the Fiscal Sponsorship Policy. _____
(initial)

I have received and understand the Donor-Initiated Fundraising Policy. _____
(initial)



Fiscal Sponsorship Policy

The Community Foundation may choose to provide fiscal and project sponsorship for the charitable activities of others when it determines that the accomplishment of those activities furthers the Community Foundation's mission and tax-exempt purpose. The Community Foundation will provide two types of Fiscal Sponsorship Funds. A Designated Fiscal Sponsorship Fund is established by a nonprofit organization registered with the State of Iowa that is in the process of applying for its 501(c)(3) status with the federal government. This is a temporary fund that allows the nonprofit organization to achieve its mission while it awaits approval of its 501(c)(3) status. A Community Betterment Fiscal Sponsorship Fund is established by a community group for a specific fundraising project that meets a charitable purpose and civic need. This is a temporary fund that allows the group to achieve its mission without establishing a new 501(c)(3) organization. The Community Foundation reserves the right to either accept or decline any proposed fund; it also reserves the right to dissolve any fund.

Donors receive a charitable tax deduction when they make a donation to the Community Foundation for Fiscal Sponsorship Funds. The Community Foundation handles the administration of the funds including donor acknowledgments, pledge tracking, fund accounting and distributions. Fiscal Sponsorship Funds are expected to be short-term and will be dissolved when the nonprofit's 501(c)(3) status has been granted or when the project is complete.

Procedures

Step 1: Project Submission: Interested groups must meet with Community Foundation staff to discuss the proposed Fiscal Sponsorship. Groups will then be required to submit the required documentation.

Designated Fiscal Sponsorship Fund:

- Articles of Incorporation
- Organizational By-Laws
- List of Board of Directors
- Filing/Approval with the State of Iowa as a Nonprofit Corporation
- Proof of checking account registered under the organization's tax id number
- Copy of 501(c)(3) application or written timeline and plan for completion of the application

Community Betterment Fiscal Sponsorship Fund:

- Advisory Committee
- Project Timeline
- Project Description
- Project Budget

Approved September 15, 2015

Step 2: Review and Approval Process: The above documentation will be reviewed by the Community Foundation's leadership team. The leadership team will determine if the proposed organization or project aligns with the strategic goals and objectives of the Community Foundation.

Step 3: Fiscal Sponsorship Fund Agreement: The organization or projects representatives will meet with Community Foundation staff to complete a fund agreement detailing all terms and conditions that apply to the Fiscal Sponsorship.

Minimum Opening Balance: The required minimum opening balance is \$2,500.

Duration of Funds: Designated Fiscal Sponsorship Funds will last no longer than 18 months from the inception date of the fund. This term may only be extended in situations where 501(c)(3) status has been delayed due to unforeseen circumstances; proof of submitted Form 1023 is required.

Community Betterment Fiscal Sponsorship Funds will last the duration of the project with an annual review of fund activity; if necessary, an exit strategy will be developed for projects that last longer than originally expected.

Fees: Fees will be based on the Donor-Initiated Fundraising Policy (DIF Policy) and will be determined on a case-by-case basis.

Step 4: Fundraising: All fundraising must comply with the Community Foundation's DIF Policy. Fiscal Sponsorship Funds may not begin fundraising until it has obtained the Community Foundation's approval of its fundraising plan. This includes the funding sources the project will approach, any fundraising events it plans to conduct, and all written fundraising and marketing materials. Checks should be payable to the Community Foundation with the fund name designated on the memo line. Subject to the Community Foundation's variance power, amounts contributed to the fund will be used only to support the organization or project. The Community Foundation will provide donors with gift acknowledgements as appropriate.

Step 5: Grants: All grants must comply with the Community Foundation's DIF Policy. The Community Foundation is legally responsible for assets held in the fund and for ensuring that grants to support the fund are used only for charitable purposes. Typically, the Community Foundation assures programmatic oversight through the use of an advisory group and fund advisors recommended by the organization or project. As the fiscal sponsor, the Community Foundation must be the applicant on all grant applications. The advisory group will prepare the grant application and provide it to the Community Foundation staff for final approval and signature with adequate time for review prior to the submission deadline. The advisory group will also be responsible for preparing all periodic reports as required by funders and providing those to the Community Foundation staff for final approval and signature with adequate time for review prior to the submission deadline.

Step 6: Distributions: Distributions from Designated Fiscal Sponsorship Funds will be made directly to the nonprofit organization. The organization will submit periodic expense reports with detailed expenditures documenting support of their charitable mission. Distributions will be made based on these expense reports. Distributions from Community Betterment Fiscal Sponsorship Funds will be made in accordance with the DIF Policy.

Approved September 15, 2015

Step 7: Closing Fiscal Sponsorship Funds: Designated Fiscal Sponsorship Funds: When the designated organization receives its 501(c)(3) status, the organization will provide a copy of its IRS determination letter to the Community Foundation. The balance of the fund will then be distributed directly to the organization and the fund will be closed.

If the organization fails to secure its 501(c)(3) status prior to this 18 month deadline, the Community Foundation Board of Directors will exercise variance power. The process for distributing funds will be as follows:

- The designated organization will be notified.
- Final distributions will be made to a qualified 501(c)(3) in accordance with donor intent.
- Fiscal Sponsorship Fund will be closed.

Community Betterment Fiscal Sponsorship Funds: Upon the completion of the community betterment project and once all charitable donations have been expended for the fund's project, the fund will be closed.



**DONOR-INITIATED FUNDRAISING POLICY
FOR COMPONENT FUNDS OF THE COMMUNITY FOUNDATION OF GREATER DES MOINES**

Thank you for expressing your confidence in the Community Foundation of Greater Des Moines by establishing a fund with us. We are pleased to work with you and strive to provide you with the best possible service. Core to the Community Foundation mission is promoting charitable giving. While we provide the charitable tools and fund administration to promote giving, the Community Foundation does not have the capacity to operate fundraising events for its component funds.

In establishing a Fund at the Community Foundation, we recognize there may be times when you would like to organize a fundraising opportunity to benefit the Fund. The IRS has developed strict requirements that impact any fundraising. We have developed this policy to ensure that your fundraising efforts (1) comply with IRS and other governmental regulations, (2) ensure that donors receive the appropriate acknowledgement, and (3) protect the integrity of the Community Foundation's nonprofit status and brand identity. This policy, which applies to all current and future Funds, is very important, and we are happy to assist you in assuring your fundraising complies with the guidelines stated herein. We reserve the right to refuse any assets that have been raised in violation of this policy.

Fundraising Options (see below for details)

Fundraising can occur in a variety of forms. These guidelines cover, but are not limited to, the following fundraising scenarios:

- 1) Independent fundraising by an individual or group (not a 501(c)(3)) conducted on behalf of a Fund where the event and budget are approved by the Community Foundation prior to the event and the possibility of a tax deduction for the donor exists**
- 2) Independent fundraising by an individual or group (not a 501(c)(3)) for which donors are not offered a tax deduction**
- 3) Independent fundraising event or solicitation by a 501(c)(3) organization with proceeds to benefit a Fund at the Community Foundation**
- 4) Direct, tax deductible gifts to a Fund at the Community Foundation**

The following guidelines have been developed to help guide those planning fundraising events and solicitations (referred to as Fundraising Groups).

- 1) Independent fundraising by an individual or group (not a 501(c)(3)) conducted on behalf of a Fund where the event and budget are approved by the Community Foundation prior to the event and the possibility of a tax deduction for the donor exists**

When Fundraising Groups conduct fundraising activities and solicitations on behalf of a Fund at the Community Foundation, fundraising is being done *on behalf of* the Community Foundation, and a number of significant tax and accounting issues arise. For example, it is important that these activities be conducted under the observation and fiscal guidance of the Community Foundation to ensure that donors to the Fund are entitled to the appropriate tax deductions, to protect the Fundraising Groups from unintended tax consequences to themselves, and to ensure that the Community Foundation is not exposed to penalties for failing to make proper solicitation disclosures.

Before undertaking fundraising events, the Fundraising Group must submit a written proposal (**Exhibit A**), and obtain advance approval from the Community Foundation. The proposal must be submitted and approved a minimum of 30 days prior to the event.

The proposal will define each program, event or other effort to raise money for the Fund. The Fundraising Group will then proceed according to the Community Foundation's guidelines. All fundraising materials should make clear, where applicable, that funds are being raised *on behalf of* the Fund at the Community Foundation rather than *by* the Community Foundation. An administrative fee may be charged if extra services will need to be expended by the Community Foundation.

The responsibility of the Community Foundation will be for:

- 1) the management of such money and property as it may accept into the Fund from donors, other contributors and sources;
- 2) payment of all submitted costs and expenses to vendors to the extent funds have been raised;
- 3) the application of income and principal to charitable uses, all in accordance with the governing documents of the Community Foundation; and
- 4) the provision of appropriate acknowledgements to donors.

The Fundraising Group will retain responsibility for all fundraising events and matters related to them including:

- 1) presentation of a plan to the Community Foundation prior to the event for pre-approval and adherence to the plan to implement the event;
- 2) ensuring all fundraising expenses are submitted to the Community Foundation for payment;
- 3) maintaining appropriate financial controls and records related to fundraising expenses;
- 4) adherence to all relevant local, state and federal laws;
- 5) assessment of the need for liability insurance coverage (see G);
- 6) reporting to the Community Foundation, as required by the approved proposal.

Payment of Expenses

The Fundraising Group will establish a budget for submission to the Community Foundation prior to all events. In accordance with IRS regulations, the Community Foundation is prohibited from reimbursing expenses to a donor, advisor, or related party from a donor advised fund. The Community Foundation requires that invoices for goods and services be submitted to the Community Foundation within 30 days of the event and will then pay expenses directly from the Fund. If the Fundraising Group pays for expenses directly, the Community Foundation is not able to provide an in-kind acknowledgement to the Fundraising Group (or donor) for those expenses incurred but not reimbursed.

Designation of Checks and Receipt of Cash

Incoming checks related to the event must be made payable to the Community Foundation of Greater Des Moines with the name of the Fund in the memo line. Cash receipts are to be sent to the Community Foundation intact and any cash received may not be used to pay expenses by the Fundraising Group. All proceeds, checks and cash must be delivered to the Community Foundation, along with an accounting of all monies received within one week of receipt.

Tax Requirements and Acknowledgments

The IRS has imposed strict requirements which impact any fundraising. If the steps outlined below are not taken, donors will be denied a tax deduction; the Fundraising Group might find themselves unexpectedly subjected to tax on the funds they raise; and/or either the Community Foundation or the Fundraising Group might be subjected to penalties. Any tax and/or penalties assessed on the Community Foundation due to the fundraising will be the responsibility of the Fundraising Group.

Donors who contribute \$250 or more will need a written acknowledgement from the Community Foundation in order to claim a tax deduction for the contribution. The Community Foundation will provide the appropriate

acknowledgement to the donors, but will require certain detailed information in order to do so. Specifically, the Fundraising Group will need to provide the Community Foundation with:

- 1) The donor's complete name and address;
- 2) The date and amount of the contribution;
- 3) Whether the contribution was in cash or property;
- 4) If property, a description of the type of property and a good faith estimate of the fair market value; and
- 5) A detailed description of any goods and services provided in exchange for the contribution.

Contributions of services, while appreciated, are generally not deductible. If the Fundraising Group provides goods or services in exchange for a donation, certain disclosures are required to be made upon solicitation. For example, if the Fundraising Group is sponsoring a dinner, the donor can only deduct the excess of the ticket price above the fair market value of the dinner. This limitation on the deduction, known as a "quid pro quo disclosure", must be disclosed at the time of solicitation. Disclosure on the ticket to the event is a typical method for making this disclosure.

The Community Foundation will assist the Fundraising Group in determining the fair market value amounts and the appropriate disclosure language for the event. In order to do this, the Community Foundation will have to work with the group prior to the solicitation activity and will need information pertaining to the event, such as the ticket prices and the value of the goods or services donors are to receive. *The Fundraising Group is responsible for providing the required quid pro quo disclosure information to the Community Foundation.*

The Community Foundation will not facilitate raffles. Rummage sale purchases are not tax-deductible. The Community Foundation will not assist with determining the value of items for an auction and will not provide acknowledgments for items valued under \$250 donated for an auction.

Liability Insurance and Liability for Losses

The Fundraising Group will contact the Community Foundation prior to having a fundraising event to assess the need to secure liability insurance for the event and the Community Foundation. Insurance coverage must be reviewed and approved by the Community Foundation. The Fundraising Group will provide the Community Foundation a certificate of insurance and the Community Foundation will be listed as an additional insured.

The Fundraising Group will be responsible for all losses incurred by events. The Community Foundation will not be held responsible for such losses. The Community Foundation may require the Fundraising Group to purchase a line of credit or provide a written personal guarantee.

Fees (Type 1 on Fee Schedule on page 5)

- a. The Fundraising Group conducts a short-term charitable outreach where **no event** is planned and only direct solicitations are being conducted. Donor advised funds cannot be used for this purpose. The fee will be 2% on receipt of gifts, or a \$250 minimum annually, plus the credit card and stock transaction fees, in addition to the standard administrative fee on the Fund. Maximum number of transactions for this fee is 50.
- b. The Fundraising Group conducts a **fundraising event** (may include an auction, golf tournament, dinner, direct mail solicitation, etc.) with the **proceeds contributed to a Fiscal Sponsorship Fund**. Donor advised funds cannot be used for this purpose. The fee will be 5% of gifts received, or a \$250 minimum annually, plus the credit card and stock transaction fees. Maximum number of transactions for this fee is 150.
- c. The Fundraising Group conducts a **fundraising event** (may include an auction, golf tournament, dinner, direct mail solicitation, etc.) with the **proceeds contributed to an endowed fund**. Donor advised funds cannot be used for this purpose. The fee will be 2% of gifts received, or a \$250 minimum annually, plus the credit card and stock transaction fees, in addition to standard administrative fees on the Fund. Maximum number of transactions for this fee is 150.

2) Independent fundraising by an individual or group (not a 501(c)(3)) for which donors are not offered a tax deduction

You may make a gift to the Fund from the proceeds of an event/solicitation for which donors were not offered a charitable tax deduction.

Fundraising may be conducted by an individual, a group of people, or an organization for the benefit of a Fund at the Community Foundation. Generally, the person or group that plans and executes the fundraiser (for example: dinner; golf tournaments; walk-a-thons; auctions; sales of products or services; requests for money from individuals or organizations through mailings, advertisements, or oral solicitations) makes one lump sum donation (net of expenses) to the Fund. Unless the event is sponsored by a qualified charitable organization which accepts and acknowledges the contributions, the donor may not take a charitable tax deduction for the contribution. The Community Foundation will not acknowledge the individual contributors.

Guidelines applicable to non-tax-deductible fundraising

- An individual or group that plans and executes a fundraising event may state that the net proceeds will benefit the general purpose of the Fund.
- The individual or group may not use the Community Foundation's tax exempt number in connection with the event. Individual contributions made as a result of an event/solicitation will not qualify as a tax deductible charitable gift to the Community Foundation.
- Event organizers are responsible for obtaining and paying for any necessary insurance, permits, licenses, approvals, etc. Events or activities that include raffles or other games of chance are regulated by state and local governments and must be specifically reviewed and authorized by the appropriate branch of government.
- Fundraising events often require certificates of insurance or signed contracts. When events are sponsored independently of the Community Foundation, the name of the Community Foundation or the Fund name must not appear on any contract or agreement.
- Individual participants in the event (ticket purchasers, sponsors, golf players, etc.) make their payments to the organizing individual or group, not to the Community Foundation or the Fund. The organizers may record the contributors' names and addresses, and provide a courtesy acknowledgement. The acknowledgement letter may not include any language stating that the letter serves as an official receipt for IRS purposes or include any reference to tax deductibility.
- Event organizers will pay all expenses and send the net proceeds of the fundraiser to the Community Foundation for the benefit of the Fund. The Community Foundation will record the gift as coming from unnamed third-party donors. Please note that the Community Foundation is prohibited by law from reimbursing the event organizers for its expenses, therefore, the group must deduct its expenses before sending the net proceeds to the Community Foundation.

Fees (Type 2 Fee Schedule on page 5)

Fundraising individual or group **contributes proceeds** of an event/solicitation to the Fund at the Community Foundation. Donors were not offered a charitable tax deduction. No additional fee is added to the standard administrative fee if proceeds contributed to a Designated Fund; 1% of incoming gifts if proceeds contributed to a Fiscal Sponsorship Fund.

3) Independent fundraising event or solicitation by a 501(c)(3) organization with proceeds to benefit a Fund at the Community Foundation

You may make a gift of the proceeds from the event or solicitation that is sponsored by a 501(c)(3) organization which has a Fund at the Community Foundation for the benefit of that organization.

Organizations with their own 501(c)(3) status may sponsor a fundraising event or solicitation promoting their organization and deposit the net proceeds into the organization's Fund at the Community Foundation. The organization will issue its own acknowledgement letters to donors because the organization has its own charitable tax-exempt status and accepted the gift from the donor. In cases where gifts are sent directly to the Community

Foundation, the Community Foundation will send a gift acknowledgement from the Community Foundation indicating the gift is tax deductible, minus the any quid pro quo benefit to the donor. All fund activity can be viewed online through Manage My Fund.

Organizations should ensure they are in compliance with all applicable IRS and State of Iowa laws and regulations regarding solicitation, acknowledgement, and tax deductibility of gifts.

Fees (Type 3 on Fee Schedule on page 5)

No additional fee is added to the standard administrative fee.

4) Direct, tax deductible gifts to a Fund at the Community Foundation

You may promote your Fund through various forms of passive marketing including brochures, website, information sessions, or a request of money through an appeal letter.

In response to those marketing efforts, a donor may make a gift directly to the Fund. In that case, he/she should make their check payable to the Community Foundation of Greater Des Moines with the name of the Fund in the memo line and send it directly to the Community Foundation. The Community Foundation can also accept gifts of cash, online credit card donations, securities and complex gifts. The donor will receive a gift acknowledgement letter from the Community Foundation indicating that the gift is tax deductible. All fund activity can be viewed online through Manage My Fund.

Fees (Type 4 on Fee Schedule on page 5)

No additional fee is added to the standard administrative fee. The number of transactions is limited to 50 or less annually.

Fee Schedule	Type 1a	Type 1b	Type 1c	Type 2	Type 3	Type 4
Fund Agreement Required	Y	Y	Y	Y	Y	Y
Type of Fund	Any except Donor Advised	Fiscal Sponsorship	Endowed	Fiscal Sponsorship or Designated	Agency Fund	Agency Fund
Budget Required	Y	Y	Y	N	N	N
Meeting to discuss process required	Y	Y	Y	N	N	N
Written proposal/approval required	N	Y	Y	N	N	N
Proceeds received by CF	Gross	Gross	Gross	Net	Net	Gross
Use of Online Donations	Y	Y	Y	N	Y	Y
CF pays vendors	Y	Y	Y	N	N	N
Event registration is done through CF	N	Maybe	Maybe	N	NA	NA
Fee	2% on receipt of gifts, \$250 minimum annually	5% on receipt of gifts, \$250 minimum annually	2% on receipt of gifts; \$250 minimum annually	1% of gifts for P/T; Standard Admin Fee for Designated	Standard Admin Fee for Agency Funds	Standard Admin Fee for Agency Funds

Fee for transactions above the maximum - \$3 per transaction

Registration managed by the Community Foundation - \$250 plus \$75/hour above 2 hours of work

**Thank you for your interest in supporting your Fund.
If you have any questions about this policy, please contact the
Community Foundation of Greater Des Moines at 515.883.2626**

EXHIBIT A

Proposed Fundraising Activity Application Form and Budget

A minimum of thirty day prior to initiating your fundraising activities, you will need to provide the Community Foundation of Greater Des Moines with a description of the project and budget including information on anticipated revenues and expenses (including donated items to the event and their value), the number of people in attendance, and the fair market value of the goods and services a donor will receive when they participate in your event/project, i.e., the value of what they will receive in return for their contribution (for example, the fair market value of a dinner they are served). If some time before the event there are substantial changes to the event, it will require re-approval by the Community Foundation. The Community Foundation requires a final report listing the actual revenue/expenses and number of people attending and making contributions. The checks/contribution amounts deposited in your Fund need to correspond with the information provided.

Please complete the form below and submit to the Community Foundation for consideration and approval.

- 1) Purpose of fundraising effort:
- 2) Description of event:
- 3) Date of event:
- 4) Location of event:
- 5) Group or individuals who will conduct fundraising event. Indicate those who will authorize expenditures.
- 6) Primary contact person:
Name:
Address:
Phone:
Fax:
Email:
- 7) Do any of the above-named individuals expect to gain monetarily from conducting the event? Do any of these persons have connections to a business that will benefit from the proposed event? If so, explain?
- 8) Have these individuals or this group organized previous fundraising events? If the answer is yes, please give date, place and a brief explanation.
- 9) Is alcohol being served at the event?
- 10) Proposed project budget (*NOTE: Unauthorized expenditures will be the responsibility of the fundraising group*).

Expected Revenue \$ _____ Expected Expenses \$ _____

Net Proceeds (Revenue less Expenses) \$ _____

Number of Event/Project Participants/Donors _____

- I. Please describe and list sources of event/project revenue (Attach separate sheet if necessary)

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

II. Please describe and list sources of event/projected expenses (Attach separate sheet if necessary)

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

III. Items donated for your fundraising event (for example food and/or cases of soft drinks) must be assessed at fair market value and included in the calculation determining the value of the benefit received by the donor for his/her contribution to your fund. Please describe and list donated goods/services to your event/project and their fair market value (note: fair market value is the amount the item/service would be worth if sold to the general public in the ordinary course of trade) (Attach separate sheet if necessary)

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

IV. Will you be paying any individual for services from this Fund? Yes No

If yes, whom and explain service(s) rendered:

V. Description of event/project and contribution levels (Please detail what benefit(s) a donor receives when they contribute to your event/project). Are there different benefits associated with different levels of contribution? What does a corporate sponsor receive for contribution, and are there different benefits for corporate sponsors? (Attach separate sheet if necessary).

A contribution/gift to your Fund is a voluntary transfer of money or property that is made with no expectation of a commensurate return. If a donor will receive a financial or economic benefit in return for making a contribution/gift (dinner and entertainment, etc.), the payment is not a tax deductible charitable contribution except to the extent that it exceeds the fair market of the benefit. Therefore, for the Community Foundation to properly acknowledge charitable contributions to your Fund from a fundraising event, the information in the proposed/actual budget and the corresponding value assigned to the contributions will need to be provided. Without this information, the Community Foundation will not be able to appropriately acknowledge the donor for his/her charitable contribution to your Fund.

I have read the Community Foundation's Donor-Initiated Fundraising Policy, agree to abide by it, and attest that all information presented here is true to the best of my knowledge.

_____ Date: _____
Signature of Primary Contact

_____ Date: _____
Signature of person who authorizes expenditures (if different than above)

Submit this form to:

Community Foundation of Greater Des Moines
1915 Grand Avenue
Des Moines, IA 50309
515.883.2626
Fax: 515.309.0704

OFFICE USE ONLY

_____ Date application received

Application approved by:

_____ Date: _____
Chief Financial & Administrative Officer
Community Foundation of Greater Des Moines

_____ Date fee proposal was provided to Fundraising Group

Fundraising Group has supplied:

_____ Proof of liability insurance covering the Community Foundation (if applicable)

_____ Proof of dram shop insurance (if alcohol is to be served)

_____ Other: _____



DISCUSSION ITEM



9A: FY 2022 Business Plan Recap and Strategic Planning

Staff Resource: *Luis Montoya, Chief Planning Officer*
Elizabeth Presutti, Chief Executive Officer

- Staff will provide an update on DART's FY 2022 Business Plan and Strategic Planning efforts.



DISCUSSION ITEM



9B: Operations and Maintenance Facility Update

Staff Resource: Kent Farver, Chief Financial Officer

- Staff will provide an update on the Operations and Maintenance Facility project.



DISCUSSION ITEM



9C: Transit Asset Management (TAM) Plan Update

Staff Resources: Amber Dakan, Finance Manager

- Staff will provide a review of DART's TAM Plan and as the team works to update the plan from its original implementation in October of 2018.



DISCUSSION ITEM



9D: 2022 Iowa State Fair Update

Staff Resource: Amanda Wanke, Chief Operations Officer and Deputy CEO

- Staff will provide an update on DART's Park and Ride service for the 2022 Iowa State Fair.



MONTHLY REPORT



10A: Monthly Performance Report – June 2022

Staff Resource: *Nate Bleadorn, Business Intelligence Manager*

Summary of June 2022 Monthly Performance:

- Total June ridership was up 25% compared to June of 2021 and down slightly from May due to the removal of school service in early June. Fixed route ridership was down 10.7% this month, again due to the school service changes, and Paratransit was up 2% compared to May. RideShare was up 3% compared to last month, but overall YTD Rideshare numbers finished lower than last year primarily due to the closure of the TPI plant. DART on Demand continues to see strong ridership, with more discussion available in the Planning Department monthly report.
- For the month of June, preventable accidents occurred at a rate of 1.52 per 100,000 miles, which is down compared to last month and just above our target of 1 per 100,000 miles. Year To Date, we sit just above our goal at 1.1 preventable accidents per 100,000 miles. Non-preventable accidents occurred at a rate of 0.25 per 100,000 miles in June, which is a decrease compared to last month.
- On-Time Performance saw a slight month-to-month decrease to 83.9% for the month and 85.07% for the year, which is right at our benchmark of 85%.
- Road calls per 100,000 miles, where our buses need service while in operation, are currently sitting at 7.63 YTD. This is up 5.5% fiscal year to date. June saw an increase in Calls/100K miles compared to May.

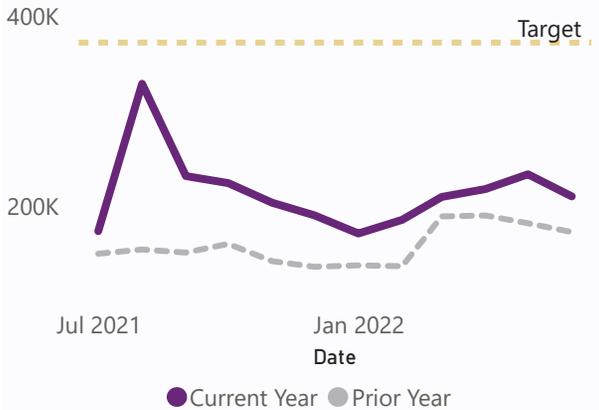


Performance Summary - June 2022

7/1/2021 6/30/2022

Ridership

Monthly **210,567**
 YTD **2,584,454**
 FY21: 173,024 (+21.7%) FY21: 1,906,468 (+35.56%)



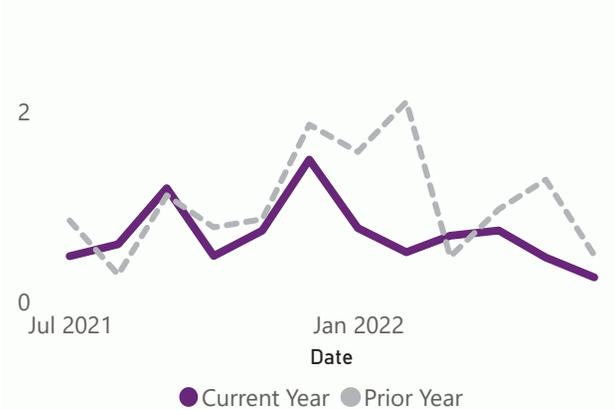
Preventable Accidents/100k Miles

Monthly **1.52**
 YTD **1.10**
 FY21: 0.49 (-213.45%) FY21: 0.79 (-39.98%)



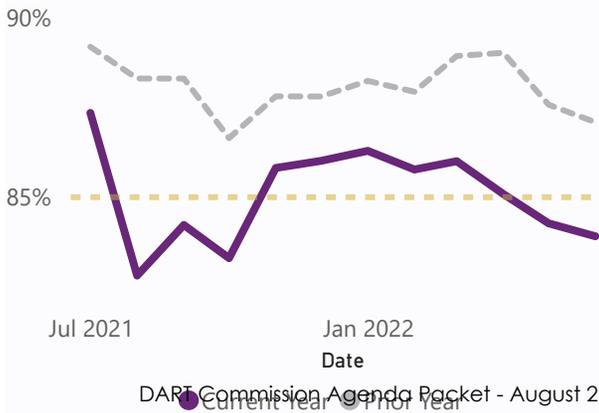
Non-Preventable Accidents/100k

Monthly **0.25**
 YTD **0.70**
 FY21: 0.49 (+47.76%) FY21: 1.05 (+33.19%)



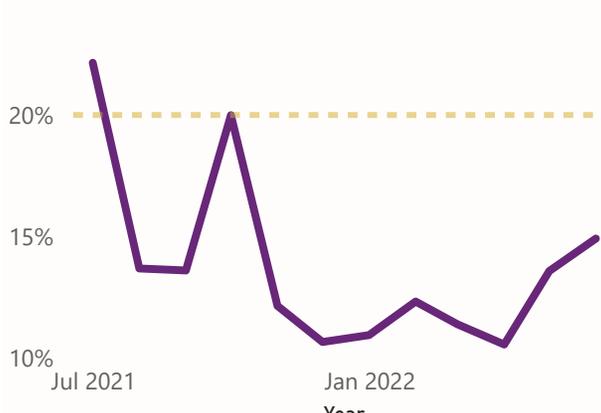
On-Time Performance

Monthly **83.91%**
 YTD **85.07%**
 FY21: 87.09% (-3.65%) FY21: 88.08% (-3.42%)



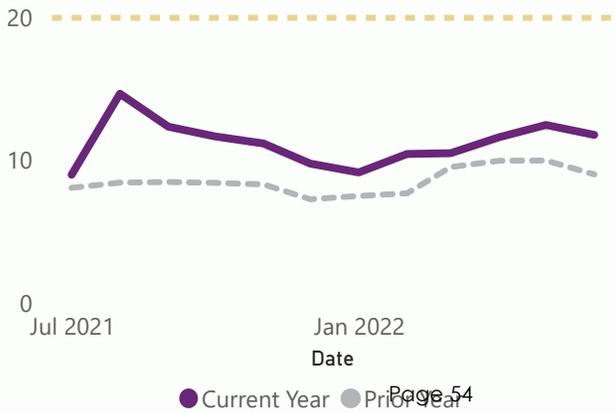
Farebox Recovery Ratio

Monthly **14.91%**
 YTD **13.73%**
 FY21: 41.74% (-64.28%) FY21: 15.83% (-13.25%)



FR Passengers / Revenue Hour

Monthly **11.79**
 YTD **11.28**
 FY21: 9.01 (+30.8%) FY21: 8.57 (+31.58%)





Fixed Route Performance

7/1/2021

6/30/2022

Ridership

Monthly

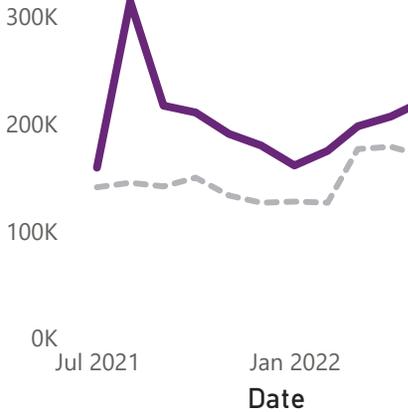
197,706

FY21: 158,620 (+24.64%)

YTD

2,430,495

FY21: 1,774,384
(+36.98%)



● Current Year ● Prior Year

On-Time Performance

Monthly

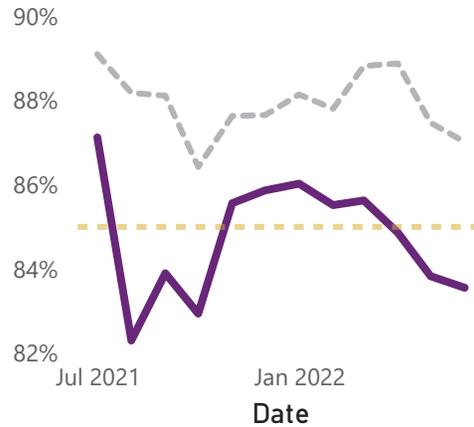
83.56%

FY21: 87.02% (-3.98%)

YTD

84.76%

FY21: 87.94% (-3.62%)



● Current Year ● Prior Year

Operating Cost/Rev. Hour

Monthly

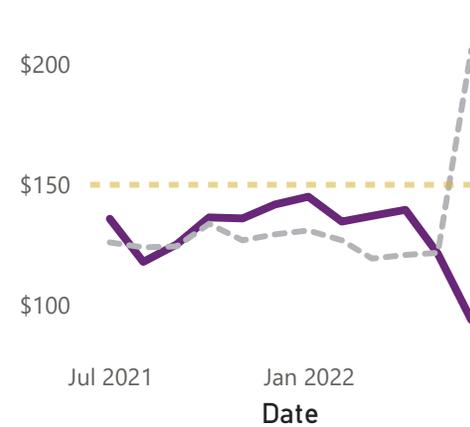
\$93.90

FY21: \$205.94 (+54.4%)

YTD

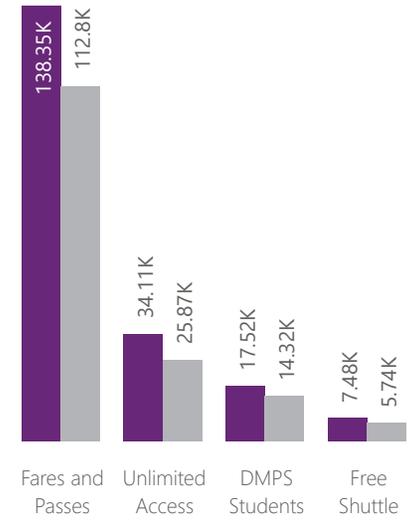
\$130.42

FY21: \$132.63 (+1.67%)



● Current Year ● Prior Year

Monthly Ridership by Fare Group



● Current Year ● Prior Year

Preventable Acc./100k

Monthly

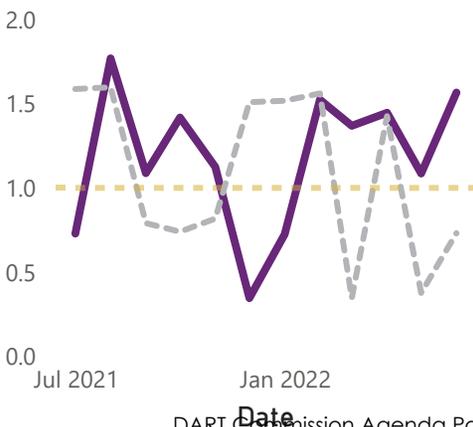
1.57

FY21: 0.73 (-114.23%)

YTD

1.19

FY21: 1.07 (-10.54%)



● Current Year ● Prior Year

Non-Preventable Acc./100k

Monthly

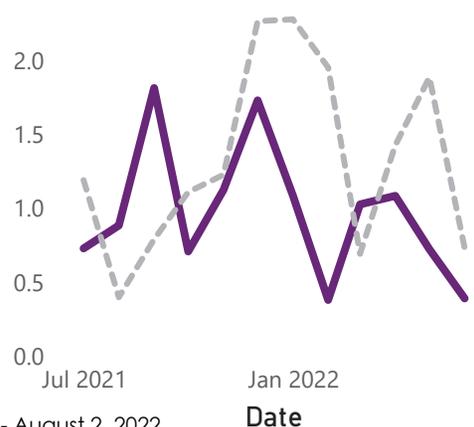
0.39

FY21: 0.73 (+46.44%)

YTD

0.98

FY21: 1.33 (+26.17%)



● Current Year ● Prior Year

Road Calls/100k Miles

Monthly

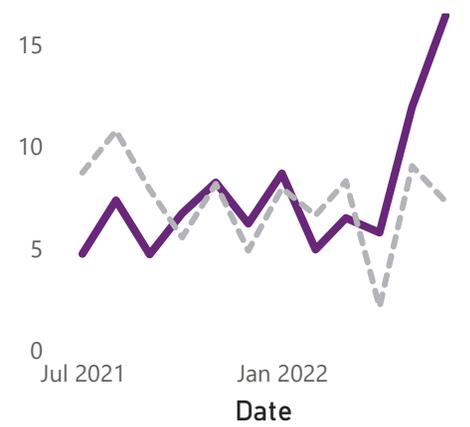
16.44

FY21: 7.31 (-124.94%)

YTD

7.63

FY21: 7.24 (-5.45%)



● Current Year ● Prior Year

Complaints/100k Passengers

Monthly

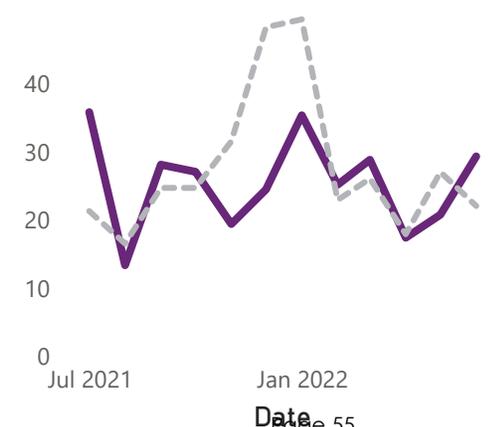
29.34

FY21: 22.07 (-32.95%)

YTD

24.52

FY21: 27.05 (+9.35%)



● Current Year ● Prior Year



Paratransit Performance

7/1/2021

6/30/2022

Ridership

Monthly

6,995

FY21: 6,092 (+14.82%)

YTD

79,020

FY21: 50,761 (+55.67%)

On-Time Performance

Monthly

90.33%

FY21: 88.78% (+1.75%)

YTD

91.55%

FY21: 92.09% (-0.58%)

Operating Cost/Passenger

Monthly

\$41.44

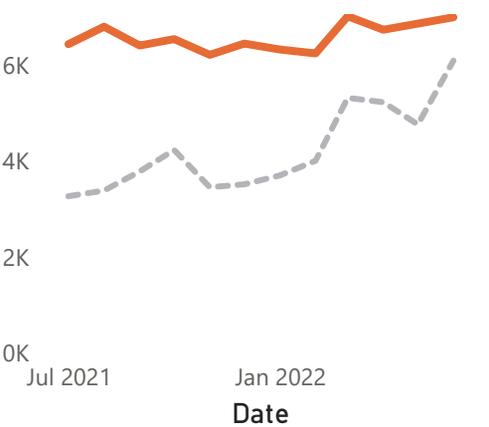
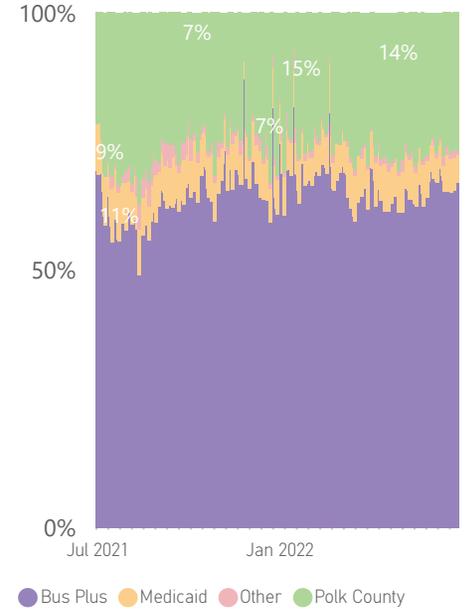
FY21: \$63.64 (+34.88%)

YTD

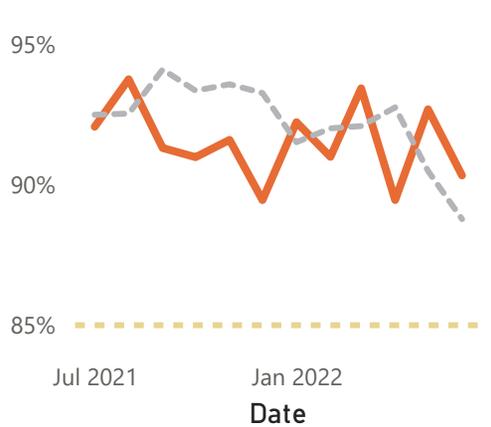
\$56.85

FY21: \$62.49 (+9.03%)

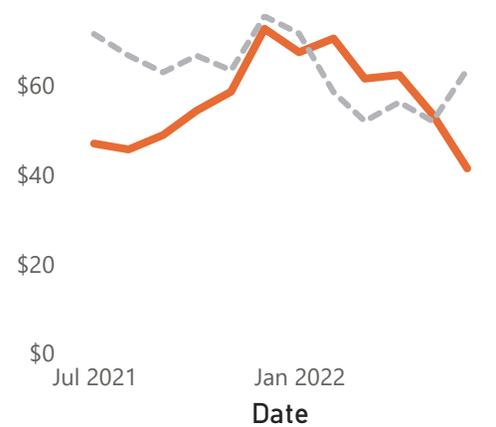
Paratransit Customer Type Breakdown



● Current Year ● Prior Year



● Current Year ● Prior Year



● Current Year ● Prior Year

Preventable Acc./100k

Monthly

2.56

FY21: 0.00

YTD

1.51

FY21: 0.17 (-772.7%)

Non-Preventable Acc./100k

Monthly

0.00

FY21: 0.00

YTD

0.25

FY21: 0.69 (+63.64%)

RideShare - Ridership

Monthly

5,866

FY21: 8,312 (-29.43%)

YTD

74,939

FY21: 81,323 (-7.85%)

RideShare - Op. Cost/Passenger*

Monthly

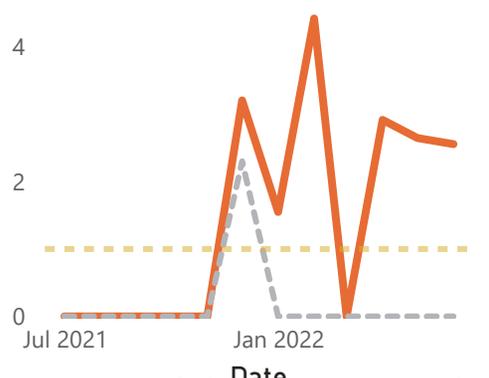
\$9.48

FY21: \$14.32 (+33.8%)

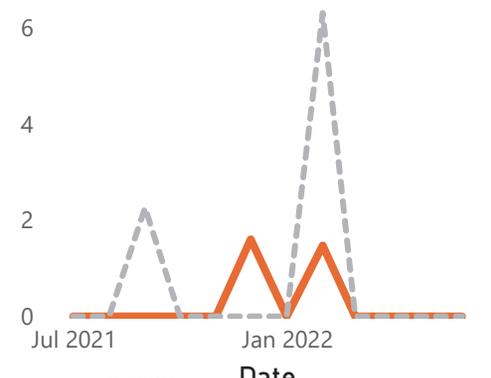
YTD

\$11.55

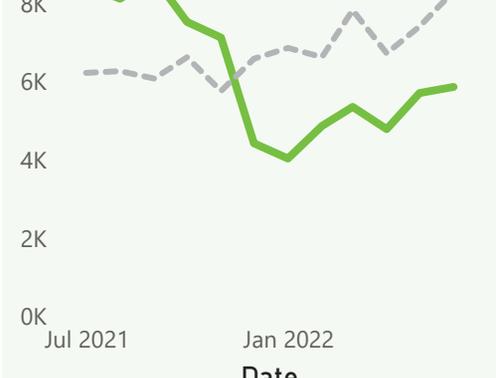
FY21: \$10.64 (-8.59%)



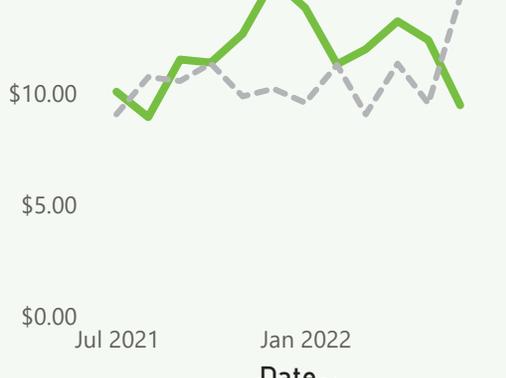
● Current Year ● Prior Year



● Current Year ● Prior Year



● Current Year ● Prior Year



● Current Year ● Prior Year



Route Details

Month

June 2022



Program	Route	Month Ridership	Month Last Year	YTD Ridership	Last Year YTD Ridership	YTD Change	YTD Change %	YTD Passengers/Revenue Hour	YTD On-Time Performance
1. Local	▲								
	#1 - Fairgrounds	7,723	7,073	251,390	78,786	172,604	219.1%	18.43	74.17%
	#3 - University	23,806	18,925	244,943	219,767	25,176	11.5%	13.45	87.68%
	#4 - E. 14th	10,063	7,901	105,396	80,498	24,898	30.9%	10.21	88.89%
	#5 - Franklin Ave/Johnston	5,475	4,378	75,381	50,805	24,576	48.4%	8.10	86.19%
	#6 - Indianola	14,499	10,932	187,346	121,841	65,505	53.8%	14.84	87.72%
	#7 - SW 9th St.	18,524	17,827	250,494	202,060	48,434	24.0%	21.08	90.05%
	#8 - Fleur Dr.	1,547	1,018	24,827	13,470	11,357	84.3%	13.02	76.74%
	#10 - East University	691	570	9,939	6,772	3,167	46.8%	5.78	85.02%
	#11 - Ingersoll/Valley Junction	1,668	1,110	15,061	11,258	3,803	33.8%	7.79	74.04%
	#13 - Evergreen	928	620	36,940	11,216	25,724	229.4%	30.29	85.20%
	#14 - Beaver Ave.	10,023	8,100	128,250	97,403	30,847	31.7%	12.29	85.16%
	#15 - 6th Ave.	12,813	10,266	154,038	117,426	36,612	31.2%	14.93	80.07%
	#16 - Douglas Ave.	22,847	17,252	244,096	202,436	41,660	20.6%	13.62	83.69%
	#17 - Hubbell Ave.	16,467	13,165	173,678	141,662	32,016	22.6%	10.86	86.01%
	#50 - Euclid	4,511	3,374	46,601	38,600	8,001	20.7%	5.84	93.41%
	#52 - Valley West/Jordan Creek	9,342	7,918	90,404	77,509	12,895	16.6%	6.98	87.46%
	#60 - Ingersoll/University	19,827	16,102	225,787	182,022	43,765	24.0%	12.83	82.12%
	#72 - West Des Moines Loop	4,124	2,648	36,496	32,813	3,683	11.2%	3.67	79.33%
#74 - NW Urbandale	408	320	3,756	2,863	893	31.2%	2.37	81.61%	
2. Shuttle	Link Shuttle	414	642	6,194	4,320	1,874	43.4%	1.84	96.72%
	Downtown Shuttle	6,710	4,927	67,005	49,800	17,205	34.5%	7.07	88.55%
3. Express	#92 - Hickman	369	331	5,401	3,963	1,438	36.3%	2.18	77.92%
	#93 - NW 86th	656	533	6,882	4,005	2,877	71.8%	2.59	83.43%
	#94 - Westown	590	309	5,314	3,109	2,205	70.9%	5.11	84.34%
	#95 - Vista	101	188	1,528	1,744	-216	-12.4%	1.77	78.57%
	#96 - E.P. True	632	462	6,601	3,757	2,844	75.7%	3.97	78.24%
	#98 - Ankeny	1,615	1,239	20,443	10,116	10,327	102.1%	4.66	80.49%
	#99 - Altoona	300	359	4,350	3,171	1,179	37.2%	2.30	79.44%
5. On Call	Ankeny		110	584	1,121	-537	-47.9%	3.50	79.42%
	NW Johnston / Grimes								
	Regional	147	65	197	120	77	64.2%	5.75	83.42%
6. DART On Demand	DART On Demand - Ankeny	840		5,247		5,247	Infinity	10.99	
Cab	Paratransit: Taxi	400	599	5,227	2,946	2,281	77.4%	4.95	
Paratransit	Paratransit: Bus/Van	6,595	5,422	72,556	47,744	24,812	52.0%	1.79	91.55%
RideShare	RideShare	5,866	8,312	74,939	81,323	-6,384	-7.9%	4.19	
Total		210,521	172,997	2,587,291	1,906,446	680,845	35.7%	9.39	85.07%



DISCUSSION ITEM



10B: Quarterly Safety Report – Q4 FY 2022

Staff Resource: Pat Daly, Safety Manager

Agency Safety Plan Safety Performance Safety Targets

DART's Public Transit Agency Safety Plan is required to set and track safety performance targets. There are seven safety performance areas tracked for the four modes of service DART delivers

The following table compares DART's Safety Performance Target goals to actual fiscal year-to-date performance and the prior year's performance for the same time frame.

FY 2022 Safety Performance Targets							
Mode of Transit Service	Fatalities	Fatalities per 100/K Miles	Injuries	Injuries per 100/K Miles	Safety Events	Safety Events per 100/K Miles	System Reliability (Major Road Calls)
Fixed Route							
FY 22 - Target	0	0	10.0	1.25	12.0	1.50	10,500
FY 22 - Actual	0	0	11.0	0.49	14.0	0.62	14,617.69
FY 21 - YTD	0	0	2.0	0.10	10.0	0.52	16,984.04
Paratransit							
FY 22 - Target	0	0	2.0	1.0	2.0	0.4	400,000
FY 22 - Actual	0	0	1.0	0.13	2.0	0.27	49,488.23
FY 21 - YTD	0	0	0.0	0.0	0.0	0.0	-----
Rideshare							
FY 22 - Target	0	0	1.0	1.0	1.0	0.17	138,000
FY 22 - Actual	0	0	0.0	0.0	2.0	0.26	-----
FY 21 - YTD	0	0	0.0	0.0	1.0	0.15	-----
Taxi							
FY 22 - Target	0	0	1.0	1.0	1.0	0.17	7,400
FY 22 - Actual	0	0	0.0	0.0	0.0	0.0	-----
FY 21 - YTD	0	0	0.0	0.0	0.0	0.00	-----

DISCUSSION ITEM

10B: Quarterly Safety Report – Q4 2022



Safety Performance Targets

For the fourth quarter there were a total of six safety events.

Fixed route saw one non-preventable motor vehicle crash after which the other vehicle was towed from the scene. Fixed route also incurred one preventable passenger injury from a fall and one preventable pedestrian injury.

Paratransit experienced one preventable motor vehicle crash that resulted in a vehicle being towed from the scene and one non-preventable passenger injury from a fall on a bus.

The final safety event was the result of an arson fire at DART Central Station.

Preventable Vehicle Accidents

For FY 22, DART has the goal of less than 1.00 preventable accident per 100/K miles of revenue service. We ended the year 1.11 preventable accidents per 100/K of revenue service.

As of the end of the fiscal year, approximately 30% of bus operators have been with DART for less than one year. Those operators experience 3.4 preventable accidents per 100/K miles of revenue service as compared to 1.1 preventable accidents for operators with more than one year with DART. Training, Operations, and Safety continue to work to identify and implement proactive mitigations in the effort to reduce the accidents incurred by our operators.



MONTHLY REPORT



11A: Operations Team Report

Staff Resources: *Amanda Wanke, Chief Operations Officer and Deputy CEO*

- **Iowa Public Transit Association (IPTA) Driver of the Year Awards Ceremony and State Roadeo:** DART was able to recognize Greg Bailey as 2022 Fixed Route Operator of the Year and Joe Vitale as 2022 Paratransit Operator of the Year. Congratulations to both of these valued employees, they do an excellent job of demonstrating DART's values to our riders.

Cesar Chavez, Justin Hazebroek, Julie Hibbard and Kurt Mackel-Wiederanders competed against operators from across the state in the IPTA Roadeo held on July 9th at the Kirkwood Community College in Cedar Rapids. Justin took home third place in the large bus competition and Kurt second place in the small bus competition.



- **Minnesota Public Transit Association (MPTA) State Roadeo:** DART was invited to have operators compete in the Minnesota Roadeo, held on July 16th. Jennifer Eaton and Tom Paca participated in the competition at the Riverland Community College in Austin, Minn.



Maintenance – Keith Welch, Fleet Manager

- **Supply Chain Impacts:** DART's fleet maintenance department continues to be impacted by parts shortages due to supply chain challenges. We have seen some improvement recently with around 95% of orders being received within 60 days, but we are still seeing back-order times of several months on about 5% of items, mainly electronic parts and some fuel filters. Staff continue to monitor inventory closely, adjusting ordering as needed, and scenario planning so that this shortage doesn't have an impact on regularly scheduled service.
- **Supply Cost:** DART is still seeing a steady increase in the cost of parts, tires, and petroleum oil lubricants (POL) such as engine oil, grease, and transmission fluid monthly. Staff continue to monitor and adjust ordering as needed. We are now starting to see fuel charges for deliveries. Some orders such as POL (petroleum products) bulk orders now have a minimum order or a fuel charge will be added. It is also becoming common to see extra surcharges for fuel and handling.

MONTHLY REPORT
11A: Operations Team Report



Transportation

- **New Fixed Route Manager:** Joy Crutcher has been promoted to the role of Fixed Route Manager. Joy will lead DART's fixed route services as well as the Dispatch and Operations Supervisor teams. Joy has extensive transportation management experience that makes her an excellent fit to provide the day-to-day leadership the team needs.
- **Hiring Update:** The operations team has several open positions within Mobility Services, Fixed Route, and Customer Experience. Hiring to fill these open positions—most of which are frontline employees—is a top priority.

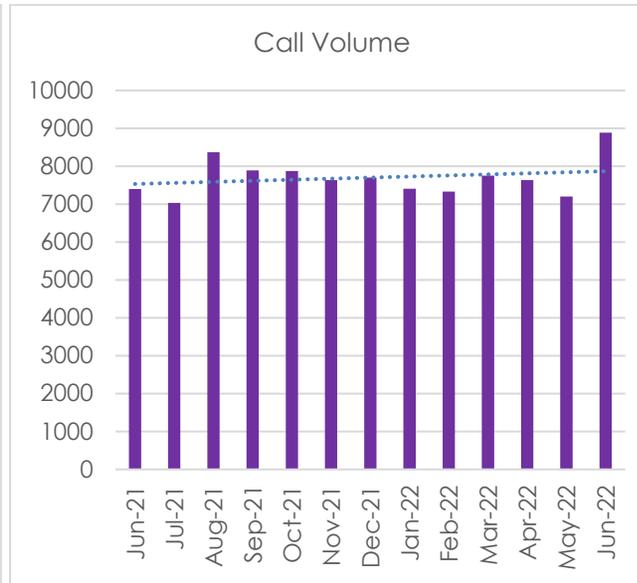
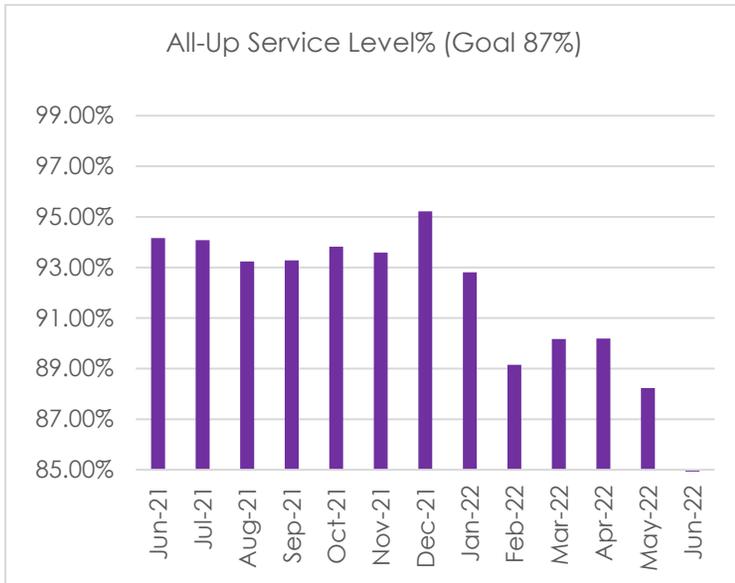
Facilities – Zach Ashmore, Facilities Manager

- **New Shelters:** The Facilities team has coordinated with DART's local contractor to schedule more shelter installs for mid-August to early September.
- **Annual Facilities Review:** The Facilities team has wrapped up the process of the annual facilities review, this includes our 50+ shelters, 1100 Dart Way, 620 Cherry, and the Center Street Parking Structure.
- **Fuel Issues:** At DART Way, the aging infrastructure is causing problems with DART's fuel tanks. The diesel fuel tank is having water intrusion issues that the Facilities Team is working to resolve.
- **Iowa State Fair Preparation:** The Facilities Team is working to paint and prep signage, wash down ticket booths, set up barriers at Gate 10, and get all ancillary items ready for the Iowa State Fair.

MONTHLY REPORT
11A: Operations Team Report



Customer Experience – Steve Wright, Customer Experience Manager



Service Level: The percentage of calls answered within 60 seconds.





MONTHLY REPORT



11B: Planning Team Report

Staff Resources: Luis Montoya, Chief Planning Officer

- **August Service Change:** On August 21st DART will implement a service change aimed at restoring DMPS tripper service for the school year. Staff worked with DMPS to identify additional trippers that will be added to the contract for the upcoming year.
- **Principal Foundation Pilots:** DART was awarded \$250,000 from the Principal Foundation to implement 2-3 pilot projects to demonstrate and learn about transit's role in financial stability in our region. The Planning team is developing a scope for service enhancements as part of the pilots that will be shared with the Commission at a future meeting.
- **DART on Demand West Des Moines:** Staff are refining the TOS proposal for a new DART on Demand zone in West Des Moines. Public outreach and analysis have led staff to recommend that rather than eliminating Route 72 entirely, we make efficiency improvements and still use the savings to launch an additional, smaller DART On Demand Zone.
- **DART on Demand (Microtransit) Pilot:** A table below shows key performance metrics for the first three weeks in July. Ridership peaked in May and declined a bit in June, likely due to decreased travel during the summer months. There continues to be some volatility in the wait times and trip denials due to no vehicle being available, and we continue to study how to best balance vehicle/driver resources with demand.

Week	Ridership			Customer Experience			Service Adoption	
	Trips	Total Unique Riders (who booked)	First Time Users (who booked)	No Proposed Trip Available (percent of requests)	Average Wait Time: on-demand only	Average Ride Duration	Mobile Booking Rate	New Accounts Created
July 5 - July 8	176	51	2	14%	27 minutes	12 Minutes	71%	19
July 11 - July 15	223	54	2	16%	18 minutes	10 Minutes	74%	12
July 18 - July 22	199	54	1	18%	23 minutes	11 Minutes	74%	14
Cumulative	5356		220					752

- **City of Des Moines License Agreement:** The City of Des Moines has requested that DART enter into a license agreement to document and govern DART bus stop signs and benches in the public right of way. Staff are in the process of negotiating the license agreement.
- **Fare Policy Research and Updates:** Staff are working with a consultant team to study DART's fare structure with the intent of establishing fare policies for DART on Demand, updating Rideshare fare policies, and investigate fixed-route fare collection technologies and policies.



MONTHLY REPORT



11C: External Affairs Team Report

Staff Resources: Erin Hockman, Chief External Affairs Officer

Marketing and Communications – Carissa Meredith, Marketing and Communications Manager

- **Independence Day service:** DART's Marketing team shared communications with riders notifying them that DART did not have service on Independence Day, Monday, July 4, 2022.
- **August service change:** DART's Marketing staff updated communications to reflect changes happening to school tripper service changes for the upcoming school year. These materials will be copromoted to students and their families with Des Moines Public Schools ahead of the start of the fall semester.
- **Ride to Thrive:** Communications continued throughout the month of July, notifying riders about the Ride to Thrive program, and encouraging past participants in the Half Fare Pilot to reenroll in Ride to Thrive and receive a new program ID. Communication methods included a social media campaign, postings to ridedart.com, on bus bilingual audio announcements, multilingual on bus hang tag newsletters, rider emails and signage posted in the DART lobby.



MONTHLY REPORT
11C: External Affairs Team Report



- **Yankee Doodle Pops and 80/35 service extensions:** DART extended service on the D-Line for Yankee Doodle Pops on Friday, July 1 garnering 641 rides and extended the hours and frequency of the Route 60 for the 80/35 Music Festival for an additional 94 rides. DART staff tables at the festival and staff a cooling bus. Both were popular with festival goers, especially those in the Gen Z age range.
- **Events:** Marketing and Communications staff patriated in two sponsored Chamber events and several other community events. Additional chamber sponsorships are planned for August and staff will assist with back-to-school events.
- **Iowa State Fair:** Advertising and promotion are in full swing for the Iowa State Fair Park & Ride. DART has once again partnered with WHO-TV13 and new this year we are working with Des Moines radio group to promote the Park & Ride. Digital and social media ads will have also be placed.

DART in the News

Top Stories:

KCCI 8 News This Morning – Cooling Center Trips

The Iowa State Fair 2022 starts soon. Here's what to know about dates, tickets and more

Prairie Meadows Casino gambling grows. Greyhound racing concludes. DART evolves.

Marketing Analytics Report

Metric	Jan 2022	Feb 2022	March 2022	April 2022	May 2022	June 2022	June 2021	Year Prior
MyDART App Accounts	35,007	35,829	36,818	37,752	38,413	39,470	26,541	49%
Website Unique Visitors	17,000	20,214	19,078	20,905	23,144	22,199	16,345	36%
Facebook Likes	5,983	6,000	6,000	6,023	6,062	6,074	4,991	22%
Twitter Followers	2,481	2,501	2,505	2,506	2,516	2,519	2,446	3%
Instagram Followers	1,488	1,490	1,503	1,517	1,540	1,552	1,425	9%
LinkedIn Followers	668	682	698	707	731	743	565	32%
Email Subscribers	13,349	13,532	13,504	13,500	13,551	13,550	13,130	3%
Trip Plans	29,093	29,081	32,865	31,214	37,318	44,412	21,315	108%
Real-time Map	22,908	21,729	22,532	21,248	28,359	34,609	18,023	92%
Next DART Bus	203,723	193,726	279,818	245,454	353,591	341,649	136,369	151%
SMS Text Messaging	123,598	125,722	147,731	135,373	136,377	128,733	107,720	20%
IVR Phone Calls	4,974	4,833	5,911	6,042	6,377	6,136	5,844	5%



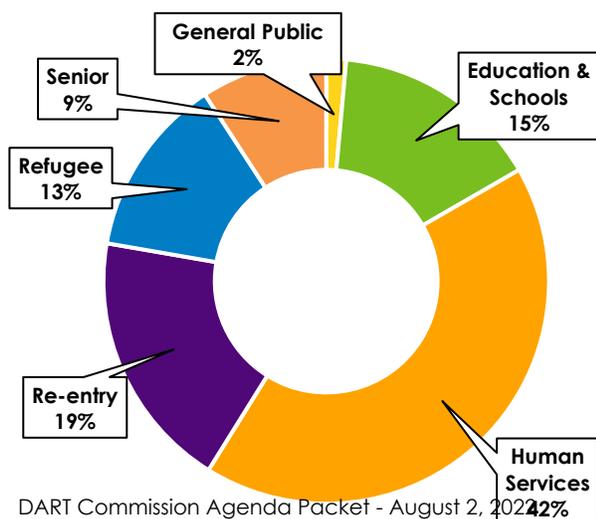
MyDART App Report

Metric	Jan 2022	Feb 2022	March 2022	April 2022	May 2022	June 2022	TOTAL FY 2022
Downloads	890	822	989	934	661	1,057	11,810
iOS	259	464	264	256	180	223	3,813
Android	631	617	725	678	481	834	8,256
Accounts Created	669	566	706	620	732	944	9,564
Orders Placed	3,005	3,164	3,472	4,082	4,615	5,132	43,759
Passes Purchased	4,118	4,363	4,774	6,674	7,473	8,409	66,006
Revenue	\$20,077	\$19,478	\$22,677	\$19,950	\$20,182	\$22,266	\$245,953

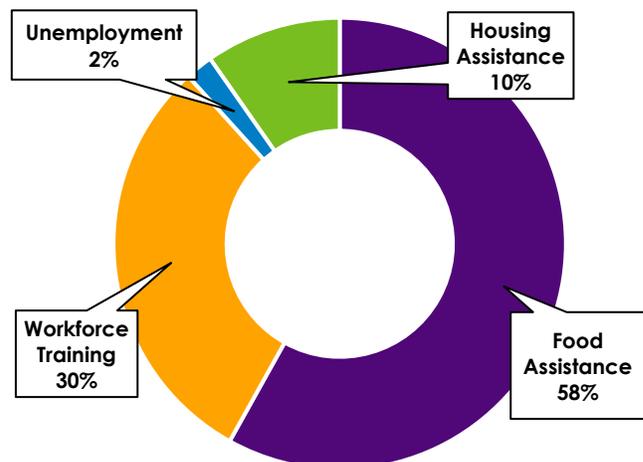
Business & Community Partnerships – Matt Harris, Business & Community Partnerships Manager

- **Art Shelters:** Nearly 80% of all planned art shelter locations have been activated, including art shelters installed or awaiting installation or art processes currently underway or completed. Art concepts are completed for more than half of all shelter locations. Seven (7) art shelters have been installed to date, with nearly a dozen installs slated for 2022, including the Roosevelt Cultural District (2), 6th Avenue Corridor (4), Ingersoll (2), and Windsor Heights (3).
- **Unlimited Access Program:** Ridership by Unlimited Access partners ended FY2022 with a month-over-month increase from May through June across nearly all partner segments, and a year-over-year increase of more than 60%. Partnership renewals in progress or upcoming include Unity Point, DMACC, DMU and City of Des Moines.
- **Ride to Thrive:** A permanent expansion of DART's half fare program was approved by the DART Commission in April and took effect July 1 as the Ride to Thrive* program. The program offers access to half-fare for individuals who can provide proof of receiving food, housing, or workforce assistance.
- **Mobility Coordination:** mobility outreach participation and half fare pilot program enrollment for FY2022 are shown below.

FY2022 Mobility Outreach Participants
 1,320 Total Participants



Half Fare Pilot* Enrollment by Eligibility
 556 Total Participants



MONTHLY REPORT
11C: External Affairs Team Report



RideShare – Victoria Henderson-Weber, RideShare Supervisor

- **New technology systems RFP:** A vendor contract for a new vanpooling technology platform was approved by the DART Commission in July. The adoption of a new technology platform will improve the user experience for passengers, enhance the program's ability to respond to interest from prospective employer partners, and introduce flexibility for non-English-speaking customers, a key demographic for program recovery.
- **Vanpooling promotion:** The number of active vanpools has increased more than 20% over the last six months with the addition of new vanpools from Pella Corporation and employees returning to work. Follow up to prospective RideShare partners is ongoing and will be aided by an in-progress overhaul of vanpooling partner boilerplate contracts and the impending implementation of a new technology platform. Fixed route ridership campaign materials are being adapted to incorporate Rideshare messaging to attract new riders returning to work.
- **Refugee transportation:** A vanpooling partnership between DART and the Bureau of Refugee Services takes effect in August and will provide transportation resources for new lowans navigating the resettlement process.

Public Affairs – Amy McCoy, Public Affairs Manager

- **State Initiatives:**
 - DART staff researched and updated a Request for Proposal (RFP) to solicit proposals for a new state lobbying contract and released the procurement. A recommendation will be presented to the Commission at their August meeting.
 - DART staff submitted feedback to the Iowa Public Information Board in response to new rulemaking for Iowa Code Chapter 22 regarding open records requests. DART sought clarification on a provision that would allow requests to be made through social media as well as sharing feedback on response times for acknowledging receipt of requests. The board has notified the public that it plans to re-work the proposed rules package.
- **Regional and Local Initiatives:**
 - Staff developed a presentation DART leadership gave during a Des Moines City Council workshop, providing an extensive update that covered governance, funding and details on planning for bus shelters and benches.
 - DART presented to the Grimes Chamber of Commerce. The presentation included an overview of DART, Grimes service and new initiatives.
- **Other Initiatives:**
 - DART staff prepared a newsletter to be sent in early August updating stakeholders on several DART initiatives, including sharing a selection of photos and videos regarding DART events and rider testimonials.

**State Legislative Update for the Des Moines Area Regional Transit Authority
Prepared by DART Staff on July 20, 2022**

- Monitored action by Gov. Kim Reynolds to appoint members of a legislative committee that will study increasing DART's funding without raising property taxes.
- Finalized plans for filing final client paperwork for previous contracts periods.
- Prepared for a discussion regarding the 2023 session and next steps on DART's priorities.
- Monitored action by the Iowa Public Information Board regarding new rules for open records requests.

Federal Update for Des Moines Area Regional Transit Authority
Prepared by Cardinal Infrastructure
July 25, 2022

Appropriations

The House Appropriations Committee approved the Fiscal Year (FY) 2023 Transportation, and Housing and Urban Development, and Related Agencies (THUD) spending bill in a 32-24 vote. The bill, along with a package of several other appropriations, has been readied for a full vote on the House floor expected before the August recess. The measure provides \$105.4 billion in total budgetary resources to USDOT, with much of the funding supporting infrastructure investments authorized in the *Bipartisan Infrastructure Law* (PL 117-58). The spending bill also includes \$3.7 billion for 1,827 Community Project Funding requests submitted by 331 Members of Congress. The full House of Representatives will consider the measure later this summer. More specifically there is:

- \$17.5 billion for FTA, including \$13.6 billion for Transit Formula Grants to expand bus fleets and increase the transit state of good repair; \$3 billion for Capital Investment Grants to create new transit routes, and \$646 million for Transit Infrastructure Grants to assist transit agencies in purchasing low and no emission buses and more,
- \$18.7 billion for FAA, \$193 million above fiscal year 2022, including \$1.6 billion for Aviation Safety and \$273 million for discretionary Airport Improvement Grants and projects,
- \$61.3 billion for FHWA formula programs funded from the Highway Trust Fund, including \$1.8 billion for discretionary highway programs and projects,
- \$3.8 billion for FRA, an increase of \$501 million above fiscal year 2022, which includes \$555 million for the Federal-State Partnership for Intercity Passenger Rail grant program, \$630 million for CRISI grants,
- \$2.3 billion for Amtrak — \$14 million above fiscal year 2022 — including \$882 million for the Northeast Corridor and \$1.5 billion for National Network grants,
- \$874 million for FMCSA,
- \$1.2 billion for NHTSA
- \$987 million for MARAD,
- \$775 million for “National Infrastructure Investments,” which is what the Administration calls RAISE, same amount as in fiscal 2022,
- \$100 million for the new Thriving Communities program created last year aimed at making transportation cleaner and more affordable and improving connections to health care, education and food security, among other purposes.

Hearings

On Tuesday, July 12, the Senate Banking, Housing, and Urban Affairs Committee held a hearing titled “Advancing Public Transportation under the Bipartisan Infrastructure Law: Update from the Federal Transit Administration.” Administrator Fernandez expressed her gratitude to Congress for the \$70 billion in COVID relief funding for transit. She said that the funding not only benefited riders but the nation’s economy. Now as the pandemic subsides, transit jobs are in high demand and ridership is slowly returning to pre-pandemic levels. She pledged FTA’s commitment to working hard to deliver the record-breaking investments from the IJA to agencies nationwide. Safety, improving the state of repair, equity and accessibility, and workforce development are all major priorities for the FTA.

On July 19, the House Transportation & Infrastructure Committee held a hearing on the implementation of the Bipartisan Infrastructure Law. USDOT Secretary Pete Buttigieg testified as part of the hearing. Secretary Buttigieg made the following comment regarding the gasoline tax and the Highway Trust Fund:

“As we continue to transition toward electric vehicles and zero-emitting vehicles, it means that we’re going to need to have other means for filling gaps in the Highway Trust Fund...Up until now Congress has been prepared to do that through general fund transfers. That’s certainly a legitimate way to fund our highway needs.” He also suggested alternatives to the gas tax, such as a vehicle miles travelled fee.

Reconciliation and CHIPS Act

Whatever form a reconciliation bill takes will be a hollow version of Democrats’ original priorities, as Sen. Joe Manchin (D-WV) has once again withdrawn from discussions surrounding a modest climate spending bill offset by corporate tax increases. Manchin wants to see a few more months’ inflation numbers before voting for such a package. For now, he’s ready to support a more modest bill addressing only health care issues without some of the other domestic spending priorities Democrats want to include. Democrats, and not just the progressive wing, are fuming over Manchin’s inability to make an agreement and have even suggested taking him off the Senate Energy Committee. Some want to move on, accept the deal in its current form, and work to push for a climate bill at a later date.

The bill to subsidize domestic semiconductor production hasn’t been finalized, but confidence is growing that the slimmed-down package could clear both chambers. The measure, dubbed “CHIPS plus” made it over its first procedural hurdle on July 19th in a 64-34 vote. That sets the bill up for success against the 60-vote threshold to withstand a filibuster.

Grant Opportunities (In Order of Due Date)

USDOT issued a NOFO for FY22 **University Transportation Centers (UTC)** Program. There is \$90 million in total program funding. DOT expects to award grants for up to 5 National UTCs, 10 Regional UTCs, and 20 Tier 1 UTCs. The agency will make award of \$4 million each for National UTCs, \$3 million each for Regional UTCs, and \$2 million each for Tier 1 UTCs. **The deadline to submit a Letter of Intent (LOI) is July 1, 2022, and the deadline to submit an application is August 25, 2022.**

USDOT issued Notice of Funding Opportunity (NOFO) for the Fiscal Year 2022 (FY22) **Safe Streets and Roads for All (SS4A)** Grant Program. The purpose of the program is to support planning, infrastructure, behavioral, and operational efforts to prevent death and serious injury on roads and streets involving roadway users. There is \$1B in total program funding. There is a 20 percent nonfederal cost share requirement. **The deadline to apply is September 15, 2022.**

USDOT launched the **Reconnecting Communities Pilot (RCP)** Discretionary Grant Program, a new opportunity authorized by the *Bipartisan Infrastructure Law* (PL 117-58). The agency will award \$195 million in total program funding for Planning Grants and Capital Construction Grants to support the restoration of community connectivity through the removal, retrofit, and mitigation of transportation facilities that have created historic barriers to mobility, access, and economic development. DOT expects to award \$50 million in funding for RCP Planning Grants ranging from \$100,000 to \$2 million each. The agency will award \$145 million in funding for RCP Capital Construction Grants ranging from \$5 million to \$100 million each. **The deadline to apply is Thursday, October 13, 2022.**

Build Back Better aka Budget Reconciliation

Senate Democrats are preparing for possible action on a party-line climate, tax and prescription-drugs bill after the latest round of talks between Senate Majority Leader Chuck Schumer and Sen. Joe

Manchin (D-WV). Manchin and Schumer met twice in mid-June to discuss the bill, and have sent some language to the Senate Parliamentarian to kickstart the rules process. Sen. Ron Wyden (D-Or), who chairs the tax-focused Finance Committee said he hopes to “get this done before the August break.”

The restarted negotiations between Senate Majority Leader Chuck Schumer and Senator Joe Manchin on possible fiscal year 2022 budget reconciliation legislation will go into overdrive this week, even though Schumer may be physically absent this week because he tested positive for COVID. On July 6, the Senate Finance Committee posted text of Medicare prescription drug purchasing legislation, to be part of the downsized reconciliation package, which the Congressional Budget Office says would reduce deficits by \$288 billion over 10 years. A package of tax increases is also coming soon, along with what is supposed to be over \$300 billion of climate-related spending. *Still unknown: how much of the \$44 billion in transportation-related funding from the December 2021 draft Senate version of the bill will be included with that climate spending, and whether or not a Manchin-approved bill will include the tax credits from the House bill to subsidize electric vehicle purchases by consumers.*

Climate emergency declaration

President Biden’s climate actions will fall short of a national emergency declaration on climate as many Democrats had been urging him to do. Biden’s climate actions will include more than \$2 billion in FEMA funding to help states deal with excessive heat and other climate change impacts. Additionally, the funding would be to expand flood control, shore up utilities, retrofit buildings, and help low-income families pay for heating and cooling costs. Biden is expected to roll out more executive actions on climate in the coming weeks.

NTD Reporting Changes

FTA is seeking public comment on five proposed NTD reporting changes and clarifications. These proposals are based on changes to Federal transportation law made by the Bipartisan Infrastructure Law. The goal is to bring all agencies up to speed with best practices and have consistent data collection procedures around the country. Fortunately, RTC has already begun tracking the data requested in the changes so they will have it available when requested by FTA. RTC will only need to adjust their emergency contact on the P-10 form and be prepared to submit the data they already collect to FTA when it releases guidance on how to do so.

DOT Issues Another GHG Measure Rule for State DOTs

On July 7, USDOT released a [new proposed rule](#) would require state DOTs and MPOs that have National Highway System mileage within their geographic boundaries to “establish declining carbon dioxide (CO2) targets and to establish a method for the measurement and reporting of greenhouse gas (GHG) emissions associated with transportation under Title 23, United States Code (U.S.C.)” The new rule is similar to a GHG performance measure rule proposed by the Obama Administration in April 2016 which was later withdrawn by the Trump Administration in May 2018 after serious debate over whether or not DOT had the legal authority to issue the rule. Section 30801 of the Senate EPW Committee’s proposed reconciliation title in the December 2021 draft bill would have given explicit legal authority to DOT to issue such a rule, and if the GOP takes control of either or both chambers of Congress this fall, you can expect amendments in the FY 2024 appropriations bills to prevent this rule from moving forward.



MONTHLY REPORT



11D: Finance, IT & Procurement Team Report

Staff Resources: Kent Farver, Chief Financial Officer

Operations and Maintenance Facility Update – Kent Farver, CFO

- DART's finalized Facility Planning Basis worksheet is scheduled to be delivered to our regional FTA office on August 15th. Taking the feedback from the FTA regional staff, the team has identified areas where additional information is necessary to provide along with draft site plans provided with this submission. We are currently working to identify water retention strategies for the site as the last part of this process. Once FTA deems this document as substantially complete, DART will proceed into the next phase of the NEPA and Section 106 review. We are also awaiting the result of our Bus and Bus Facility grant submission by mid to late August.

Finance Department – Amber Dakan, Finance Manager

- **Senior Staff Accountant**– Marika Gray, Senior Staff Accountant, has moved on from her role here at DART. We will begin the recruitment process in the coming months.
- **Fiscal Year End close out** – As FY2022 concluded on June 30, the Finance Team is working on closing entries within the financial system as well as all account reconciliations in preparation for the financial audit in mid-September.
- **Federal and State Quarterly Reporting** – The Finance Team is working to complete the required quarterly Federal Financial Reports (FFR) and Milestone Progress Reports (MPR) for each open grant agreement.
- **Iowa Public Transit Association (IPTA) Annual Conference** – Amber Dakan along with other DART staff attended the annual IPTA Conference in Cedar Rapids in July. FTA and State updates given were very informative of changing guidelines and the opportunity for Q&A.
- **Financial Planning**- Staff are actively working with Public Financial Management (PFM) on developing a 5-year financial plan to be complete this fall.

Procurement Department – Mike Tiedens, Procurement Manager

Upcoming Projects and Procurements:

- **Armored Car Services** – DART is seeking a contractor to provide daily cash and currency pickups from both DART locations and provide secure transportation to DART's bank for deposit.
 - Request for Proposals September 2022

Contracts and Task Orders Approved Recently:

- **Brand Refresh** – (DART Contract with Hatch for On-Call Marketing Services); Services include but are not limited to: Establish a brand architecture to ensure consistent and appropriate application of DART's brand and develop and present brand refresh concepts that include an updated look and feel for the DART brand.
 - The task order has a Not to Exceed amount of \$34,500



MONTHLY REPORT
11D: Finance/IT/Procurement

Future Procurements:

- HRIS System
- Fire Panel Replacement (DCS)
- Facilities Truck
- Bond/Financing Counsel Services
- Construction Management Services
- Occupational Medical Services
- Art Wall Refresh
- Security Upgrades
- Outdoor Signage Displays
- Glass Replacement

IT Department

- **Technology Plan (Health Assessment) Development** – R&B was onsite in mid-July to conduct in person interviews and facilitate group discussions. DART leadership is currently reviewing a draft report with follow up work anticipated to last through July and August.
- **Radio Replacement Project** – During August the IT team will program and test the vehicle radios and the portable radios, install building antennas, setup the transition bridge to allow overlap with the two systems, and start training after the fair. Vontas is engaged for programming the vehicles' IVLUs to communicate with the new radios. Vehicle installation is planned for this fall.
- **TransitMaster Upgrade** – Project plan and schedule is being developed and IT has started provisioning the new servers. The upgrade is expected to be completed by December 2022.



MONTHLY REPORT



11E: Human Resources, Training & Safety Team Report

Staff Resource: *Todd Sadler, Chief Human Resources Officer*

Human Resources – Shelby VanSteenwyk HR Specialist

• **Recruitment Update - Current Openings:**

- Bus Service Person
- Fixed Route Operator
- Paratransit Operator
- Buildings & Ground Person
- Operations Supervisor
- Transportation Director
- State Fair Driver

• **Recent Hires:**

- HR Specialist PT started on 06/2
- Bus Service employee started on 07/05
- Temporary Mail Assistant P/T started on 07/05
- Transportation Administrative Coordinator started on 07/07
- Marketing and Communications Coordinator started on 07/07
- Fixed Route Manager started on 06/06
- Procurement Manager started on 07/22
- Temporary Payroll Specialist started on 07/25
- Mobility Services Analyst P/T started on 07/25
- Fixed Route Operator started on 07/26
- Paratransit Operator to start on 08/01
- Fixed Route Operator to start on 08/01
- HR Manager to start on 08/1
- IT Director to start on 08/15
- Bus Service to start on 08/29

• **COVID-19 Update:** Since the beginning of 2022 we have had 84 positive tests. Notable statistics include that our total vaccination rate is 68.49 percent. We are continuing to showcase the benefit of getting vaccinations to our employees.

Training – Matt Johnson, Training Manager

- **Paratransit Trainees:** Training continues for two Paratransit Operators in training.
- **Paratransit New Operators:** One paratransit operator completed all training requirements and graduated to become a paratransit operator.
- **Smith System Safety Class Refresher:** Training continues Smith System safe driving course refresher classes for all experienced operators. These four-hour refresher courses cover material and reinforcement practice for the principles covered in the initial course that everyone receives upon hire. The majority of operators have now completed their refresher course.



MONTHLY REPORT

11E: Human Resources, Training and Safety Team Report

- **Senior Trainer:** The Senior Trainer role pilot program continues through the summer. Senior Trainer John Rugama has coordinated the Smith System refresher courses, as well as continued ongoing retraining and refreshers for new current operators.

Safety – Pat Daly, Safety Manager

- **Safety Risk Assessments:** Conducted safety risk assessments on several new DMPS school routes for Planning.
- **Iowa Public Transportation Association:** Assisted the IPTA with setting up and holding the 2022 State ROADEO.
- **DART Safety Plan:**
 - Developed initial draft of a reconfigured safety committee that meets the new requirements set forth in the Bipartisan Infrastructure Bill.
 - Continued work on emergency response plans included in the Agency Safety Plan



MONTHLY REPORT



11F: Chief Executive Officer

Staff Resource: Elizabeth Presutti, Chief Executive Officer

- **DART Executive Committee:** The DART Executive Committee met on Tuesday, July 19. The discussion items presented during the meeting included:
 - Principal Foundation Grant Service Pilot
 - DART Operations and Maintenance Facility
 - Strategic Planning
 - City of Des Moines License Agreement
- **Federal Transit Authority's Triennial Review:** this is one of FTA's management tools for examining grantee performance and adherence to current FTA requirements and policies. Mandated by Congress in 1982, the Triennial Review occurs once every three years. It examines how recipients of Urbanized Area Formula Program funds meet statutory and administrative requirements. The virtual onsite review will take place August 8, 2022. We will keep the Commission updated on the findings once this review has completed.
- **Iowa Public Transit Association (IPTA) Annual Meeting:** Myself and several DART employees attended the 2022 IPTA Annual Meeting & Training Conference took place in person in Cedar Rapids July 6-8, 2022! This is an opportunity for transit agency employees from across the State of Iowa to train on a variety of topics to benefit multiple staff positions such as transit leaders, managers, maintenance, drivers, administrators, and mobility coordinators.



FUTURE DART COMMISSION ITEMS



Future Agenda Items:

September 6, 2022 – 12:00 P.M.	
Action Items	Information Items
<ul style="list-style-type: none"> • Paratransit ADA Path Forward • State Lobbying Contract • City of Des Moines License Agreement • Surplus Vehicle Donation Policy • FY23 Safety Targets Approval 	<ul style="list-style-type: none"> • State Fair Update • ADA Paratransit Path Forward Update • Electric Bus Update
October 4, 2022 – 12:00 P.M.	
Action Items	Information Items
<ul style="list-style-type: none"> • Privacy Policy 	<ul style="list-style-type: none"> • Transit Riders Advisory Committee Update
November 1, 2022 – 12:00 P.M.	
Action Items	Information Items
<ul style="list-style-type: none"> • PTASP Approval • STBG Grant • Security Services 	<ul style="list-style-type: none"> • FY 2024 Budget Update • Quarterly Investment Report • Quarterly Financial Update • Quarterly Safety Report • Commission Nominating Committee

Upcoming DART Meetings:

MEETING	DATE	TIME	LOCATION
DART Executive Committee	Wednesday, August 17, 2022	12:00 p.m.	Zoom