



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 – 818 4096 5939/PASSCODE - 497122

JULY 9, 2024 – 12:00 PM

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1. CALL TO ORDER
2. ROLL CALL AND ESTABLISHMENT OF QUORUM
3. NOTICE OF MEETING
4. APPROVAL OF JULY 9, 2024, AGENDA
5. PUBLIC COMMENT (Limit 3 minutes)
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12. COMMISSIONER ITEMS
 - A. Reimagine DART Commission Workshop #1 – **Thursday, August 22, 2024 – 2:30-5:30 P.M.**
 - B. Reimagine DART Commission Workshop #2 – **Tuesday, September 17, 2024 – 1:00-4:00 P.M.**
13. NEXT MEETING: Regular DART Meeting - **Tuesday, August 6, 2024 – 12:00 P.M.**
14. 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.

PRESENTATION

6A: Iowa Public Transit Association (IPTA) Award Presentation

Staff Resource: Amanda Wanke, Chief Executive Officer

- Carl Lingen, President and CEO of the Iowa Public Transit Association (IPTA), will join the meeting for an award presentation.

PRESENTATION

6B: Des Moines Metropolitan Planning Organization (MPO) Update

Staff Resource: Amanda Wanke, Chief Executive Officer

- Dylan Mullinix, Executive Director of the Des Moines Metropolitan Planning Organization, will provide an update to the DART Commission.

7:	Transit Riders Advisory Committee (TRAC) Update
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Resource: *Brandon Paulsen, TRAC Chair*

A hybrid meeting of the Transit Riders Advisory Committee was held on Wednesday, June 26, 2024, and a quorum was not met. Included are key highlights from the meeting’s discussion.

- **Safety Plan Update:** Safety Manager, Pat Daly, provided an overview of what goes into DART’s overall safety plan. This update included reviewing reporting requirements and FY24 benchmarking and incidents including a discussion of hazard mitigation analysis as it relates to DART’s 30’ Gillig buses and the seating configuration. TRAC members were able to engage with questions as it relates to safety around vehicle speed and layover locations.
- **August Service Change:** Planning and Development Manager, Tony Filippini, updated TRAC on a minor service change that will be implemented in August as it relates to how DART provides DMPS school trip service and minor changes to some express routes given current ridership patterns.
- **O & M Facility Update:** Chief Operating and Planning Officer, Luis Montoya, provided an overview of DART’s progress towards its new operational and maintenance facility. This update included a review of the different phases of the project, funding opportunities and timeline for construction.
- **Communications Updates:** Communications Manager, Sarah Welch, reminded TRAC members of upcoming changes that would take place in July related to customer service hours and the elimination of Wi-Fi on buses to help balance DART’s budget. An update on website changes coming soon was highlighted to show riders how they can more easily find the information they are seeking.

The next hybrid TRAC meeting is currently scheduled for Wednesday, July 31, 2024.

**DES MOINES AREA REGIONAL TRANSIT AUTHORITY
COMMISSION MEETING MINUTES
MEETING HOSTED IN-PERSON AND VIRTUALLY
620 CHERRY STREET, DES MOINES IA 50309
June 4, 2024**



(Meeting was held in a hybrid format)

Commissioners/Alternates Present and Voting:

Dean O'Connor, Todd Shafer, Tara Cox, Michael McCoy (arrived 12.11pm, left 1.04pm), Connie Boesen, Andrew Borcharding, Paula Dierenfeld, Ross Grooters, Angela Connolly, Russ Trimble (left at 1.12pm) and Lauren Campbell

Commissioners Absent:

Srikant Mikkilineni

Other Commissioners Present:

Chris Coleman

CALL TO ORDER

Chair Russ Trimble called the meeting to order at 12:00 p.m. Roll call was taken, and a quorum was present.

Notice of the meeting was duly published.

APPROVAL OF AGENDA

Chair Russ Trimble requested a motion to approve the agenda as presented.

It was moved by Connie Boesen and seconded by Dean O'Connor to approve the June 4, 2024, agenda. The motion carried unanimously.

PUBLIC COMMENT:

Heather Armstrong from Des Moines asked if it was possible to have a north/east Polk County On Demand service. Chair Russ Trimble shared this will be something we will investigate in the future.

Garland Armstrong from Des Moines suggested a bench is needed at the Hubbell and Douglas NE corner stop and asked the progress of this and when construction will start. DART staff will follow up appropriately.

Lee Jasinski from Ankeny shared her concern on the DART on Demand rate increase, and she feels that she is not getting the information she needs to understand the changes. Todd Schafer, Ankeny Commissioner, shared he has received data from DART staff and will follow up appropriately once he has had a chance to review.

**DES MOINES AREA REGIONAL TRANSIT AUTHORITY
COMMISSION MEETING MINUTES – JUNE 4, 2024**



Alec Davis from Des Moines, leader of Momentum DSM, invited the DART Commission to their next event which will take place on June 29th.

CONSENT ITEMS

6A – Commission Meeting Minutes – May 7, 2024

6B – Health Insurance Renewal

6C – Caravan Intergovernmental Agreement

6D – On-Call Marketing Contract Amendment

6E – Mobility Services MOU Approval

6F – April FY2024 Consolidated Financials

It was moved by Connie Boesen and seconded by Tara Cox to approve consent item 6A. The motion was approved by Dean O’Connor, Todd Schafer, Tara Cox, Michael McCoy, Connie Boesen, Andrew Borcharding, Paula Dierenfeld, Ross Grooters, Angela Connolly, Russ Trimble and Lauren Campbell. Bridget Montgomery abstained.

It was moved by Connie Boesen and seconded by Tara Cox to approve the remaining consent items 6C-6F. The motion carried unanimously.

ACTION ITEMS

7A – FY 25 Detailed Budget Approval

Dan Washburn, Chief Financial Officer, outlined the proposed and detailed DART budget for FY25, reviewing with the Commission the revenue and expense assumptions used to develop the proposed budget. A workshop was held with Commission members and city managers on February 23rd where staff shared the FY 2025 budget and service level details. As required by the 28M Agreement, the commission published and then held a public hearing on April 23rd. The budget presented at that time was a high-level budget referred to as the “Status Quo Budget” and adopted to provide the commission and staff the most flexibility of approving a budget to align revenues with expenses. Following the public hearing and commission approval, finance staff certified and filed the FY 2025 Budget with the approved property tax levies with the Iowa Department of Management (IDOM) and Polk County in April. Now, DART staff have been able to confirm many of the previously unknown funding components of FY 25 and have brought back a revised detailed FY 2025 budget for approval. The FY 2025 Budget is largely similar to the original “Status Quo” budget originally certified thanks largely to funding received through the MPO. Revenue and expenditure assumptions were outlined in more detail in a budget book shared with Commissioners.

It was moved by Russ Trimble and seconded by Connie Boesen to approve and adopt the FY25 DART budget as presented. The motion carried unanimously.

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7B – August Service Change

Tony Filippini, Planning and Development Manager, provided the background on the August service changes, identifying that minor changes happen each August when DART implements a service change to add service to support the Des Moines Public Schools academic year and make any necessary route and/or schedule changes to improve service for customers. In addition, minor changes to Express Route trip times were outlined. None of the August changes meet the threshold of a “major service change” so therefore there is no impact to Title VI.

It was moved by Tara Cox and seconded by Todd Schafer to approve service changes to select fixed routes effective August 18, 2024. The motion carried unanimously.

7C – DART On Demand River Bend

Luis Montoya, Chief Planning and Operations Officer, provided background on the DART On Demand River Bend pilot service, which was funded through a Principal Foundation grant after the Community Foundation and United Way completed a Gaps Analysis in 2019-2020 where this community was identified as needing more transit. Unfortunately, the service was not as successful as hoped so after an evaluation it is being recommended to discontinue the service. DART staff will do a review to better understand and share why this service was not better utilized.

It was moved by Todd Schafer and seconded by Bridget Montgomery to approve service changes to discontinue DART On Demand River Bend at the end of FY 2024 Fiscal Year, with final day of service on Friday, June 28, 2024. The motion carried unanimously.

7D – DART On Demand Jordan Creek

Luis Montoya, Chief Planning and Operations Officer, shared that in March of 2022, the DART Commission approved the Transit Optimization Study as a framework for scaling DART services to the appropriate level to match user demand with available resources. To test various models of On Demand, a first mile/last-mile zone was designed for the community of West Des Moines to extend DART services into the developing Grand Avenue corridor using a cost-neutral approach. The On-Demand service launched June 12, 2023. The service operates Monday through Friday from 7:30 am to 4:00 pm. After one year we have seen low ridership so in response to this, an alternative service has been considered to match resources with demand. The transition from On Demand to On Call will save operating resources when not in use but will require customers to book one day in advance. The Via app will no longer be used for the Jordan Creek zone, customers will need to make reservations by calling DART Customer Service.

- The On Call zone will be available Monday – Friday from 7:00 am to 6:00 pm.
- The zone will be slightly larger to include the new Des Moines University West Des Moines Campus.

It was moved by Ross Grooters and seconded by Connie Boesen to approve the discontinuation of DART On Demand Jordan Creek at the end of the Fiscal Year 2024, with final day of service on Friday, June 28, 2024, and launch Jordan Creek on Call on July 1,

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2024 to operate Monday – Friday from 7:00 am to 6:00 pm. The motion carried unanimously.

7E - DART On Demand Fare Increase

Luis Montoya, Chief Planning and Operations Officer shared that The DART On Demand pilot originally launched with a \$1 promotional fare to help garner interest in the new service and incentivize new ridership. In August 2022, the DART Commission approved a fare structure for DART on Demand that mirrored the fixed route fare structure, which has a one-way base fare of \$1.75. The objectives of that fare level were shared. Since that time, DART has monitored ridership and service reliability and found that more vehicles had to be added to the service to keep it reliable for customers. DART On Demand in Ankeny has grown from 1 vehicle initially to 3 vehicles during the peak demand.

The recommendation is to make the DART On Demand fare consistent with the On Call fare at \$3.50. The half-fare price for this service remains at \$.75. It was also mentioned that public input was conducted as well as a paper survey.

It was moved by Tara Cox and seconded by Connie Boesen to approve an increase to the DART On Demand fare, as described above, effective in the new fiscal year. The motion carried unanimously.

DISCUSSION ITEMS:

9A – O&M Facility Update

Luis Montoya, Chief Planning and Operations Officer, provided an update on the design, construction and funding of the new Operations and Maintenance facility.

9B – Updated Procurement Policy and Procedures

Mike Gulick, Procurement Manager, provided an update on the changes made in DART's Procurement Policy and shared that this will be brought back for Commission approval at the July meeting.

9C – Performance Report – April 2024

Nate Bleadorn, Business Intelligence Manager, provided an update on the month of April's performance, sharing that ridership was up 15% compared to 2023 and up 10.5% year to date. Fixed Route, Paratransit and DART on Demand are all trending upwards for the month of April. Our preventable accident and non-preventable accident goals per 100,000 miles were met. Nate shared our new Route 2 performance since its launch in February and that April recorded the lowest number of customer complaints per 100,000 miles.

DEPARTMENTAL MONTHLY REPORTS (BY EXCEPTION)

Due to time, Vice Chair Ross Grooters asked the Commission to refer to their packets to review the monthly department reports, except for the CEO report.

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COMMISSION MEETING MINUTES – JUNE 4, 2024**



12A - Operations

12B – Planning

12C - External Affairs

12D – Finance/IT/Procurement

12E – Human Resources

12F – Chief Executive Officer

Amanda Wanke, Chief Executive Office, congratulated the DART Operators that placed in the DART Roadeo and shared who will be attending the upcoming State Roadeo which will occur in Ames this weekend. She thanked those Commissioners who were able to attend the “drive the bus” event and presented awards from the event to Commissioners Boesen and Shafer who were not able to stay for the whole event to get their awards. During the severe weather event this past month, DART staff were able to pivot quickly to provide school service and transport a homeless community to a nearby shelter. Amanda thanked DART staff for all their efforts during this event. Amanda reminded the Commission about the Reimagine DART survey and the dates identified for the community interviews.

FUTURE AGENDA ITEMS

None

COMMISSIONER ITEMS

None

NEXT MEETING:

Regular DART Meeting - Tuesday, July 9, 2024 – 12:00 P.M.

ADJOURN

Vice Chair, Ross Grooters, adjourned the meeting at 1:21 p.m.

Chair

Clerk

Date

CONSENT ITEM



8B:	Updated Procurement Policy and Procedures
Action:	Approve Updated Procurement Policy and Separating Procedures from Policy

Staff Resource: *Michael Gulick, Procurement and Contract Manager*

Background:

- DART’s Procurement and Procedures Manual hasn’t been updated since 2018.
- Federal Regulations and Guidelines have changed or been updated since 2018.
- The Procurement Department reviewed and updated the existing Public Procurement Policy and Procedures Manual with the goal of ensuring that it aligns with modern regulatory requirements, including thresholds, and provides DART with a reliable, user-friendly guide for all procurement activities performed in the organization. Brick Gentry (DART’s Legal Counsel) has evaluated and approved the updated policy.
- Normally when making routine policy updates, a redline copy would be provided to reviewers. However, the existing manual was overhauled, and the version provided for review is entirely new content. Therefore, instead of providing a redline version, we’ve summarized key changes below.
- The Procurement Department is currently helping to draft a Signature Policy for DART, which the Procurement Policy will reference. After consultation with DART’s Legal Counsel, it is recommended the signature policy is owned by the office of DART’s CEO and will be brought to the Commission for approval in the coming months.

Key Changes

- **Removed non-policy content:** The existing manual included both procurement *policy* and procurement *procedures*. This resulted in confusion between what was policy (which must be approved by commission and rarely changes) and what was procedure (which doesn’t require approval and changes often). As a result of removing procedure content, the updated document is considerably shorter. The procedures have been removed and reside in a separate document. What’s the difference between a policy and a procedure? Policy: A high-level statement of DART’s intentions, values, and overall approach to a particular area or issue. It provides a framework for decision-making, and it is required that staff adhere to all policies. Procedure: A detailed set of instructions that outlines how a task should be carried out. They’re practical guides for employees to follow when implementing DART’s policies.
 - **Renamed document:** Because the updated document contains only procurement policies, not procurement procedures, it was renamed to “DART Procurement Policy”.
 - **Adopted federal procurement regulations and guidelines including thresholds:** The updated policy adopts modern federal regulations and guidelines including procurement thresholds for both procurements that use federal funds, as well as those that don’t. Examples:



CONSENT ITEM

8B: Updated Procurement Policy and Procedures

- Micro-Purchase threshold to \$10,000, and Small Purchase threshold to \$250,000. Federal and FTA requirements such as Independent Cost Estimate, Cost and Price Analysis now align with current Federal and FTA thresholds.
- **Removed state procurement regulations:** DART is a discrete “governmental entity” and is not an instrument of the state executive branch (verified by DART’s Legal Counsel). Therefore, DART is not bound to Iowa Code Chapter 8A(IC8A) procurement code. The IC8A references were removed such as the \$50,000 informal competition threshold for procurement of professional services and goods.
- **Removed Procurement Card content:** P-Card is a payment mechanism. The PCARD policy is owned by the accounting department who manages the PCARD program.
- **Reorganized and streamlined content:** The existing manual had a complex structure and contained duplicative content. By reorganizing and streamlining it, it’s now easier to navigate and was further shortened.

Annual Review

- The Procurement Department will review and update the policy annually and seek Commission approval of updates as needed. This will ensure that the policy remains current and effective in supporting DART’s procurement initiatives

Recommendation:

Approve the updated Procurement Policy.

DART Procurement Policy

Scope: See "Purpose and Scope"

Responsible Department: Procurement

Effective Date: [7/10/2024](#)

Revision Date: 7/9/2024

Approved By: DART Commission on [x/x/2024](#)



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Purpose and Scope

- This document contains procurement policies, not procurement procedures.
- This policy:
 - Is a high-level statement that communicates DART's intentions, values, and overall approach to particular areas and issues.
 - Provides a framework for decision-making and actions at DART.
 - Is intended to set the direction, expectations, and principles that guide DART's employees', officers', agents', and Commission members' behavior and decision-making.
- This policy applies to all contractual actions by DART, with the following exceptions:
 - Transactions involving real estate
 - Joint development projects (in which DART forms a partnership with a private sector entity)
 - Purchases from government-regulated entities such as public utilities which are granted market exclusivity by the regulating agency
 - Purchases of professional subscriptions, memberships, seminars, and expenses in connection with industry meetings and conferences
 - Purchases for travel and living expenses on DART business and other similar expenditures incidental to the routine conduct of DART's business
 - Revenue contracts (contracts whose principal purpose is to generate revenue for DART) of the "open contract opportunities" sort (i.e., when a party seeks to contract with DART on an opportunity that is similarly open to any similar parties). At DART, these include Unlimited Access contracts, Caravan (vanpooling) contracts, and special event contracts.
 - Employment contracts

Applicability and Governance

- DART's procurement actions are governed by:
 - Federal regulations regarding procurements that use federal funds, including 49 U.S.C. (known as the Common Grant Rule)
 - FTA Master Agreement (FTA MA(31))
 - This procurement policy
- Guidelines for following federal regulations are provided in the following resources:
 - 2 CFR 200 (issued by the Office of Management and Budget (OMB) and commonly known as the "Uniform Guidance")
 - FTA C4220.1F (Third-Party Contracting Requirements); Note that this "applies to... regional public transportation authorities that are not a State" and allows for such an authority to "use its own procurement procedures, if those procedures conform to applicable Federal law and regulations, including the applicable Common Grant Rule."
 - Federal Acquisition Regulations (FAR)

- It’s DART’s policy to follow federal regulations for all procurements, even those that don’t use federal funds. If no federal funds are used, federal provisions and certifications aren’t required.

Who May Procure for DART?

Only DART employees who have received the appropriate level of training may procure goods and services for DART. All procurements over \$50,000 must be conducted by DART’s Procurement Department.

Procurement Authority Levels *		
Contract Threshold**	Who May Conduct the Procurement?	Notes
Micro-Purchases (up to \$10,000)	Employees who have completed Micro Purchase training	The Procurement Department provides Micro-Purchase training
Small Purchases between \$10,001 and \$50,000	Employees who have completed Small Purchase training	The Procurement Department provides Small Purchase training
>\$50,000	Procurement Department must conduct all procurements over \$50,000	

* Procurement Authority is not the same as Signature Authority. For information about Signature Authority (i.e., who may approve/sign invoices, purchase orders, and other contracts), refer to DART’s Signature Policy.

** Includes the entire life of contract, including the aggregate sum of all amendments, change orders, task orders, and renewals, of the contract

General Procurement Standards

Standards of Conduct

- The conduct of DART employees, officers, agents, and Commission members involved in procurement or contracting activities are governed by:
 - Chapter 68B of the Code of Iowa (Government Ethics and Lobbying)
 - 2 CFR 200 (issued by the Office of Management and Budget (OMB) and commonly known as the “Uniform Guidance”)
 - This procurement policy
 - The Employee Code of Conduct & Ethics policy and the Conflict of Interest policy, located in the DART Handbook.

- Any person who knowingly and intentionally violates these standards is subject to disciplinary action, up to termination of employment.

Sources

To acquire property or services, DART can:

1. Use its own labor force and equipment
2. Enter into an agreement for shared use of property and services
3. Partner with another purchaser to complete a joint procurement
4. Use a State or local government purchasing schedule or purchasing contract
5. Use Federal excess and surplus property
6. Use a General Services Administration (GSA 70) federal supply schedule.
7. Use an existing contract that's held by another recipient (called "piggybacking")
8. Shop the open market (i.e., compare prices of vendors, solicit quotes, bids, and proposals, etc. to allow potential contractors to compete with one another)

Geographic Preferences

- With some exceptions, DART's competitive procurement decisions may not take into consideration any state or local geographic preferences, even if those preferences are imposed by state or local laws or regulations.
- Geographic location may be a selection criterion only in procurements for:
 - Architectural and engineering (A&E) services
 - State licensing requirements
 - Major disaster or emergency relief

Competition

- DART's competitive procurement transactions must be conducted in a manner that:
 - Maximizes full and open competition
 - Doesn't provide an unfair competitive advantage to any potential vendor
- Some situations considered restrictive of competition include:
 - Unreasonable business requirements for bidders or offerors
 - Unnecessary or excessive experience requirements, excessive bonding requirements, insurance, warranty, or similar requirements that affect an otherwise qualified firm's ability to compete
 - Noncompetitive pricing practices between firms or between affiliated companies.
 - Using prequalification procedures that conflict with FTA Circular 4220.1F, Chapter VI(1)(c)
 - Noncompetitive awards to any person or firm on retainer contract if that award is not for the property or services specified for delivery under the retainer contract

- Specifying only a “brand name” product, without specifying that equivalent products will be accepted and without providing a description of equivalent products.
- Any arbitrary action in the procurement process
- Competitive procurement standards may be waived:
 - When purchasing fleet replacement parts and related inventory, when doing so is necessary to:
 - Ensure the timeliness of the receipt
 - Maintain compatibility and warranty
 - Control shipping costs
 - When DART accepts from a private entity a grant that has specific requirements or stipulations
- It is the policy of DART that Disadvantaged Business Enterprises (DBEs), as defined in 49 C.F.R. Part 26, shall have an opportunity to participate in awards of DART’s contracts and subcontracts. DART must make good-faith efforts to ensure utilization of DBEs. Refer to [DART’s DBE Policy](#) for information regarding how Procurement is involved in DART’s DBE program.

Economic Purchasing and Price Principles

- Duplicative and unnecessary purchases must be avoided. DART purchases only what it needs at the time of the acquisition.
- Duplicative procurement standards may be waived for fleet maintenance purposes, when it’s necessary for DART to purchase backup/duplicative supplies of fleet replacement parts and related inventory.
- Consideration should be given to consolidating or breaking out procurements to obtain more economic pricing (or to provide opportunities for disadvantaged businesses, women-owned business, minority-owned businesses, or small businesses). However, it’s prohibited to consolidate or break out procurements for the purpose of circumventing competitive procurement requirements.
- Where appropriate, analysis will be made of lease versus purchase alternatives or any other appropriate methodology to determine the most economical approach.

Price Reasonableness and Analysis

- Price reasonableness should be considered for every procurement.
- (FTA Best Practices Manual 4.6) For procurement actions (including modifications) above the Simplified Acquisition Threshold (SAT) and for public improvements (construction/building work), the following are required:
 - Independent Cost Estimate (ICE), and
 - Price Analysis or Cost Analysis

Independent Cost Estimate (ICE)

- The ICE is an estimate of what the product or service “should” cost.
- The ICE must be prepared without knowledge of the contractor’s proposed pricing (i.e., the ICE must be performed before receiving bids or proposals).
- ICE sources/resources include:
 - Past purchases
 - Published price lists
 - Historical pricing information
 - Comparable purchases by other agencies
 - Engineering estimates
 - Independent third-party estimates
- The source and date of an ICE must be documented

Price Analysis

- A Price Analysis is simply a comparative process involving total price.
- The accepted forms of price analysis techniques include:
 - Adequate price competition (at least two bidder responses)
 - Prices set by law or regulation
 - Established catalog prices and market prices
 - Comparison to previous purchases

Cost Analysis

- A Cost Analysis is an element-by-element analysis of the costs that make up the total price.
- If a reasonably sound Price Analysis cannot be determined, a Cost Analysis is required.

DART’s Third-Party Contract Provisions

- **General Provisions:** DART’s Procurement Department maintains a library of boilerplate contract provisions, which should be used as a starting point for its third-party contracts. These provisions include, for example, language regarding contract term, contract price, contractor obligations, scope of work, project schedule, contract modifications, delays, payment, dispute resolution, and more.
- **Special Provisions:** Certain types of contracts require DART’s Data Privacy and Security Standards Provisions and/or SaaS Terms and Conditions.

Federal Third-Party Contract Provisions and Certifications

- Applicable federal provisions (which flow down to subcontractors) must be included in contracts that use federal funds.
- Which provisions are required depends on what the contract is for, what the price is, and more. For example, all contracts that use federal funds require an

equal employment opportunity provision, but only construction contracts over \$2,000 require an anti-kickback provision.

- Contractors must sign applicable federal certifications. Which certifications are required depends on what the contract is for, what the price is, and more. For example, contracts for transit (people-moving) services require an Alcohol and Controlled Substances Testing certification.

Specifications

- Contract specifications describe in detail the requirements surrounding the product or service DART intends to procure.
- DART solicitations must include a clear, accurate description of the technical requirements for the material, product, or service to be procured.
- Whenever practical, requirements will be described in terms of functions to be performed or level of performance required, including the range of acceptable characteristics or minimum acceptable standards.
- Specifications should be detailed enough to ensure that bidders can submit pricing on a comparable basis. However, specifications or scopes of services for negotiated procurements may be more general and accommodate the possibility of alternative solutions or products.
- Specifications shouldn't contain details that could restrict competition or be so detailed as to restrict competition.
- When it's impractical to describe all technical requirements clearly and accurately, a "brand name or equal" description may be used to define the performance. This description should set forth those salient physical, functional, or other characteristics of the referenced product that an equal product must have in order to meet the recipient's needs. However, this method may not be used to limit competition, but rather to describe the characteristics of the product needed. The specifications must include the relevant characteristics that the product must meet and state that vendors may offer "equal" products meeting those characteristics. (If only a "brand name" or make/model is specified, without the "or equal" provision, the procurement must be processed as a sole source and is subject to justification requirements).
- Whenever practicable and economically feasible, products and services dimensioned in the metric system of measurement are acceptable.
- Whenever practicable and economically feasible, preference will be given to products and services that conserve natural resources, protect the environment, and are energy efficient.

Selection Procedures

- DART's selection procedures ensure fair, unbiased evaluation of competing offers for all types of competitive procurement transactions.
- When a purchase from a vendor exceeds the micro-purchase threshold, the vendor must be determined to be responsive and responsible. Responsibility determination must include a search of the online System for Award Management

(<https://sam.gov/>) to determine that the vendor has not been debarred or suspended from federal awards.

- If there is a technical evaluation (often required in RFPs), it must be overseen by the Procurement Department to ensure it's fair, thorough, and adequately documented. A determination shall be made by the Procurement and Contracts Manager that the apparently successful offeror:
 - Is responsive (i.e., complies with all material elements of the solicitation)
 - Is responsible (i.e., possesses the technical and financial resources to successfully perform the contract, and has a satisfactory record of past performance, compliance with public policy, and integrity).
 - Is submitting a fair and reasonable price

Records / Documentation

- DART must maintain records detailing the history of a procurement in a manner consistent with its size, complexity, and cost. At a minimum, these records include:
 - **Signed/executed copy of contract**, if one exists
 - **Procurement Method:** The rationale for the method of the procurement (e.g., competitive sealed bidding, competitive negotiation, sole source, etc.)
 - **Contract Type:** The rationale for the selection of the contract type (e.g., fixed price, cost reimbursement, etc.)
 - **Contractor Selection:** The rationale for contractor selection or rejection, as well as a written responsibility determination for the successful contractor, if applicable
 - **Cost or Price:** The basis for the contract price, which is typically determined using an independent cost estimate, a cost analysis, or a price analysis
- Additional records to maintain could include things like bond documentation and contractor correspondence.
- DART's:
 - Record retention policy is here: K:\Procurement\Procurement\Records Retention\Final\DART Records Management Policy - Final.
 - Procurement record retention rules are located on the specified tab in K:\Procurement\Procurement\Records Retention\Final\Exhibit A - DART Record Retention Schedule

Contract Period / Term

The appropriate contract period (term) depends on the contract type.

Contract Type	Contract Period Not to Exceed
Rolling Stock and replacement parts	5 years
Services	6 years (maximum 3-year initial term, with up to three individual 1-year renewals)
Information Technology (e.g., SaaS)	10 years (maximum 5-year initial term, with up to five individual 1-year renewals)

Base contract periods on sound business judgment, including considerations like:

- The nature of the item being purchased
- The need to give the contractor the opportunity to recapture start-up costs
- The need to give competing vendors the opportunity to do business with DART
- The relative benefit to DART of a longer or shorter contract term

Resolution of Third-Party Contracting Issues

DART is responsible for resolving all contractual and administrative issues arising out of its third-party procurements, including source evaluation and selection, protests of awards, disputes, and claims using good administrative practices and sound business judgment. All DART contracts include terms for protests, disputes, and claims/litigation.

Contract Options

- A contract option is a unilateral right in a contract by which, for a specified time, DART may elect to purchase additional equipment, supplies, or services called for by the contract, or may elect to renew a contract.
- A contract renewal is a common type of contract option. (Note that a contract renewal is different from a contract extension, which is a type of contract modification).
- Official change orders (aka amendments) must be completed when a contract option is exercised.
- There are limitations to when and how contract options can be exercised. For example, if a contract’s options were not evaluated as part of the original contract award, exercising those options after contract award will result in a sole source award requiring justification.
- Exercising an option after DART has negotiated a lower or higher price will also result in a sole source award unless that price can be reasonably determined from the terms of the original contract, or that price results from Federal actions that can be reliably measured, such as changes in federal prevailing labor rates.



- DART may not exercise an option unless it has determined that the option price is better than prices available in the market, or that when it intends to exercise the option, the option is more advantageous.

Contract Modifications

- Modifications to an active contract are often desired or required. A contract modification might, for example, alter a project timeline, modify tasks that were in the original scope of work, or extend a contract.
- Each contract modification must stand on its own merit, just like an original contract. Therefore, you must have:
 - A justification / reason (requirement) for the change
 - Funds to support the change
 - Evidence that prices are fair and reasonable
 - Documentation that tells the story of the purchase
- When modifying a contract, an official change order (aka amendment) must be completed, according to the terms outlined in the original contract. If a change order adds work, the work must be within the original scope of the contract.

Procurement Thresholds

The method of procurement/degree of competition required depends in part on the dollar value and the type of contract. Purchases may not be divided to be under a dollar threshold to avoid competition or procurement standards.

Price Threshold (for life of contract, including extensions)	Procurement Level	Method of Procurement / Minimum Degree of Competition
Up to Micro-Purchase Threshold (*\$10,000)	Micro-Purchase	No competitive quotes required.
Micro-Purchase Threshold up to Simplified Acquisition Threshold (SAT) (*\$250,000)	Small Purchase	At least two competitive quotes required (three or more are preferred)
Greater than Simplified Acquisition Threshold (SAT) (*\$250,000)	Large Purchase	Competitive sealed bidding or competitive proposals are required

* As of April 2024:

- The Micro-Purchase threshold is \$10,000 (as set by the FAR at 48 CFR part 2)
- The Simplified Acquisition Threshold is \$250,000 (as set by the FAR at 48 CFR part 2)

Micro-Purchases

Micro-purchases are typically made for items sold “off-the-shelf” to the general public (e.g., pencils, hand sanitizer). They are single, discrete purchases, or “one-off” purchases, to which contract periods/length of contract considerations don’t apply.

Competition: No competition is required, but it’s encouraged when practicable.

Contract Required: No contract or Purchase Order (PO) is required for micro-purchases.

Documentation:

- Most micro-purchases don’t require documentation (with some exceptions, such as construction projects over \$2,000 that use federal funds)
- It’s recommended that you retain the following records.
 - DART’s Written Record of Procurement Micro-Purchases form
 - Quote, order form, receipt, or invoice
 - If vendor requires it, the Purchase Order (PO)

Additional Information:

- Purchases may not be split into micro-purchases to avoid a competitive solicitation process.

Small Purchases

- Small purchases are relatively simple and informal solicitations for services, supplies, or other property.
- Small purchases could involve multi-year contracts, as long as contract aggregate expenditure doesn’t exceed the SAT.
- Procurements over \$50,000 must be handled by DART’s Procurement Department.

Competition Required: Competition is required. At least two (but ideally three) quotes or proposals from qualified sources must be sought out and documented.

Contract Required: A contract or PO is required, with applicable federal clauses and certifications included if using federal funds.

Documentation Required:

- DART’s Written Record of Procurement – Small Purchases form
- Invoices
- Purchase Order, if above \$10,000
- Copy of solicitation correspondence (i.e., the letter or email that was sent to vendors)
- Responses received from bidders (in email or written form), and any other bidder correspondence
- DART’s Bid Quotation Form, which includes reason for award determination and details such as buyer name, date, department, funding source, budgetary

estimate, vendor information, item description, unit and total costs, and comments.

- DART Commission approval for procurement, if \$100,000 or greater
- See [Records / Documentation](#)

Large Purchases

Competition Required: Competitive sealed bidding through DART's eProcurement system is required.

Contract Required: Yes, with applicable federal clauses and contractor certifications included if using federal funds.

Documentation Required:

- DART's Record of Procurement – Large Purchases form
- Determination of responsiveness and responsibility
- Solicitation, including specifications, and amendments
- Advertisement of solicitation
- Notified vendors/bid list
- ICE Summary
- Price Analysis and (if needed) Cost Analysis
- Documentation concerning rebid or proposal conferences and/or any solicitation Q&As
- Notice of Intent to Award Contract
- Rejection letters
- Public Bid opening documentation
- Best and Final Offers (BAFOs)
- Protest letters, decisions, and related documents
- Signed federal clauses and certifications
- DART Commission approval for procurement
- Contractor-submitted data and reports
- Correspondence and documentation related to complaints or contractor performance
- Documentation regarding pre-award or post-award Mistakes in Bid
- Invoices / Purchase Orders
- Additional documentation is required for some contract (e.g., construction contracts)
- See [Records / Documentation](#)

Procurement Methods

Competitive Quotes

Definition:

- A method of procurement that involves soliciting quotes (via a Request for Quote, or an RFQ, usually via emails or letters) for specified goods or services from at least two (preferably three or more) vendors
- DART determines from which vendors to solicit the quote.
- A reasonable effort should be made to solicit quotes from a range of vendors.
- The fixed-price award goes to the lowest quote. This method doesn't permit negotiations or consideration of qualitative factors, with some exceptions listed below.
- Results in a Firm Fixed Price Contract

When it's used/additional information:

- Competitive quotes are used to find vendors for micro-purchases and small purchases (although they're not required for micro-purchases).
- Occasionally negotiations are allowed during this type of procurement. For example:
 - Only a single quote was received, so DART negotiates with the vendor to ensure a fair price.
 - The lowest quote was too expensive, so DART negotiates with that vendor to obtain a price within available funds.

Competitive Sealed Bidding

Definition:

- A method of procurement that includes public notice of an Invitation for Bid (IFB) and evaluation of bids based on criteria established in the IFB.
- The fixed-price award goes to the lowest responsive and responsible bidder. This method doesn't permit bidder negotiations or consideration of qualitative factors, with some exceptions listed below.
- Results in a Firm Fixed Price Contract

When it's used/additional information:

- This is the preferred method for acquiring property, construction, and other well-defined services or goods. If a different method is used for these purposes, there must be a well-documented justification and it must be approved in advance by the Procurement Department.
- Occasionally negotiations are allowed during this type of procurement.
 - Examples:
 - Only a single responsive bid was received from a responsible bidder, so DART negotiates with the bidder to ensure a fair price.

- The responsive bid from the lowest responsible bidder was too expensive, so DART negotiates with that bidder to obtain a contract price within available funds.
- However, DART may not, as part of a negotiation process, alter the scope and specifications defined in the IFB in a manner that might have attracted additional bidders if it had been incorporated in the solicitation. The IFB must be canceled and started over.

Competitive Proposals

Definition:

- A method of procurement that includes the issuance of a written Request for Proposal (RFP), public notice of the RFP (if over SAT threshold), evaluation based on criteria established in the RFP, and negotiation with the top ranked Offeror.
- The negotiated award (of either a fixed price contract or a cost-reimbursement type contract) goes to the Offeror offering the best value to DART.

When it's used: Competitive Negotiation is required when the Procurement and Contracts Manager has determined that all of the following conditions exist:

- A complete, adequate, and realistic specification or purchase description isn't available.
- Two or more responsible offerors are willing and able to compete effectively for the award.
- The selection of the successful offeror requires consideration of factors other than price.
- Discussions with offerors are anticipated.

Specialty Procurements

Construction

Definition:

- Construction contracts are contracts for building, altering, repairing, improving, or demolishing any structure, building, or highway, and any draining, dredging, excavation, grading, or similar work upon real property.
- Requires competitive sealed bidding, except under very limited instances and with a written determination made in advance by DART's Procurement and Contracts Manager.

Special considerations:

- Davis-Bacon prevailing wage requirements apply to construction contracts exceeding \$2,000.
- DART will use value engineering for all construction projects over \$10 million.

Architectural and Engineering (A&E) Services

- FTA requires the use of the qualifications-based procurement procedures contained in the Brooks Act to acquire A&E services, and also for program management, construction management, feasibility studies, preliminary engineering, design, architectural, engineering, surveying, mapping, and related services. (49 U.S.C. Section 5325(b)(1))
- Geographic location may be a selection criterion if an appropriate number of qualified firms are eligible to compete for the contract.

Rolling Stock

The term “rolling stock” applies to vehicles used to transport passengers and includes buses and vans. Light duty vehicles used to transport passengers are considered rolling stock. Light duty vehicles such as vans, sedans, and pick-up trucks used for administrative and maintenance purposes are considered equipment.

DART will comply with the requirements of FTA C 4220.1F, Chapter 4, Section 2.e., Rolling Stock – Special Requirements when procuring rolling stock. These requirements include accessibility, special DBE requirements, minimum service life, spare ratios, air pollution and fuel economy, pre-award and post-delivery review, bus testing, and time limits on options.

Revenue

- A revenue contract is one in which DART provides access to public transportation assets to generate revenue or create business opportunities.
- There are two types of revenue contracts:
 - Limited Contract Opportunities: A contract opportunity that is not open to all similar parties due to its limited nature (e.g., there is limited space on the side of a bus for advertising). DART uses a competitive process for these to allow interested parties an equal chance to obtain that limited opportunity.
 - Open Contract Opportunities: A contract opportunity that is open to any interested party, so no competitive process is necessary. DART’s open contract opportunities include Unlimited Access contracts, Caravan (vanpooling) contracts, and special events contracts.

Sole Source

Definition: A Sole Source procurement is one that has been accomplished through the solicitation and acceptance of a proposal from only one source, when normally competition would be required.

When It’s Used:

- Sole Source procurements can be used only if only one source is practically available.
- Circumstances that may lead to and justify a sole source action are:

- **Unique Capability or Availability.**
 - Unique or Innovative Concept. The offeror demonstrates a unique or innovative concept or capability not available from another source. Unique or innovative concept means a new, novel, or changed concept, approach, or method that is the product of original thinking, the details of which are kept confidential or are patented or copyrighted, and is available to DART from only one source and has not in the past been available to DART from another source.
 - Patent or Restricted Data Rights. Patent or data rights restrictions preclude competition.
 - Substantial Duplication Costs. In the case of a follow-on contract for the continued development or production of highly specialized equipment or services and major components thereof, when it is likely that award to another contractor would result in substantial duplication of costs that are not expected to be recovered through competition.
- **Single Bid or Proposal.** Upon receiving a single bid or proposal in response to a solicitation, the Procurement and Contracts Manager will determine if competition was adequate. This should include a review of the specifications for undue restrictiveness and might include a survey of potential sources that chose not to submit a bid or proposal.
 - Adequate Competition: Procurement and Contracts Manager acknowledges competition to be adequate when the reasons for few responses were caused by conditions beyond DART's control. Many unrelated factors beyond DART's control might cause potential sources not to submit a bid or proposal. If the competition can be determined adequate, DART's competition requirements will be fulfilled, and the procurement will qualify as a valid sole source.
 - Inadequate Competition: Procurement and Contracts Manager acknowledges competition to be inadequate when caused by conditions within DART's control. For example, if the specifications used were within DART's control and those specifications were unduly restrictive, competition will be inadequate.
- All change orders (amendments) outside the scope of the original contract are considered a sole source procurement.
- A written justification for the sole source procurement is required.

Emergency

Definition: An Emergency Procurement is one that has been made without following normal procedures and competition guidelines, due to an emergency.

When It's Used/Additional Information:

- Emergency procurements are allowed only when a delay could result in jeopardy to persons or property.
- The situation leading to the emergency should be one that could not normally be anticipated.
- In all cases of emergency purchases, solicitations should be requested from as many potential sources as is practicable under the circumstance.
- Justification for the emergency procurement and a statement of reasonableness of costs must be documented and submitted to the Procurement and Contracts Manager for approval. This documentation must be attached to the purchase order and placed in the procurement file.

Approval: Must be approved by the Procurement and Contracts Manager. If it's above Commission threshold, it must be approved by the DART Commission at the next feasible opportunity following the emergency procurement.

State or Local Government Purchasing Schedules or Purchasing Contracts

A state or local government purchasing schedule or purchasing contract means an arrangement that a State or local government has established with multiple vendors in which those vendors agree to provide essentially an option to the State or local government, and its subordinate government entities and others it might include in its programs, to acquire specific property or services in the future at established prices.

State or local government purchasing schedule or purchasing contracts are subject to federal requirements, including, but not limited to, full and open competition, no geographic preferences, Buy America, and bus testing, and must include all FTA required clauses and certifications with its purchase orders issued under the State contract.

GSA's Cooperative Purchasing Program

- Per FTA Circular 4220.1F, DART can use the GSA's Cooperative Purchasing Program to purchase:
 - Information technology (Section 211 of the E-Government Act of 2002, 40 U.S.C. Section 502(c)(1)) and
 - Products and services to facilitate recovery from a major disaster (Section 833 of the John Warner National Defense Authorization Act for Fiscal Year 2007, Public Law 109-364, amended 40 U.S.C. Section 502(d)).
- All federal requirements, required clauses, and certifications must be properly followed and included, whether in the master contract or DART's purchase documents.

Piggybacking

DART can use contract options held by another recipient (known as “piggybacking”) (per FTA C 4220.1F). When DART obtains contractual rights through assignment, it may use these rights only after determining that:

- The original contract price remains fair and reasonable
- The original contract provisions comply with all applicable Federal requirements, including the presence of an “assignability” clause
- The assigning recipient originally procured quantities necessary for their needs (i.e., they did not procure unreasonably large quantities)
- The quantities the assigning recipient acquired, together with the quantities the acquiring recipient seeks, do not exceed the amounts available under the assigning recipient’s contract
- The agency with the contract complied with all FTA requirements relating to competition and performance of a cost or price analysis
- The prices it will pay are fair and reasonable (using Price Analysis or Cost Analysis)

All appropriate documentation from the original awarding agency must be obtained and retained in the procurement file for that acquisition.

Prohibited and Restricted Procurement Methods

- (Prohibited) **Cost Plus a Percentage of Cost** and **Percentage of Construction Cost**: In these contracts, the contractor’s fee automatically increases when its costs (time, materials) increase. In other words, the more the contractor spends, the higher the contractor’s fee is. This incentivizes inefficiency.
- (Restricted) **Cost Plus Fixed-Fee**
 - Also known as on-call contracts, task order contracts, or Indefinite Delivery Indefinite Quantity (IDIQ) contracts.
 - These contracts don’t specify a fixed quantity of services and may be used only for projects for which the requirements and costs cannot be accurately defined upfront.
 - The contractor is reimbursed for its actual costs (“Cost”), and its required fee/profit (“Fixed Fee”) is set at the beginning of the contract. Fee/profit is fixed regardless of performance.
 - The initial award should include a commitment from the contractor on rates the contractor will use in pricing each individual task. These rates will be fixed for the life of the contract and applied to each task order, as applicable.
- (Restricted) **Time and Materials**
 - In these contracts, the more time it takes the contractor to complete the work, the more it earns. This generates an open-ended contract price and offers the contractor no incentive to control costs.
 - Permitted only if:
 - No other type of contract is suitable, and

- The contract specifies a ceiling price that the contractor may not exceed except at its own risk
- DART must oversee these contracts to ensure the contractor is effectively controlling costs.

Procurement Quick Reference

	State/Local Government Purchasing Schedules/ Purchasing Contracts	Micro-Purchases	Small Purchase RFQ	Small Purchase RFP	Large Purchase IFB	Large Purchase RFP	Sole Source	Emergency
Amount of Contract	Any	Up to \$10,000	\$10,001-250,000	\$10,001-250,000	More than \$250,000	More than \$250,000	Varies	Varies
Competition Requirement	Already complete (although must be verified)	At least one quote	At least two quotes	At least two proposals	At least two bids	At least two proposals	Waived	Waived
Method of Award	Already awarded	A fair and reasonable price	Lowest bid	Multiple factors in addition to price	Lowest bid	Multiple factors in addition to price	Direct negotiation	Direct negotiation
Advertising Requirement	N/A	None	None	None	Formal advertisement	Formal advertisement	None/Waived	None/Waived
Procurement Lead Time	1-2 days	1-2 days	2-3 weeks	2-3 weeks	12-18 weeks	9-12 weeks	Varies	ASAP

CONSENT ITEM



8C:	Trapeze Software Group, Inc. and Vontas Contract Extension
Action:	Approve extending Trapeze Software Group, Inc. and Vontas Contract for up to Two (2) Additional Years

Staff Resource: *Michael Gulick, Procurement and Contract Manager*
Kyle Foster, Information Technology Director

Background:

- In March 2011, DART purchased hardware and software from Trapeze Software Group, LLC to handle all transportation operating functions (scheduling, routing, payment, etc.).
- DART repurchased hardware and software from Trapeze in 2016 and 2018.
- In 2021, Trapeze created Vontas, a business division of Trapeze that specializes in hardware.
- Trapeze Software Group provides software that manages our paratransit, fixed route operations, incident reporting, automated voice response for customers, route planning, fleet management, and fuel tracking.
- Vontas Provides vehicle tracking, detour controls, fare management software, and all the onboard IT equipment on the buses.
- DART seeks to extend the Contract for an additional two (2) years as a Sole Source for the following justification:
 - Cost efficiency: Awarding the contract to another vendor would result in substantial duplication of costs that wouldn't be recovered through competition.
 - Operational Impact: The implementation of different bus operating hardware and software would impact innumerable aspects of DART's transportation operating functions, and would require substantial human resources, financial resources, and existing institutional knowledge.
 - Unacceptable Delay: All of DART's transportation services would be incapable of functioning between the time that these contracts expired, and new hardware and software were bid out and implemented (2-3 years).

Costs:

- DART has spent \$5,371,357.13 with Trapeze and Vontas since July 1, 2018.
- July 1, 2024 to June 30, 2025 costs are \$441,275 (with \$35,779 discount applied for long term customer). July 1, 2025 to June 30, 2026 costs are \$ 485,402 (with \$49,496 discount applied for long term customer).
- These expenses are already included in DART's operating budget, and no new funding is needed. The costs do not include any new purchases of software or hardware, which will be evaluated on a case-by-case basis dependent on need and funding available.

Recommendation:

- Approve extending Trapeze Software Group, Inc. and Vontas for up to two (2) additional years at an expected cost of \$1,000,000 (includes contingency).

CONSENT ITEM



8D:	Des Moines Public School Service Contract Renewal
Action:	Approve pricing to provide fixed route service and unlimited access to Des Moines Public Schools for the 2024/25 school year

Staff Resource: *Luis Montoya, Chief Operating and Planning Officer*

Background:

- DART has been providing Des Moines Public Schools middle and high school students transportation to and from school since 1993.
- Over 2,800 student trips per day are provided on DART's regular fixed route services, as well as additional bus routes that include slight variations off a DART route.
- As part of the contract, DART provides:
 - School tripper service that are minor deviations from normal fixed routes that cater to bell times and district needs
 - Fare-free access to and from school to students based on DMPS eligibility criteria (distance between home and school)
 - Unlimited ridership privileges to all middle and high school students on weekday afternoons and throughout all break periods (Christmas Break, Spring Break, and Summer Break).
 - Unlimited access to all DART transit services for any of the approximately 5,000 Des Moines Public School District employees.
- DMPS compensates DART for the full cost of DART services on a per-mile and per-hour of service basis. The district's payment will be guaranteed and received in 10 equal monthly payments during the school year.
- The DART Commission last approved a five-year contract with Des Moines Public Schools in June 2023, and each year the Commission approves updated pricing for the upcoming academic year.
- Pricing for the 2024-2025 academic year is included in the agenda packet, which reflects collective bargaining and operator wage changes, increased fuel costs, and changes in service requested by DMPS.

Costs:

- DART anticipates providing service to all school tripper routes for the entire academic year (167 days).
- DMPS will pay DART an amount of \$1,082,146 subject to the addition or deletion of any existing routes, school days, or major cost escalation (fuel). This represents a 3% increase over the 2023-2024 contract price.
- Additional details can be found in the attached contract and cost breakdown sheet.



CONSENT ITEM

8D: Des Moines Public School Service Contract Renewal

Recommendation:

- Approve pricing to provide fixed route service and unlimited access to Des Moines Public Schools for the 2024/25 school year.

Appendix II 2024-2025 Transportation Costs			
<u>Labor Costs</u>	<u>2022-2023</u>	<u>2023-2024</u>	<u>2024-2025</u>
PT Wage	\$ 21.63	\$ 22.28	\$ 22.95
PT Benefit Cost	\$ 8.44	\$ 8.77	\$ 9.12
PT Total	\$ 30.07	\$ 31.05	\$ 32.07
FT Wage	\$ 26.78	\$ 27.58	\$ 28.41
FT Benefit Cost	\$ 11.21	\$ 11.66	\$ 12.12
FT Subtotal	\$ 37.99	\$ 39.24	\$ 40.53
FT Total With Overtime	\$ 56.98	\$ 58.86	\$ 60.80
Labor Rate Average <i>(2/3 part-time, 1/3 full-time at OT)</i>	\$ 39.04	\$ 40.32	\$ 41.65
Total Hours	93.50	93.50	93.50
Labor Costs	\$ 609,552.64	\$ 629,577.26	\$ 650,324.79
<i>Calculations are based on # of school days:</i>	167	167	167
<u>Mileage Costs</u>			
Total Mileage	849.50	849.50	849.50
Mileage Rate	\$ 2.14	\$ 2.25	\$ 2.34
Mileage Costs	\$ 303,594.31	\$ 318,774.03	\$ 331,524.99
Estimated School Service Costs	\$ 913,146.95	\$ 948,351.29	\$ 981,849.78
<u>Other Costs</u>			
Printing Costs	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
Supervisor	\$ 27,040.00	\$ 28,121.60	\$ 29,246.46
Support Costs	\$ 28,040.00	\$ 29,121.60	\$ 30,246.46
TOTAL DMPS-DART SERVICE	\$ 941,186.95	\$ 977,472.89	\$ 1,012,096.24
One-ride tickets - 1,000	\$ 750.00	\$ 750.00	\$ 750.00
All Students/All Employees Ride Free (*See Clarifications Below)	\$ 69,300.00	\$ 69,300.00	\$ 69,300.00
TOTAL DMPS-DART CONTRACT	\$ 1,011,236.95	\$ 1,047,522.89	\$ 1,082,146.24

***Clarifications**

- Ride DART Free Privileges for secondary school students assigned to DART routes and all DMPS employees

- Students not assigned to DART buses may ride DART free during all non-school hours (after 4:00 pm on school days as well as all-day on weekends/breaks/summer)

ONE-RIDE TICKETS:

DART will provide DMPS with 1,000 one-ride tickets. Additional tickets can be provided at \$0.75 each.

2024-2025 DAILY RATE:

The daily rate for DART to provide service for additional school days is \$5,879
 The daily rate for virtual days during the course of the school year is \$3,894
 There will be an additional fee for late start days of \$2,939

CONSENT ITEM



8E:	FY 2025 Iowa Communities Assurance Pool (ICAP) Renewal
Action:	Approve the renewal contracts in the amount of \$1,427,439 with Iowa Communities Assurance Pool (ICAP) and \$44,393 with Bilbrey Insurance for Fiscal Year 2025

Staff Resource: *Amber Dakan, Finance Director*

Background:

- Iowa Communities Assurance Pool (ICAP) is a membership-based group, formed to create a self-insurance program offered solely to Iowa public entities such as DART. The group was formed in 1986 in response to a turbulent insurance market at the time and now services more than 800 public entities in its membership in property and casualty lines.
- Bilbrey Insurance is the ICAP insurance broker who manages the ICAP program and manages DART's coverage.
- DART entered the ICAP risk pool on July 1, 2015. This will be DART's tenth year of membership.
- DART began holding additional Cyber coverage in FY 2019 due to the increased frequency of cyber-attacks. This will be the seventh year of excess coverage for cyber claims.
- DART's coverage includes Liability (General, Automobile, Law Enforcement and Excess), Public Officials Wrongful Acts, Vehicle, Property, Equipment Breakdown, and Crime through ICAP and cyber coverage directly through Bilbrey Insurance.
- In addition to servicing the policy, ICAP also provides full-service incident claim processing from point of claim filing, all liability determinations, risk assessments, legal resources, and ongoing training for DART employees.
- This year's renewal maintains the same coverage types with increases in Vehicle and Property coverage limits due to increased values and a reduction in limits to cyber coverage due to policy reductions.
- The deductible remains at \$50,000 for our Fixed Route and Paratransit rolling stock and \$10,000 for our Rideshare fleet.

Costs:

- Total cost of DART's ICAP renewal is \$1,427,439 for FY 2025. The change from the prior year is \$231,173, or a 19.3% increase.
- The cost of DART's cyber renewal is \$44,393 for FY2025. This is a decrease of \$8,784 or 16.5% from the prior year due to controls implemented on the agency side as well as a lower policy limit available.
- The renewal premium increase was anticipated due to a persistently hard property insurance market, sharply rising replacement costs for property & casualty claims, as well as an increase in catastrophic weather events for the state. DART continues to partner with ICAP to explore ongoing risk mitigation techniques to slow the rate of premium increases.
- DART's coverage renewal amount is within the FY 25 budget for these items.

Recommendation:

- Approve the coverage renewal amount of \$1,471,831.65 to include \$1,427,439 with ICAP and \$44,393 with Bilbrey Insurance.

CONSENT ITEM



8F:	May FY 2024 Consolidated Financial Report
Action:	Approve the May 2024 Consolidated Financial Report

Staff Resource: *Amber Dakan, Finance Director*

Year-to-Date Budget Highlights:

Revenue:

- Fixed Route operating revenue is exceeding budget by 2.0% year-to-date. This is a result of higher revenues in School Funding, Other Contracted Services, and Mobile Ticketing Passes.
- Fixed Route non-operating revenue is trending over budget by 4.2% due to the higher than projected interest income from favorable interest rates as well as State Operating Assistance exceeding budget expectations.
- Mobility Services operating revenue is exceeding budget by 13.5% so far in FY2024. Polk County Funding, Cash Fares, Other Contracted Services, and Mobile Ticketing Passes are all ahead of budget projections.
- Mobility Services' non-operating revenue is exceeding budget by 4.7% year-to-date. The full budget amount of CARES grant dollars has been drawn down for the year. In addition, an extra 5310 grant funding has been allocated to cover the higher levels of overflow taxicab expense.
- Caravan revenues are under budget by 27.8% year-to-date due to lower than anticipated passenger fares. Caravan is working to add additional business partners to the program in FY25 as well as implement a new user platform.

Operating Expense:

- Fixed Route operating expenses are seeing a 4.1% savings from projections. Salaries, Wages & Fringes, Insurance, and Services are seeing the most savings to date.
- Mobility Services operating expenses are over budget by 9.0% year-to-date. Salaries, Wages, and Fringes, Purchased Transportation Services, and Fuel & Lubricants are seeing the highest over budget levels due to an increase in demand for these services.
- Caravan has budget savings of 16.3% year-to-date for operating expenses. Services as well as Fuel and Lubricants are seeing the largest savings to date, which reflects the reduced service levels.

Recommendation:

- Approve the May FY2024 Consolidated Financial Report.

**** TOTAL Un-Audited Performance of May FY2024 Year-to-Date as Compared to Budget:**

Fixed Route	\$ 2,682,862	Reserve for Accidents (See Balance Sheet):
Mobility Services	\$ (137,464)	\$199,918
<u>Caravan</u>	<u>\$ (54,394)</u>	
Total	\$ 2,491,004	

FY2024 Financials: May 2024

FIXED ROUTE	May 2024			Year-To-Date-(11) Months Ending 5/31/2024		
	Actual	Budgeted	Variance	Actual	Budgeted	Variance
Operating Revenue	450,096	402,217	47,879	4,511,127	4,424,383	86,744
Non-Operating Revenue	2,585,829	2,674,281	(88,452)	30,642,099	29,417,089	1,225,010
Subtotal	3,035,925	3,076,498	(40,573)	35,153,226	33,841,473	1,311,754
Operating Expenses	3,037,084	3,076,498	39,414	32,470,364	33,841,473	1,371,109
Gain/(Loss)	(1,159)	-	(1,159)	2,682,862	-	2,682,862

MOBILITY SERVICES	May 2024			Year-To-Date-(11) Months Ending 5/31/2024		
	Actual	Budgeted	Variance	Actual	Budgeted	Variance
Operating Revenue	70,527	53,054	17,473	662,421	583,596	78,825
Non-Operating Revenue	210,312	343,925	(133,613)	3,961,193	3,783,175	178,018
Subtotal	280,839	396,979	(116,140)	4,623,614	4,366,771	256,843
Operating Expenses	456,466	396,979	(59,487)	4,761,078	4,366,771	(394,307)
Gain/(Loss)	(175,627)	-	(175,627)	(137,464)	-	(137,464)

CARAVAN	May 2024			Year-To-Date-(11) Months Ending 5/31/2024		
	Actual	Budgeted	Variance	Actual	Budgeted	Variance
Operating Revenue	16,486	33,333	(16,847)	227,511	366,667	(139,156)
Non-Operating Revenue	-	9,468	(9,468)	112,410	104,143	8,268
Subtotal	16,486	42,801	(26,315)	339,921	470,809	(130,888)
Operating Expenses	81,458	42,801	(38,657)	394,315	470,809	76,494
Gain/(Loss)	(64,972)	-	(64,972)	(54,394)	-	(54,394)

SUMMARY	May 2024			Year-To-Date-(11) Months Ending 5/31/2024		
	Actual	Budgeted	Variance	Actual	Budgeted	Variance
Operating Revenue	537,109	488,604	48,505	5,401,059	5,374,646	26,413
Non-Operating Revenue	2,796,141	3,027,673	(231,532)	34,715,702	33,304,407	1,411,295
Subtotal	3,333,250	3,516,278	(183,028)	40,116,761	38,679,053	1,437,709
Operating Expenses	3,575,008	3,516,278	(58,731)	37,625,757	38,679,053	1,053,296
Gain/(Loss)	(241,758)	-	(241,758)	2,491,004	-	2,491,004

DISCUSSION ITEM



9A: Reimagine DART Update

Staff Resource: Erin Hockman, Chief Strategy Officer

- DART staff will provide an update on Reimagine DART.

DISCUSSION ITEM



9B: Iowa State Fair Updates and Reminders

Staff Resource: Luis Montoya, Chief Operating and Planning Officer

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

DISCUSSION ITEM



9C: HRIS Update

Staff Resource: Kyle Foster, IT Director and Kelley Burgess, Chief People Officer

- DART staff will provide an update on the UKG HRIS implementation project.

MONTHLY REPORT



9D: Performance Report – May 2024

Staff Resource: Nate Bleadorn, Business Intelligence Manager

Summary of May 2024 Monthly Performance:

- Total May Ridership was up 2.93% compared to the same month last year with YTD ridership 9.74% higher than FY23 YTD. Driving this growth is:
 - Fixed route ridership was up 3% compared to May 2023 and YTD ridership is up 10%.
 - Paratransit ridership was up 5.4% compared to May 2023 and YTD ridership is up 7.2%. When combined with DART On Demand, mobility services ridership in May was 6.27% higher than May 2023 and nearly 11% higher than last year.
 - DART On Demand ridership was up 12% compared to May 2023 and YTD ridership is up 38%.
- Both preventable and non-preventable accidents were .97 per 100,000 miles in May. Through May, our preventable accidents YTD were .67 per 100,000 miles, which meets our goal of less than 1 preventable accident per 100,000 miles. Non-preventable accidents per 100,000 miles YTD is 1.37.
- On-Time Performance (OTP) was 78.57% in May. This is below our target of 85%.
- Road calls per 100,000 miles, which is when buses need service while in operation, were 8.45 for fixed route in May. YTD we are at 10.75 road calls per 100,000 miles for fixed route, which does not meet our goal of fewer than 7 road calls per 100,000 miles. The higher number of road calls continues to reflect our aging fixed route fleet. We have several buses we maintain in service beyond their normal useful life.
- Caravan ridership is down 15% YTD through May. Rides for May were down 13.74% from May of 2023.
- We provided more than 9,500 free rides in May for Bike and Board Month. This is a promotion to provide free fixed route rides for passengers who board with a bicycle. Our total in 2024 was a 30%+ increase on 2023, and we eclipsed our pre-pandemic ridership number for the promotion.



Performance Summary - May 2024

6/1/2023 5/31/2024

Ridership

Preventable Accidents/100k Miles

Non-Preventable Accidents/100k

Monthly **305,172**
FY23: 296,483 (+2.93%)

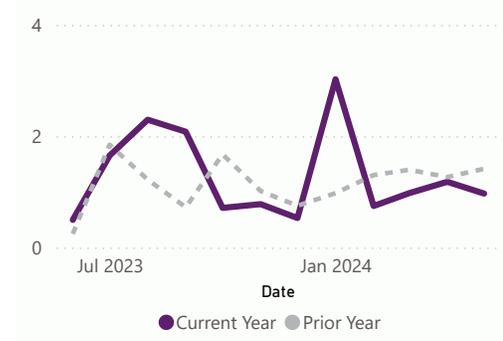
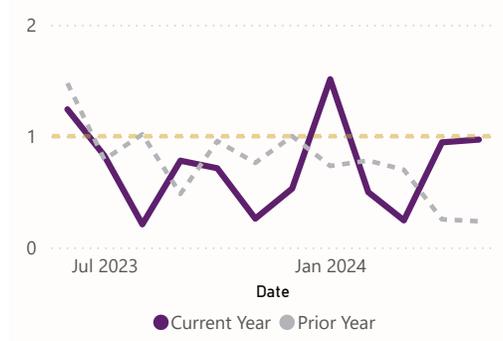
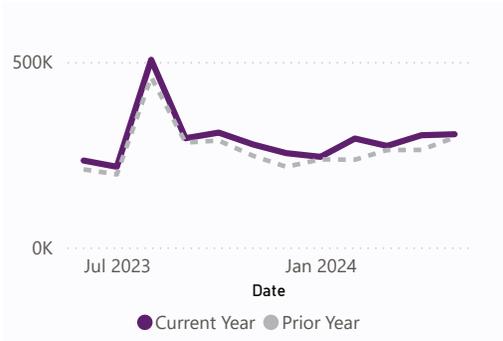
YTD **3,278,862**
FY23: 2,987,922 (+9.74%)

Monthly **0.97**
FY23: 0.24 (-311.15%)

YTD **0.67**
FY23: 0.70 (+4.45%)

Monthly **0.97**
FY23: 1.41 (+31.47%)

YTD **1.37**
FY23: 1.23 (-11.02%)



On-Time Performance

Farebox Recovery Ratio

FR Passengers / Revenue Hour

Monthly **78.57%**
FY23: 79.87% (-1.63%)

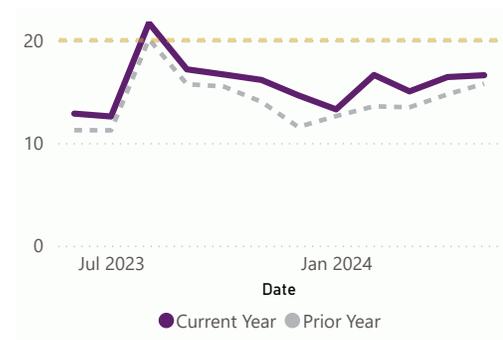
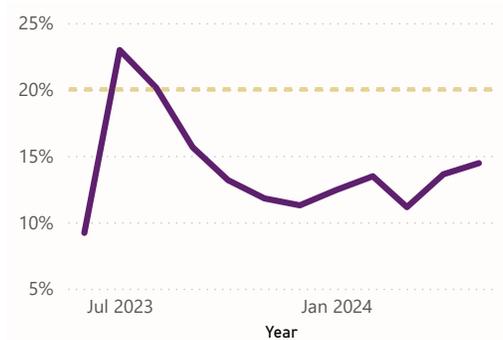
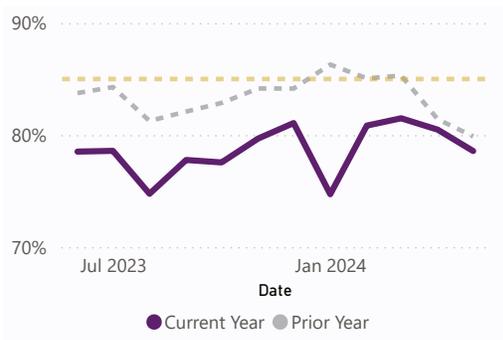
YTD **78.65%**
FY23: 83.34% (-5.63%)

Monthly **14.45%**
FY23: 14.34% (+0.74%)

YTD **14.54%**
FY23: 14.45% (+0.63%)

Monthly **16.60**
FY23: 15.78 (+5.19%)

YTD **16.25**
FY23: 14.54 (+11.77%)





Fixed Route Performance

6/1/2023

5/31/2024

Ridership

Monthly

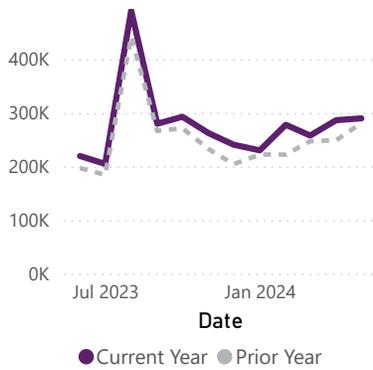
289,666

FY23: 280,913 (+3.12%)

YTD

3,111,549

FY23: 2,822,108
(+10.26%)



On-Time Performance

Monthly

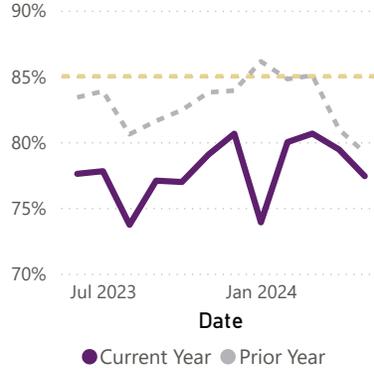
77.41%

FY23: 79.19% (-2.25%)

YTD

77.83%

FY23: 82.95% (-6.17%)



Operating Cost/Rev. Hour

Monthly

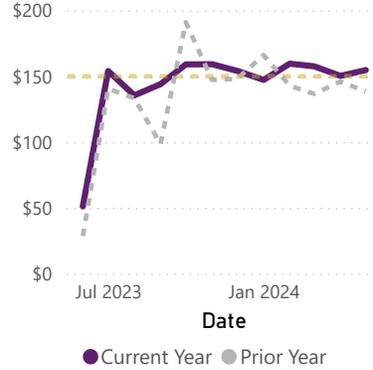
\$154.72

FY23: \$138.48 (-11.73%)

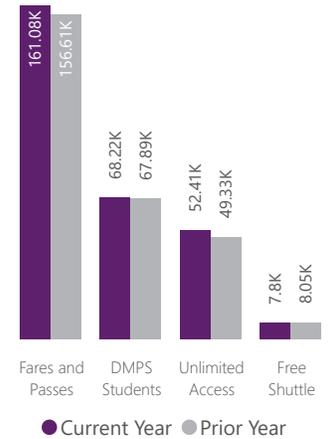
YTD

\$151.81

FY23: \$144.30 (-5.2%)



Monthly Ridership by Fare Group



Preventable Acc./100k

Monthly

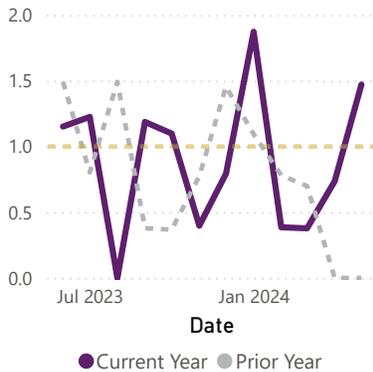
1.47

FY23: 0.00

YTD

0.85

FY23: 0.73 (-16.16%)



Non-Preventable Acc./100k

Monthly

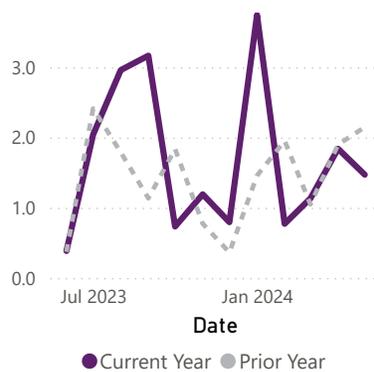
1.47

FY23: 2.15 (+31.54%)

YTD

1.83

FY23: 1.53 (-20%)



Road Calls/100k Miles

Monthly

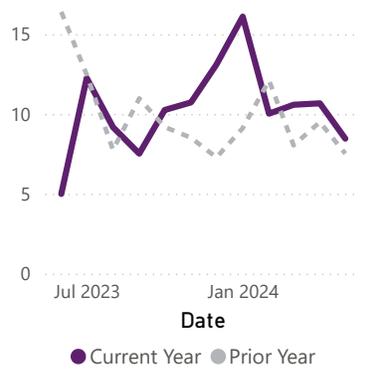
8.45

FY23: 7.52 (-12.48%)

YTD

10.75

FY23: 9.22 (-16.56%)



Complaints/100k Passengers

Monthly

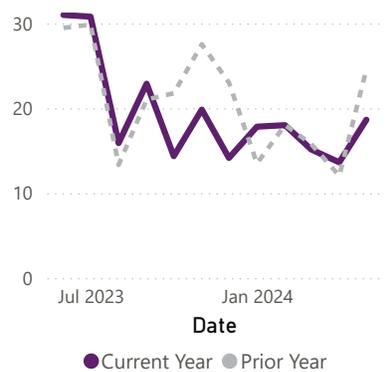
18.64

FY23: 24.56 (+24.1%)

YTD

17.87

FY23: 19.42 (+7.98%)



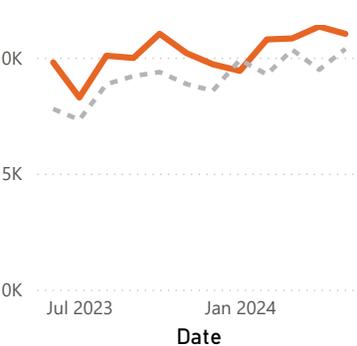


Paratransit Performance

6/1/2023 5/31/2024

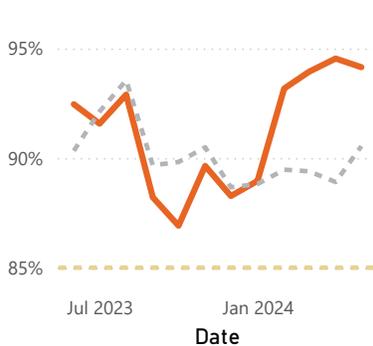
Ridership

Monthly: 11,024
YTD: 112,670
FY23: 10,374 (+6.27%)
FY23: 101,546 (+10.95%)



On-Time Performance

Monthly: 94.15%
YTD: 91.28%
FY23: 90.54% (+3.98%)
FY23: 90.10% (+1.3%)

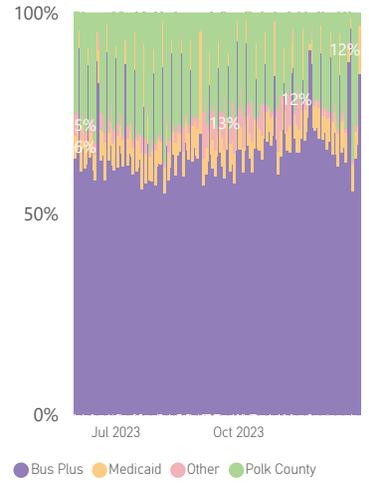


Operating Cost/Passenger

Monthly: \$53.88
YTD: \$53.19
FY23: \$52.48 (-2.66%)
FY23: \$53.55 (+0.66%)

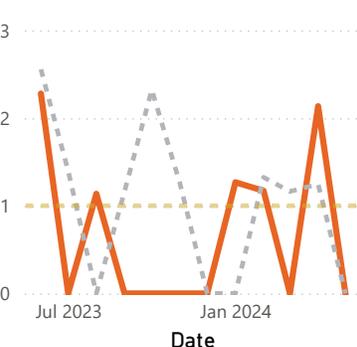


Paratransit Customer Type Breakdown



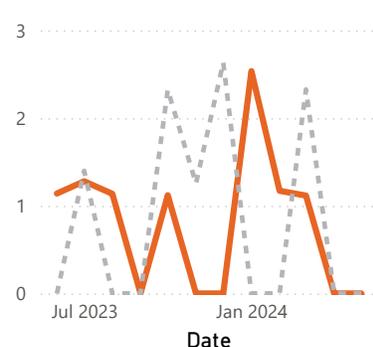
Preventable Acc./100k

Monthly: 0.00
YTD: 0.53
FY23: 0.00
FY23: 0.89 (+40.18%)



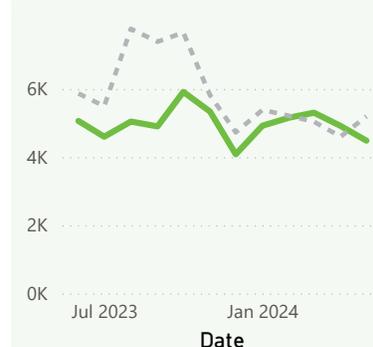
Non-Preventable Acc./100k

Monthly: 0.00
YTD: 0.75
FY23: 0.00
FY23: 0.89 (+16.26%)



RideShare - Ridership

Monthly: 4,482
YTD: 54,643
FY23: 5,196 (-13.74%)
FY23: 64,268 (-14.98%)



RideShare - Op. Cost/Passenger*

Monthly: \$24.01
YTD: \$12.83
FY23: \$12.20 (-96.8%)
FY23: \$12.00 (-6.96%)





DART On Demand Performance

Request Zone

All

Booking Type

All

6/1/2023

5/31/2024

Completed Trips

Monthly

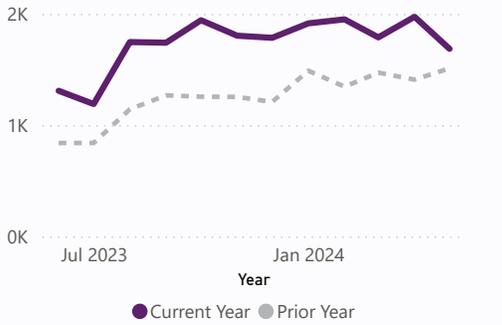
1,686

FY23: 1511 (+11.58%)

YTD

19,525

FY23: 14197 (+37.53%)



Avg. Wait Time (On Demand)

Monthly

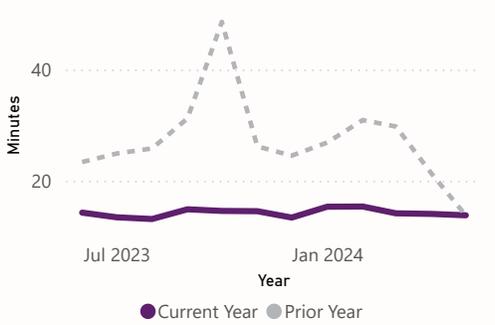
13.82

FY23: 13.79 (-0.22%)

YTD

14.25

FY23: 27.80 (+48.75%)



Mobile Booking Rate

Monthly

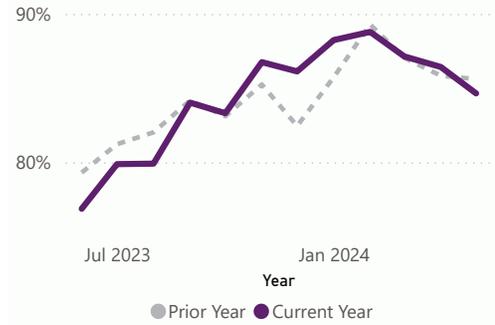
84.64%

FY23: 85.60% (-1.12%)

YTD

85.20%

FY23: 85.09% (+0.13%)



Unique Active Riders

Monthly

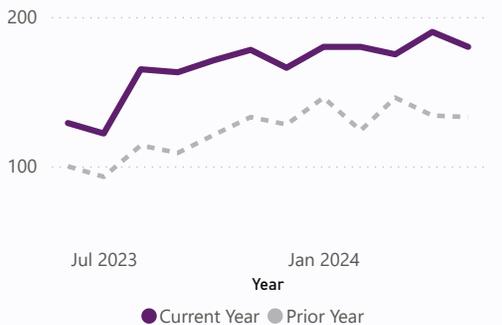
180

FY23: 133 (+35.34%)

YTD

475

FY23: 356 (+33.43%)



New Accounts Created

Monthly

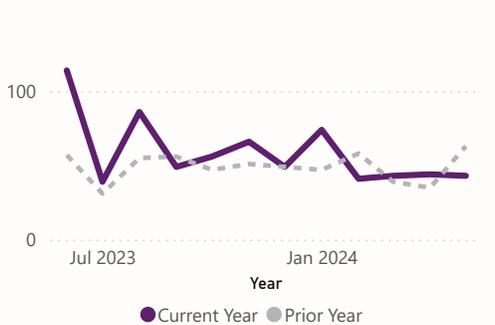
43

FY23: 63 (-31.75%)

YTD

590

FY23: 531 (+11.11%)



First Time Riders

Monthly

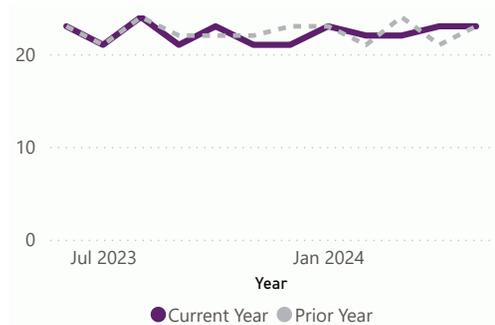
23

FY23: 23 (+0%)

YTD

234

FY23: 236 (-0.85%)





Route Details

Month

May 2024 ▼

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	13,028	11,775	359,372	337,650	21,722	6.4%	25.29	62.16%
	#2 - Maury St	162		381		381	Infinity	Infinity	
	#3 - University	29,295	27,539	283,921	260,934	22,987	8.8%	16.71	76.87%
	#4 - E. 14th	13,175	11,568	124,691	108,108	16,583	15.3%	13.55	79.17%
	#5 - Franklin Ave/Johnston	11,369	11,071	121,480	97,615	23,865	24.4%	11.63	79.84%
	#6 - Indianola	28,482	25,408	273,263	231,591	41,672	18.0%	23.22	83.22%
	#7 - SW 9th St.	30,354	31,309	301,697	276,204	25,493	9.2%	27.72	85.61%
	#8 - Fleur Dr.	2,567	2,224	30,041	24,047	5,994	24.9%	16.07	74.20%
	#10 - East University	1,611	1,205	14,198	10,930	3,268	29.9%	9.21	84.70%
	#11 - Ingersoll/Valley Junction	3,786	3,862	38,968	31,576	7,392	23.4%	20.09	66.42%
	#13 - Evergreen	5,904	5,652	52,684	46,903	5,781	12.3%	42.01	79.89%
	#14 - Beaver Ave.	15,622	16,180	153,289	147,655	5,634	3.8%	15.68	83.17%
	#15 - 6th Ave.	21,763	21,714	213,715	182,960	30,755	16.8%	22.66	76.48%
	#16 - Douglas Ave.	30,571	31,596	312,770	289,608	23,162	8.0%	18.72	78.79%
	#17 - Hubbell Ave.	22,420	21,643	230,165	202,371	27,794	13.7%	15.96	79.67%
	#50 - Euclid	6,399	7,033	64,967	57,258	7,709	13.5%	8.94	82.92%
	#52 - Valley West/Jordan Creek	13,213	9,615	125,235	99,796	25,439	25.5%	10.47	67.75%
#60 - Ingersoll/University	25,235	23,237	254,995	236,513	18,482	7.8%	15.68	78.54%	
#72 - West Des Moines Loop	2,707	5,152	29,834	47,874	-18,040	-37.7%	6.13	75.82%	
#74 - NW Urbandale	384	545	4,276	5,708	-1,432	-25.1%	3.07	77.54%	
2. Shuttle	Link Shuttle	865	931	9,500	8,792	708	8.1%	3.11	86.15%
	Downtown Shuttle	5,745	6,717	58,662	65,501	-6,839	-10.4%	9.33	82.94%
3. Express	#92 - Hickman	1,035	378	7,816	4,104	3,712	90.4%	6.64	68.60%
	#93 - NW 86th	729	757	8,518	7,272	1,246	17.1%	4.09	79.19%
	#94 - Westown	294	299	3,937	3,959	-22	-0.6%	5.18	80.79%
	#95 - Vista	262	190	3,088	2,292	796	34.7%	5.83	73.74%
	#96 - E.P. True	672	1,078	7,575	8,830	-1,255	-14.2%	7.08	71.31%
	#98 - Ankeny	1,587	1,935	20,631	21,425	-794	-3.7%	6.38	75.69%
	#99 - Altoona	430	300	3,437	2,917	520	17.8%	3.76	78.17%
5. On Call	Ankeny				1	-1	-100.0%		
	NW Johnston / Grimes								
	Regional				28	-28	-100.0%		
6. DART On Demand	#31 - DART On Demand - Jordan Creek			17		17	Infinity	18.89	
	#32 - DART On Demand - River Bend	18		172		172	Infinity	3.51	
	DART On Demand - Ankeny	1,668	1,512	19,379	14,272	5,107	35.8%	3.35	
Cab	Paratransit: Taxi	622	758	10,272	7,280	2,992	41.1%	3.47	
Paratransit	Paratransit: Bus/Van	8,716	8,105	83,070	79,791	3,279	4.1%	1.82	91.28%
RideShare	RideShare	4,482	5,196	54,643	64,268	-9,625	-15.0%	5.21	
Total		305,172	296,484	3,280,659	2,986,033	294,626	9.9%	12.80	78.65%

MONTHLY REPORT



10A: Operations Team Report - July 2024
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Staff Resources: Luis Montoya, Chief Operating and Planning Officer

Maintenance – Keith Welch, Fleet Manager

Light Duty Buses Received: An order placed earlier this year for 5 Frontrunner light-duty buses has been delivered. The buses are currently being painted in the maintenance area at Dart Way and the ITS (integrated technology system) equipment will be delivered in July, with ITS Installation beginning after delivery. The goal is to have these buses in service by the end of September of 2024.

New Heavy-Duty Bus Order: After the Commission’s approval in May, 4-30’ buses and 10-40’ buses were ordered and are scheduled to be delivered in 2025.

New Light Duty Bus Order: We have ordered 5 Frontrunner light-duty buses to be delivered in 2025.

Iowa State Fair- The Maintenance department has started its preparation of buses for Iowa State Fair. The weekday peak number for the Iowa State Fair for Fixed Route buses is 27 and for the weekend the peak number is 35 buses. These peak demand numbers are in addition to DART’s regular service, and so with 9 buses that will for sure be out of service, the team is working diligently to ensure the rest of the fleet is ready for operation.

Iowa Public Transit Association (IPTA) Annual Meeting: Keith Welch presented at IPTA on DART’s experience with battery electric buses, focusing mainly on battery performance and the maintenance perspective. The audience were primarily staff from other Iowa transit agencies, but a representative from the FTA regional office commended Keith on DART’s collection, display and use of data to drive decision making.

Transportation – Lewis Lowry, Transportation Director; Joy Crutcher, Fixed Route Manager; Skip Herbold, Mobility Services Manager

Hot Fun in the Summertime: DART employees work hard to deliver exceptional bus service to our customers. On June 12th, all administrative members of the DART team celebrated our bus operators, dispatchers, operations supervisors, managers, technicians and building facilities staff with a picnic. This was our way to say “thanks” for the work our team does as public transit service ambassadors.

Customer Service Training: Taking care of our internal and external customers begins with understanding the value of how to deliver high quality customer service. All leaders in the transportation department attended a three-hour workshop on the topic of “Exceeding Customer Expectations.” Our goal is to empower our people to develop a customer service culture in the work they do by being a role model for each other and the community we serve.

Iowa Public Transit Association (IPTA) Bus Rodeo: The transportation department is delighted to report that DART had two winning bus operators at the IPTA Bus Rodeo. Mobility Services Bus

MONTHLY REPORT

10A: Operations Team Report



Operators Joe Vitale and Kurt Makel-Wiederanders competed in the small bus competition in Ames, Iowa. Joe won second place honors and Kurt came in a close third place finish.

Facilities – Ben Cross, Facilities Manager

1100 DART Way: The sprinkler riser drains were replaced on June 21st, 2024. The metal drains were severely corroded from their age and were showing signs of leaking. While most major repairs have been deferred while we work to construct a new facility, this repair could no longer be avoided.



Iowa State Fair: Facility staff have started prepping for the Iowa State Fair. Staff have been running the a/c in the ticket booths to make sure they are all working efficiently as well as building signs that are put out at the Park and Ride locations. Staff did a field review with the Executive Director and Chief of Police for the Iowa State Fair to work out final details and discuss resource needs.

DART Central Station: Emergency light fixtures have started to be replaced on the interior and exterior as they are 12 years old and parts are not available for the original fixtures. Staff have also been pressure washing different platforms each week to keep the platforms clean and safe to use.



10B	Planning Team Report
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Staff Resources: Tony Filippini, AICP – Planning & Development Manager

Department Projects

- **August Service Change:** Staff are finalizing schedules for the upcoming Des Moines Public Schools 2024-2025 academic year. The first day of school for DMPS will be on Monday, August 26, 2024.
- **Fall Service Change:** The department is preparing service updates for the fall 2024 service change. Several routes will be evaluated for on-time performance and some route realignments will be developed to improve operations. In addition, the level of service will be adjusted to match the FY 2025 operating budget by eliminating the D-Line.
- **Iowa Public Transit Association (IPTA) Annual Meeting:** Tony Filippini presented at IPTA on the planning and implementation of mobility-on-demand pilots including Flex Connect and DART On Demand services. The audience were primarily staff from other Iowa transit agencies.

Regional Coordination

- **Connected Corridors:** DART staff started participating on a working group lead by the Greater Des Moines Partnership to advance the goals of the Downtown DSM: Future Forward Vision and Action Plan Connect Corridors section. The working group will meet about every other month.



10C: External Affairs Team Report

Staff Resources: *Erin Hockman, Chief Strategy Officer*

- **Reimagine DART RFP:** External Affairs and Planning staff are working with procurement to finalize an RFP that will be published in mid-July, seeking proposals for Reimagine DART. The robust scope of work includes five technical requirements. Three are required, including:
 - Peer system comparison
 - Network redesign
 - Evaluation of service redesign impact to Paratransit service area

There are two optional technical requirements DART is seeking to include, which are:

- Fare policy analysis and recommendation
- Public engagement and input opportunities

Responses will be due in early August with interviews of the top proposers tentatively scheduled for the week of August 19. Staff is planning to bring a recommendation on the contractor to the Commission for approval at the September meeting.

Marketing – Carissa Meredith, Marketing Manager

- **Iowa State Fair Service Marketing:** The team has been updating previous marketing collateral and communicating changes for the State Fair Park & Rides shuttle service.
 - A new, more comprehensive landing page is being added to our website.
 - Recommendations and enhancements for the Iowa State Fair’s website were passed along earlier this year.
 - Refreshed digital ads are being developed to start late July into August.
 - On-site signage has been created and updated to reflect changes for 2024.
- **Jordan Creek On Call Marketing:** Beginning July 1, DART On Demand Jordan Creek transitioned to Jordan Creek On Call. Staff have implemented a marketing and communications plan to ensure all customers are aware. Efforts included website updates search engine optimization, social media, collateral and customer service outreach.



Marketing Analytics Report

Metric	Dec. 2023	Jan. 2024	Feb. 2024	March 2024	April 2024	May 2024	May 2023	Year Prior
MyDART App Accounts	67,216	68,150	68,957	71,519	72,392	73,392	54,871	34%
Website Unique Visitors	15,688	21,691	23,016	18,423	20,901	23,309	22,551	3%
Facebook Followers	6,387	6,403	6,410	6,412	6,427	6,435	6,247	3%
Twitter Followers	2,580	2,583	2,584	2,586	2,591	2,591	2,542	2%
Instagram Followers	1,772	1,792	1,803	1,806	1,818	1,828	1,650	11%
LinkedIn Followers	1,064	1,123	1,141	1,148	1,164	1,174	958	23%
Email Subscribers	6,362	4,765	4,759	4,723	6,585	6,575	14,432	-54%
Trip Plans	49,333	46,372	54,913	55,978	42,619	55,978	52,706	6%
Real-time Map	31,736	33,246	38,221	35,635	31,243	35,635	39,784	-10%
Next DART Bus	487,102	421,229	540,016	557,876	558,690	557,876	465,376	20%
SMS Text Messaging	113,801	134,277	128,123	135,782	139,547	157,797	140,106	13%

MyDART App Report

Metric	Dec. 2023	Jan. 2024	Feb. 2024	March 2024	April 2024	May 2024	TOTAL FY 2024
Downloads	833	1,351	1,269	1,298	1,374	1,010	16,243
iOS	359	352	296	377	547	482	5,904
Android	474	999	973	921	827	528	10,355
Accounts Created	757	934	805	801	873	1,000	13,013
Orders Placed	6,364	6,294	6,425	6,625	6,973	7,035	76,989
Passes Purchased	8,507	8,550	8,870	9,214	9,617	9,294	110,531
Revenue	\$33,026	\$36,154	\$36,288	\$36,723	\$38,167	\$34,846	\$407,402

Communications – Sarah Welch, Communications Manager

- New DART Blog and Other Website Updates:** Staff are finalizing updates to DART’s website, including adding a page that features DART’s services by community and a blog. In preparation for the blog, the communications team has been developing articles that provide a deeper understanding of DART, showcase stories/testimonials from riders and community partners, and share information riders are seeking. Initial blog includes a feature on the website include an overview of DART ridership, how to access cooling centers, and Kemin’s investments in public transit through an Unlimited Access partnership. Blogs will primarily be shared on social media, in newsletters, and on different pages of the website.
- Communications Planning:** Staff are developing communications plans to support several initiatives that will launch in August and September. In early August, riders will begin receiving

MONTHLY REPORT
10C: External Affairs Team Report



information about minor schedule changes to several routes to align with a change in the DMPS bell times. DART also is preparing outreach strategies for public input on November service changes that will include eliminating the D-Line. Public input will run from late August through mid-September. Finally, staff is developing a comprehensive communications plan to support Reimagine DART as that effort gets underway.

DART in the News

[Extreme heat has arrived in Iowa. Here's how to stay safe](#)

KCCI, 06/17/2024

[Polk County Emergency Management's Extreme Temperature Plan is in Place](#)

WHO Radio News, 06/17/2024

[DART plans for changes coming in July](#)

WOI, 06/04/2024

Caravan – Victoria Henderson Weber, Caravan Supervisor

- **Caravan Recovery & Data:** The entire External Affairs team is working to rebuild DART's vanpool program. The recovery strategy includes implementing an improved technology platform, updating the fare policy, rebranding the program, and increasing awareness to attract new vanpool participants and new vanpool partners.

Our goal is for each vanpool to have a minimum of 7 passengers. The program currently has on average 8+ people per vanpool, achieving the target for this key performance indicator that shows program efficiency.

The staff is focused on increasing the number of vanpools in service and have set a target to have 46 vanpools in operation by the end of FY25. Based on conversations with several large employers, staff are on track to achieve this key metric.

FY	Vanpools	Ave. Pass Per Van	Pass Miles
FY19	88	7.24	8,467,267
FY20	49	4.29	6,197,708
FY21	48	4.96	3,074,463
FY22	32	6.53	3,318,638
FY23	27	5.86	3,347,794
July 2023	26	6.29	191,855
August 2023	25	6.52	212,816
September 2023	25	7.04	221,312
October 2023	26	8.15	278,085
November 2023	24	7.79	251,640
December 2023	24	7.96	193,175
January 2024	24	8.63	226,370
February 2024	23	9.09	249,106
March 2024	23	8.91	253,498
April 2024	23	8.74	234,222
May 2024	23	8.26	196,647
FY25 Target	46	7.69	7,383,192

- **Ride Matching with the DOT Update:** DART staff and the DOT are working with HBSS to create a new ride matching website to replace iowarideshare.org. This website provides accessibility for individual passengers to join vanpools. The replacement website will serve much of the same purpose as well as support connectivity with other transit agencies for commuting opportunities. The DOT is fully funding the cost of the website.

MONTHLY REPORT

10C: External Affairs Team Report

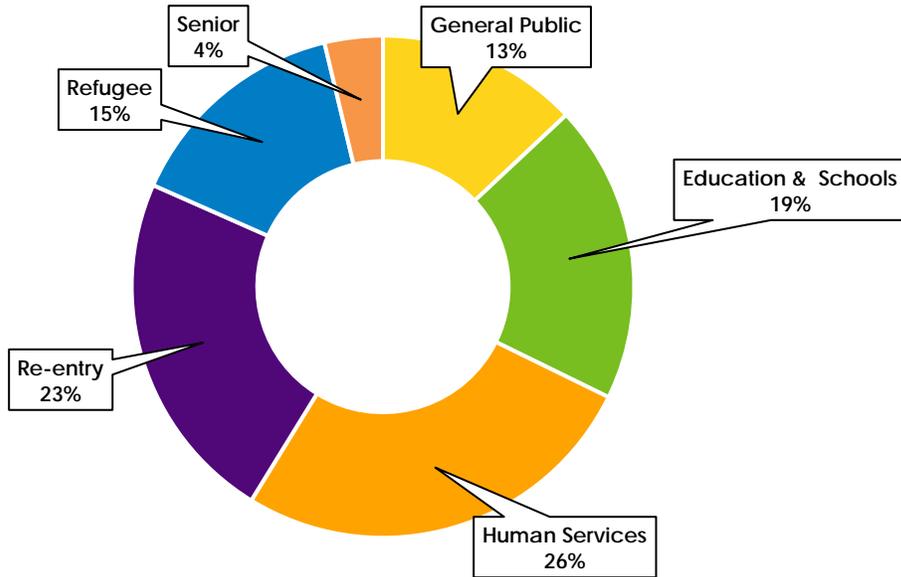


- **Pending Partnership:** DART staff have been working with Wells, Inc. to develop a vanpooling program that would replace their private shuttle service and extend vanpooling opportunities to rural NW Iowa communities. The contract is currently being reviewed by Wells, Inc.'s legal team. We anticipate 8-10 vanpools being established initially for this partnership with opportunity for growth.

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

- **Reimagine DART Fundraising:** DART was recently awarded a new \$250,000 grant from the Principal Foundation, bringing the total grant funding awarded/allocated to Reimagine DART from the Principal Foundation and Mid-Iowa Health Foundation to \$342,000, or nearly 70% of DART's overall private-sector fundraising goal. Additional grant requests totaling \$95,000 have been submitted to the Polk County Community Betterment Program and the Telligen Foundation. On July 12, DART has been invited to present on Reimagine DART to the Central Iowa Funders Forum, a consortium of private foundations and corporate funders hosted by the Community Foundation of Greater Des Moines.
- **Unlimited Access:** Year-over-year ridership for Unlimited Access partners continues to trend 30% higher through May 2024, accounting for more than 335,000 fixed route trips YTD. Unlimited Access partnership contract renewals completed or in progress include UnityPoint Health System and Drake University. A proposal for Unlimited Access partnerships is under consideration by Atlantic Coca-Cola Bottling.
- **Art Shelter Program:** The City of Johnston and the Johnston Arts Council will dedicate its completed art shelter project featuring work by local artist Laura Palmer on Monday, July 15 at 5 pm. This is DART's 12th art shelter installation out of nearly 50 planned or in development. Artist selection is complete for shelter projects in Uptown at 42nd St. and University (2 shelters) and along the SW 9th Corridor (4 shelters) in Des Moines. Art concept development for planned shelter locations is 99% complete. Additional calendar 2024 installations are anticipated for locations in Des Moines, Urbandale, and Windsor Heights.
- **Ride to Thrive Program:** 1,339 individuals have enrolled as of June 2024, with 46% enrolling via food assistance eligibility, 36% via housing assistance, and 18% via workforce assistance.
- **New Record for Mobility Coordination & Outreach Training:** FY2024 saw a record for mobility outreach and training participation, surpassing the prior record of 2,662 set in FY2020. Recent highlights include presentations by DART's Community Mobility Coordinator to students at Johnston High School and a senior housing community in Ankeny, a training hosted by DART for students from Iowa Vocational Rehabilitation Services, as well as participation in Polk County Senior Fest at the State Fairgrounds and World Refugee Day celebration at Franklin Junior High. In the month of June alone, more than 60 refugees received training on how to use DART as part of their cultural orientation to Greater Des Moines.

FY2024 Mobility Outreach Participants
3,336 Total Participants as of June 2024



■ General Public ■ Education & Schools ■ Human Services ■ Re-entry ■ Refugee ■ Senior

10D:	Finance/Procurement/IT Team Report
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Staff Resources: Dan Washburn, Amber Dakan, Mike Gulick, and Kyle Foster

Finance Department – Amber Dakan, Finance Director

- **HRIS System Implementation:** The Finance, HR, and IT staff continue efforts towards implementation work of UKG/Kronos in replacement of multiple systems including payroll processing. Payroll go live began 6/23/24 with a planned first payroll in the new system on 07/12/24.
- **Government Finance Officers Association Annual (GFOA) Conference:** Kayley Alexander, Accounting Manager, and Amber Dakan, Finance Director, had the opportunity to attend the annual GFOA conference, which allows attendees to receive education on new accounting requirements as well as learning about ways to improve budgeting, audit performance, public participation, cash flowing and capital asset forecasting. The conference was very beneficial, and each of us took away ideas to put into practice at DART.
- **Fiscal Year End Preparation:** The Finance team is actively preparing for the close out of fiscal year 2024, which includes year end physical asset inventory and preparing work papers for the upcoming onsite financial audit in September.

Procurement Department – Mike Gulick, Procurement Manager

- **Heavy Duty Bus Procurement:** Working through final quote and pre-award Buy America Certifications to formally place order for four 30-foot and ten 40-foot heavy duty buses. The approximate lead time is 18 to 24 months from the date of purchase order. Commission approved this purchase on May 7, 2024.
 - Purchase Order Issued
 - Estimated Delivery Lead-Time 12-15 months
- **Light Duty Bus Procurement:** Working through final quote and pre-award Buy America Certification to formally place order for five light duty buses. The approximate lead time is 10 - 12 months from the date of purchase order. Commission approved this purchase on May 7, 2024.
 - Purchase Order Issued
 - Estimated Delivery Lead-Time 10-12 months
- **Reimagine DART Procurement:** Working with Leadership on drafting RFP for the project. Targeting publicly posting the RFP on July 10, 2024, with Proposals due August 5, 2024.
- **Signature Policy Update:** Working with CEO on drafting updated Signature Policy to provide staff additional clarity to staff on who can sign and approve what documents.

IT Department – Kyle Foster, IT Director

- **Technology Roadmap:** Underutilization of existing software and solutions as well as aging infrastructure equipment were two key points identified in a technology audit.

MONTHLY REPORT

10D: Finance/Procurement/IT Team Report

- Systemwide upgrades of software, along with consolidation of duplicate solutions are a key focus for FY23 & FY24.
 - Half of our systems have been updated as of 6/28/2023. The remaining systems are all being upgraded at once due to them sharing server infrastructure. The upgrade process started on 11/2/2023. Testing is 90% complete. There were a few bugs identified but are being resolved with a patch. We've pushed back the upgrade until September 2024, to focus all our attention on the UKG implementation. Staff training will be coordinated after the upgrades are completed.
- Server hardware is getting past its useful life. Storage, servers, and network equipment are all in the process of being upgraded in 2023/2024.
 - Storage has been replaced and cut over as of Q1 of 2023. Compute servers have been installed and configured at both locations. Migration of the virtual servers from the old equipment to the new equipment is under way. We are currently auditing our internal network infrastructure and internet line setup. A plan is being designed to simplify the setup at both Dart Way and DCS, as well as to easily add on the new Operations and Maintenance facility. We should have a build of materials quote for this within the next 2 weeks.
- **Disaster Recovery/Incident Response:** DART IT staff are currently undergoing a full update/re-write of our DR and Incident Response Plan. Cyber Security threats, loss of power, loss of facility, and individual system failures are all being taken into consideration to meet all critical system recovery time objectives. The plan has been completed and is being tested to identify any holes.
- **Document Management Discovery:** DART has utilized many different solutions to store documents over time, which has caused inefficiencies and challenges in finding historical documents. It was identified as a priority to establish a single solution for all document management needs. A new SharePoint site has been built specifically focused on Document Management. AP and Policy storage have been the first projects selected to pilot this. Departmental sites are being built on an as-needed basis to help with adoption to the new site. DART IT staff are actively working on building this out in house. A recent help desk employee we hired comes with a document management background, so we intend to leverage her skills for this project as well.
- **HRIS implementation:** As mentioned in earlier reports, DART has selected UKG/Kronos as our new HRIS (Human Resources Information System) vendor, and IT is heavily involved in supporting this implementation and transition.
 - Staff training has been completed.
 - Parallel payroll testing started on 5/26/2024.
 - Everything is still on track to be fully cutover by 7/12/2024.
- **Passenger Information Displays (PIDS):** As mentioned in earlier reports, DART has selected GMV Syncromatics as our vendor to replace the platform signs at DCS.
 - A kickoff call happened on 3/27/2024.
 - A Site visit was performed by GMV on 4/24/2024 to finalize the build list.

MONTHLY REPORT

10D: Finance/Procurement/IT Team Report

- o The component build is estimated to be completed late August, with scheduled install time of early September.

10E: Human Resources/Training/Safety Team/Customer Service Report

Staff Resources: Kelley Burgess – Chief People Officer

A. Employee Engagement:

Summer Kickoff Lunch: We celebrated the start of summer with a cookout in the DART paratransit barn. People leaders grilled and served hot dogs and burgers for employees. It was a great day to be together as Team DART!



Employee Recognition: Over the last four weeks, the DART Team celebrated two bus operators' retirements, Warren Jernstad and Tom Paca. We appreciate their combined 29 years of service to DART customers!

MONTHLY REPORT

10E: Human Resources/Training/Safety/Customer Service Team Report

Warren Jernstad – 17 Years of Service

Tom Paca – 12 Years of Service



- B. HRIS Update:** Timeline is on track with the second parallel payroll processing completed this month. The project has had multiple wins already: consolidation of five disparate systems into one unified platform, integrated with twelve third party systems to eliminate manual processes, modernized and simplified policies, and delivered in-house training for all employees. All core modules (Payroll, Core HR, Time & Scheduling, Benefits & Absence) are in final validation stages, and two additional value add modules (Learning Management System LMS and Performance Management) are live today. Employee goals for the next fiscal year will be entered directly into UKG.

Human Resources – Alaina Severino, Human Resources Manager

- **Recruitment Update:** The HR department is currently interviewing for the following openings:
 - Bus Operator (Para & Fixed) Bus Maintenance Technician
 - Building and Grounds person
 - State Fair Driver
- **Recent Hires:**
 - 2 – Fixed Route Operators
 - 1 – Operations Supervisor 1 – Operations Dispatcher
 - 1 – Mobility Services Operator 2 – Customer Service Reps
- **Turnover Rate:** May 1.7%, June .7% YTD 10.5%

Training – Matt Johnson, Training Manager

- **Fixed Route New Hire Trainees:** Training continues for two Fixed Route operators.
- **Mobility Services New Hire Trainees:** Training continues for one Mobility Services operator.
- **Mobility Services Training Graduates:** One new operator completed all training requirements and graduated to Part-Time Mobility Services Operator.
- **Fixed Route Training Graduates:** Two new operators completed all training requirements and graduated to Part-Time Fixed Route Operator.

MONTHLY REPORT

10E: Human Resources/Training/Safety/Customer Service Team Report

- **Operations Safety Meetings:** Safety meetings were held with all operators. Topics highlighted included a focus on physical wellbeing. This included discussion of proper steering technique and stretching to promote healthy living. Safety focused on intersections and proper procedure to navigate challenging situations. Finally, Operators were also engaged around accident preventability and a consideration of leading causes of accidents in our environment as well as how to prevent those personally.
- **Transit Ambassador for Customer Service Sessions:** Sessions continue for the Transit Ambassador Program. DART has utilized this program since 2017 as a focused development for experienced operators to further develop their skills around delivering a positive customer experience. A group of twenty-three operators are scheduled to complete the multi-session program by the end of June.
- **Training Handbook Update:** Training completed an update to the Training Handbook; this will be provided to all new operators starting July 1st. Train-the-Trainer sessions were held with all behind the wheel trainers, as well as learning sessions with Operations people leaders.

Safety – Pat Daly, Safety Manager

- **New Employee Safety Orientations:** Delivered two new employee safety orientations that included an overview of DART's Agency Safety Plan, the Employee Safety Report Program, the hazard and near-miss reporting program, and safety familiarization tours of 1100 Dart Way and DART Central Station.
- **New Operator Accident Prevention Discussions:** We met with two groups of new operators finishing their classroom training to discuss accident preventability, show them the most common accidents new operators have, and talked about actions they can take to avoid those.
- **Safety Meetings:** Discussed recent accidents and near-misses, focusing on those attributed to distracted driving. Using video of the incidents, facilitated discussions on each incident, guiding operators to put themselves in the place of the operators involved and then express their thoughts on how the incidents could have been avoided.
- **Iowa Public Transit Association (IPTA):** Escorted DART's IPTA Drivers of the Year and Rodeo participants to the annual awards dinner in Ames then participated as judges for the Rodeo competition the next day.
- **Transit Riders Advisory Committee (TRAC):** Delivered a presentation to DART's TRAC detailing the Agency Safety Plan and walked the members through the risk assessment that led to the 30' Gillig bus configuration without the rear doors.

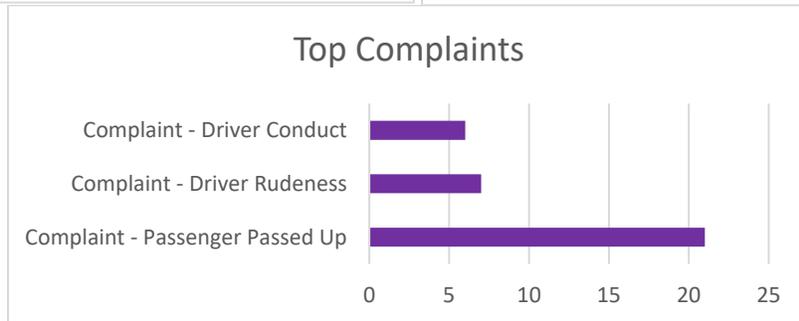
Customer Experience – Alyson Reimers, Customer Service Supervisor:

Service Levels – We are continuing to see our service levels trend in a positive direction. We've hired two Customer Service Specialists; they will start July 8th.

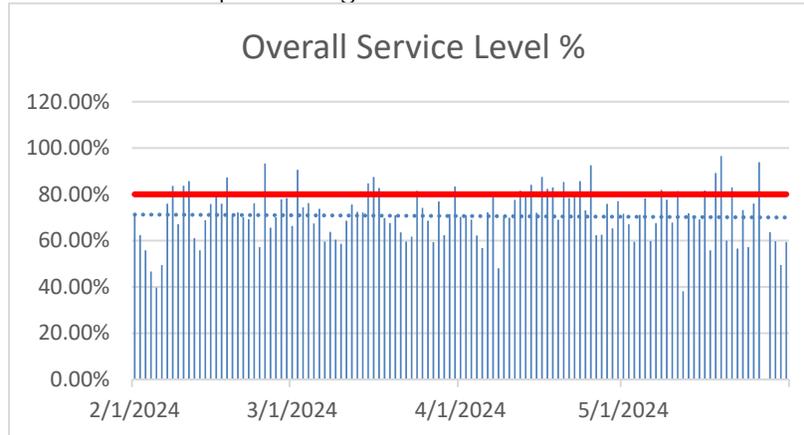
Call Trends – We have continued to see normal call trends: schedule questions, Paratransit questions/reservations, etc. We continue to see a decrease in driver rudeness complaints in May versus April. We unfortunately saw an increase in Passenger passed up complaints for May.

MONTHLY REPORT

10E: Human Resources/Training/Safety/Customer Service Team Report



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



10F:	Chief Executive Officer
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Staff Resource: Amanda Wanke, Chief Executive Officer

- **DART Executive Committee:** Due to minimal agenda items and upcoming Commission interviews and workshops, the June Executive Committee meeting was cancelled. The next meeting will be held on Wednesday, July 24th at 12.30pm.
- **NEXUS Presentation:** I had the opportunity to present about both DART and my personal leadership journey at a June NEXUS meeting. Founded in 1977 by Connie Winer and five other pioneering female business leaders, the purpose of NEXUS is to provide professional, business and personal support to each other.
- **MPO Presentation:** I presented to both the MPO Technical and Policy Committees—my first official presentation to the group since becoming CEO. My presentation included updates on funding, Reimagine DART, and infrastructure including fleet and facilities.
- **Strategic Planning:** The Executive Leadership Team, to be followed by all DART people leaders, are in the process of identifying FY25 business planning initiatives and goals, in line with the Commission-approved FY 2024-2026 Strategic Plan. An update will be brought to the Commission at a future meeting.
- **Iowa Public Transit Association and FTA Region 7 Meetings:** I and several staff members participated in the Iowa Public Transit Association annual meeting in June. This included an opportunity for us to meet with FTA Region 7 leadership to update them on key things happening at DART and ask questions related to ongoing business with the FTA.
- **Member Community Meetings:** I recently completed a round of one-on-one meetings with interested DART Commissioners. This is part of an effort to ensure regular and transparent communication including any community-specific updates, feedback for me, and discussion on other timely issues. While we will proactively schedule these 1-2 times a year, I'm always happy to meet one-on-one at any time if a Commissioner or Alternate would like.
- **Reimagine DART Surveys, Interviews and Workshops:** DART hired Baton Global to lead a member community survey, interview and workshop process with the following goals:
 - Define what success for regional transit looks like by coming to consensus on the 3-4 outcomes we are trying to achieve by investing in regional transit
 - Identify barriers to success
 - Determine next steps to move forward on a service redesign and addressing barriers

This process was started with a survey of DART member communities. The survey was open from May 23 – June 21 and received a 66% response rate (58 individuals responded out of 87). The survey results will be used to gather more specific feedback during member community interviews in late July and early August.

FUTURE DART COMMISSION ITEMS



Future Agenda Items:

August 6, 2024 – 12:00 P.M.	
Consent/Action Items	Information Items
<ul style="list-style-type: none"> Advertising Policy 	<ul style="list-style-type: none"> Transit Riders Advisory Committee Update Iowa State Fair Updates/Reminders Business Plan Update November Service Change/Title VI Construction Contract Change Order Policy Paratransit Update
September 3, 2024 – 12:00 P.M.	
Consent/Action Items	Information Items
<ul style="list-style-type: none"> Network Redesign Contract O&M Facility Construction Contracts Construction Contract Change Order Policy Network Redesign Contract CEO Performance Review 	<ul style="list-style-type: none"> Transit Riders Advisory Committee Update Mobility Coordinator Update Quarterly Investment Report Quarterly Financial Update Quarterly Safety Report USURV Update
October 1, 2024	
Consent/Action Items	Information Items
<ul style="list-style-type: none"> November Service Change/Title VI 	<ul style="list-style-type: none"> Transit Riders Advisory Committee Update

Upcoming DART Meetings:

MEETING	DATE	TIME	LOCATION
DART Executive Committee Meeting	Wednesday, July 24, 2024	12.30 p.m.	Zoom