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BROOKS ESSER
MARINA FRASER
RICO E. MEDINA
JOSH POWELL
PETER RATTO
JACKIE SPEIER

APRIL CHAN
GENERAL MANAGER/CEO

AGENDA

San Mateo County Transit District

Board of Directors Meeting

August 6, 2025, 2:00 pm

Bacciocco Auditorium, 2nd Floor
1250 San Carlos Avenue, San Carlos, CA 94070

Members of the public may attend in-person or participate remotely via Zoom at: <https://us02web.zoom.us/j/81001317517?pwd=6LuOhomk1KpISW9X2CbpthZRGreaIA.1> or by entering Webinar ID: **810 0131 7517**, Passcode: **792571** in the Zoom app for audio/visual capability or by calling 1-669-900-9128 (enter webinar ID and press # when prompted for participant ID) for audio only.

Please Note the following COVID-19 Protocols for in-person attendance:

1. Visitors experiencing the following symptoms of COVID-19 may not enter the building:

- Cough
- Shortness of Breath
- Fever
- Chills
- Muscle Pain
- Sore Throat
- Loss of Taste or Smell

2. Wearing of masks is recommended but not required.

Public Comments: Public comments may be submitted to publiccomment@samtrans.com prior to the meeting's call to order so that they can be sent to the Board as soon as possible, while those received during or after an agenda item is heard will be included into the Board's weekly correspondence and posted online at: <https://www.samtrans.com/meetings>.

Oral public comments will also be accepted during the meeting in person and through Zoom* or the teleconference number listed above. Public comments on individual agenda items are limited to one per person PER AGENDA ITEM. Participants using Zoom over the Internet should use the Raise Hand feature to request to speak. For participants calling in, dial *67 if you do not want your telephone number to appear on the live broadcast. Callers may dial *9 to use the Raise Hand feature for public comment. Each commenter will be recognized to speak and callers should dial *6 to unmute themselves when recognized to speak.

Each public comment is limited to two minutes or less. The Board and Committee Chairs have the discretion to manage the Public Comment process in a manner that achieves the purpose of public communication and assures the orderly conduct of the meeting.

The video live stream will be available after the meeting at <https://www.samtrans.com/about-samtrans/video-board-directors-cac-and-measure-w-coc>.

Wednesday, August 6, 2025

2:00 pm

1. Call to Order / Pledge of Allegiance
2. Roll Call
3. Consideration of any requests from Directors to participate remotely due to Emergency Circumstances
4. Adoption of Agenda Motion
5. Consent Calendar
 - 5.a. Approval of Minutes of the Board of Directors Meeting of July 2, 2025 Motion
 - 5.b. Accept Information on Statement of Revenues and Expenses for the Period Ending June 30, 2025 Motion
 - 5.c. Accept Quarterly Investment Report Motion
 - 5.d. Accept Contracts and Procurement Quarterly Report of Technology Purchases for Fourth Quarter of Fiscal Year 2025 Motion
 - 5.e. Receive Additional Survey Data and Analysis from 2024 Triennial Customer Survey Motion
 - 5.f. Awarding Contracts to Corey, Canapary & Galanis and EMC Research, Inc. for On-Call Market Research and Survey Services for an Aggregate Not-To-Exceed Amount of \$2.1 Million for a Three-Year Base Term, with up to Two Additional One-Year Option Terms Resolution
 - 5.g. Updating the Public Transportation Agency Safety Plan Resolution
 - 5.h. Authorizing Submittal of Three Applications for San Mateo County Transportation Authority Cycle 3 Measure A Alternative Congestion Relief and Measure W Transportation Demand Management Program Funding Resolution

Note: All items appearing on the agenda are subject to action by the Board. Staff recommendations are subject to change by the Board.

6. Public Comment for Items Not on the Agenda
Comments by each individual speaker shall be limited to two (2) minutes. Items raised that require a response will be deferred for staff reply.
7. Report of the Chair Informational
8. Report of the General Manager/CEO
 - 8.a. Report of the General Manager/CEO | July 30, 2025 Informational
 - 8.b. Service Update: August Service Changes and Regional Transfer Coordination Informational
 - 8.c. Monthly Headquarters Construction Status Update Informational
9. Recess to Committee Meetings
 - 9.a. Community Relations Committee / Committee of the Whole
D. Canepa (Chair), M. Fraser, J. Speier
 - 9.a.1. Call to Order
 - 9.a.2. Approval of Minutes of the Community Relations Committee Meeting of July 2, 2025 Motion
 - 9.a.3. Accessible Services Update Informational
 - 9.a.4. Citizens Advisory Committee Update Informational
 - 9.a.5. Paratransit Advisory Council Update Informational
 - 9.a.6. Monthly State of Service Report - June 2025 Informational
 - 9.a.7. Adjourn
 - 9.b. Finance Committee / Committee of the Whole
 - 9.b.1. Call to Order
 - 9.b.2. Approval of Minutes of the Finance Committee Meeting of July 2, 2025 Motion
 - 9.b.3. Adopting a Disadvantaged Business Enterprise Overall Goal of 0.8 Percent for Federal Fiscal Years 2026-2028 for Federal Transit Administration-Assisted Contracts Motion

Note: All items appearing on the agenda are subject to action by the Board. Staff recommendations are subject to change by the Board.

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| 9.b.4. | Awarding a Contract to Skyline Commercial Interiors, Inc. dba Skyline Construction Inc. to Provide General Construction and Associated Services for the Millbrae Headquarters and Related Ancillary Services at the District's San Carlos Headquarters and Other District Locations for a One-Year Base Term, with up to Two Additional One-Year Option Terms, for a Total Amount of \$7,836,070.85 | Motion |
| 9.b.5. | Authorizing an Agreement with Clark Construction Group - CA, LP for Phase 1 Construction Services under the Construction Manager General Contractor Services for the South Base Battery Electric Bus Charging Infrastructure Project in the Amount of \$36,276,673 and Amending the Fiscal Year 2026 Capital Budget to Increase it by \$13,868,679, from \$4,698,405 to \$18,567,084 | Motion |
| 9.b.6. | Adjourn | |
| 9.c. | Strategic Planning, Development, and Sustainability Committee / Committee of the Whole
<i>R. Medina (Chair), M. Chuang, P. Ratto</i> | |
| 9.c.1. | Call to Order | |
| 9.c.2. | Approval of Minutes of the Strategic Planning, Development, and Sustainability Committee Meeting of July 2, 2025 | Motion |
| 9.c.3. | Ride Plus Microtransit Evaluation Key Findings | Informational |
| 9.c.4. | Adjourn | |
| 9.d. | Legislative Committee / Committee of the Whole
<i>J. Powell (Chair), P. Ratto, J. Speier</i> | |
| 9.d.1. | Call to Order | |
| 9.d.2. | Approval of Minutes of the Legislative Committee Meeting of July 2, 2025 | Motion |
| 9.d.3. | Receive Legislative Update and Approve Legislative Proposal: Assembly Bill 1250 (Papan) | Motion |

Note: All items appearing on the agenda are subject to action by the Board. Staff recommendations are subject to change by the Board.

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| 9.d.4. | Receive Updates and Consider Staff Recommendation on Regional Transportation Funding | Motion |
| i. | Receive Update on and Consider Approval of Caltrain Proposal for Member Agencies' Contributions | |
| ii. | Receive Update on and Consider Opting In to Senate Bill 63 Regional Transportation Funding Measure | |

9.d.5. Adjourn

10. Reconvene Board of Directors Meeting

11. Matters for Board Consideration: Finance Committee

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|-------|---|------------|
| 11.a. | Adopting a Disadvantaged Business Enterprise Overall Goal of 0.8 Percent for Federal Fiscal Years 2026-2028 for Federal Transit Administration-Assisted Contracts | Resolution |
| 11.b. | Awarding a Contract to Skyline Commercial Interiors, Inc. dba Skyline Construction Inc. to Provide General Construction and Associated Services for the Millbrae Headquarters and Related Ancillary Services at the District's San Carlos Headquarters and Other District Locations for a One-Year Base Term, with up to Two Additional One-Year Option Terms, for a Total Amount of \$7,836,070.85 | Resolution |
| 11.c. | Authorizing an Agreement with Clark Construction Group - CA, LP for Phase 1 Construction Services under the Construction Manager General Contractor Services for the South Base Battery Electric Bus Charging Infrastructure Project in the Amount of \$36,276,673 and Amending the Fiscal Year 2026 Capital Budget to Increase it by \$13,868,679, from \$4,698,405 to \$18,567,084 | Resolution |

12. Matters for Board Consideration: Legislative Committee

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|-------|--|--------|
| 12.a. | Receive Legislative Update and Approve Legislative Proposal: Assembly Bill 1250 (Papan) | Motion |
| 12.b. | Receive Updates and Consider Staff Recommendation on Regional Transportation Funding | Motion |
| i. | Receive Update on and Consider Approval of Caltrain Proposal for Member Agencies' Contributions | |
| ii. | Receive Update on and Consider Opting In to Senate Bill 63 Regional Transportation Funding Measure | |

13. Communications to the Board of Directors

Note: All items appearing on the agenda are subject to action by the Board. Staff recommendations are subject to change by the Board.

14. Board Members Requests

15. Date / Time of Next Regular Meeting: Wednesday, September 3, 2025, at 2:00 pm

The meeting will be accessible via Zoom teleconference and/or in person at the San Mateo County Transit District, Bacciocco Auditorium, 2nd Floor, 1250 San Carlos Avenue, San Carlos, CA. Please see the meeting agenda for more information.

16. Report of the General Counsel

16.a. Closed Session: Closed Session: Conference with Legal Counsel – Initiation of Litigation Pursuant to Government Code Section 54956.9(d)(1): Estate of Sol Gloria, et al v. San Mateo County Transit District, et al., San Mateo County Superior Court, Case No. 23-CIV-01053

16.b. Report Out from Closed Session [tentative]

17. Adjourn

Information for the Public

If you have questions on the agenda, please contact the District Secretary at 650-551-6108. Agendas are available on the SamTrans website at: <https://www.samtrans.com/meetings>. Communications to the Board of Directors can be emailed to board@samtrans.com.

Free translation is available; Para traducción llama al 1.800.660.4287; 如需翻译 请电1.800.660.4287

Date and Time of Board and Citizens Advisory Committee Meetings

San Mateo County Transit District (SamTrans) Board and Committees: First Wednesday of the month, 2:00 pm; SamTrans Citizens Advisory Committee (CAC): Last Wednesday of the month, 6:30 pm. Date, time and location of meetings may be changed as necessary. Meeting schedules for the Board and CAC are available on the website.

Location of Meeting

This meeting will be held in-person at: San Mateo County Transit District, Bacciocco Auditorium, 2nd Floor, 1250 San Carlos Avenue, San Carlos, CA. Members of the public may attend in-person or participate remotely via Zoom as per the information provided at the top of the agenda.

*Should Zoom not be operational, please check online at: <https://www.samtrans.com/meetings> for any updates or further instruction.

Public Comment

Members of the public may participate remotely or in person. Public comments may be submitted by comment card in person and given to the District Secretary. Prior to the meeting's call to order, public comments may be submitted to publiccomment@samtrans.com prior to the meeting's call to order so that they can be sent to the Board as soon as possible, while those received during or after an agenda item is heard will be included into the Board's weekly correspondence and posted online at: <https://www.samtrans.com/meetings>.

Public comments will also be accepted during the meeting through Zoom or the teleconference number listed above. Public comments on individual agenda items are limited to two minutes and one per person PER AGENDA ITEM. Each online commenter will be automatically notified when they are unmuted to speak. The Board Chair shall have the discretion to manage the Public Comment process in a manner that achieves the purpose of public communication and assures the orderly conduct of the meeting.

Accessible Public Meetings/Translation

Upon request, SamTrans will provide for written agenda materials in appropriate alternative formats, or disability-related modification or accommodation, including auxiliary aids or services, to enable individuals with disabilities to participate in and provide comments at/related to public meetings. Please submit a request, including your name, phone number and/or email address, and a description of the modification, accommodation, auxiliary aid, service or alternative format requested at least 72 hours in advance of the meeting or hearing. Please direct requests for disability-related modification and/or interpreter services to the Title VI Administrator at San Mateo County Transit District, 1250 San Carlos Avenue, San Carlos, CA 94070; or email titlevi@samtrans.com; or request by phone at 650-622-7864 or TTY 650-508-6448.

Availability of Public Records

All public records relating to an open session item on this agenda that are not exempt from disclosure pursuant to the California Public Records Act and that are distributed to a majority of the legislative body will be available for public inspection at 1250 San Carlos Avenue, San Carlos, CA 94070 at the same time that the public records are distributed or made available to the legislative body.

**San Mateo County Transit District
1250 San Carlos Avenue, San Carlos, California**

**Board of Directors
DRAFT Minutes of July 2, 2025**

Members Present: D. Canepa, B. Esser, M. Fraser, R. Medina, J. Powell, P. Ratto, M. Chuang (Vice Chair), J. Gee (Chair - arrived at 3:58 pm)

Members Present via Teleconference: J. Speier (arrived at 2:05 pm)

Members Absent: None

Staff Present: E. Bit, M. Bouchard, J. Cassman, A. Chan, T. Dubost, J. Epstein, C. Espiritu, Z. Fan, C. Fromson, L. Lumina-Hsu, B. McMullan, D. Olmeda, M. Rush, H. Salem, D. Santoro, C. Schultz, M. Tolleson, N. Tolmie, M. Tseng, S. van Hoften, K. Yin

1. Call to Order / Pledge of Allegiance

Acting Chair Marie Chuang called the meeting to order at 2:00 pm and led the Pledge of Allegiance.

2. Roll Call

Margaret Tseng, District Secretary, called the roll and confirmed that a Board quorum was present.

3. Consideration of any requests from Directors to participate remotely due to Emergency Circumstances – There were none.

4. Adoption of Agenda

Joan Cassman, General Counsel, stated the changes from the usual order of business are reflected on the agenda included the following:

- Report of the General Counsel and Closed Session moved to the beginning of the meeting
- Committees reordered to hear Strategic Planning, Development, and Sustainability Committees and then Legislative Committee
- Report of the Chair moved to after the Committees

Motion/Second: Esser/Medina

Ayes: Canepa, Esser, Fraser, Medina, Powell, Ratto, Chuang

Noes: None

Absent: Speier, Gee

5. Report of the General Counsel

5.a. Report Out from Closed Session at June 4, 2025 Board Meeting

5.a.1. Closed Session: Conference with Legal Counsel – Existing Litigation Pursuant to Government Code Section 54956.9(d)(1): Paul Ghenis v. San Mateo County Transit District, et al., Superior Court of California, County of San Mateo, Case No. 20-CIV- 04138

Ms. Cassman stated no reportable action was taken.

5.b. Recess to Closed Session

5.b.1. Closed Session: Conference with Legal Counsel - Initiation of litigation pursuant to Government Code section 54956.9(d)(4): 1 case

The Board adjourned to closed session at 2:05 pm.

Director Speier arrived at 2:05 pm.

6. Reconvene Regular Session

The Board reconvened to regular session at 2:59 pm.

7. Report of the General Counsel - Report Out from Above Closed Session (Verbal)

Ms. Cassman stated no reportable action was taken.

8. Consent Calendar

8.a. Approval of Minutes of the Board of Directors Meeting of June 4, 2025

8.b. Accept Statement of Revenues and Expenses for the Period Ending May 31, 2025

8.c. Adopting an Updated Safety-Sensitive Policy Concerning Substance Abuse –

Approved by Resolution No. 2025-28

8.d. Authorizing an Amendment to a Contract with Vintage Elevator Services, Inc. to Provide Elevator Test, Inspection and Maintenance Services to Increase the Total Not-to-Exceed Amount by \$250,000 and Extend the Term for Two Years –

Approved by Resolution No. 2025-29

8.e. Authorizing Exercise of an Option to Extend the Term of Agreement with the San Mateo County Sheriff's Office for Law Enforcement Services for Five Years at an Estimated Cost of \$11,585,704 – Approved by Resolution No. 2025-30

Motion/Second: Medina/Ratto

Ayes: Canepa, Esser, Fraser, Medina, Powell, Ratto, Speier, Chuang

Noes: None

Absent: Gee

9. Public Comment for Items Not on the Agenda

Sandra Lang, Paratransit Coordinating Council, spoke in support of Senate Bill (SB) 63 and commented on the need for public transportation in vulnerable communities, and on the work and transit services of the San Mateo County Transit District.

Ray Fields, Service Employees International Union 1021 (SEIU) Bay Area Rapid Transit (BART) chapter Vice President and Bay Area Forward member, spoke in support of SB 63 and a business gross receipts tax.

Adina Levin, Seamless Bay Area, commented on wayfinding signs and programs that increase transit ridership.

Ren Fitzgerald, San Mateo County, commented on Bay Pass program.

10. Report of the General Manager/CEO

10.a. Report of the General Manager/CEO | June 25, 2025

April Chan, General Manager/CEO, reported SamTrans participation in three local Pride events with over 30 staff in attendance.

10.b. Monthly New Headquarters Construction Status Update

Kris McGee, Managing Principal, Urban Hive Development, and Joshua Mello, Executive Officer of Planning and Development, provided the presentation that included the following:

- New wall framing completed; mechanical, electrical, and plumbing work currently in progress; construction submittals processed; furniture, audio/visual, and power dimensions being verified
- Reviewed risk register items and mitigation efforts
- Non-tenant improvement general construction, also known as Day 2, anticipated to go to Board for approval in August 2025

11. Recess to Committee Meetings

The Board meeting recessed to Committee Meetings at 3:18 pm.

Chair Gee joined the meeting at 3:58 pm.

The Board of Directors recessed at 4:06 pm.

The Board of Directors reconvened at 4:16 pm.

12. Reconvene Board of Directors Meeting

Chair Gee reconvened the Board meeting at 7:43 pm.

13. Report of the Chair

13.a. Convening Human Resources Ad Hoc Committee to Oversee Performance Evaluations of General Manager/Chief Executive Officer and General Counsel and Seeking Board's Delegation of Authority to Engage Evaluation Process Facilitator

Human Resources (HR) Ad Hoc Committee will meet on July 8. Anticipates completion performance evaluation review for both GM/CEO and General Counsel by November 1, 2025.

Motion/Second: Powell/Medina

Ayes: Canepa, Esser, Fraser, Medina, Powell, Ratto, Speier, Chuang, Gee

Noes: None

Absent: None

14. Matters for Board Consideration: Community Relations Committee

Director Canepa led the Board in voting on the following item:

14.a. Approve Appointment of James Ganner, Representing Bus Riders, to the Citizens Advisory Committee

Motion/Second: Ratto/Esser

Ayes: Canepa, Esser, Fraser, Medina, Powell, Ratto, Speier, Chuang, Gee

Noes: None

Absent: None

15. Matters for Board Consideration: Finance Committee

Director Esser led the Board in voting on the following items:

15.a. Approving and Ratifying the Insurance Program for Fiscal Year 2026– *Approved by Resolution No. 2025-31*

Motion/Second: Medina/Chuang

Ayes: Canepa, Esser, Fraser, Medina, Powell, Ratto, Speier, Chuang, Gee

Noes: None

Absent: None

- 15.b. Awarding Contracts to Trillium USA Company, LLC for (1) Design, Construction, and Commissioning of a Permanent Hydrogen Fueling Station for a Total Amount of \$17,365,635.39, and (2) Maintenance Services for a Not-to-Exceed Amount of \$1,696,358.16 for a Three-Year Base Term and Two One-Year Option Terms for an Additional Not-to-Exceed Amount of \$1,277,704.08— Approved by Resolution No. 2025-32**

Motion/Second: Medina/Chuang

Ayes: Canepa, Esser, Fraser, Medina, Powell, Ratto, Speier, Chuang, Gee

Noes: None

Absent: None

16. Matters for Board Consideration: Strategic Planning, Development, and Sustainability Committee

Director Medina led the Board in voting on the following item:

- 16.a. Adopting the San Mateo County Transit District Fiscal Years 2026-2029 Capital Improvement Plan and Fiscal Years 2026-2035 10-Year Capital Program – Approved by Resolution No. 2025-33**

Motion/Second: Ratto/Chuang

Ayes: Canepa, Esser, Fraser, Medina, Powell, Ratto, Speier, Chuang, Gee

Noes: None

Absent: None

17. Matters for Board Consideration: Legislative Committee

Director Powell led the Board in voting on the following items:

- 17.a. Receive Legislative Update and Approve Legislative Proposal: Assembly Bill 476 (González)**

Motion/Second: Esser/Medina

Ayes: Canepa, Esser, Fraser, Medina, Powell, Ratto, Speier, Chuang, Gee

Noes: None

Absent: None

- 17.b. Receive Senate Bill 63 Update: Term Sheet Proposal on Caltrain Member Agencies Contributions - Discussion and Direction**

Motion/Second: Esser/Medina

Ayes: Canepa, Esser, Fraser, Medina, Powell, Ratto, Speier, Chuang, Gee

Noes: None

Absent: None

18. Communications to the Board of Directors – Available online.

19. Board Member Requests/Comments – Director Esser requested to adjourn the meeting in memory of Helen Tang Gee.

20. Date / Time of Next Regular Meeting: Wednesday, August 6, 2025 at 2:00 pm at via Zoom and in person at the San Mateo County Transit District, Bacciocco Auditorium, 2nd Floor, 1250 San Carlos Avenue, San Carlos, CA.

21. Adjourn – The meeting adjourned at 7:50 pm in memory of Helen Tang Gee.

An audio/video recording of this meeting is available online at <https://www.samtrans.com/about-samtrans/video-board-directors-cac-and-measure-w-coc>. Questions may be referred to the District Secretary's office by phone at 650-551-6108 or by email to board@samtrans.com.

**San Mateo County Transit District
Staff Report**

To: Board of Directors

Through: April Chan, General Manager/CEO

From: Kate Jordan Steiner, Chief Financial Officer

Subject: **Accept Information on Statement of Revenues and Expenses for the Period
Ending June 30, 2025**

Action

This item is for information only. No action required.

Significance

The Finance Division performs extensive work after the June 30 fiscal year-end to close the prior year and prepare for the new one. Due to the scope of these activities, a complete Statement of Revenues and Expenses for June 2025 cannot be produced in time for the regular board meeting cycle. Accordingly, staff anticipate presenting the June 2025 report at the October 8, 2025 Board of Directors meeting. External auditors Eide Bailly, LLP, are expected to complete the annual audit by the end of October, with the Annual Comprehensive Financial Report anticipated in early November 2025.

Budget Impact

There is no impact to the budget.

Background

No additional information.

Prepared By:	Jessica Wong	Financial Reporting Accountant	650-508-6499
	Annie To	Director of Accounting	650-622-7890

**San Mateo County Transit District
Staff Report**

To: Board of Directors

Through: April Chan, General Manager/CEO

From: Kate Jordan Steiner, Chief Financial Officer

Subject: **Accept Quarterly Investment Report**

Action

Staff proposes that the Board accept and enter into the record the Quarterly Investment Report for the quarter ending June 30, 2025.

Significance

The San Mateo County Transit District (District) Investment Policy contains a requirement for a quarterly report to be transmitted to the Board within 45 days of the end of the quarter.

Budget Impact

There is no impact on the budget.

Background

The District is required by California State law to submit quarterly investment reports to the Board of Directors within 45 days of the end of each quarter. The report provides transparency and accountability in managing public funds by detailing the investment portfolio's composition, performance, and compliance with legal and policy requirements. For June 30, 2025, the report includes:

- Types, issuers, maturity dates, and amounts of investments.
- Descriptions of funds managed by contracted parties.
- Current market values for all securities as of June 30, 2025.
- Compliance with the Investment Policy and California Government Code.
- Certification of the District's ability to meet its six-month expenditure requirements.

Portfolio Balances and Performance Highlights:

The District's total investment portfolio is valued at \$611.4 million. During the 4th quarter, the entire portfolio earned \$5.65 million in interest income, with \$1.96 million generated from PFM Asset Management LLC (PFM) managed holdings.

1. \$229.5 million Investment Portfolio managed by PFM comprised of fixed income securities:
 - a. \$199.2 million in operating funds: 4.09 percent yield in Quarter 4 Fiscal Year 2025 (Q4FY25)
 - b. \$30.3 million in paratransit funds: 4.10 percent yield in Q4FY25

For both (a) and (b) combined, the portfolio sustained \$1.4 million in unrealized market value appreciation in Q4FY25, as yields fell from 4.27 percent (as of March 31, 2025) to 4.09 percent (as of June 30, 2025). Interest rates on maturities under 10 years moved lower during the quarter, as investors sought the safety of Treasuries in the midst of fiscal policy uncertainty and market volatility. The portfolio also benefited from recent market reactions to tariff announcements, as higher prices on fixed income securities result in higher market values on existing holdings.

2. \$382 million Liquidity Portfolio in Q4FY25, managed by the District staff, composed of short-term investments such as:

- a. \$5.9 million Local Agency Investment Fund (LAIF): 4.3 percent yield
- b. \$9.5 million U.S. Bank Money Market Funds: 3.9 percent yield
- c. \$119.6 million Bank of America Checking: 4.4 percent yield
- d. \$246.8 million in California Asset Management Program (CAMP): 4.4 percent yield

Market Conditions:

Federal Reserve Actions:

- At its June 2025 meeting, the Federal Reserve (Fed) maintained the federal funds rate within the 4.25-4.5 percent range. Chair Powell indicated that rate cuts might have been considered if not for the uncertainty around new tariffs. The resilient economic data supports the Fed's cautious wait-and-see approach.
- The Fed's June 2025 Summary of Economic Projections estimate real gross domestic product (GDP) growth at 1.4 percent for the calendar year, a downward revision from the previous 1.7 percent estimate.

- The Fed's updated "dot plot," which shows the rate expectations for the next several years, continues to suggest 50 basis points (bps) in rate cuts by the end of calendar year 2025. The projections showed eight of the Fed's nineteen policymakers expect to reduce the rate range to 3.75-4.00 percent by the end of calendar year 2025, and two policymakers felt a further quarter-point reduction would be appropriate.

Market and Economic Indicators:

- The 10-year Treasury yield fluctuated during Q4FY25, reaching a high of approximately 4.58 percent in mid-May and closing at 4.24 percent on June 30, 2025. The U.S. Treasury yield curve steepened over the quarter. The front end of the yield curve moved lower amid expectations for Fed rate cuts while longer-term maturities (the time left until a financial instrument matures or expires) rose on concerns regarding the longer-term impacts of the proposed federal reconciliation bill.

Labor Market and Consumer Spending:

- In the quarter ended June 30, 2025, U.S. private-sector employers added 147,000 jobs; The unemployment rate dropped to 4.1 percent in June, down from 4.2 percent at the end of March 2025.
- The unemployment rate is projected to rise to between 4.4 percent and 4.8 percent by the end of 2025, up from earlier estimates of 4.3 percent in March 2025.
- Inflation and Tariffs: Persistent inflation and concerns over new tariffs have been influencing consumer confidence and spending behaviors. The National Retail Federation (NRF) projects a slowdown in retail sales growth for the Calendar Year 2025, forecasting an increase between 2.7 percent and 3.7 percent, compared to a 3.6 percent rise in 2024.
- Consumer sentiment remains subdued due to expectations for higher prices and weaker labor market conditions as tariffs weigh on the pace of economic growth. However, there has been modest improvement from the April lows due to progress on tariff negotiations. A sharp labor market downturn remains the biggest threat to consumer spending.

Portfolio Compliance

The District's investment portfolio complies with the Investment Policy and relevant California Government Code provisions. Managed holdings' valuations were sourced from ICE Data Services, while liquidity holdings are valued at book value, consistent with their short-term nature. The District also certifies its ability to meet expenditure requirements for the next six months.

Prepared By: Adela Alicic

Senior Financial Analyst

650-508-7981

INVESTMENT GLOSSARY

Asset Backed Securities - An asset-backed security (ABS) is a financial security backed by a loan, lease or receivables against assets other than real estate and mortgage-backed securities. For investors, asset-backed securities are an alternative to investing in corporate debt.

Certificate of Deposit - A certificate of deposit (CD) is a savings certificate with a fixed maturity date, specified fixed interest rate and can be issued in any denomination aside from minimum investment requirements. A CD restricts access to the funds until the maturity date of the investment. CDs are generally issued by commercial banks and are insured by the FDIC up to \$250,000 per individual.

Collateralized Mortgage Obligation - Collateralized mortgage obligation (CMO) refers to a type of mortgage-backed security that contains a pool of mortgages bundled together and sold as an investment. Organized by maturity and level of risk, CMOs receive cash flows as borrowers repay the mortgages that act as collateral on these securities. In turn, CMOs distribute principal and interest payments to their investors based on predetermined rules and agreements.

Commercial Paper - Commercial paper is an unsecured, short-term debt instrument issued by a corporation, typically for the financing of accounts receivable, inventories and meeting short-term liabilities. Maturities on commercial paper rarely range any longer than 270 days. Commercial paper is usually issued at a discount from face value and reflects prevailing market interest rates.

Credit Spreads - The spread between Treasury securities and non-Treasury securities that are identical in all respects except for quality rating.

Duration - The term duration has a special meaning in the context of bonds. It is a measurement of how long, in years, it takes for the price of a bond to be repaid by its internal cash flows. It is an important measure for investors to consider, as bonds with higher durations carry more risk and have higher price volatility than bonds with lower durations.

Net Asset Value - Net asset value (NAV) is value per share of a mutual fund or an exchange-traded fund (ETF) on a specific date or time. With both security types, the per-share dollar amount of the fund is based on the total value of all the securities in its portfolio, any liabilities the fund has and the number of fund shares outstanding.

Roll-down - A roll-down return is a form of return that arises when the value of a bond converges to par as maturity is approached. The size of the roll-down return varies greatly between long and short-dated bonds. Roll-down is smaller for long-dated bonds that are trading away from par compared to bonds that are short-dated. Roll-down return works two ways in respect to bonds. The direction depends on if the bond is trading at a premium or at a discount. If the bond is trading at a discount the roll-down effect

will be positive. This means the roll-down will pull the price up towards par. If the bond is trading at a premium the opposite will occur. The roll-down return will be negative and pull the price of the bond down back to par.

Volatility - Volatility is a statistical measure of the dispersion of returns for a given security or market index. Volatility can either be measured by using the standard deviation or variance between returns from that same security or market index. Commonly, the higher the volatility, the riskier the security.

Yield Curve - A yield curve is a line that plots the interest rates, at a set point in time, of bonds having equal credit quality but differing maturity dates. The most frequently reported yield curve compares the three-month, two-year, five-year and 30-year United States Treasury debt. This yield curve is used as a benchmark for other debt in the market, such as mortgage rates or bank lending rates, and it is also used to predict changes in economic output and growth.

Yield to Maturity - Yield to maturity (YTM) is the total return anticipated on a bond if the bond is held until the end of its lifetime. Yield to maturity is considered a long-term bond yield but is expressed as an annual rate. In other words, it is the internal rate of return of an investment in a bond if the investor holds the bond until maturity and if all payments are made as scheduled.

EXHIBIT 1
SAN MATEO TRANSIT DISTRICT
REPORT OF INVESTMENTS
FOR QUARTER ENDING JUNE 30, 2025

Identifier	ABS	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
02007NAC2	ALLYA 2024-2 A3	570,000.00	09/27/2024	07/16/2029	569,941.06	569,469.90	570,518.70
02007NAC2	ALLYA 2024-2 A3	90,000.00	09/27/2024	07/16/2029	89,990.69	89,916.30	90,081.90
02582JJZ4	AMXCA 2023-1 A	680,000.00	06/14/2023	05/15/2026	679,939.68	683,508.80	684,980.62
02582JJZ4	AMXCA 2023-1 A	105,000.00	06/14/2023	05/15/2026	104,990.69	105,541.80	105,769.07
02582JKH2	AMXCA 2024-1 A	1,610,000.00	04/23/2024	04/16/2029	1,609,669.95	1,642,151.70	1,645,894.06
02582JKH2	AMXCA 2024-1 A	245,000.00	04/23/2024	04/16/2029	244,949.78	249,892.65	250,462.14
02582JKP4	AMXCA 2025-2 A	1,390,000.00	05/13/2025	04/15/2030	1,389,974.84	1,398,506.80	1,401,150.89
02582JKP4	AMXCA 2025-2 A	210,000.00	05/13/2025	04/15/2030	209,996.20	211,285.20	211,684.67
05522RDG0	BACCT 2023-1 A	610,000.00	06/16/2023	05/15/2026	609,861.90	612,610.80	613,909.42
05522RDG0	BACCT 2023-1 A	95,000.00	06/16/2023	05/15/2026	94,978.49	95,406.60	95,608.84
05522RDH8	BACCT 2023-2 A	640,000.00	12/14/2023	11/16/2026	639,914.05	646,771.20	648,187.73
05522RDH8	BACCT 2023-2 A	100,000.00	12/14/2023	11/16/2026	99,986.57	101,058.00	101,279.33
05522RDJ4	BACCT 2024-1 A	1,565,000.00	06/13/2024	05/15/2029	1,564,912.20	1,588,177.65	1,591,606.74
05522RDJ4	BACCT 2024-1 A	230,000.00	06/13/2024	05/15/2029	229,987.10	233,406.30	233,910.26
05522RDK1	BACCT 2025-1 A	915,000.00	06/12/2025	05/15/2030	914,996.52	921,194.55	923,275.92
05522RDK1	BACCT 2025-1 A	135,000.00	06/12/2025	05/15/2030	134,999.49	135,913.95	136,221.04
05594BAD8	BAAT 251 A3	280,000.00	05/12/2025	11/15/2029	279,980.68	281,285.20	281,657.36
05594BAD8	BAAT 251 A3	40,000.00	05/12/2025	11/15/2029	39,997.24	40,183.60	40,236.77
14041NGE5	COMET 2024-1 A	1,675,000.00	09/24/2024	09/17/2029	1,674,673.04	1,669,908.00	1,672,826.22
14041NGE5	COMET 2024-1 A	265,000.00	09/24/2024	09/17/2029	264,948.27	264,194.40	264,656.09
14044CAC6	COPAR 2021-1 A3	5,509.54	10/27/2021	09/15/2026	5,509.43	5,500.72	5,502.61
14044CAC6	COPAR 2021-1 A3	958.18	10/27/2021	09/15/2026	958.16	956.65	956.98
14318MAD1	CARMX 2022-3 A3	405,197.62	07/20/2022	04/15/2027	405,188.06	404,314.29	405,029.24
14318MAD1	CARMX 2022-3 A3	64,238.65	07/20/2022	04/15/2027	64,237.13	64,098.61	64,211.95
161571HT4	CHAIT 2023-1 A	1,450,000.00	09/15/2023	09/15/2028	1,449,598.06	1,466,762.00	1,470,087.33
161571HT4	CHAIT 2023-1 A	220,000.00	09/15/2023	09/15/2028	219,939.02	222,543.20	223,047.73
161571HV9	CHAIT 241 A	1,565,000.00	01/31/2024	01/16/2029	1,564,761.65	1,576,455.80	1,579,655.36
161571HV9	CHAIT 241 A	240,000.00	01/31/2024	01/16/2029	239,963.45	241,756.80	242,247.47
17305EHA6	CCCIT_25-A1	2,000,000.00	06/26/2025	06/21/2030	1,999,457.40	2,011,660.00	2,012,854.44
17305EHA6	CCCIT_25-A1	300,000.00	06/26/2025	06/21/2030	299,918.61	301,749.00	301,928.17
254683CZ6	DCENT 2023-2 A	1,255,000.00	06/28/2023	06/15/2028	1,254,830.45	1,262,668.05	1,265,417.89
254683CZ6	DCENT 2023-2 A	190,000.00	06/28/2023	06/15/2028	189,974.33	191,160.90	191,577.21
31680EAD3	FITAT 2023-1 A3	1,165,424.78	08/23/2023	08/15/2028	1,165,352.52	1,174,526.75	1,177,391.10
31680EAD3	FITAT 2023-1 A3	179,650.46	08/23/2023	08/15/2028	179,639.32	181,053.53	181,495.07
344928AD8	FORDO 2023-A A3	320,932.62	03/31/2023	02/15/2028	320,899.15	321,285.64	321,948.90
344928AD8	FORDO 2023-A A3	47,798.48	03/31/2023	02/15/2028	47,793.49	47,851.05	47,949.84
34535KAD0	FORDO 2025-A A3	1,445,000.00	03/25/2025	10/15/2029	1,444,859.55	1,449,363.90	1,452,221.79
34535KAD0	FORDO 2025-A A3	230,000.00	03/25/2025	10/15/2029	229,977.64	230,694.60	231,149.49
362549AD9	GMCAR 2025-2 A3	330,000.00	05/14/2025	04/16/2030	329,609.69	331,775.40	332,363.90
362549AD9	GMCAR 2025-2 A3	50,000.00	05/14/2025	04/16/2030	49,940.86	50,269.00	50,358.17
362554AC1	GMCAR 2021-4 A3	970.35	10/21/2021	09/16/2026	970.33	968.82	969.09

362554AC1	GMCAR 2021-4 A3	163.83	10/21/2021	09/16/2026	163.82	163.57	163.61
437918AC9	HAROT 2024-1 A3	1,065,000.00	02/21/2024	08/15/2028	1,064,953.67	1,074,127.05	1,076,593.12
437918AC9	HAROT 2024-1 A3	165,000.00	02/21/2024	08/15/2028	164,992.82	166,414.05	166,796.12
437921AD1	HAROT 252 A3	420,000.00	05/08/2025	10/15/2029	419,953.09	420,831.60	421,606.27
437921AD1	HAROT 252 A3	65,000.00	05/08/2025	10/15/2029	64,992.74	65,128.70	65,248.59
438123AC5	HAROT 2023-4 A3	310,000.00	11/08/2023	06/21/2028	309,945.41	313,307.70	313,795.95
438123AC5	HAROT 2023-4 A3	45,000.00	11/08/2023	06/21/2028	44,992.08	45,480.15	45,551.03
43813YAC6	HAROT 2024-3 A3	1,155,000.00	08/21/2024	03/21/2029	1,154,818.55	1,161,283.20	1,162,749.41
43813YAC6	HAROT 2024-3 A3	185,000.00	08/21/2024	03/21/2029	184,970.94	186,006.40	186,241.25
44935CAD3	HART 2025-A A3	1,170,000.00	03/12/2025	10/15/2029	1,169,827.43	1,174,516.20	1,176,762.60
44935CAD3	HART 2025-A A3	185,000.00	03/12/2025	10/15/2029	184,972.71	185,714.10	186,069.30
65479UAD0	NAROT 2024-A A3	1,470,000.00	05/22/2024	12/15/2028	1,469,862.70	1,486,772.70	1,490,222.30
65479UAD0	NAROT 2024-A A3	215,000.00	05/22/2024	12/15/2028	214,979.92	217,453.15	217,957.68
65481GAD7	NAROT 2025-A A3	1,410,000.00	05/27/2025	12/17/2029	1,409,729.28	1,424,184.60	1,426,998.33
65481GAD7	NAROT 2025-A A3	210,000.00	05/27/2025	12/17/2029	209,959.68	212,112.60	212,531.67
73329KAD8	PILOT 251 A3	360,000.00	05/21/2025	10/20/2028	359,961.44	363,193.20	363,700.30
73329KAD8	PILOT 251 A3	100,000.00	05/21/2025	10/20/2028	99,989.29	100,887.00	101,027.86
89231HAD8	TAOT 2025-B A3	745,000.00	04/30/2025	11/15/2029	744,957.31	749,581.75	751,018.77
89231HAD8	TAOT 2025-B A3	110,000.00	04/30/2025	11/15/2029	109,993.70	110,676.50	110,888.68
89237QAD2	TAOT 2024-C A3	755,000.00	07/30/2024	03/15/2029	754,999.55	762,164.95	763,802.46
89237QAD2	TAOT 2024-C A3	120,000.00	07/30/2024	03/15/2029	119,999.93	121,138.80	121,399.07
92348KDY6	VZMT 2025-3 A1A	1,510,000.00	03/31/2025	03/20/2030	1,509,935.07	1,516,628.90	1,518,709.76
92348KDY6	VZMT 2025-3 A1A	225,000.00	03/31/2025	03/20/2030	224,990.33	225,987.75	226,297.81
92868MAD1	VALET 2025-1 A3	1,190,000.00	03/25/2025	08/20/2029	1,189,959.54	1,198,841.70	1,200,477.95
92868MAD1	VALET 2025-1 A3	190,000.00	03/25/2025	08/20/2029	189,993.54	191,411.70	191,672.95
92970QAA3	WFCIT 2024-1 A	1,800,000.00	03/01/2024	02/15/2029	1,799,511.48	1,823,364.00	1,827,316.00
92970QAA3	WFCIT 2024-1 A	275,000.00	03/01/2024	02/15/2029	274,925.36	278,569.50	279,173.28
92970QAE5	WFCIT 2024-2 A	890,000.00	10/24/2024	10/15/2029	889,867.75	894,183.00	895,879.93
92970QAE5	WFCIT 2024-2 A	140,000.00	10/24/2024	10/15/2029	139,979.20	140,658.00	140,924.93
92970QAJ4	WFCIT 2025-1 A	1,765,000.00	06/10/2025	05/15/2030	1,764,970.70	1,778,819.95	1,783,288.34
92970QAJ4	WFCIT 2025-1 A	265,000.00	06/10/2025	05/15/2030	264,995.60	267,074.95	267,745.84
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Identifier	AGCY BOND	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
3130AK5E2	FEDERAL HOME LOAN BANKS	550,000.00	09/11/2020	09/04/2025	548,350.00	546,089.50	546,759.81
3130AK5E2	FEDERAL HOME LOAN BANKS	115,000.00	09/11/2020	09/04/2025	114,655.00	114,182.35	114,322.51
3135G05X7	FEDERAL NATIONAL MORTGAGE ASSOCIATION	1,300,000.00	08/27/2020	08/25/2025	1,293,916.00	1,292,031.00	1,293,737.25
3135G05X7	FEDERAL NATIONAL MORTGAGE ASSOCIATION	275,000.00	08/27/2020	08/25/2025	273,713.00	273,314.25	273,675.19
3135G06G3	FEDERAL NATIONAL MORTGAGE ASSOCIATION	1,200,000.00	11/12/2020	11/07/2025	1,195,704.00	1,184,160.00	1,185,060.00
3135G06G3	FEDERAL NATIONAL MORTGAGE ASSOCIATION	275,000.00	11/12/2020	11/07/2025	274,015.50	271,370.00	271,576.25
3137EAEU9	FEDERAL HOME LOAN MORTGAGE CORP	1,600,000.00	07/23/2020	07/21/2025	1,592,032.00	1,596,512.00	1,599,178.67
3137EAEU9	FEDERAL HOME LOAN MORTGAGE CORP	350,000.00	07/23/2020	07/21/2025	348,257.00	349,237.00	349,820.33
3137EAEX3	FEDERAL HOME LOAN MORTGAGE CORP	1,300,000.00	09/25/2020	09/23/2025	1,296,087.00	1,288,157.00	1,289,484.08

3137EAEX3	FEDERAL HOME LOAN MORTGAGE CORP	550,000.00	09/25/2020	09/23/2025	548,344.50	544,989.50	545,550.96
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Identifier	CASH	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
CCYUSD	Cash Bank of America	119,609,491.00	---	06/30/2025	119,609,491.00	119,609,491.00	119,609,491.00
CCYUSD	Receivable	30,203.61	---	06/30/2025	30,203.61	30,203.61	30,203.61
CCYUSD	Receivable	28,660.42	---	06/30/2025	28,660.42	28,660.42	28,660.42
CCYUSD	Receivable	3,020.42	---	06/30/2025	3,020.42	3,020.42	3,020.42

CCYUSD	Receivable	61,884.45	---	06/30/2025	61,884.45	61,884.45	61,884.45
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Identifier	CD	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
65558UYF3	Nordea ABP - New York Branch	400,000.00	11/03/2022	11/03/2025	400,000.00	401,348.00	404,973.22
89115B6K1	Toronto-Dominion Bank - New York Branch	2,500,000.00	10/31/2022	10/27/2025	2,500,000.00	2,509,275.00	2,606,108.33
89115B6K1	Toronto-Dominion Bank - New York Branch	400,000.00	10/31/2022	10/27/2025	400,000.00	401,484.00	416,977.33

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Identifier	CORP	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
009158BH8	AIR PRODUCTS AND CHEMICALS INC	1,225,000.00	02/08/2024	02/08/2029	1,223,370.75	1,242,578.75	1,264,962.22
009158BH8	AIR PRODUCTS AND CHEMICALS INC	180,000.00	02/08/2024	02/08/2029	179,760.60	182,583.00	185,872.00
025816ED7	AMERICAN EXPRESS CO	855,000.00	04/25/2025	04/25/2029	855,000.00	864,721.35	872,137.19
025816ED7	AMERICAN EXPRESS CO	645,000.00	04/25/2025	04/25/2029	645,000.00	652,333.65	657,928.06
025816ED7	AMERICAN EXPRESS CO	130,000.00	04/25/2025	04/25/2029	130,000.00	131,478.10	132,605.66
025816ED7	AMERICAN EXPRESS CO	95,000.00	04/25/2025	04/25/2029	95,000.00	96,080.15	96,904.13
02665WFQ9	AMERICAN HONDA FINANCE CORP	1,400,000.00	09/05/2024	09/05/2029	1,398,320.00	1,393,406.00	1,413,254.89
02665WFQ9	AMERICAN HONDA FINANCE CORP	225,000.00	09/05/2024	09/05/2029	224,730.00	223,940.25	227,130.25
032654BE4	ANALOG DEVICES INC	1,450,000.00	06/16/2025	06/15/2030	1,448,724.00	1,461,846.50	1,464,565.25
032654BE4	ANALOG DEVICES INC	225,000.00	06/16/2025	06/15/2030	224,802.00	226,838.25	227,260.13
04636NAF0	ASTRAZENECA FINANCE LLC	1,300,000.00	03/03/2023	03/03/2028	1,297,374.00	1,327,534.00	1,348,306.92
04636NAF0	ASTRAZENECA FINANCE LLC	200,000.00	03/03/2023	03/03/2028	199,596.00	204,236.00	207,431.83
05565EBW4	BMW US CAPITAL LLC	850,000.00	08/16/2021	08/12/2026	849,745.00	821,831.00	825,933.43
05565EBW4	BMW US CAPITAL LLC	150,000.00	08/16/2021	08/12/2026	149,955.00	145,029.00	145,752.96
06051GFS3	BANK OF AMERICA CORP BANK OF NEW YORK	800,000.00	12/18/2020	08/01/2025	907,952.00	799,568.00	812,484.67
06406RBA4	MELLON CORP BANK OF NEW YORK	2,700,000.00	01/28/2022	01/26/2027	2,694,006.00	2,617,677.00	2,641,508.25
06406RBA4	MELLON CORP BERKSHIRE HATHAWAY	425,000.00	01/28/2022	01/26/2027	424,056.50	412,041.75	415,792.97
084664CZ2	FINANCE CORP BERKSHIRE HATHAWAY	2,700,000.00	03/17/2022	03/15/2027	2,649,348.00	2,632,257.00	2,650,542.00
084664CZ2	FINANCE CORP	400,000.00	03/17/2022	03/15/2027	392,496.00	389,964.00	392,672.89

09290DAA9	BLACKROCK INC	175,000.00	03/14/2024	03/14/2029	174,683.25	178,703.00	181,147.65
09290DAA9	BLACKROCK INC	1,675,000.00	03/14/2024	03/14/2029	1,675,820.75	1,710,443.00	1,733,841.82
09290DAA9	BLACKROCK INC	25,000.00	03/14/2024	03/14/2029	24,954.75	25,529.00	25,878.24
09290DAA9	BLACKROCK INC	250,000.00	03/14/2024	03/14/2029	250,122.50	255,290.00	258,782.36
14913R2U0	CATERPILLAR FINANCIAL SERVICES CORP	1,350,000.00	01/13/2022	01/08/2027	1,343,182.50	1,303,168.50	1,314,197.25
14913R2U0	CATERPILLAR FINANCIAL SERVICES CORP	200,000.00	01/13/2022	01/08/2027	198,990.00	193,062.00	194,695.89
17275RBR2	CISCO SYSTEMS INC	1,485,000.00	02/26/2024	02/26/2029	1,484,480.25	1,521,798.30	1,546,806.11
17275RBR2	CISCO SYSTEMS INC	215,000.00	02/26/2024	02/26/2029	214,924.75	220,327.70	223,948.36
17325FBB3	CITIBANK NA	2,600,000.00	10/04/2023	09/29/2028	2,587,104.00	2,718,482.00	2,757,039.71
17325FBB3	CITIBANK NA	400,000.00	10/04/2023	09/29/2028	398,016.00	418,228.00	424,159.96
24422EXB0	JOHN DEERE CAPITAL CORP	1,300,000.00	07/25/2023	07/14/2028	1,309,932.00	1,331,902.00	1,361,753.25
24422EXB0	JOHN DEERE CAPITAL CORP INTERNATIONAL BUSINESS MACHINES CORP	200,000.00	07/25/2023	07/14/2028	201,528.00	204,908.00	209,500.50
459200KS9	INTERNATIONAL BUSINESS MACHINES CORP	1,300,000.00	07/27/2022	07/27/2025	1,300,000.00	1,299,428.00	1,321,672.44
459200KS9	MACHINES CORP	200,000.00	07/27/2022	07/27/2025	200,000.00	199,912.00	203,334.22
46625HMN7	JPMORGAN CHASE & CO	450,000.00	12/21/2020	07/15/2025	509,647.50	449,829.00	457,921.50
539830BZ1	LOCKHEED MARTIN CORP	205,000.00	05/25/2023	05/15/2028	204,631.00	207,345.20	208,510.85
539830BZ1	LOCKHEED MARTIN CORP	30,000.00	05/25/2023	05/15/2028	29,946.00	30,343.20	30,513.78
571676AY1	MARS INC	400,000.00	03/12/2025	03/01/2030	399,568.00	405,280.00	411,093.33
571676AY1	MARS INC	65,000.00	03/12/2025	03/01/2030	64,929.80	65,858.00	66,802.67
58933YBH7	MERCK & CO INC	515,000.00	05/17/2023	05/17/2028	514,582.85	517,369.00	519,918.25
58933YBH7	MERCK & CO INC	80,000.00	05/17/2023	05/17/2028	79,935.20	80,368.00	80,764.00
61747YET8	MORGAN STANLEY	1,300,000.00	07/20/2022	07/17/2026	1,300,000.00	1,299,805.00	1,327,515.08
61747YET8	MORGAN STANLEY NATIONAL RURAL UTILITIES COOPERATIVE FINANCE CORP	200,000.00	07/20/2022	07/17/2026	200,000.00	199,970.00	204,233.09
63743HFS6	NATIONAL RURAL UTILITIES COOPERATIVE FINANCE CORP	540,000.00	09/16/2024	06/15/2029	560,919.60	555,795.00	557,031.00
63743HFS6	NATIONAL RURAL UTILITIES COOPERATIVE FINANCE CORP	860,000.00	09/16/2024	06/15/2029	893,763.60	885,155.00	887,123.44
63743HFS6	NATIONAL RURAL UTILITIES COOPERATIVE FINANCE CORP	80,000.00	09/16/2024	06/15/2029	83,099.20	82,340.00	82,523.11
63743HFS6	NATIONAL RURAL UTILITIES COOPERATIVE FINANCE CORP	120,000.00	09/16/2024	06/15/2029	124,711.20	123,510.00	123,784.67
69371RT71	PACCAR FINANCIAL CORP	1,450,000.00	05/08/2025	05/08/2030	1,447,752.50	1,468,299.00	1,478,011.99
69371RT71	PACCAR FINANCIAL CORP	225,000.00	05/08/2025	05/08/2030	224,651.25	227,839.50	229,346.69
857477DB6	STATE STREET CORP	700,000.00	04/24/2025	04/24/2030	700,000.00	712,985.00	719,282.63
857477DB6	STATE STREET CORP	110,000.00	04/24/2025	04/24/2030	110,000.00	112,040.50	113,030.13
87612EBM7	TARGET CORP	240,000.00	01/24/2022	01/15/2027	239,592.00	232,464.00	234,622.00
87612EBM7	TARGET CORP	35,000.00	01/24/2022	01/15/2027	34,940.50	33,901.00	34,215.71
89236TLL7	TOYOTA MOTOR CREDIT CORP	575,000.00	01/05/2024	01/05/2029	574,241.00	581,819.50	594,891.17
89236TLL7	TOYOTA MOTOR CREDIT CORP	775,000.00	01/05/2024	01/05/2029	773,938.25	784,191.50	801,809.83
89236TLL7	TOYOTA MOTOR CREDIT CORP	115,000.00	01/05/2024	01/05/2029	114,842.45	116,363.90	118,978.23
89236TLL7	TOYOTA MOTOR CREDIT CORP	85,000.00	01/05/2024	01/05/2029	84,887.80	86,008.10	87,940.43
91324PEC2	UNITEDHEALTH GROUP INC	1,150,000.00	05/19/2021	05/15/2026	1,147,999.00	1,117,869.00	1,119,558.86
91324PEC2	UNITEDHEALTH GROUP INC	200,000.00	05/19/2021	05/15/2026	199,652.00	194,412.00	194,705.89
931142FB4	WALMART INC	930,000.00	04/18/2023	04/15/2028	928,288.80	931,041.60	938,698.60
931142FB4	WALMART INC	140,000.00	04/18/2023	04/15/2028	139,742.40	140,156.80	141,309.47
---	---	38,905,000.00	---	04/12/2028	39,039,236.50	39,049,484.05	39,503,939.84

Identifier	FHLMC	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
3132CWMM3	FH SB0364	645,259.73	06/25/2021	06/01/2035	695,267.36	625,882.58	627,764.59
3132CWMM3	FH SB0364	119,769.79	06/25/2021	06/01/2035	129,051.94	116,173.10	116,522.43
3133L7LB1	FH RC1222	729,382.95	10/19/2021	12/01/2034	784,086.67	708,828.94	710,956.31
3133L7LB1	FH RC1222	131,288.93	10/19/2021	12/01/2034	141,135.60	127,589.21	127,972.14
3133L9AJ2	FH RC2709	782,682.21	10/18/2022	09/01/2037	768,496.09	778,455.73	781,390.78
3133L9AJ2	FH RC2709	126,908.92	10/18/2022	09/01/2037	124,608.69	126,223.61	126,699.52
3137H8B42	FHMS K-J40 A1	788,084.82	07/14/2022	06/25/2028	788,075.36	775,727.65	777,960.55
3137H8B42	FHMS K-J40 A1	131,347.47	07/14/2022	06/25/2028	131,345.89	129,287.94	129,660.09
3137H8H79	FHMS K-J41 A1	1,570,868.68	08/04/2022	01/25/2029	1,570,849.83	1,534,094.64	1,538,201.15
3137H8H79	FHMS K-J41 A1	261,811.45	08/04/2022	01/25/2029	261,808.30	255,682.44	256,366.86
3137H92N8	FHMS K-J42 A1	966,751.67	09/15/2022	07/25/2029	966,714.93	958,572.95	961,716.51
3137H92N8	FHMS K-J42 A1	161,854.35	09/15/2022	07/25/2029	161,848.20	160,485.06	161,011.36
3137H9MM8	FHMS K-J43 A1	1,353,889.96	12/15/2022	12/25/2028	1,353,866.95	1,356,259.27	1,357,246.93
3137H9MM8	FHMS K-J43 A1	206,844.30	12/15/2022	12/25/2028	206,840.78	207,206.28	207,357.17
3137H9QT9	FHMS K-J44 A1	1,648,135.76	02/23/2023	01/25/2029	1,648,084.67	1,658,568.46	1,664,828.63
3137H9QT9	FHMS K-J44 A1	251,798.52	02/23/2023	01/25/2029	251,790.72	253,392.40	254,348.82
3137HA4K9	FHMS K-J45 A1	1,593,541.62	05/25/2023	11/25/2028	1,593,538.43	1,604,807.96	1,610,723.98
3137HA4K9	FHMS K-J45 A1	243,457.75	05/25/2023	11/25/2028	243,457.26	245,178.99	246,082.83
3137HACX2	FHMS K-505 A2	1,800,000.00	07/20/2023	06/25/2028	1,817,978.40	1,832,508.00	1,839,736.50
3137HACX2	FHMS K-505 A2	275,000.00	07/20/2023	06/25/2028	277,746.70	279,966.50	281,070.85
3137HAD45	FHMS K-J46 A1	1,427,367.21	07/27/2023	06/25/2028	1,427,331.53	1,439,000.25	1,444,682.36
3137HAD45	FHMS K-J46 A1	221,488.02	07/27/2023	06/25/2028	221,482.48	223,293.14	224,174.85
3137HAGY6	FHMS K-752 A1	791,416.62	08/24/2023	01/25/2029	768,038.96	793,213.13	796,038.49
3137HAGY6	FHMS K-752 A1	122,481.14	08/24/2023	01/25/2029	118,863.17	122,759.18	123,196.43
3137HAMH6	FHMS K-506 A2	1,800,000.00	09/14/2023	08/25/2028	1,773,372.60	1,826,190.00	1,833,165.00
3137HAMH6	FHMS K-506 A2	275,000.00	09/14/2023	08/25/2028	270,931.93	279,001.25	280,066.88
3137HAMS2	FHMS K-507 A2	1,800,000.00	09/28/2023	09/25/2028	1,778,484.60	1,834,398.00	1,841,598.00
3137HAMS2	FHMS K-507 A2	275,000.00	09/28/2023	09/25/2028	271,712.93	280,255.25	281,355.25
3137HAQ74	FHMS K-508 A2	1,800,000.00	10/19/2023	08/25/2028	1,760,515.20	1,830,978.00	1,838,088.00
3137HAQ74	FHMS K-508 A2	275,000.00	10/19/2023	08/25/2028	268,967.60	279,732.75	280,819.00
3137HAST4	FHMS K-509 A2	1,350,000.00	10/31/2023	09/25/2028	1,306,957.95	1,377,729.00	1,383,185.25
3137HAST4	FHMS K-509 A2	205,000.00	10/31/2023	09/25/2028	198,463.98	209,210.70	210,039.24
3137HB3D4	FHMS K-510 A2	655,000.00	11/21/2023	10/25/2028	653,106.40	672,612.95	675,379.78
3137HB3D4	FHMS K-510 A2	100,000.00	11/21/2023	10/25/2028	99,710.90	102,689.00	103,111.42
3137HDV56	FHMS K-524 A2	1,520,000.00	07/25/2024	05/25/2029	1,529,979.81	1,549,594.40	1,555,573.07
3137HDV56	FHMS K-524 A2	240,000.00	07/25/2024	05/25/2029	241,575.76	244,672.80	245,616.80
3137HDXL9	FHMS K-526 A2	1,705,000.00	08/15/2024	07/25/2029	1,720,948.57	1,727,625.35	1,734,080.20
3137HDXL9	FHMS K-526 A2	270,000.00	08/15/2024	07/25/2029	272,525.58	273,582.90	274,605.08
3137HKXJ8	FHMS K-539 A2	665,000.00	04/24/2025	01/25/2030	664,976.73	671,011.60	673,455.48
3137HKXJ8	FHMS K-539 A2	105,000.00	04/24/2025	01/25/2030	104,996.33	105,949.20	106,335.08
---	---	29,391,431.87	---	07/16/2029	29,369,535.82	29,578,390.58	29,682,183.65

Identifier	FHLMC CMO	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
3133Q5GZ3	FHS 370 A3	527,683.75	12/29/2020	09/25/2033	535,145.53	507,188.52	507,628.25
3137F7DH5	FHR 5048 B	383,948.07	11/30/2020	05/25/2033	388,807.41	355,954.42	356,274.37
3137F7DH5	FHR 5048 B	81,219.78	11/30/2020	05/25/2033	82,247.72	75,298.05	75,365.73
3137HB3G7	FHMS K-511 A2	1,000,000.00	12/07/2023	10/25/2028	997,127.00	1,021,860.00	1,025,910.00
3137HB3G7	FHMS K-511 A2	150,000.00	12/07/2023	10/25/2028	149,569.05	153,279.00	153,886.50
3137HDJJ0	FHMS K-522 A2	1,900,000.00	06/13/2024	05/25/2029	1,899,994.30	1,941,515.00	1,949,119.75
3137HDJJ0	FHMS K-522 A2	280,000.00	06/13/2024	05/25/2029	279,999.16	286,118.00	287,238.70
---	---	4,322,851.61	---	02/21/2030	4,332,890.17	4,341,212.98	4,355,423.31

Identifier	FNMA	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
3140K7XA6	FN BP0672	703,119.37	05/18/2021	03/01/2035	753,436.35	678,221.91	679,979.71
3140K7XA6	FN BP0672	124,079.89	05/18/2021	03/01/2035	132,959.36	119,686.22	119,996.42
3140Q9FM0	FN CA1971	823,661.00	01/18/2022	06/01/2033	869,091.05	810,449.48	812,851.82
3140Q9FM0	FN CA1971	123,549.15	01/18/2022	06/01/2033	130,363.66	121,567.42	121,927.77
3140QGKN6	FN CA8400	727,020.28	03/22/2021	12/01/2035	795,405.63	711,440.24	713,560.72
3140QGKN6	FN CA8400	142,299.56	03/22/2021	12/01/2035	155,684.61	139,250.08	139,665.12
3140X92C8	FN FM6170	495,403.84	06/25/2021	07/01/2035	536,893.91	486,432.08	488,083.42
3140X92C8	FN FM6170	92,888.22	06/25/2021	07/01/2035	100,667.61	91,206.01	91,515.64
3140X9K46	FN FM5714	420,056.24	03/25/2021	11/01/2035	457,598.76	412,453.22	413,853.41
3140X9K46	FN FM5714	75,010.04	03/25/2021	11/01/2035	81,714.06	73,652.36	73,902.39
3140XALC4	FN FM6622	909,088.83	03/29/2021	02/01/2036	955,963.72	853,734.41	855,628.35
3140XALC4	FN FM6622	170,454.16	03/29/2021	02/01/2036	179,243.20	160,075.20	160,430.32
3140XC4K1	FN FM8925	819,257.33	11/16/2021	08/01/2034	888,382.17	816,561.97	819,292.83
3140XC4K1	FN FM8925	153,610.75	11/16/2021	08/01/2034	166,571.66	153,105.37	153,617.41
3140XHQQ3	FN FS2262	1,177,451.53	06/30/2022	06/01/2037	1,192,353.65	1,155,892.39	1,159,817.23
3140XJHF3	FN FS2929	1,181,770.27	10/18/2022	09/01/2037	1,146,501.82	1,157,425.80	1,161,365.04
3140XJHF3	FN FS2929	196,961.71	10/18/2022	09/01/2037	191,083.64	192,904.30	193,560.84
3140XJJ87	FN FS2986	909,271.92	10/21/2022	10/01/2032	882,277.91	904,325.48	907,356.39
3140XJJ87	FN FS2986	128,738.74	10/21/2022	10/01/2032	124,916.81	128,038.40	128,467.53
---	---	9,373,692.83	---	07/15/2035	9,741,109.57	9,166,422.35	9,194,872.35

Identifier	FNMA CMO	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
31394CP22	FNR 2005-33 QE	1,215,432.46	03/31/2023	04/25/2035	1,238,839.02	1,238,258.28	1,243,322.58
31394CP22	FNR 2005-33 QE	184,485.28	03/31/2023	04/25/2035	188,038.07	187,949.92	188,718.61
31394CP22	FNR 2005-33 QE	1,399,917.74	03/31/2023	04/25/2035	1,426,877.09	1,426,208.19	1,432,041.19

Identifier	MMFUND	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
31846V534	FIRST AMER:US TRS MM Y	9,527,132.44	---	06/30/2025	9,527,132.44	9,527,132.44	9,527,132.44
31846V534	FIRST AMER:US TRS MM Y	4,349,532.47	---	06/30/2025	4,349,532.47	4,349,532.47	4,349,532.47
31846V534	FIRST AMER:US TRS MM Y	431,821.51	---	06/30/2025	431,821.51	431,821.51	431,821.51
SM - LAIF	Local Agency Investment Fund	5,909,052.26	---	06/30/2025	5,909,052.26	5,909,052.26	5,909,052.26
SM-CAMP	California Asset Management Program	246,810,582.56	---	06/30/2025	246,810,582.56	246,810,582.56	246,810,582.56
---	---	267,028,121.24	---	06/30/2025	267,028,121.24	267,028,121.24	267,028,121.24

Identifier	MUNI	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
13077DQD7	CALIFORNIA ST UNIV REV	430,000.00	07/29/2021	11/01/2025	430,000.00	425,003.40	425,621.17
13077DQD7	CALIFORNIA ST UNIV REV	75,000.00	07/29/2021	11/01/2025	75,000.00	74,128.50	74,236.25
341271AD6	FLORIDA ST BRD ADMIN FIN CORP REV	350,000.00	09/16/2020	07/01/2025	352,320.50	350,000.00	352,201.50
341271AD6	FLORIDA ST BRD ADMIN FIN CORP REV	250,000.00	09/16/2020	07/01/2025	251,767.50	250,000.00	251,572.50
341271AD6	FLORIDA ST BRD ADMIN FIN CORP REV	650,000.00	09/16/2020	07/01/2025	650,000.00	650,000.00	654,088.50
341271AD6	FLORIDA ST BRD ADMIN FIN CORP REV	75,000.00	09/16/2020	07/01/2025	75,497.25	75,000.00	75,471.75
341271AD6	FLORIDA ST BRD ADMIN FIN CORP REV	55,000.00	09/16/2020	07/01/2025	55,388.85	55,000.00	55,345.95
341271AD6	FLORIDA ST BRD ADMIN FIN CORP REV	130,000.00	09/16/2020	07/01/2025	130,000.00	130,000.00	130,817.70
60412AK85	MINNESOTA ST	405,000.00	08/25/2020	08/01/2025	405,000.00	403,768.80	404,831.93
60412AK85	MINNESOTA ST	85,000.00	08/25/2020	08/01/2025	85,000.00	84,741.60	84,964.73
---	---	2,505,000.00	---	08/01/2025	2,509,974.10	2,497,642.30	2,509,151.97

Identifier	SUPRANATIONAL	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
459058KJ1	INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPM	1,800,000.00	07/19/2022	06/15/2027	1,799,064.00	1,776,600.00	1,779,100.00
459058KJ1	INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPM	275,000.00	07/19/2022	06/15/2027	274,857.00	271,425.00	271,806.94
459058KJ1	INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPM	2,075,000.00	07/19/2022	06/15/2027	2,073,921.00	2,048,025.00	2,050,906.94

Identifier	US GOV	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
912828U24	UNITED STATES TREASURY	500,000.00	10/11/2022	11/15/2026	460,820.31	487,520.00	488,797.17
912828U24	UNITED STATES TREASURY	2,000,000.00	12/07/2022	11/15/2026	1,861,015.63	1,950,080.00	1,955,188.70
912828U24	UNITED STATES TREASURY	1,550,000.00	01/06/2023	11/15/2026	1,442,044.92	1,511,312.00	1,515,271.24
912828U24	UNITED STATES TREASURY	150,000.00	10/11/2022	11/15/2026	138,246.09	146,256.00	146,639.15
912828U24	UNITED STATES TREASURY	100,000.00	01/06/2023	11/15/2026	93,035.16	97,504.00	97,759.43
91282CAZ4	UNITED STATES TREASURY	7,000,000.00	06/30/2025	11/30/2025	6,887,617.19	6,887,580.00	6,889,803.36
91282CAZ4	UNITED STATES TREASURY	600,000.00	06/30/2025	11/30/2025	590,367.19	590,364.00	590,554.57

91282CBC4	UNITED STATES TREASURY	350,000.00	06/07/2021	12/31/2025	344,859.38	343,371.00	343,374.57
91282CBC4	UNITED STATES TREASURY	7,200,000.00	12/06/2021	12/31/2025	6,983,437.50	7,063,632.00	7,063,705.37
91282CBC4	UNITED STATES TREASURY	1,200,000.00	11/04/2021	12/31/2025	1,167,234.38	1,177,272.00	1,177,284.23
91282CBC4	UNITED STATES TREASURY	50,000.00	10/06/2021	12/31/2025	49,101.56	49,053.00	49,053.51
91282CBC4	UNITED STATES TREASURY	525,000.00	11/04/2021	12/31/2025	510,665.04	515,056.50	515,061.85
91282CBW0	UNITED STATES TREASURY	350,000.00	01/06/2022	04/30/2026	341,468.75	340,515.00	340,957.26
91282CCH2	UNITED STATES TREASURY	2,150,000.00	06/11/2024	06/30/2028	1,901,826.17	2,001,607.00	2,001,680.03
91282CCH2	UNITED STATES TREASURY	1,650,000.00	07/03/2024	06/30/2028	1,456,705.08	1,536,117.00	1,536,173.05
91282CCH2	UNITED STATES TREASURY	2,200,000.00	08/05/2024	06/30/2028	1,986,703.13	2,048,156.00	2,048,230.73
91282CCH2	UNITED STATES TREASURY	1,150,000.00	09/06/2024	06/30/2028	1,054,720.70	1,070,627.00	1,070,666.06
91282CCH2	UNITED STATES TREASURY	350,000.00	06/11/2024	06/30/2028	309,599.61	325,843.00	325,854.89
91282CCH2	UNITED STATES TREASURY	525,000.00	07/03/2024	06/30/2028	463,497.07	488,764.50	488,782.33
91282CCH2	UNITED STATES TREASURY	350,000.00	08/05/2024	06/30/2028	316,066.41	325,843.00	325,854.89
91282CCH2	UNITED STATES TREASURY	100,000.00	09/06/2024	06/30/2028	91,714.84	93,098.00	93,101.40
91282CCP4	UNITED STATES TREASURY	450,000.00	07/08/2022	07/31/2026	411,943.36	434,128.50	435,301.67
91282CCP4	UNITED STATES TREASURY	150,000.00	08/15/2022	07/31/2026	136,593.75	144,709.50	145,100.56
91282CEN7	UNITED STATES TREASURY	4,400,000.00	02/03/2023	04/30/2027	4,236,546.88	4,321,988.00	4,342,373.87
91282CEN7	UNITED STATES TREASURY	650,000.00	02/03/2023	04/30/2027	625,853.52	638,475.50	641,487.05
91282CEV9	UNITED STATES TREASURY	4,000,000.00	03/06/2025	06/30/2029	3,871,875.00	3,926,880.00	3,927,233.26
91282CEV9	UNITED STATES TREASURY	600,000.00	03/06/2025	06/30/2029	580,781.25	589,032.00	589,084.99
91282CFB2	UNITED STATES TREASURY	4,950,000.00	05/05/2023	07/31/2027	4,782,744.14	4,853,524.50	4,910,305.92
91282CFB2	UNITED STATES TREASURY	1,900,000.00	06/06/2023	07/31/2027	1,811,976.56	1,862,969.00	1,884,763.89
91282CFB2	UNITED STATES TREASURY	1,525,000.00	07/07/2023	07/31/2027	1,437,669.92	1,495,277.75	1,512,771.02
91282CFB2	UNITED STATES TREASURY	1,600,000.00	09/15/2023	07/31/2027	1,498,750.00	1,568,816.00	1,587,169.59
91282CFB2	UNITED STATES TREASURY	875,000.00	05/05/2023	07/31/2027	845,434.57	857,946.25	867,983.37
91282CFB2	UNITED STATES TREASURY	300,000.00	06/06/2023	07/31/2027	286,101.56	294,153.00	297,594.30
91282CFB2	UNITED STATES TREASURY	225,000.00	07/07/2023	07/31/2027	212,115.23	220,614.75	223,195.72
91282CFB2	UNITED STATES TREASURY	250,000.00	09/15/2023	07/31/2027	234,179.69	245,127.50	247,995.25
91282CFZ9	UNITED STATES TREASURY	3,100,000.00	12/05/2023	11/30/2027	3,058,949.22	3,111,873.00	3,122,047.52
91282CFZ9	UNITED STATES TREASURY	3,100,000.00	01/05/2024	11/30/2027	3,088,132.81	3,111,873.00	3,122,047.52
91282CFZ9	UNITED STATES TREASURY	325,000.00	12/05/2023	11/30/2027	320,696.29	326,244.75	327,311.43
91282CFZ9	UNITED STATES TREASURY	450,000.00	01/05/2024	11/30/2027	448,277.34	451,723.50	453,200.45
91282CGP0	UNITED STATES TREASURY	1,500,000.00	02/06/2024	02/29/2028	1,506,269.53	1,511,370.00	1,531,424.35
91282CGP0	UNITED STATES TREASURY	2,100,000.00	04/05/2024	02/29/2028	2,066,613.28	2,115,918.00	2,143,994.09
91282CGP0	UNITED STATES TREASURY	2,700,000.00	05/06/2024	02/29/2028	2,626,593.75	2,720,466.00	2,756,563.83
91282CGP0	UNITED STATES TREASURY	225,000.00	02/06/2024	02/29/2028	225,940.43	226,705.50	229,713.65
91282CGP0	UNITED STATES TREASURY	175,000.00	04/05/2024	02/29/2028	172,217.77	176,326.50	178,666.17
91282CGP0	UNITED STATES TREASURY	425,000.00	05/06/2024	02/29/2028	413,445.31	428,221.50	433,903.57
91282CJR3	UNITED STATES TREASURY	2,550,000.00	11/05/2024	12/31/2028	2,511,949.22	2,552,295.00	2,552,554.85
91282CJR3	UNITED STATES TREASURY	4,700,000.00	12/06/2024	12/31/2028	4,638,128.91	4,704,230.00	4,704,708.94
91282CJR3	UNITED STATES TREASURY	2,700,000.00	01/07/2025	12/31/2028	2,640,410.16	2,702,430.00	2,702,705.14
91282CJR3	UNITED STATES TREASURY	4,900,000.00	02/06/2025	12/31/2028	4,799,320.31	4,904,410.00	4,904,909.32
91282CJR3	UNITED STATES TREASURY	325,000.00	11/05/2024	12/31/2028	320,150.39	325,292.50	325,325.62
91282CJR3	UNITED STATES TREASURY	800,000.00	12/06/2024	12/31/2028	789,468.75	800,720.00	800,801.52
91282CJR3	UNITED STATES TREASURY	400,000.00	01/07/2025	12/31/2028	391,171.87	400,360.00	400,400.76
91282CJR3	UNITED STATES TREASURY	675,000.00	02/06/2025	12/31/2028	661,130.86	675,607.50	675,676.28

---	UNITED STATES TREASURY	83,075,000.00	---	10/04/2027	80,102,177.75	81,749,280.00	82,042,109.25
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Identifier	YANKEE	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
63254ABE7	NATIONAL AUSTRALIA BANK LTD (NEW YORK BRANCH)	1,250,000.00	06/13/2022	06/09/2027	1,238,825.00	1,247,562.50	1,250,545.49
63254ABE7	NATIONAL AUSTRALIA BANK LTD (NEW YORK BRANCH)	1,250,000.00	06/13/2022	06/09/2027	1,238,825.00	1,247,562.50	1,250,545.49
Identifier	Summary	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
--	--	611,238,235.23	--	02/24/2027	608,739,329.07	610,310,349.78	611,432,787.26

**San Mateo County Transit District
Staff Report**

To: Board of Directors

Through: April Chan, General Manager/CEO

From: Kate Jordan Steiner, Chief Financial Officer

Subject: **Accept Contracts and Procurement Quarterly Report of Technology Purchases for Fourth Quarter of Fiscal Year 2025**

Action

Staff recommends that the Board of Directors (Board) of the San Mateo County Transit District (District) accept the attached Contracts and Procurement Quarterly Report of Technology Purchases for Fourth Quarter of Fiscal Year 2025.

Significance

Pursuant to Resolution No. 2024-26, the Board directed staff to provide a report to the Board on a quarterly basis advising of actions taken pursuant to the authority conferred by this Resolution.

Budget Impact

Accepting this report has no impact to the budget.

Background

Pursuant to Resolution No. 2024-26, the Board authorized the General Manager/CEO or designee to execute contracts and amendments exceeding \$250,000 for:

- a. Technology systems equipment and related services through District-approved cooperative purchasing programs and piggyback contracts to meet the District's technology equipment and services requirements, pursuant to the terms and conditions of each cooperative purchasing program vendor agreement or piggyback agreement, and to the extent that each cooperative purchasing program, each vendor agreement, and each piggyback contract fully complies with the District's statutory procurement authority and procurement policy;
- b. New or additional software licenses or license renewals, maintenance, product support, or related professional services through original equipment manufacturers, product licensors, or their authorized distributors or consultants to permit continued effective use and upkeep of District-owned information technology, hardware, and software;
- c. Professional and staff augmentation services for information technology, pursuant to the District's procurement authority and policy; and

- d. Expansion or modification of previously competitively procured proprietary software from an original provider when the original provider is the only source of such software and/or related services.

Prepared By: Danielle Rodriguez Procurement Support Specialist 650-551-6185

C&P Quarterly Report of Technology Purchases for Fourth Quarter of FY2025

SAMTRANS

The purchases listed below are for Information Technology Licenses, License Renewal fees, Maintenance Service, and Professional Services

Resolution #2024-26

Total Board Approved Authority

\$8,000,000.00

July 1, 2024 - September 30, 2024

1st Quarter

PO, Contract or Amendment Date	PO#, Contract # or Amendment #	Vendor	PO or Contract Description	PO or Contract Amount	Remaining Authority
6/5/2024	SAMTR-19334F	Triune Infomatics	IT Helpdesk Support Contractor	\$ 181,000.00	
8/26/2024	SAMTR-21345	Carahsoft Technology	Remix Technology PO amount of \$68,771 but cumulative amount since FY21 is \$302,422	\$ 302,422.00	
9/5/2024	25-S-L-035	Carahsoft Technology	ComplianceQuest Safety Information Management System Software for Five-Years	\$ 755,444.95	
9/5/20/24	22-S-L-078/SAMTR-0000021247	Darktrace	Add 750 mailboxes to the Darktrace Cybersecurity monitoring software for \$31,605 with a cumulative contract amount of \$689,732.	\$ 689,732.00	
9/5/2024	24-S-T-023	Sybyte Technology	IT Staff Augmentation Services: Database Architect. Added \$250,010 with a cumulative contract amount of \$500,000.	\$ 500,000.00	
			SubTotal	\$ 2,428,598.95	\$ 5,571,401.05

October 1, 2024 - December 31, 2024

2nd Quarter

PO, Contract or Amendment Date	PO#, Contract # or Amendment #	Vendor	PO or Contract Description	PO or Contract Amount	Remaining Authority
12/24/2024	25-S-L-063	SHI International	Hopthru Software-as-a-Service (SaaS)	\$ 529,194.72	
			SubTotal	\$ 529,194.72	\$ 5,042,206.33

January 1, 2025 - March 31, 2025

3rd Quarter

PO, Contract or Amendment Date	PO#, Contract # or Amendment #	Vendor	PO or Contract Description	PO or Contract Amount	Remaining Authority
2/24/2025	21-S-L-026/SAMTR-0000021669	CDT	Microsoft Statewide M365 GCC	\$ 473,789.84	
3/25/2025	22-S-L-083	Crayon Software Experts, LLC	Add \$300,000 to the contract to pay for Feb-June 2025 invoices. This is Amendment 4 to Contract 22-S-L-083.	\$ 300,000.00	
			SubTotal	\$ 773,789.84	\$ 4,268,416.49

April 1, 2025 - June 30, 2025

4th Quarter

PO, Contract or Amendment Date	PO#, Contract # or Amendment #	Vendor	PO or Contract Description	PO Amount	Remaining Authority
5/20/2025	25-S-P-121	Clearwater Analytics	Web based investment accounting tool	\$353,388.00	
6/16/2025	26-S-L-003	SHI International	Microsoft Azure, Server and Cloud Licenses	\$2,000,000.00	
			SubTotal	\$3,427,177.84	\$ 841,238.65
			TOTAL CONTRACT & PO AMT TO DATE	\$ 7,158,761.35	\$841,238.65

**San Mateo County Transit District
Staff Report**

To: Board of Directors

Through: April Chan, General Manager/CEO

From: Emily Beach, Chief Communications Officer

Subject: **Receive Additional Survey Data and Analysis from 2024 Triennial Customer Survey**

Action

The key findings from the 2024 Triennial Customer Survey were presented at the May 7, 2025 San Mateo County Transit District Board of Directors meeting. During the presentation, Chair Gee, Vice Chair Chuang, and Directors Powell and Canepa requested additional data points and analysis from the Triennial Survey.

The additional survey data and analysis are for informational purposes only and no Board recommendation/action is required.

Significance

This update provides the Board with valuable insights and trends into household income findings, car access, rider ethnicities and access/egress mode to/from SamTrans.

- From 2019-2023 the average household income in San Mateo County was more than three times higher than that of SamTrans riders.
- A significant majority of riders, 79 percent, do not drive or have access to a car. In contrast San Mateo County residents average two cars per household.
- SamTrans serves a higher share of Hispanic/Latino (44 percent), Asian (34 percent), and Black/African American (8 percent) riders than the overall San Mateo County population.
- Nearly three-quarters (74 percent) of riders walk all the way to their SamTrans bus stop and to their destination.

Budget Impact

No impact on the budget.

Prepared By: Julian Jest

Manager, Market Research

650-464-4017



Methodology

- Field dates: Sept. 17, 2024 through Nov. 21, 2024
- Survey offered in English, Spanish and Chinese
- 55% of customers approached completed a survey
- Sample size: $N = 3,248$
- Surveys weighted by route according to SamTrans ridership
- Margin of Error (MOE): Overall MOE= +/- 1.63%

Board Request

- Director Gee: Requested 2015-2024 Triennial Survey comparisons for household income; access to a car.
- Director Powell: Requested a comparison between SamTrans ridership and county-wide demographics.
- Director Chuang: Requested data on how riders are getting to and from SamTrans.
- Director Canepa: Requested an update on BayPass (see BayPass Phase 1 Evaluation Report).

Household Income Key Findings

- Since 2015, SamTrans riders have had an average annual household income of \$46,000.
- With inflation averaging 3.3% annually between 2015 and 2024**, rider income has effectively declined in real terms.

Comparison with County Residents

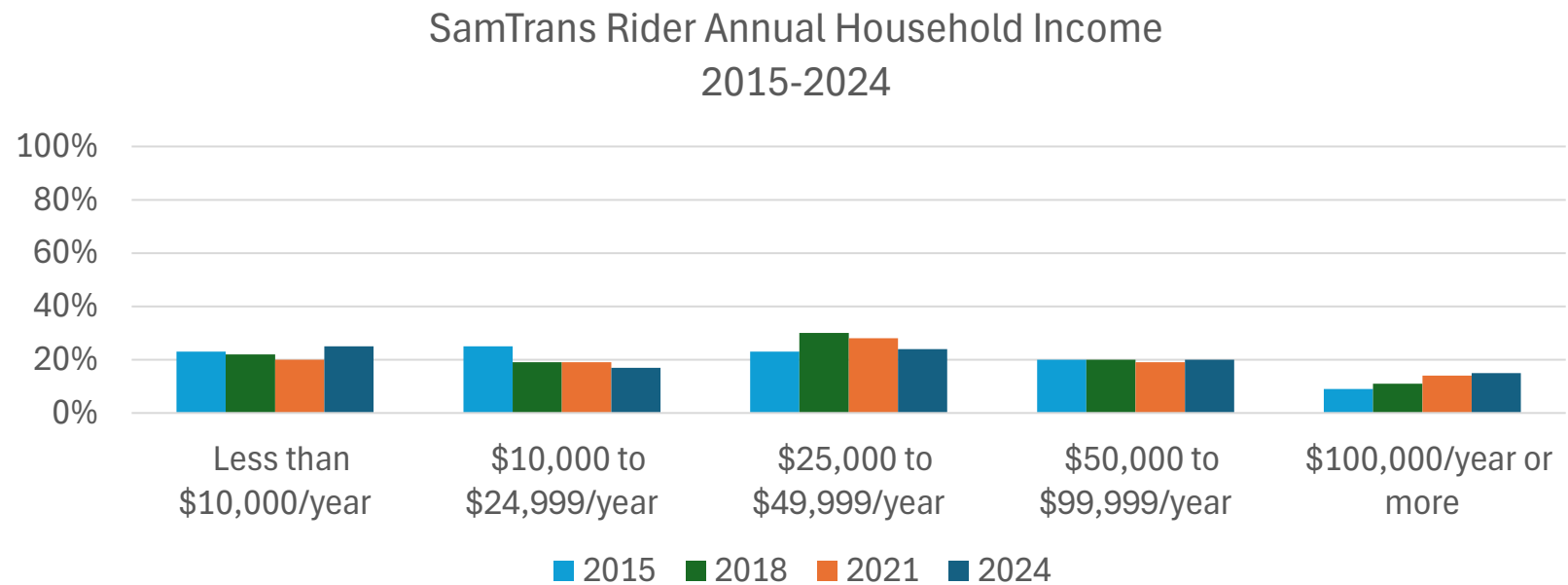
Between 2019 and 2023 the average household income in San Mateo County was \$156,000* – more than three times the average of SamTrans riders.

*Source: [US Census Bureau](#)

**Source: [Association of Bay Area Governments - Consumer Price Index](#)

Trends in Household Income

Between 2015 and 2024, rider income levels have remained relatively flat. Coupled with rising inflation, the economic situation of riders has worsened.



Key Insight:

SamTrans provides mobility services to some of the most economically disadvantaged communities in the Bay Area.

Rider Income Category

94% of riders meet the county definition of “low-income,” and 68% are considered “extremely low-income” – both up from 2021

Category	2024	2021
Extremely Low Income (30% AMI)	68%	67%
Very Low Income (50% AMI)	15%	16%
Low Income (80% AMI)	11%	8%
Median Income (100% AMI)	3%	5%
Moderate Income (120% AMI)	3%	4%
Total	100%	100%
SamTrans Total Low-Income Ridership	94%	91%

California State Income Limits for SMC

Effective 5/9/2024 - Area median Income **\$186,600** (based on household of 4)

Income Category	Income Limits by Family Size (\$)							
	1	2	3	4	5	6	7	8
Extremely Low (30% AMI) *	41,150	47,000	52,900	58,750	63,450	68,150	72,850	77,550
Very Low (50% AMI) *	68,550	78,350	88,150	97,900	105,750	113,600	121,400	129,250
Low (80% AMI) *	109,700	125,350	141,000	156,650	169,200	181,750	194,250	206,800
Median (100% AMI)	130,600	149,300	167,950	186,600	201,550	216,450	231,400	246,300
Moderate (120% AMI)	156,750	179,100	201,500	223,900	241,800	259,700	277,650	295,550

[Calculated by cross-referencing HH size and HHI and comparing categories to the CA State definitions of “low-income” for San Mateo County for 2021 and 2024. 2024 shown.]

Access to a Car Key Findings

- 79% of respondents report lacking access to a car as their main reason for riding SamTrans – consistent across all rider subgroups.
- Access to a car is lower among riders under 25 and those earning less than \$25k/year.

Comparison with County Residents

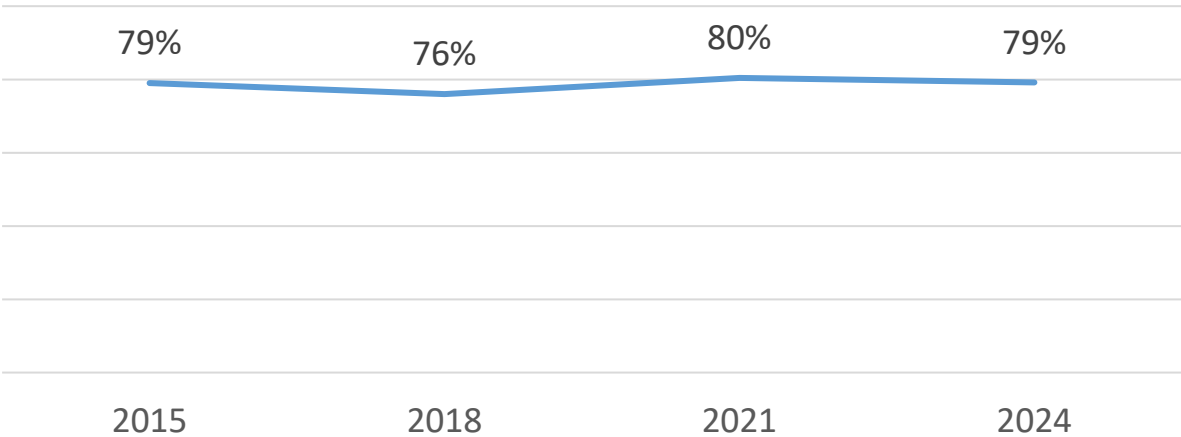
Most households in San Mateo County have access to a car (on average two per household*), showing higher levels of access to a car compared to SamTrans riders.

*Source: [Data USA – San Mateo County](#)

Trend in Car Access Over Time

Lack of access to a car has been consistently high among riders surveyed between 2015 and 2024.

Main Reason for Riding SamTrans: No car/don't drive.
2015-2024



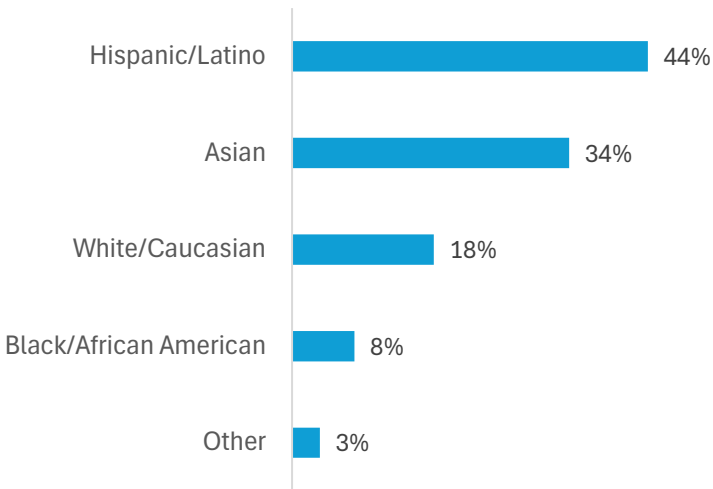
Key Insight:

SamTrans is an essential pillar of the community, and an irreplaceable mode of transit to thousands in the county.

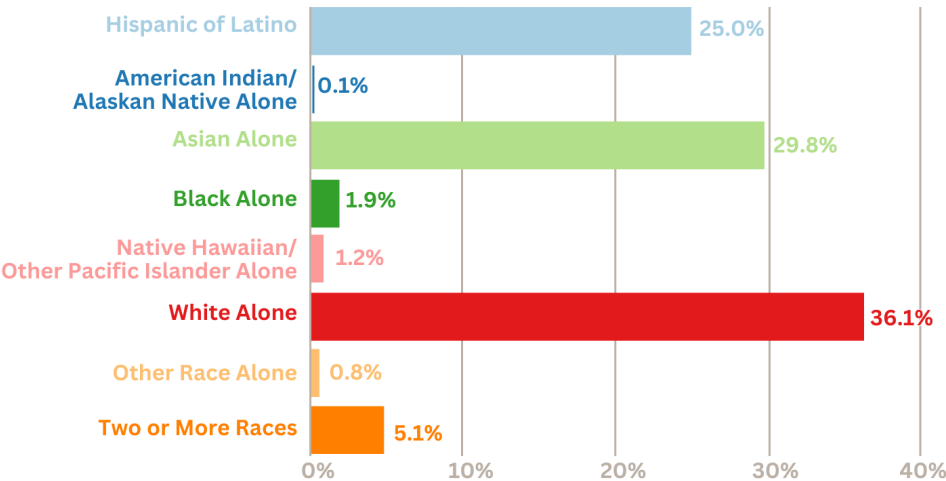
Rider Ethnicity Key Findings

- SamTrans serves a higher share of Hispanic/Latino (44%), Asian (34%), and Black/African American (8%) riders than the overall San Mateo County population.

SamTrans Riders: 2024 Triennial Survey



San Mateo County: 2020 Census Race/Ethnicity

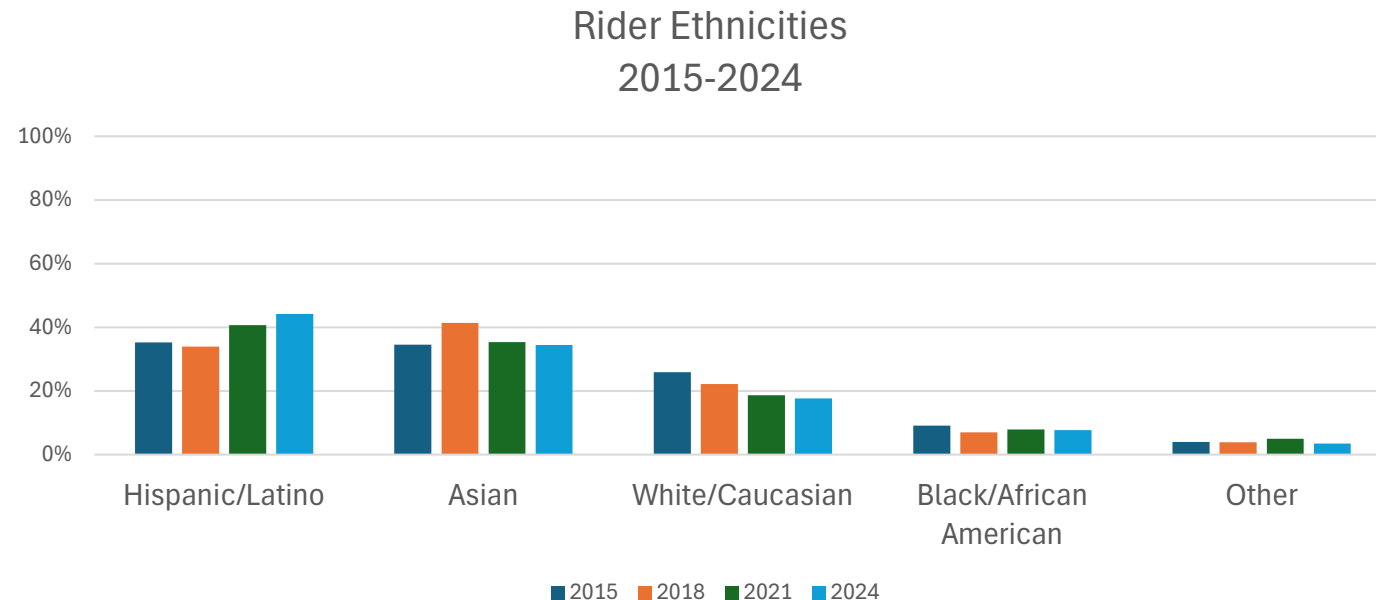


*United States Census Bureau's Decennial 2020 Survey

Note: the Triennial Survey and the Census collect race/ethnicity differently, so comparisons should be made with caution. A direct comparison of Hispanic/Latino populations is appropriate (44% of riders vs. 25% of the County). Comparisons for other groups can be made but are less precise.

Trend in Rider Ethnicity Over Time

Increase in the share of Hispanic/Latino riders between 2015 and 2024 from 34% to 44%, and a decrease in the share of White/Caucasian riders from 26% to 18%.

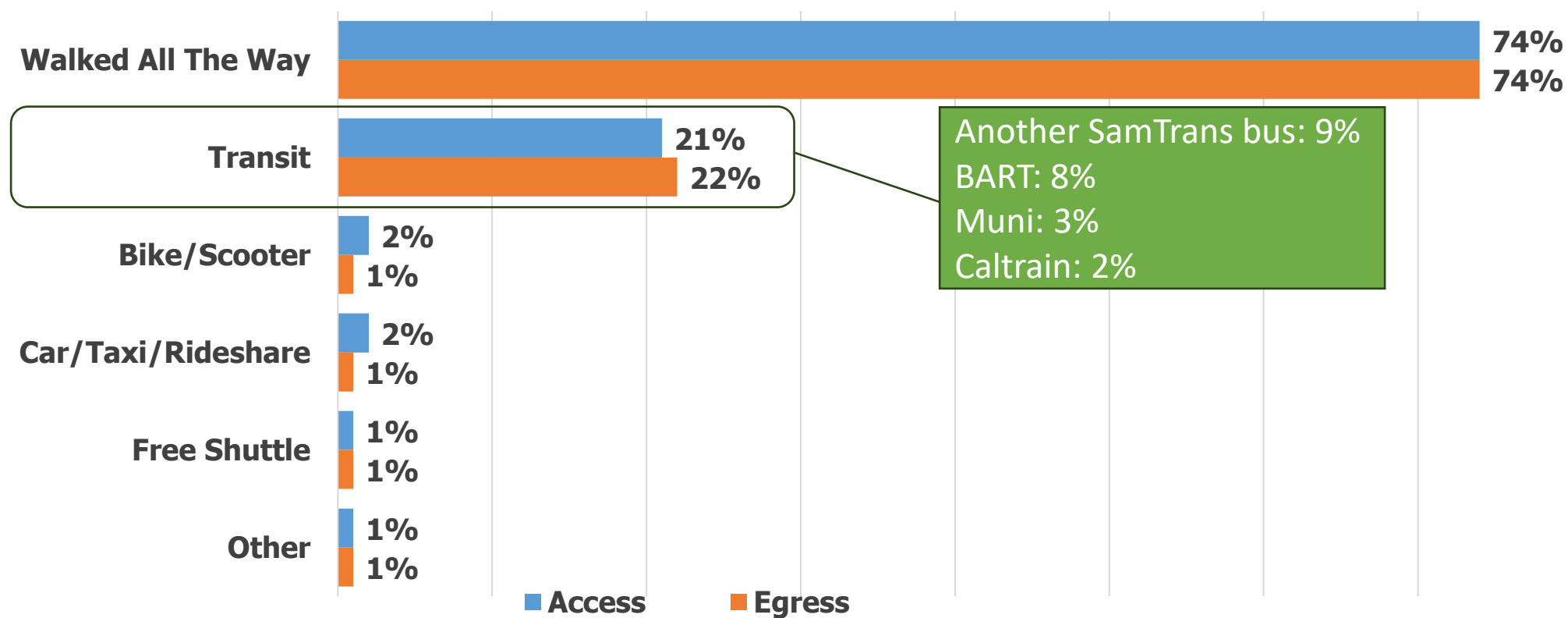


Opportunity:

Tailor outreach, language accessibility and cultural relevance of service and communications to maintain and grow ridership.

Access and Egress Overview

Nearly three-quarters (74%) of riders walk all the way both to their SamTrans bus stop and to their destination.



How did you get to the bus stop where you **BOARDED** this bus? [multiple responses accepted]
 How will you get from this bus to your final destination? [multiple responses accepted]

Transfers: Between SamTrans Buses

- Half of riders (56%) use one SamTrans bus for their trip, the rest (44%) use two or more buses – an increase over both 2018 and 2021 (39%)
- Half of respondents (50%) would be willing to transfer (or transfer more) if it meant a shorter overall trip, and for 42%, if it meant buses came more often

Key Insights:

- Over half of riders use only one bus for their trip, but more riders are transferring than in 2021
- Riders are benefitting from free transfers between SamTrans buses (Clipper/Mobile App)
- There is a willingness to transfer – *if done right*



Please email jestj@samtrans.com with any questions.



Clipper BayPass **Phase 1** **Evaluation Report**



CLIPPER
BayPass

ACKNOWLEDGEMENTS

Fare Integration Task Force

Denis Mulligan, Golden Gate Bridge

Michelle Bouchard, San Mateo County Transit District

April Chan, San Mateo County Transit District

Bill Churchill, Central Contra Costa Transit Authority

Eddy Cummins, Sonoma-Marín Area Rail Transit District

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Kate Miller, Napa Valley Transportation Authority

Robert Powers, Bay Area Rapid Transit District

Julie Kirschbaum, San Francisco Municipal Transportation Agency

Christy Wegener, Livermore Amador Valley Transit Authority

Partner Institutions

MidPen Housing

San Francisco State University

San José State University

Santa Rosa Junior College

University of California, Berkeley

Project Team

Metropolitan Transportation Commission and

San Francisco Bay Area Rapid Transit

Consultant Team

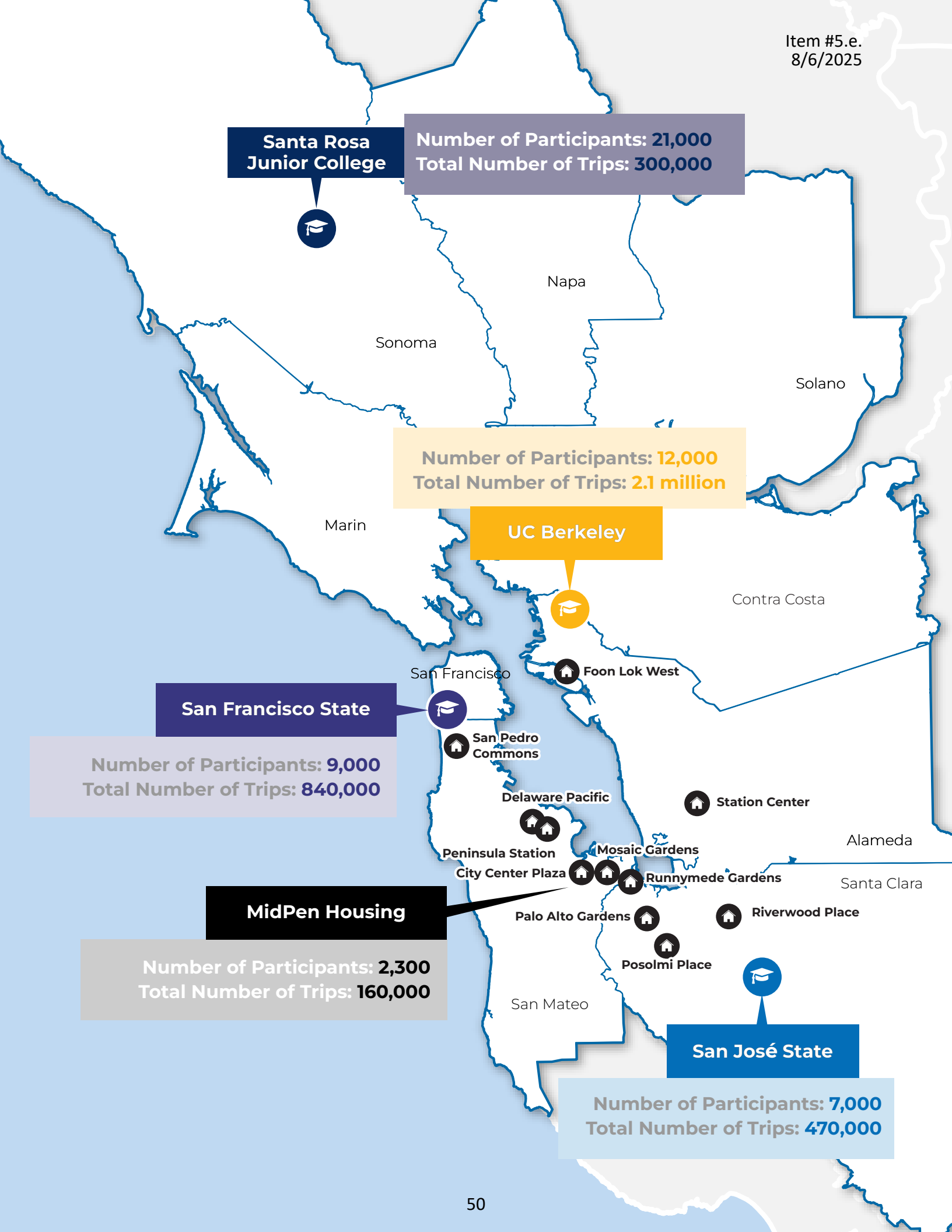
ARUP, Civic Edge, and The Behavioralist

CONTENTS

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	BayPass Pilot Overview	
	BayPass Pilot Design	
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01

EXECUTIVE SUMMARY



Background

The Clipper BayPass Phase 1 pilot evaluated the effects of a universal, unlimited transit pass (*Clipper BayPass*) between Fall 2022 and Summer 2024.

During this period, the Clipper BayPass was made available to approximately 50,000 individuals at four higher education institutions and twelve affordable housing properties in the San Francisco Bay Area.



Figure 1: BayPass Program Overview

Findings

In August 2022, the Clipper BayPass was randomly assigned to approximately one quarter of students at San Francisco State University, San José State University and the University of California at Berkeley.

The Phase 1 program evaluation found that, on average across these universities:

Students with access to Clipper BayPass:

- **took 30% more transit trips**
- **made 163% more inter-transit-agency transfers**
- **were between 6%-15% less likely to leave their university between Fall 2022 and Fall 2023**



than their peer students who only had access to their universities' respective, preexisting institutional transit passes.

During Phase 1 of the Clipper BayPass pilot, students at participating universities as well as Santa Rosa Junior College and affordable housing residents at MidPen housing locations took millions of transit trips across the Bay Area. In survey responses collected during the pilot, individuals eligible for Clipper BayPass indicated that access to the Clipper BayPass made them more likely to take transit and visit new locations in the Bay Area.

In Fall 2024, San Francisco State University students began purchasing BayPass for all students via their student transportation fee. In Spring 2025, UC Berkeley students voted to increase existing student fees to purchase BayPass for all students beginning in Fall 2025. Discussions with San José State, Santa Rosa Junior College and MidPen affordable housing regarding the potential to continue as BayPass partner organizations beyond 2025 are ongoing.

Recommendations

Given these positive results, the program evaluation recommends:

- Expanding BayPass to additional universities and affordable housing locations in the 9-county Bay Area to increase transit ridership, build a culture of public transportation use, and improve student retention.
- Continue to grow the BayPass program beyond universities and affordable housing locations by continuing to enroll employers and other membership organizations. As of April 2025, there are eleven paying BayPass partner organizations that make BayPass available to their approximately 37,000 total employees, students and residents. These BayPass partner organizations are: San Francisco State University, University of California - San Francisco (UCSF), OpenAI, San Francisco Airport Commission, Alameda Transportation Management Association, City of Menlo Park, City of Palo Alto, Foon Lok East (MidPen housing), Kiku Crossing (MidPen housing), Piedmont Gardens and Robinhood. When UC Berkeley's approximately 45,000 students become eligible for BayPass in Fall 2025, the total number of individuals eligible for BayPass will increase to approximately 82,000.

02

PURPOSE

This report summarizes the findings of the Clipper BayPass Phase 1 Pilot, which tested the effects of a universal transit pass program (Clipper BayPass) that was made available to approximately 50,000 individuals at four higher education institutions and twelve affordable housing properties in the San Francisco Bay Area.

The evaluation focuses on the period between August 15, 2022 and June 30, 2024.

The pilot included a randomized controlled trial that analyzed the impact of BayPass among students at three large universities with a combined student population of approximately 100,000. Data collected through this experiment demonstrates that access to Clipper BayPass had significant impacts on travel behavior:

students randomly assigned access to Clipper BayPass took significantly more transit trips and transferred far more frequently between transit operators than students randomly assigned access to preexisting (primarily) single-agency transit passes.

Enrollment data also suggests that access to a **Clipper BayPass may have reduced student attrition rates.**

Given these promising results, the project team recommends the Metropolitan Transportation Commission (MTC) and Bay Area transit operators continue to expand access to Clipper BayPass in the region.

03

INTRODUCTION

BayPass Pilot Overview

The Clipper BayPass Pilot is the Bay Area's first regional unlimited-ride transit pass. BayPass users have unlimited access to all bus, rail, and ferry services in the nine-county Bay Area region that accept Clipper, at no cost at the point of use.

Clipper BayPass was created in 2022 under the direction of the Fare Integration Task Force, a special committee of the Clipper Executive Board consisting of several transit operators and MTC. The Task Force focused on cost-effectively improving coordination and integration of fares among transit agencies to improve customer experience and grow ridership.



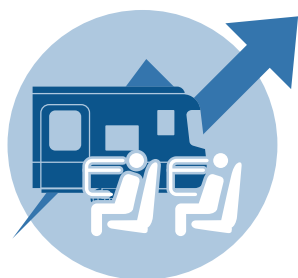
Figure 2: Partner Transit Agencies across the Bay Area

A Transit Fare Coordination and Integration Study¹, led by BART and MTC, explored various regional fare coordination and integration policies. One of the study's recommendations was to pilot an employer or institutional pass program, offering "all-you-can-ride" passes for employees / members.

Figure 3: Fare Coordination and Integration Study Report

Several of the Bay Area's transit agencies offer their own institutional programs, such as the AC Transit EasyPass, the Caltrain Go Pass, the VTA SmartPass and the SamTrans Way2Go pass. However, prior to the BayPass's introduction, the Bay Area lacked an unlimited use, all-access pass for the region's twenty-two transit agencies that use the Clipper fare payment system.

The BayPass pilot was designed to evaluate the impact that an unlimited institutional regional transit pass may have on:



Increasing transit ridership



Generating new transit revenues



Improving customer experience and attitudes towards transit

BayPass Pilot Design

The BayPass Pilot is split into two program phases

Phase 1, which began in August 2022, was designed to evaluate the BayPass's impact on students and affordable housing residents. More than 50,000 students and residents were eligible for the pass in this phase, which ends in Fall 2025. Phase 1 is fully funded by transit operators and MTC (i.e., the BayPass was provided at no additional cost to students and affordable housing residents). This evaluation report focuses on Phase 1 for the period from August 15, 2022 through June 30, 2024, which was the originally planned duration of Phase 1 of the Clipper BayPass Pilot. In Spring 2024, Phase 1 of the pilot was extended through Fall 2025.

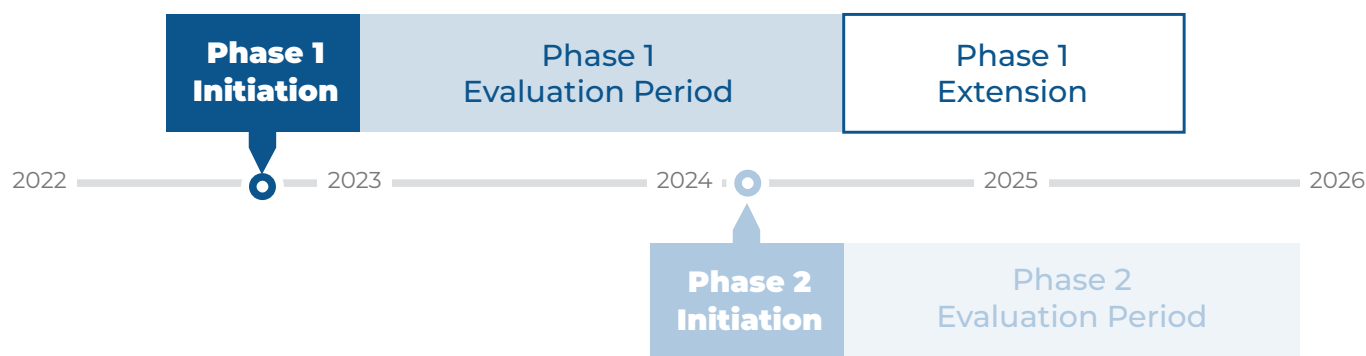


Figure 4: BayPass Pilot Design Schedule

Phase 2 of the pilot began in January 2024 and offers employers/ organizations the opportunity to purchase the BayPass on behalf of their employees, residents and/or students. Phase 2 is funded by sales of the BayPass to partner organizations (i.e., BayPass sales are used to reimburse transit operators for trips taken by BayPass participants). The Phase 2 pilot and evaluation are ongoing. A Phase 2 evaluation report will be released in the future.

BayPass Pilot Design

The first phase included a total of 51,300 individuals eligible for the BayPass at San Francisco State University (SFSU), San José State University (SJSU), University of California – Berkeley (UCB), Santa Rosa Junior College (SRJC), and 12 MidPen affordable housing properties (MidPen).

Institutions were selected for participation based on their diverse locations across the Bay Area as well as having preexisting passes on 1 to 3 transit agencies on Clipper, which provided an administrative structure that supported rapid implementation.

At the universities, passes were randomly assigned to a subset of the student population to enable the program evaluation team to accurately measure the impact of an all-system transit pass. At MidPen affordable housing properties and at SRJC, all residents and students, respectively, were eligible for the BayPass.

BayPass Pilot Design

Participant Agency	Participant Information
 SAN FRANCISCO STATE UNIVERSITY	<ul style="list-style-type: none"> • Approximately 22,000 students² • 9,000 BayPass participants randomly selected • Campus is served by 1 Muni rail line, 5 Muni bus routes, and 2 SamTrans bus routes • Prior to the introduction of the BayPass, all SFSU students had unlimited SFMTA and SamTrans access, plus a 50% discount on BART to and from the Daly City station • 87% of students live off campus³, 55% commute by transit⁴
 SJSU SAN JOSÉ STATE UNIVERSITY	<ul style="list-style-type: none"> • Approximately 36,000 students⁵ • 7,000 BayPass participants randomly selected • Campus is served by 2 VTA light rail lines and 8 VTA bus routes • Prior to the introduction of the BayPass, all SJSU students had unlimited VTA local bus and light rail access, plus a 50% discount on VTA express buses • 87% of students live off campus, 38% commute by transit⁶
 Berkeley UNIVERSITY OF CALIFORNIA	<ul style="list-style-type: none"> • Approximately 46,000 students⁷ • 12,000 BayPass participants randomly selected • Campus is served by BART and 6 AC Transit bus lines • Prior to the introduction of the BayPass, all UCB students had unlimited AC Transit access • 73% of students live off campus⁸, 34% commute by transit⁹
 SANTA ROSA JUNIOR COLLEGE	<ul style="list-style-type: none"> • Approximately 21,000 students¹⁰ • All students were offered the BayPass • Campus is served by 4 Sonoma County Transit buses and 5 Santa Rosa CityBus routes • Prior to the introduction of the BayPass, all SRJC students had unlimited access to Sonoma County Transit, Santa Rosa CityBus, and Petaluma Transit • 98% of students live off campus¹¹, 6% commute by transit¹²
 MidPen HOUSING Building Communities. Changing Lives.	<ul style="list-style-type: none"> • Approximately 2,300 residents at 12 selected properties • All residents from 12 selected properties were offered the BayPass • Properties are located in San Mateo, Santa Clara and Alameda Counties and are served by varying levels of transit from operators that include BART, Caltrain, SamTrans, VTA and AC Transit • Prior to the introduction of the BayPass, residents at three properties had unlimited access to SamTrans buses and residents at two properties had unlimited VTA local bus and light rail access, plus a 50% discount on VTA express buses

Table 1: BayPass Partner Agency Participant Information



EVALUATION METHODS AND DATA SOURCES

Clipper Trip Data

The BayPass evaluation team primarily utilized Clipper trip data and a randomized controlled trial covering approximately 100,000 students at three large universities to determine the pilot's impact on public transit use at SFSU, SJSU, and UCB. This data was also cross referenced by survey respondents' self-identified income to understand potential impacts by student income level.

The BayPass was not randomly assigned at SRJC or MidPen, which constrained the BayPass project team's ability to make conclusive assertions related to the BayPass's effect on public transportation use and rates of student attrition at those institutions.

Student Attrition Information

The BayPass evaluation team worked with SFSU, SJSU, and UCB to attain anonymized enrollment data at each university. This data was analyzed together with anonymized information provided by universities regarding student status over time to estimate BayPass's potential impact on student attrition rates.

Online Participant Surveys

The evaluation included a series of online surveys conducted from Fall 2022 through Spring 2024. These surveys were intended to build a better understanding of the impact of the BayPass on attitudes toward public transit, demand for parking, and housing choice (i.e., on-campus versus off-campus). The surveys also asked a series of demographic questions to identify a respondent's income and other population characteristics. Because the population of survey respondents may not be representative of the entire student population (for example, survey respondents at the universities took 2.3 times more trips on transit than the overall student population at those universities), surveys do not provide a basis for causal assertions. However, the surveys do provide helpful anecdotal context.

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SUMMARY OF KEY IMPACTS THE BAYPASS EFFECT

In its first year, BayPass increased transit ridership at the universities with preexisting institutional pass programs by 30% on average and increased transfers between transit agencies by 163% on average.

Among a subset of students who responded to the survey, the BayPass effect on transit trips taken was nearly twice as large among low-income survey respondents as it was for middle-and-high income survey respondents.

Additionally, approximately 90% of university survey respondents indicated that the “BayPass helped them get to and from new locations in the Bay Area” and that “since receiving the Clipper BayPass they were more likely to use public transportation options in the Bay Area”.

Between Fall 2022 and Fall 2023, students with access to BayPass at SFSU were 11% less likely to leave the university than their peers that only had access to the university’s preexisting institutional transit pass.

Similarly, students with BayPass access at SJSU were 6% less likely to leave the university and students with BayPass access at UCB were 15% less likely to leave the university.

Attrition rates are determined by whether the student’s anonymized identifier appeared in the list of active students in both Fall 2022 and Fall 2023. If the student’s anonymized identifier appeared in Fall 2022 but did not appear in Fall 2023, then the analysis assumes that the student attrited (i.e., was no longer an active student at the university).

The following sections of this report detail these results and analyses of trip data, institutional enrollment and attrition, and participant perception of the program information received from online surveys.

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DETAILED ANALYSES

Randomized Controlled Trial: SFSU, SJSU, and UCB¹³

The BayPass team used Clipper trip data to determine BayPass's impact on public transit usage during the Phase 1 pilot period. Since BayPass was randomly assigned at SFSU, SJSU and UCB, the pilot's impact on public transit usage can be determined with a high degree of statistical confidence. This is because the student populations who were randomly selected to be eligible to receive the BayPass and those students who were not randomly selected are essentially identical.

The only difference between the groups is whether they were eligible for the BayPass, so the evaluation can be confident in asserting that statistically significant differences observed in the Clipper trip data measured at the university level are due to the BayPass. Random assignment ensures that any external factors (e.g., economic conditions, public health guidelines, relative price of transportation options, etc.) would impact both the BayPass eligible and non-BayPass eligible groups equally.

Appendix A contains additional detail on the impact of BayPass on transit trips taken and inter-operator transfers made by operator and institution.

The effect of BayPass on the **average total number of trips taken per eligible student**

(Through Year 1)¹⁴

Figure 5 shows the total average number of trips taken in the first year of the BayPass pilot (i.e., August 15, 2022 – June 30, 2023) at each university, comparing the group of students eligible for the BayPass to their peers who were not.

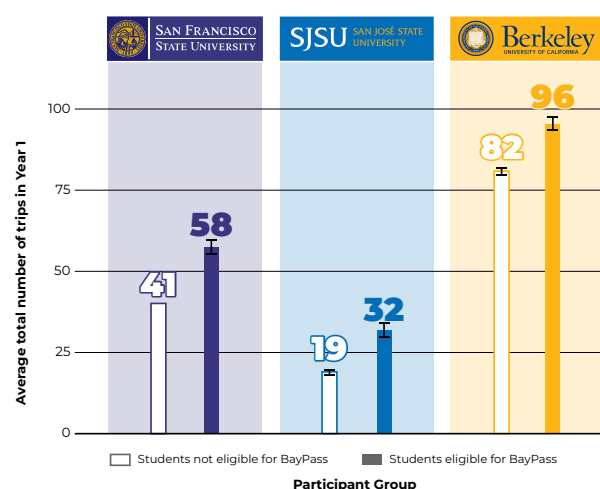


Figure 5 - Average total number of trips by Participant Group

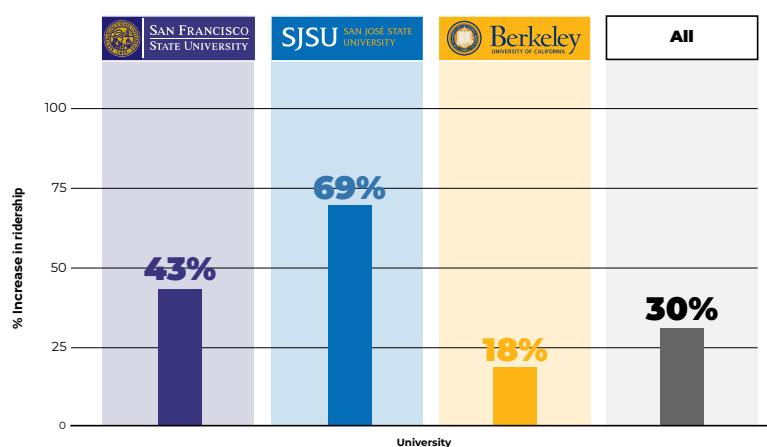


Figure 6 - Percentage increase in number of trips by University

Figure 6 shows the percentage increase in trips shown in Figure 5.

As Figure 6 indicates, across all participating universities, **students eligible for the BayPass took 30% more trips on average than their peers who were only eligible for the preexisting institutional pass programs that predated BayPass at each institution** (i.e., unlimited access to SF Muni and SamTrans and discounted BART from Daly City at SFSU, unlimited access to VTA buses and light rail and discounted VTA express buses at SJSU and unlimited access to AC Transit local and transbay buses at UCB). **This relative increase attributable to BayPass was 43% at SFSU, 69% at SJSU and 18% at UCB.**

The effect of BayPass on the **average total number of trips taken per eligible student** (Through Year 2)

Figure 7 shows the total average number of trips taken from the outset of the BayPass pilot at each university to the end of the second year of the pilot (i.e., August 15, 2022 - June 30, 2024), comparing the group of students eligible for the BayPass to their peers who were not.¹⁵

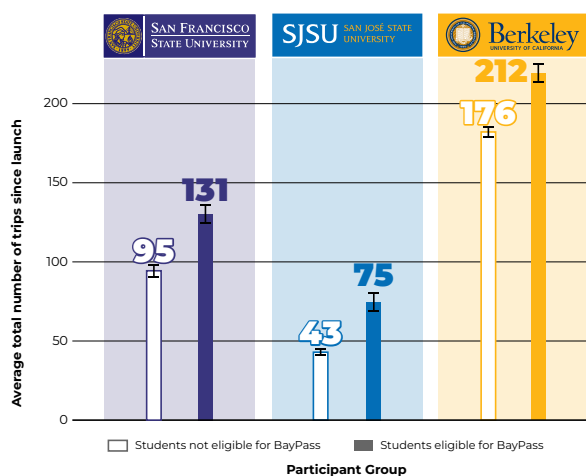


Figure 7 - Average total number of trips by Participant Group

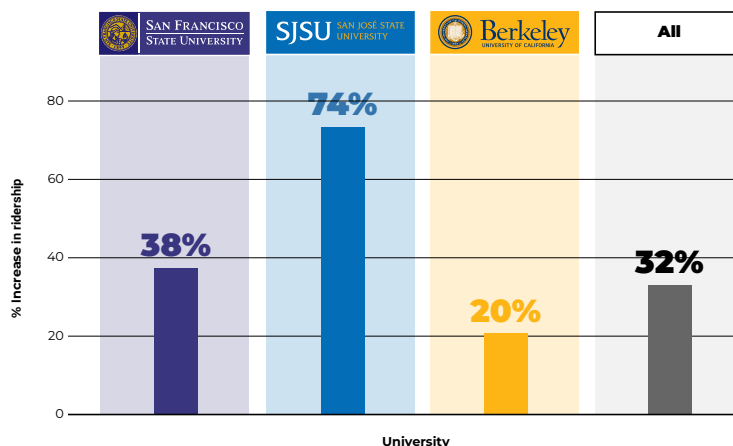


Figure 8 - Percentage increase in number of trips by University

Figure 8 shows the percentage increase in trips shown in Figure 7.

As Figure 8 indicates, through the second year of the BayPass pilot across all participating universities, students eligible for the BayPass took 32% more trips on average than their peers who were only eligible for the preexisting institutional pass programs that predated BayPass at each institution. **This relative increase attributable to BayPass was 38% at SFSU, 74% at SJSU and 20% at UCB.**

The effect of BayPass on the **average number of between-transit-operator transfers taken per eligible student**

(Through Year 1)

Figure 9 shows the total average number of between-transit-operator transfers (e.g., AC Transit to SF Muni, BART to Caltrain, etc.) made in the first year of the BayPass pilot (i.e., August 15, 2022 – June 30, 2023) at each university, comparing the group of students eligible for the BayPass to their peers who were not.

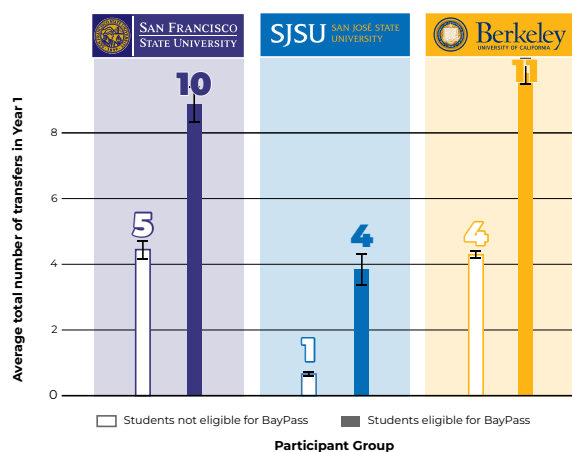


Figure 9 - Average total number of between-operator-transfers by Participant Group

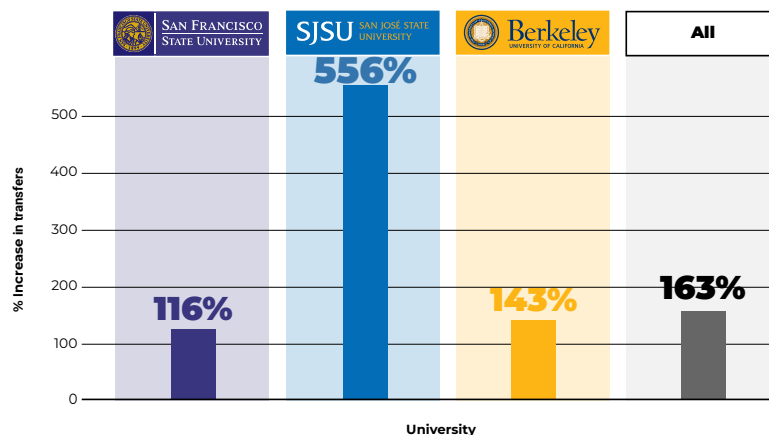


Figure 10 - Percentage increase in between-operator-transfers by University

Figure 10 shows the percentage increase in between-operator-transfers shown in Figure 9.

As Figure 10 indicates, through the first year of the BayPass pilot across all participating universities, students eligible for the BayPass transferred between transit operators 163% more on average than their peers who were only eligible for the preexisting institutional pass programs that predated BayPass at each institution. **This relative increase attributable to BayPass was 116% at SFSU, 556% at SJSU and 143% at UCB.**

The effect of BayPass on the **average number of between-transit-operator transfers taken per eligible student**

(Through Year 2)

Figure 11 shows the total average number of between-transit-operator transfers (e.g., AC Transit to SF Muni, BART to Caltrain, etc.) made from the outset of the BayPass pilot at each university to the end of the second year of the pilot (i.e., August 15, 2022 - June 30, 2024), comparing the group of students eligible for the BayPass to their peers who were not.

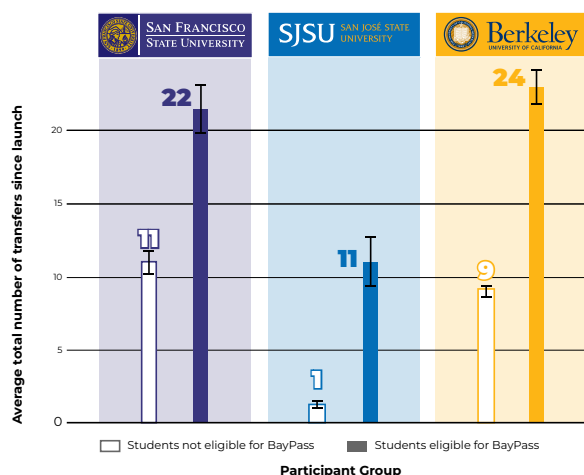


Figure 11 - Average total number of between-operator-transfers by Participant Group

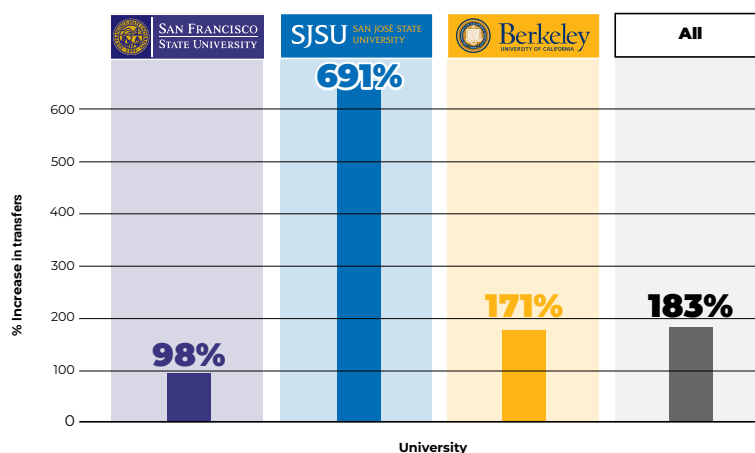


Figure 12 - Percentage increase in between-operator-transfers by University

Figure 12 shows the percentage increase in between-operator-transfers shown in Figure 11.

As Figure 12 indicates, through the second year of the BayPass pilot across all participating universities, students eligible for the BayPass transferred between transit operators 183% more on average than their peers who were only eligible for the preexisting institutional pass programs that predated BayPass at each institution. **This relative increase attributable to BayPass was 98% at SFSU, 691% at SJSU and 171% at UCB.**

Differential Impact by Student Income Level

Because the BayPass project team was not able to attain data on income level for all students at SFSU, SJSU and UCB, this analysis relies only on survey respondents' self-identified income level. While the difference between the survey respondent population and the overall student population does not invalidate this comparative analysis, it is crucial to note that transit use among the group of individuals studied in this analysis is significantly different than the entire student population; survey respondents took 2.3 times more trips on transit than the overall student population during the two-year pilot period.

As shown in Figure 13, among those survey respondents who identified as low-income (i.e., household incomes lower than 200% of 2024 poverty level threshold, adjusted for household size), the BayPass increased transit use by 27.4% over the course of the study period.

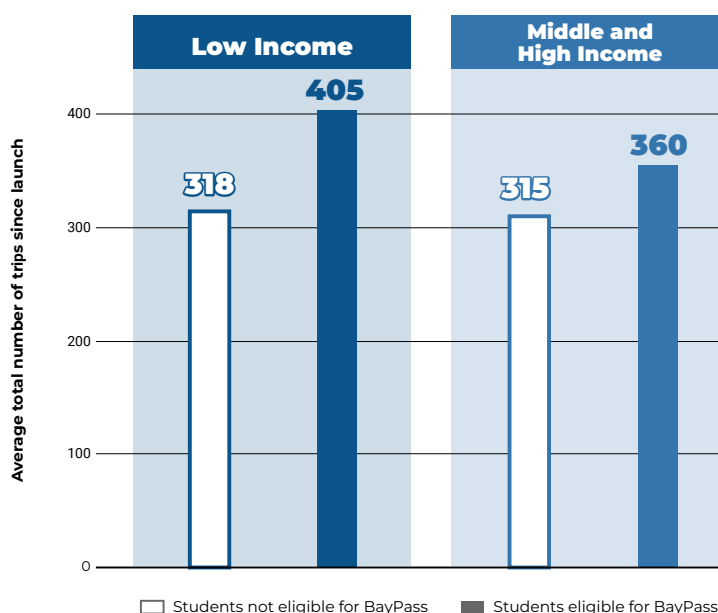


Figure 13: Average number of Trips by Income since launch

Among those survey respondents who identified as middle-and high income (i.e., household incomes higher than 200% of 2024 poverty level threshold, adjusted for household size) the BayPass increased transit use by 13.9%.

In other words, the BayPass's effect on transit trips taken was nearly twice as large among low-income students as it was for middle-and-high income students.

Institution Enrollment and Attrition: SFSU, SJSU, and UCB

The BayPass evaluation team worked with university partners to understand whether the BayPass influenced the rate of attrition at each university. Attrition rates are determined by whether the student's anonymized identifier appeared in the list of active students in both Fall 2022 and Fall 2023 student enrollment snapshots provided by the universities. If the student's anonymized identifier appeared in Fall 2022 but did not appear in Fall 2023, then the analysis assumes that the student attritted (i.e., was no longer an active student at the university). Factors that drive attrition include graduating and leaving the university before obtaining a certificate or diploma¹⁶.

As the first row of Table 1 shows, the BayPass reduced the rate of attrition between Fall 2022 and Fall 2023 by 11% at SFSU, 6% at SJSU and 15% at UCB.

	 SAN FRANCISCO STATE UNIVERSITY	SJSU SAN JOSÉ STATE UNIVERSITY	 Berkeley UNIVERSITY OF CALIFORNIA
Calculated Impact of BayPass on Rate of Attrition by University	Reduced attrition rate by 11%	Reduced attrition rate by 6%	Reduced attrition rate by 15%

Table 2: Analysis of Anonymized Student Identifier Data Provided by Universities

The calculated attrition rates for BayPass eligible and non-BayPass eligible students are based solely on groups of students at each institution who were eligible for institutional transit passes in Fall 2022 and Fall 2023. Student transit pass eligibility may differ by university and may extend beyond undergraduate and graduate students to include certificate, continuing education or other student types. A future analysis, with access to more granular student type data, might consider evaluating the impact of increased access to transit on attrition by student type. A detailed version of Table 2 appears in Appendix B, Section 1.4 on page 19.

Descriptive Summaries of Transit Use by SFSU, SJSU, UCB, MidPen Affordable Housing Residents and SRJC Students

To provide additional context regarding patterns in transit use by partner institution, the below tree maps show the share of total trips taken at each institution by transit operator at MidPen, SFSU, SJSU, SRJC and UCB for the period from August 15, 2022 through June 30, 2024.

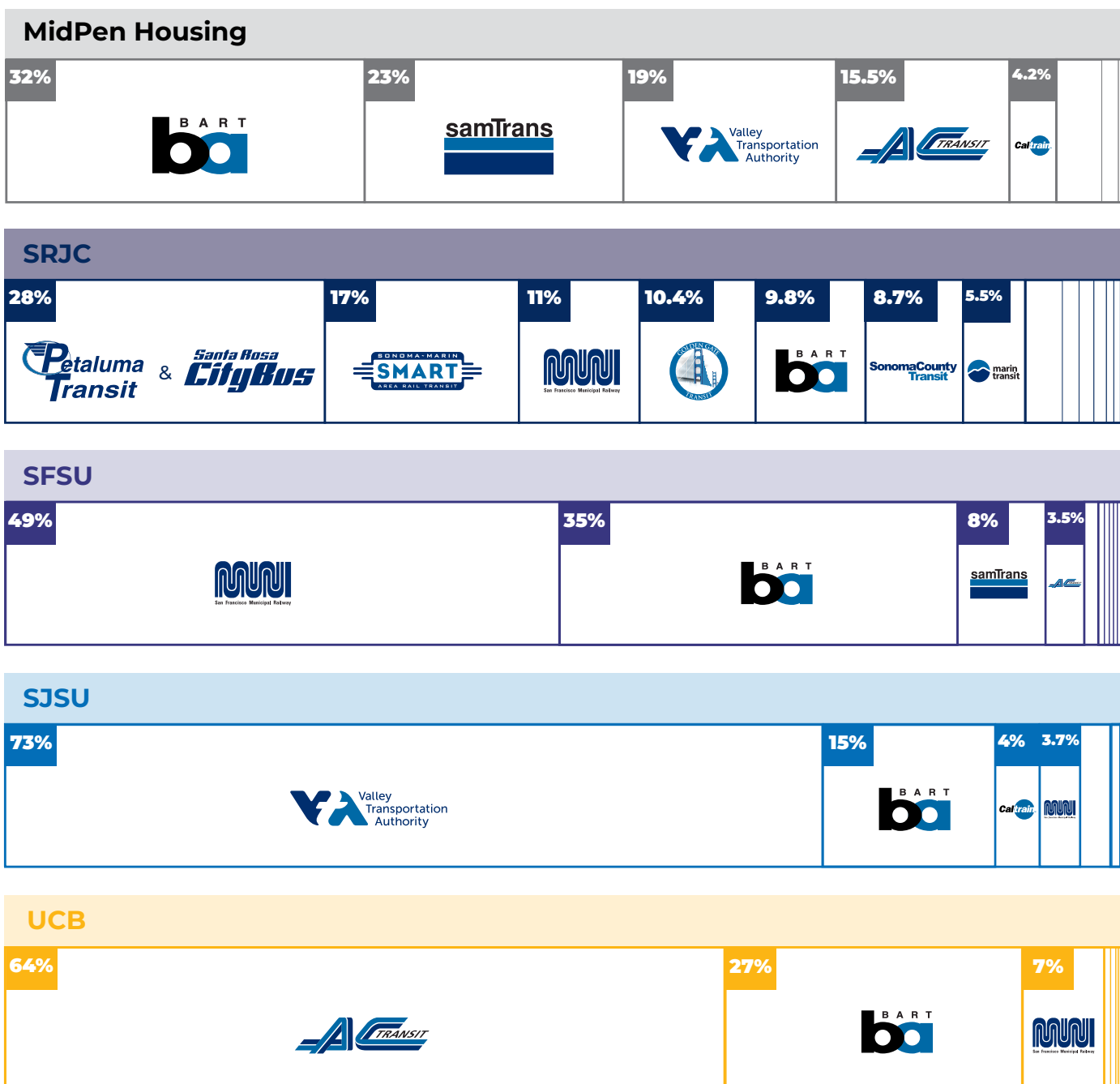
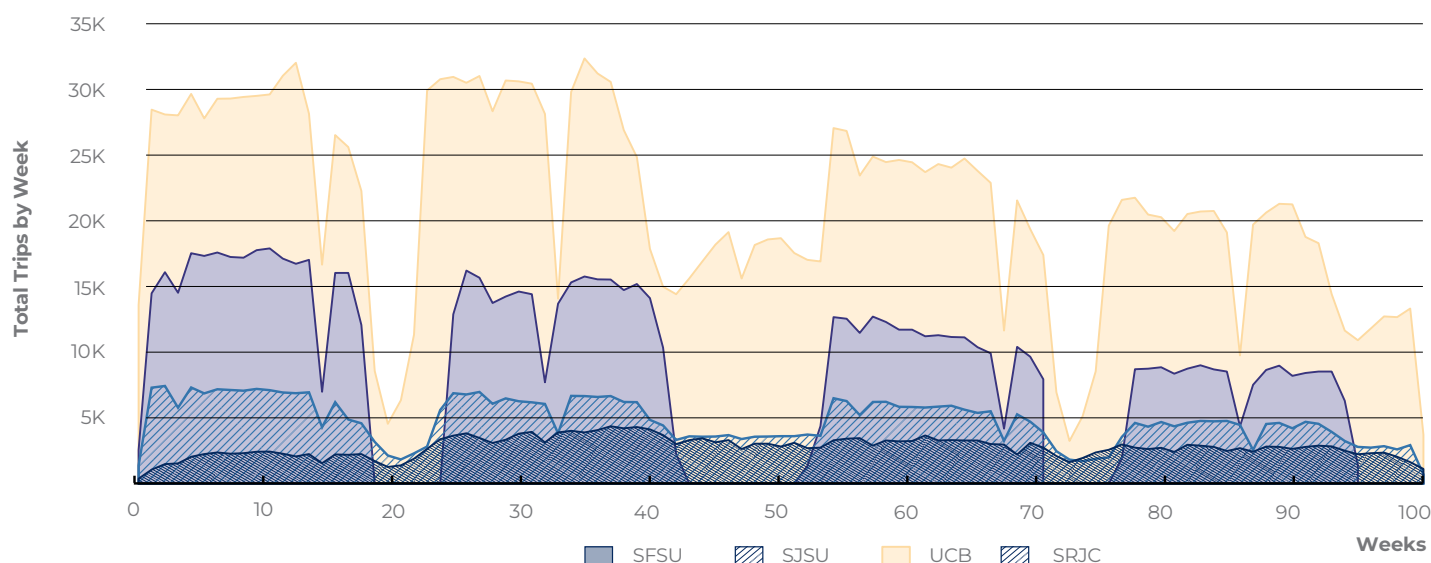


Table 3: BayPass Partner Tree Maps

Descriptive Summaries of Transit Use by SFSU, SJSU, UCB, MidPen Affordable Housing Residents and SRJC Students

The below time series charts show the total number of trips taken by BayPass users at MidPen, SFSU, SJSU, SRJC and UCB for the period from August 15, 2022 through June 30, 2024.

Total BayPass Trips by Week - Universities/SRJC



Total BayPass Trips by Week - MidPen

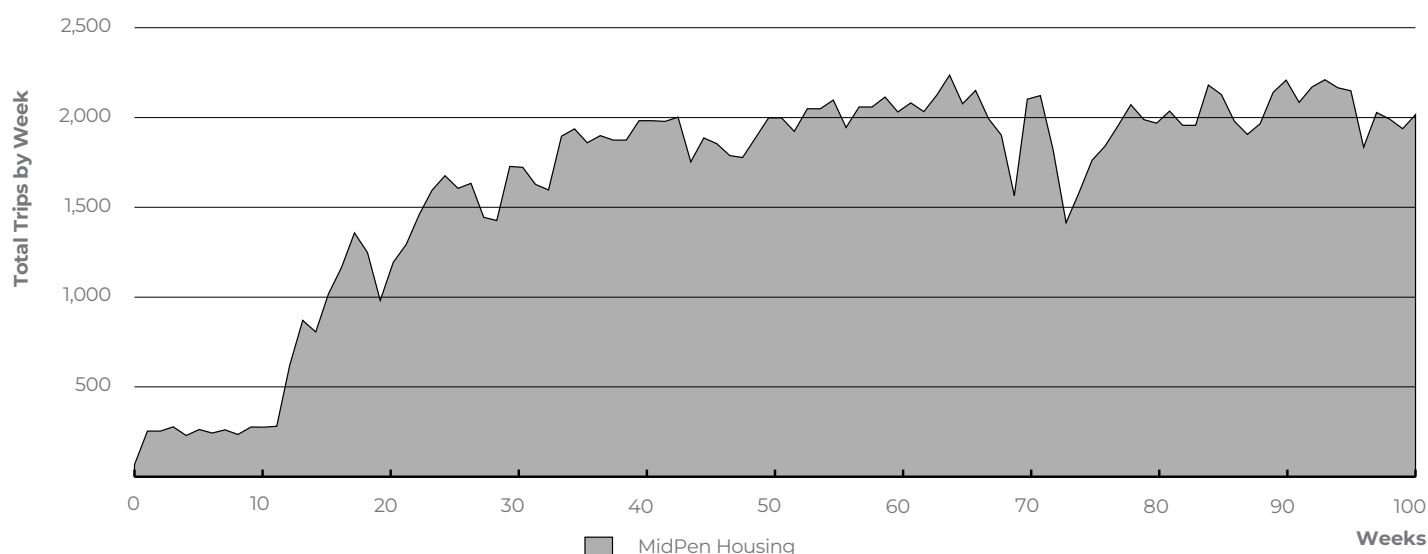


Figure 14: BayPass Partners Time Series

Survey

Comparative analyses of the survey results alone did not yield any consistent trends related to the BayPass's effect on attitudes toward transit, demand for parking, demand for single-occupancy vehicle trips or housing choice (on- or off-campus). This may be in part because the group of individuals who responded to the survey at SFSU, SJSU and UCB used 2.3 times more public transit than those who did not respond to the survey, which suggests that their views on transit or decision-making regarding transit, parking, driving, and housing location may not be representative of the entire student body.

However, survey responses offered some helpful anecdotal information and measured support for the pilot including:

- 88% of SFSU students, 85% of SJSU students and 97% of UCB students who were eligible for the BayPass indicated that the BayPass helped them get to and from new locations in the Bay Area.
- 88% of SFSU students, 84% of SJSU students and 96% of UCB students who were eligible for the BayPass indicated that since receiving the Clipper BayPass they are more likely to use public transportation options in the Bay Area.

Results of these survey analyses are available in Appendix B, Section 2 at page 20.



NEXT STEPS AT BAYPASS PHASE 1 INSTITUTIONS

The BayPass project team is continuing to partner with SFSU, SJSU, UCB, MidPen and SRJC.

At present:

- SFSU students opted to expand BayPass to all approximately 24,000 undergraduate and graduate students in Fall semester 2024. Students pay for the BayPass via a student fee. The Academic Year 2024-2025 BayPass-specific fee at SFSU is \$120 per student per semester. This fee covers all trips taken on public transit agencies that accept Clipper but does not cover transit trips taken during winter or summer breaks at SFSU.
- In April 2025, UCB students voted to add a BayPass student fee to their existing transit fee for academic years 2025-26 and 2026-27. Approximately 90% of UCB students who voted in the April 2025 ASUC election at UCB voted in favor of increasing their transit fee to purchase BayPass¹⁷. The BayPass student fee of \$124 per semester provides the BayPass to the entire student body beginning in Fall 2025 and includes trips taken during winter and summer breaks at UCB. The proposed fee includes a \$41 per semester return-to-aid fee as required by UCB policy. The return-to-aid fee is not associated with the cost of directly providing transit to UCB students. The BayPass fee does not cover trips taken on AC Transit, which are covered under a separate Class Pass agreement between UCB and AC Transit.
- BayPass will continue to be offered to individuals who were initially provided BayPass in Fall 2022 at SFSU, SJSU, UCB, SRJC and MidPen at no cost to the institutions through June 2025 (or October 2025 in MidPen's case). The BayPass project team is actively working with SJSU, SRJC and MidPen to explore pathways for expansion toward a paid program.
- In 2024, MidPen housing expanded a paid version of BayPass to two new locations: 124 units at Foon Lok East (in Oakland's Brooklyn Basin) and 225 units at Kiku Crossing (in San Mateo).

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CONCLUSION AND RECOMMENDATIONS

The Clipper BayPass has had significant impacts on travel behavior (more transit trips taken and inter-operator transfers made) and may have reduced student attrition rates at SFSU, SJSU and UCB. Students at SRJC and residents at MidPen have taken hundreds of thousands of trips on BayPass across the Bay Area's twenty-two transit agencies that use Clipper. Individuals eligible for BayPass felt that the BayPass helped them visit new locations in the Bay Area and made them more likely to use public transit.

Given these positive outcomes, the BayPass project evaluation team recommends:

- Expand BayPass to additional universities and affordable housing locations in the 9-county Bay Area to increase transit ridership, build a culture of public transportation use and improve student retention
- Continue to grow the BayPass program beyond universities and affordable housing locations by continuing to enroll additional employers and other membership organizations. As of April 2025, there are eleven paying BayPass partner organizations that make BayPass available to their approximately 37,000 total employees, students and residents. These BayPass partner organizations are: San Francisco State University, University of California - San Francisco (UCSF), OpenAI, San Francisco Airport Commission, Alameda Transportation Management Association, City of Menlo Park, City of Palo Alto, Foon Lok East (MidPen housing), Kiku Crossing (MidPen housing), Piedmont Gardens and Robinhood. When UC Berkeley's approximately 45,000 students become eligible for BayPass in Fall 2025, the total number of individuals eligible for BayPass will increase to approximately 82,000.

END NOTES

1	https://mtc.ca.gov/planning/transportation/regional-transportation-studies/transit-fare-coordination-integration-study
2	https://marcomm.sfsu.edu/sf-state-facts
3	https://www.calstate.edu/dev/campuses/san-francisco/Pages/student-life.aspx
4	https://sustain.sfsu.edu/sites/default/files/documents/2023TransportationSurveyResultsReport.pdf
5	https://www.sjsu.edu/facts-and-accomplishments/facts.php
6	https://www.sjsu.edu/as/departments/transportation-solutions/annual-commute-surveys/index.php
7	https://opa.berkeley.edu/campus-data/uc-berkeley-quick-facts
8	https://www.usnews.com/best-colleges/university-of-california-berkeley-1312/student-life#:~:text=University%20of%20California%2C%20Berkeley%20has,of%20students%20live%20off%20campus.
9	https://pt.berkeley.edu/sites/default/files/2023_commuter_report.pdf
10	Student Headcount Comparison - Current Semester Fact Book
11	Santa Rosa Junior College Housing Housing
12	Fall 2022 Student Survey Report page 13.
13	The BayPass was not randomly assigned at SRJC or MidPen, which constrained the BayPass project team's ability to make conclusive assertions related to the BayPass's effect on public transportation use and rates of student attrition. The BayPass was available to all SRJC students enrolled in Fall 2022 and Spring 2023 semesters as well as all MidPen Affordable Housing Residents for the period from November 2022 through July 2024. Therefore, the evaluation cannot make conclusive comparative assertions regarding the BayPass's impact on public transportation use or attrition / graduation rates.
14	This evaluation measures public transit ridership using Clipper tap data from university-issued Clipper cards (either Clipper BayPass or their institution's preexisting institutional transit pass). To further validate these findings, the BayPass project team conducted a sensitivity test that examined responses to a survey question that asked whether and how often students used fare media other than their university-issued Clipper card, the details of which appear in Appendix B "Sensitivity Analysis" on page 33. The conclusion of the sensitivity analysis is that use of other fare media is likely to be more prevalent among students who were not eligible for BayPass, however, when we adjust ridership to reflect this difference, the impact of BayPass eligibility on total transit ridership remains strongly positive and significant. After adjusting for possible use of other fare media, the project team estimated that the BayPass's effect on total transit trips taken per eligible student during year 1 of the pilot program (i.e., August 2022 – July 2023) may have been 33% at SFSU, 50% at SJSU and 13% at UCB. Regression tables in Appendix B "Sensitivity Analysis" on pages 35 to 38 contain additional detail by university and academic year.
15	Analyses of the BayPass's impact on transit trips taken over the entire two-year pilot period exclude those students who were originally eligible for transit passes in Fall 2022 (both BayPass and non-BayPass passes) but who did not remain in the student population in Fall 2023. This approach is more conservative when comparing the impact on transit trips taken (i.e., less likely to overstate the observed effect) than including students who were originally eligible for transit passes in Fall 2022 but who did not remain in the student population in Fall 2023.
16	It is possible that an individual might also have chosen to remain enrolled in an institution solely to maintain their access to the BayPass, which would also play a role in reducing rates of attrition. If this were the case, then one might rightly assert that eligibility for BayPass could encourage students to delay graduating or attaining a certificate versus a scenario in which they were only eligible for their respective, preexisting institutional transit passes. However, given the Bay Area's very high cost of living and the opportunity cost of remaining enrolled at university, the project evaluation team doubts that savings on transportation associated with access to the BayPass would have caused significant numbers of students to choose to delay graduation. Furthermore, most transit trips taken by BayPass-eligible and non-BayPass-eligible students at SFSU, SJSU and UCB were taken on transit operators to which all students already had unlimited access via their preexisting institutional transit passes (i.e., SF Muni at SFSU, VTA at SJSU and AC Transit at UCB). Future analyses of transit passes at educational institutions might consider further exploration of their effect on time-to-graduation/certification.
17	LIVE: 2025 ASUC election results ASUC Elections 2025 dailycal.org

**San Mateo County Transit District
Staff Report**

To: Board of Directors

Through: April Chan, General Manager/CEO

From: Kate Jordan Steiner, Chief Financial Officer
Emily Beach, Chief Communications Officer

Subject: **Awarding Contracts to Corey, Canapary & Galanis and EMC Research, Inc. for On-Call Market Research and Survey Services for an Aggregate Not-To-Exceed Amount of \$2.1 Million for a Three-Year Base Term, with up to Two Additional One-Year Option Terms**

Action

Staff recommends that the Board of Directors (Board) of the San Mateo County Transit District (District):

1. Award contracts to Corey, Canapary & Galanis of San Francisco, California (CC&G) and EMC Research, Inc. of Oakland, California (EMC) to provide On-Call Market Research and Survey Services (Services) on an as-needed basis for an aggregate not-to-exceed amount of \$2.1 million for a three-year base term, with up to two additional one-year option terms.
2. Authorize the General Manager/CEO or designee to execute contracts with CC&G and EMC in full conformity with the terms and conditions of the solicitation documents and negotiated agreements, and in a form approved by legal counsel.
3. Authorize the General Manager/CEO or designee to exercise up to two additional one-year option terms, if in the best interest of the District.

Significance

Award of these proposed contracts for the Services will provide the District with a bench of qualified and experienced firms to conduct rider and non-rider research, ridership count projects, passenger satisfaction, and polling surveys on a project-by-project basis. Through these Services, the District aims to gain deeper insights into enhancing customer satisfaction and overall experience, ultimately improving service effectiveness and advancing its goal of providing safe and accessible mobility options to the community.

Budget Impact

Funds to support these contracts are included in the District's current Operating Budget and will be included in future years' operating budgets.

Background

On March 17, 2025, the District, the Peninsula Corridor Joint Powers Board, and the San Mateo County Transportation Authority (TA) (collectively referred to as the “Agencies”) issued joint Request for Proposals (RFP) 25-S-J-T-P-018 for the Services. The RFP was advertised on the Agencies’ eProcurement website. Twenty-six potential proposers downloaded the RFP. The Agencies received three proposals, all of which were found to be responsive to the requirements of the solicitation documents. A Selection Committee (Committee), composed of staff from the Agencies, reviewed, evaluated, and scored the proposals in accordance with the evaluation criteria set forth in the RFP.

Evaluation Criteria	Maximum Points
Company Qualifications, Experience and References	25 Points
Qualifications and Experience of Key Personnel	25 Points
Project Understanding and Management Plan	25 Points
Cost Proposal	25 Points
Small Business Enterprise (SBE) Preference (not applicable to the TA)	5 Points
Total	105 Points

The Committee determined that CC&G and EMC were the highest-ranked firms. Staff determined these two firms possess the requisite experience and qualifications required for successful performance of the Services as defined in the solicitation documents.

CC&G and EMC are certified SBEs and received five points for the SBE Preference.

Staff successfully negotiated contract terms, including prices, with each of the two highest-ranked firms. Staff performed a price analysis and determined the negotiated prices to be fair, reasonable, and consistent with those paid by other public agencies for similar work in the Bay Area.

The proposed contracts are for a total aggregate not-to-exceed amount of \$2.1 million for a three-year base term, with up to two additional one-year option terms. Staff will issue Work Directives (WDs) for specific needs during the contract term on an as-needed basis. If it is in its best interest, the District may elect to compete any given WD amongst the two firms on the bench. There is no guarantee of any amount of work or level of effort that will be ordered from or allocated to, or total compensation to be paid to either of the firms under the awarded contracts.

Prepared By:	Pooja Mehra	Procurement Administrator II	650-551-6114
	Julian Jest	Manager, Market Research	650-508-6245

Resolution No. 2025-

**Board of Directors, San Mateo County Transit District
State of California**

* * *

**Awarding Contracts to Corey, Canapary & Galanis and EMC Research, Inc. for
On-Call Market Research and Survey Services for an Aggregate Not-To-Exceed Amount of
\$2.1 Million for a Three-Year Base Term, with up to Two Additional One-Year Option Terms**

Whereas, on March 17, 2025, the San Mateo County Transit District (District), the Peninsula Corridor Joint Powers Board, and the San Mateo County Transportation Authority (collectively referred to as the “Agencies”) issued joint Request for Proposals (RFP) 25-S-J-T-P-018 for On-Call Market Research and Survey Services (Services) to establish a bench of firms to provide the Services on an as-needed basis; and

Whereas, in response to the RFP, the Agencies received three proposals, all of which were found to be responsive to the requirements of the RFP; and

Whereas, a Selection Committee (Committee), composed of staff from the Agencies, reviewed, evaluated, scored and ranked the proposals in accordance with the evaluation criteria set forth in the RFP, and determined that the following two firms were the highest-ranked:

- Corey, Canapary & Galanis of San Francisco, California (CC&G), and
- EMC Research, Inc. of Oakland, California (EMC); and

Whereas, the Committee determined that CC&G and EMC possess the requisite experience and qualifications required to successfully perform the Services; and

Whereas, staff successfully negotiated contract terms, including prices, with each of the two highest-ranked firms; and

Whereas, staff performed a price analysis and determined the negotiated prices to be fair, reasonable, and consistent with those charged for similar work in the Bay Area; and

Whereas, staff recommends that the Board of Directors (Board) award contracts to a bench of firms that consists of CC&G and EMC to provide the Services for an aggregate not-to-exceed amount of \$2.1 million for a three-year base term, with up to two additional one-year option terms.

Now, Therefore, Be It Resolved that the Board of Directors of the San Mateo County Transit District hereby awards contracts to:

- Corey, Canapary & Galanis of San Francisco, California, and
- EMC Research, Inc. of Oakland, California

to provide On-Call Market Research and Survey Services for an aggregate not-to-exceed amount of \$2.1 million for a three-year base term, with up to two additional one-year option terms; and

Be It Further Resolved that the Board authorizes the General Manager/CEO or designee to execute contracts on behalf of the District with CC&G and EMC in full conformity with the terms and conditions of the RFP and negotiated agreements, and in forms approved by legal counsel; and

Be It Further Resolved that the Board authorizes the General Manager/CEO or designee to execute up to two additional one-year option terms, if in the best interest of the District.

Regularly passed and adopted this 6th day of August 2025, by the following vote:

Ayes:

Noes:

Absent:

Chair, San Mateo County Transit District

Attest:

District Secretary

**San Mateo County Transit District
Staff Report**

To: Board of Directors

Through: April Chan, General Manager/CEO

From: David Santoro, Deputy General Manager
Tabby Davenport, Director of Safety and Security

Subject: **Updating the Public Transportation Agency Safety Plan**

Action

Staff recommends that the Board of Directors (Board) approve the San Mateo County Transit District's (District) updated Public Transportation Agency Safety Plan (PTASP) as required by 49 Code of Federal Regulations (CFR) Section 673.11(a)(1).

Significance

The Federal Transit Administration (FTA) requires certain operators of public transportation systems that are recipients of Urbanized Area Formula Grant Program funds under 49 United States Code Section 5307 (Section 5307 Grant Program) to develop, certify, and implement a PTASP incorporating Safety Management Systems. The District adopted its initial PTASP on December 2, 2020, pursuant to Resolution No. 2020-52. Whenever the PTASP is amended, it must be approved by both the District's Board and the General Manager/CEO.

As part of the District's ongoing commitment to strengthening its Safety Management System (SMS), staff is proposing several key updates to the PTASP, including, but not limited to:

- Enhanced organizational oversight through two formal safety committees: The Safety Review Committee includes representation from both of the District's labor unions (the Amalgamated Transit Union and Teamsters) and management to foster collaborative dialogue around front-line safety concerns. The Safety Management System Advisory Committee provides broader cross-functional oversight, with the flexibility to incorporate legal and Board input as needed.
- Appointment of Tabby Davenport as the SMS Executive and expansion of associated roles and responsibilities related to executive-level safety accountability and PTASP certification.
- To improve risk management and hazard identification: deployment of a digital Safety and Security Hazard Reporting Tool; launch of a formal Risk Reduction Program, with targeted focus areas including operator assault and visibility impairments; and an updated Injury and Illness Prevention Program to align with current PTASP goals.

- Advanced safety performance monitoring and evaluation efforts: implementation of new tools such as the Operator Assault Tracker and integration of public health data; introduction of the Workplace Violence Prevention Plan (WVPP) to better address employee safety and response strategies; and, to support data-driven decision-making, particularly in relation to safety performance measures and contractor accountability, development of Continuous Improvement Plans.
- In the area of safety training and communication: several enhancements to strengthen operational readiness, introduction of certified trainers and updated curriculum to include new standards and de-escalation training modules; emphasis on field-based scenario instruction and a process for regular training audits to ensure quality control, and reinforcement of consistent policy messaging and communication strategies across all levels of the organization to support a unified approach to safety.

The PTASP update was developed with, and has been approved by, relevant safety committees and union representatives.

Budget Impact

Approval of the proposed updates to the District's PTASP has no impact budget impacts.

Background

Adopting a PTASP is a federal requirement established by the FTA under 49 CFR Part 673, as mandated by the Moving Ahead for Progress in the 21st Century Act (MAP-21). The PTASP regulations require all transit agencies that receive Section 5307 funds and operate public transportation systems to develop and implement comprehensive safety plans for their agencies.

The PTASP is intended to ensure that each transit agency adopts a proactive, risk-based approach to managing safety. It formalizes the Safety Management System (SMS) framework to identify, assess, mitigate, and monitor safety risks across the organization. The PTASP must include safety performance targets, a safety risk management process, safety assurance practices, and a safety promotion program, including training and communication. Transit agencies must update and certify their PTASPs on an annual basis. The PTASPs must be reviewed and approved by the agency's Accountable Executive and governing body, and must be developed in coordination with front-line employees through a Joint Labor-Management Safety Committee or an equivalent body.

The District is required to review, update as needed, and self-certify its PTASP annually.

Prepared By: Omar Brown Acting Deputy Director, Safety and Security 650-508-7744

Resolution No. 2025-

**Board of Directors, San Mateo County Transit
District State of California**

* * *

Updating the Public Transportation Agency Safety Plan

Whereas, safety is a core value of the San Mateo County Transit District (District); and

Whereas, Part 673 of Title 49 of the Code of Federal Regulations (CFR) requires that the District's governing board approve and annually review and update its Public Transportation Agency Safety Plan (PTASP); and

Whereas, the District's PTASP, initially adopted on December 2, 2020, pursuant to Resolution No. 2020-52:

1. Sets forth a sufficiently explicit process for safety risk management, with adequate means of risk mitigation for bus transportation;
 2. Includes a process and timeline for annually reviewing and updating the safety plan;
 3. Sets forth a comprehensive staff training program for the operations personnel directly responsible for safety;
 4. Assigns a Safety Management System (SMS) Executive who has the authority and responsibility for day-to-day implementation and operation of the agency's SMS and a direct line to the Accountable Executive;
 5. Includes adequate methods to support the execution of the PTASP by all employees, agents, and contractors for the bus transportation system; and
 6. Sufficiently addresses all other applicable requirements provided in 49 CFR Part 673;
- and

Whereas, staff has prepared the updated PTASP, attached as Attachment 1, to make changes including, but not limited to the following:

- Enhanced organizational oversight through two formal safety committees – the Safety Review Committee with representation from both labor unions and management to foster collaborative dialogue around front-line safety concerns, and the Safety Management System Advisory Committee – to provide broader cross-functional oversight, with the flexibility to incorporate legal and Board input as needed;
- Deployment of a digital Safety and Security Hazard Reporting Tool to improve risk management and hazard identification;
- Launch of a formal Risk Reduction Program, with targeted focus areas including operator assault and visibility impairments;
- Coordination with an updated Injury and Illness Prevention Program and Workplace Violence Prevention Plan;
- Advanced safety performance monitoring and evaluation efforts using tools such as the Operator Assault Tracker and public health data;
- Inclusion of Continuous Improvement Plans to support data-driven decision-making, particularly in relation to safety performance measures and contractor accountability;
- Enhancements to strengthen operational readiness in the areas of safety training and communication, including an emphasis on field-based scenario instruction and a process for regular training audits to ensure quality control; and

- Reinforcement of consistent policy messaging and communication strategies across all levels of the organization to support a unified approach to safety; and

Whereas, the PTASP update was developed with, and has been approved by, relevant safety committees and union representatives; and

Whereas, the General Manager/CEO recommends that the Board of Directors approve the District's updated PTASP, set forth as Attachment 1.

Now, Therefore, Be It Resolved that the Board of Directors of the San Mateo County Transit District hereby approves the San Mateo County Transit District's updated Public Transportation Agency Safety Plan as set forth in full in Attachment 1 to this Resolution.

Regularly passed and adopted this 6th day of August, 2025 by the following vote:

Ayes:

Noes:

Absent:

Chair, San Mateo County Transit District

Attest:

District Secretary

SAN MATEO COUNTY TRANSIT DISTRICT
1250 SAN CARLOS AVE, SAN CARLOS, CA 94070-1306
PUBLIC TRANSPORTATION AGENCY SAFETY PLAN

2025



San Mateo County Transit District
Public Transportation Agency Safety Plan (PTASP)
Safety Management System (SMS) Profile — Signature Page

1. General Information

Field	Details
Agency Name	San Mateo County Transit District
Headquarters Address	1250 San Carlos Avenue, San Carlos, CA 94070
Version Number	1.2
Modes of Service	Fixed-route bus, paratransit, shuttle
FTA Funding Types	5307, 5310, 5311, 5339

2. Executive Oversight

Title	Name	Signature	Date
Accountable Executive	April Chan, General Manager/CEO	_____	_____
SMS Executive	Tabby Davenport, Director, Safety and Security	_____	_____

3. Stakeholder

Safety Review Committee	Signature	Date
ATU	_____	_____
Teamsters	_____	_____
Teamsters	_____	_____

4. Governance and Documentation

Item	Details
Governing Body	San Mateo County Transit District Board of Directors
Adoption Date	2025
Supporting Documentation	Resolution 2022-78 (Appendix A)

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1. Transit Agency Information

The San Mateo County Transit District (SamTrans) is the administrative body responsible for public transportation in San Mateo County. SamTrans oversees various transportation programs, including fixed-route bus service, ADA-compliant paratransit (Redi-Wheels and RediCoast), commuter buses, and community-based dial-a-ride shuttles.

SamTrans is governed by a nine-member Board of Directors, which includes two representatives from the San Mateo County Board of Supervisors, three members from city councils representing the northern, central, and southern parts of the county, three members of the public, and one additional public member designated as a transportation expert and appointed by the Board of Supervisors.

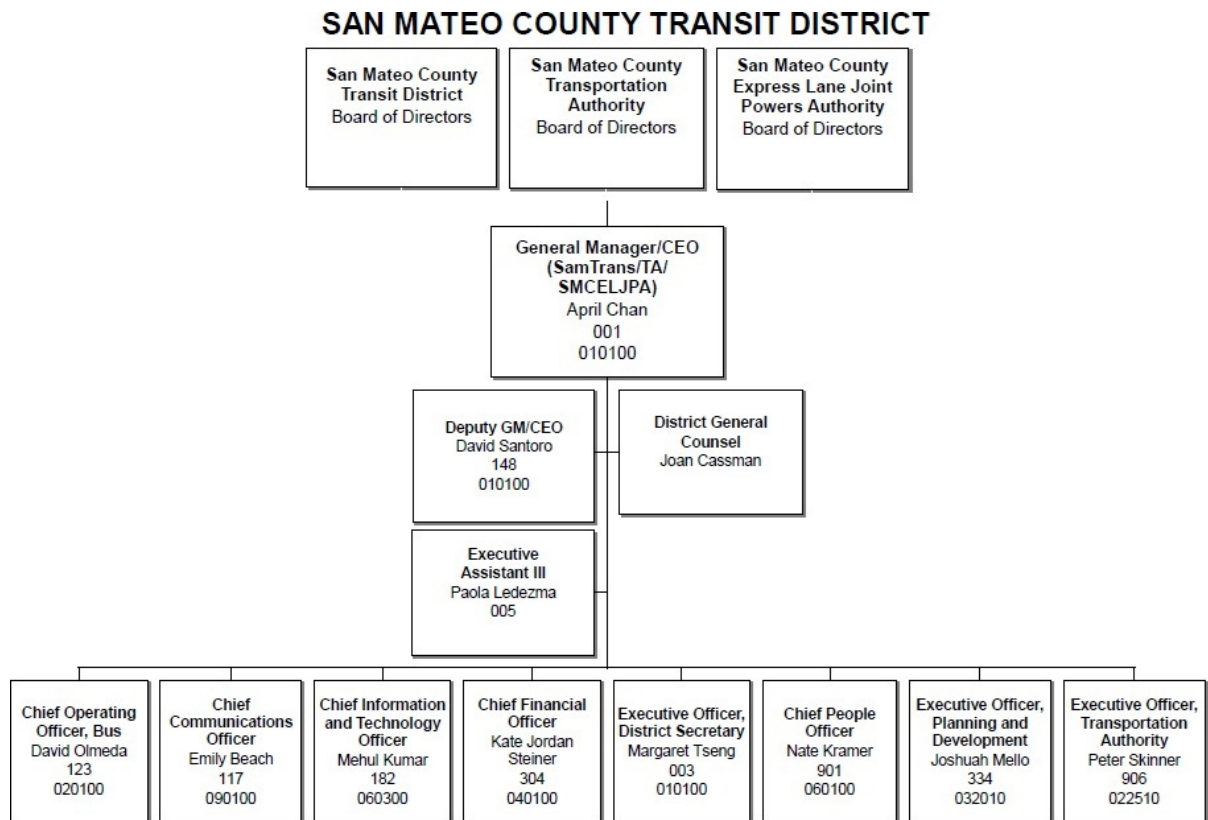
SamTrans operates bus service throughout San Mateo County, with some routes extending into Santa Clara County and San Francisco. The agency's service area spans 446 square miles and serves a population of approximately 742,893. While SamTrans operates most of its fixed-route services, two portions are contracted to MV Transportation. MV also operates SamCoast demand-response and RediCoast paratransit service under the Coastside Transportation Services contract, while Transdev is contracted to operate Redi-Wheels paratransit services in urbanized areas. Additionally, Shuttle service is operated by MV, and SamTrans now offers Ride Plus, an on-demand microtransit service operating in Half Moon Bay/El Granada and the East Palo Alto/Belle Haven neighborhoods of Menlo Park, currently operated by Transdev.

The fixed-route network consists of 76 bus routes, with service hours varying by route. SamTrans services operate 24 hours a day, 7 days a week. ADA complementary paratransit services—including Redi-Wheels, Ride Plus, and RediCoast—are available within three-fourths of a mile of fixed-route services and during the same hours of operation. As a result, a significant portion of SamTrans' paratransit services also operate 24/7.

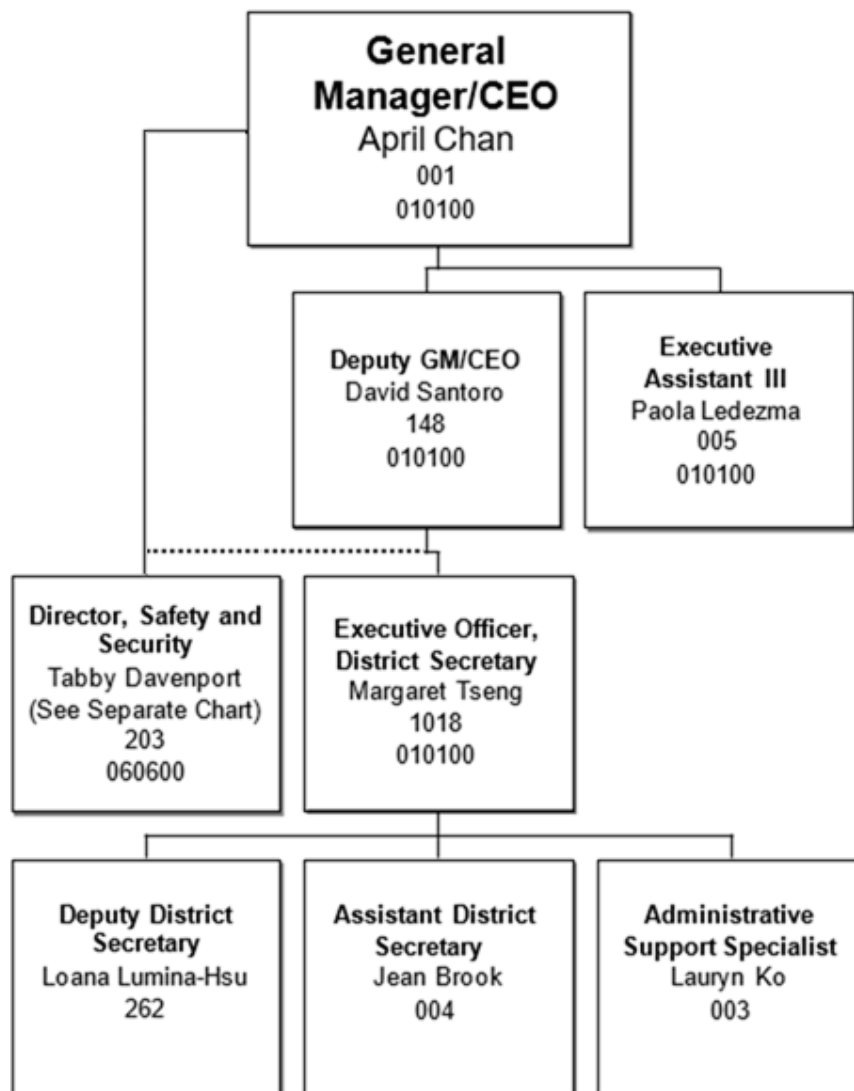
The agency maintains a fleet of 315 buses for fixed-route service, including low-floor 29-, 35-, and 40-foot coaches, as well as 60-foot articulated buses. The peak vehicle requirement is 252 buses. The fleet is powered by a mix of diesel, electric hybrid, battery electric, and hydrogen fuel technologies. SamTrans utilizes 90 cutaways and minivans, all of which, along with the fixed-route fleet, are eligible for FTA interest for paratransit.

SamTrans operations are supported by two maintenance facilities: the North Base in South San Francisco, which has federal interest, and the South Base in San Carlos, which is locally funded. Paratransit operations are centralized at the Brewster Depot in Redwood City. SamTrans services are organized around seven key transit centers:

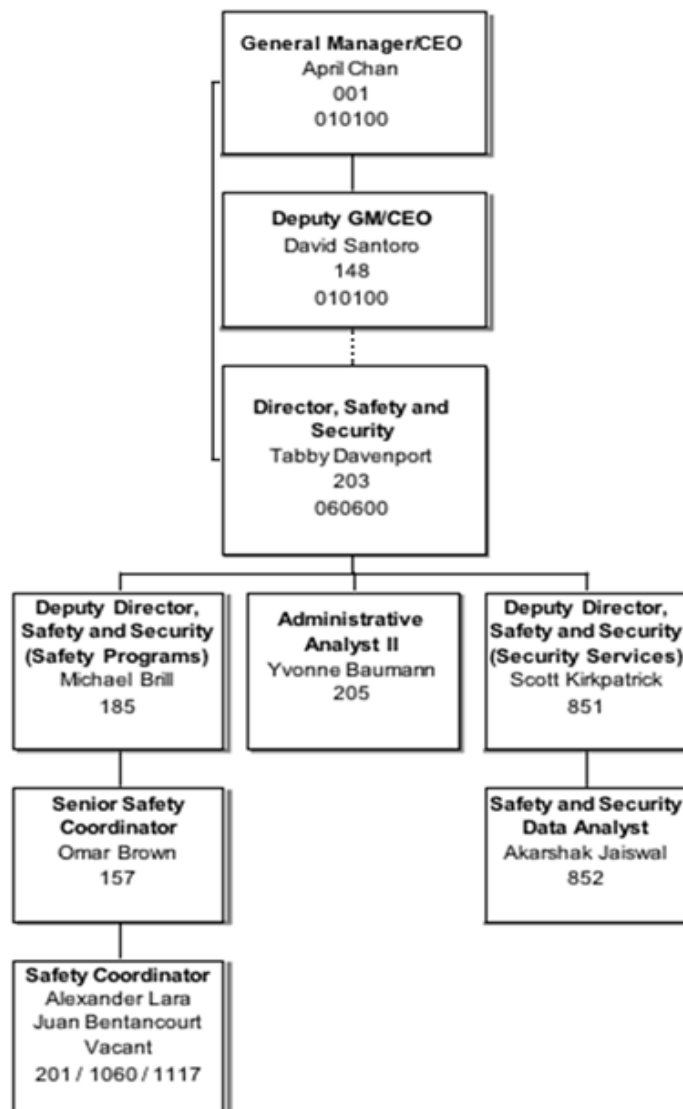
- Daly City BART Station
- Colma BART Station
- South San Francisco BART Station
- Millbrae BART/Caltrain Station
- Redwood City Caltrain Station
- Palo Alto Caltrain Station



EXECUTIVE ADMINISTRATION



EXECUTIVE ADMINISTRATION SAFETY AND SECURITY



Safety Performance Targets							
Mode of Transit Service	Fatalities (Total)	Fatalities (per 100,00 VRM)	Injuries (Total)	Injuries (Rate)	Safety Events (Total)	Safety Events (Rate)	System Reliability
Motor Bus, Directly Operated	1	0.020	7	0.140	44	0.880	25,000 mi between road calls
Demand Response, Purchased	0	0	0	0.0	1	0.035	2.5 complaints /1,000 trips
Motor Bus, Purchased	2	0	1.6	0.13	5	1.00	25,000 mi between road calls
Mode of Transit Service	Transit Worker Fatality Rate	Assaults on Transit Workers (total)	Rate of Assaults on Transit Workers	Transit Worker Injury Rate	Transit Worker Fatality Rate	Safety Events (Rate)	Rate Per Vehicle Revenue Miles
Motor Bus, Directly Operated	0	3	0.58	0	0	8.45	100,000 Vehicle Revenue Miles
Demand Response, Purchased	0	0	0	0	0	0.0	100,000 Vehicle Revenue Miles
Motor Bus, Purchased	0	1	0.02	0	0	0.044	100,000 Vehicle Revenue Miles
Mode of Transit Service	Major Events (total)	Major Event Rate / VRM	Collision (Total)	Collision Rate / VRM	Pedestrian Collision Rate	Vehicular Collision Rate	Rate Per Vehicle Revenue Miles
Motor Bus, Directly Operated	29	0	29	.029	0	27	100,000 Vehicle Revenue Miles
Demand Response, Purchased	5	0	5	.05	0	5	100,000 Vehicle Revenue Miles
Motor Bus, Purchased	10	0	10	.01	.02	8	100,000 Vehicle Revenue Miles

2. Safety Management Policy

Safety Management Policy Statement

All employees are held accountable for demonstrating the highest level of safety, from Executive Management to every staff member in the district.

The San Mateo County Transit District is committed to leading by example.

Executive Management: Will lead the development of an organizational culture that delivers safe operations and provides appropriate resources through ensuring safe practices and complying with federal, state, and safety-related requirements, rules, standards, and industry best practices. The District will hold executives, managers, and employees accountable for safety performance by enhancing safety operations and promoting efficient reporting and communication.

Communication & Training: All employees will be trained to perform their job duties safely and in safety reporting procedures. The SMS facilitates awareness of our safety objectives and performance targets, encourages open communication, and reduces the risk of accidents, property damage, and equipment loss. Proactive efforts will be made to identify and minimize workplace hazards.

Responsibility & Accountability: Managers will actively ensure that Safety Assurance functions are monitored and supported by clearly defining safety responsibilities and accountabilities. Managers are responsible for ensuring that Safety Risk Management is performed and that safety risks are assessed and mitigated.

Responsibility of Employees & Contractors: To improve hazard identification and analysis and achieve an acceptable level of safety, all employees and contractors are expected to support safety management by identifying and reporting hazards through a safety risk evaluation process and an employee safety reporting program.

Employee Reporting: As a part of the SMS, all frontline employees will be afforded an opportunity to use a safety reporting program to share safety concerns, such as reporting hazards, unhealthy or unsafe work practices and ineffective policies directly to their supervisor, through SMS committee meetings, via the Hazard Reporting application, or through a Safety and Security Department representative.

No action will be taken against any employee who communicates safety conditions through the reporting program, unless the disclosure involves an illegal act, gross misconduct, or negligence, or a violation of District policies and procedures.

Performance Monitoring & Measuring: To continuously improve safety performance, The District will establish and measure safety performance against data-driven targets. Managers will verify that safety risk mitigations are effective and remain relevant.

Review & Evaluation: The District will assess SMS performance through internal processes that support the revisions and development of safety objectives and performance targets. Reviews, inspections, investigations, corrective action reports, and SMS audits will support our goal of continuous safety improvement.

SMS Program Oversight: The SMS Program is managed by and under the authority of the Director of Safety and Security. All levels of management and all employees are accountable for the delivery of the highest level of safety performance, beginning with the General Manager/CEO. The Director of Safety and Security also serves as the SMS Executive and will provide the resources and training needed to ensure the SMS is efficient and successful.

The Safety Review Committee (SRC) comprises eight members: four labor union members (including two from the Amalgamated Transit Union [ATU] and two from the Teamsters) and four members of SamTrans management. ATU and Teamsters leadership will appoint their respective committee members, and SamTrans management will appoint its members. The Committee will be chaired by the Director of Safety and Security or their designee. The Safety and Security Department will train all SRC members in the Agency Safety Plan (ASP) and Safety Management System (SMS) process.

SRC members will not receive additional compensation.

The Safety Management System Advisory Committee (SMSAC) is comprised of 8-10 members from various departments, including Safety, Operations, Human Resources, Information Technology, Government Affairs, Finance, Planning, and Risk Management, with optional members from Legal and Board of Directors, as needed. The Committee will be chaired by the Director of Safety and Security or their designee. The Safety and Security Department will train all SMSAC members in the ASP and SMS process.

Annual Review and Update of the Agency Safety Plan

The SRC will review the ASP annually or as needed to make necessary updates, corrections, and modifications in accordance with 49 CFR Part 673. Any significant changes —whether required by regulation or otherwise —will be drafted by the SRC by October of each year, or as otherwise required by compliance agency mandates. The Committee will finalize any recommended changes to the ASP and forward them to the SMSAC for review and implementation.

The committee's agenda and outcomes will be distributed electronically and posted on the Safety Boards at each Base and the headquarters central office.

Public Transportation Agency Safety Plan

Management Commitment: SamTrans management will take appropriate measures to promote a safe environment and prevent workplace accidents and injuries by considering employee suggestions, staying informed about workplace safety and health hazards, and reviewing safety programs regularly.

SMS Goals: The overall goal of the SMS Program is to reduce and mitigate vehicular and pedestrian safety events involving transit vehicles and to reduce and mitigate assaults on transit workers.

Data Monitoring by SMS Executive: The SMS Executive will review leading and lagging indicators, Miles Between Preventable Accidents, accident committee reports, safety-related work orders, and other relevant data to identify potential safety hazards. The SMS Executive will also monitor the Operator Assault Tracker and incident reports related to violence against a transit worker.

Hazard Analysis and Review Process: Once a hazard is identified, an analysis will be conducted to assess its potential severity and likelihood, in accordance with the Safety Risk Management Process defined in section 3 of the plan. The results will be presented to the SRC for review and comment. If necessary, the Safety & Security Department will engage outside experts to assist. Mitigations or findings from the SRC will be presented to the SMCTD Board by the Director of Safety & Security.

Safety Risk Mitigation Review: The SRC will review safety risk mitigations necessary to reduce the likelihood and severity of potential consequences identified through the transit agency's safety risk assessment. This includes mitigation strategies related to any instance where the agency fails to meet annual safety performance targets as part of the Safety Reduction Program.

Distribution of the Safety Management Policy (SMP): The District has established organizational accountabilities and responsibilities for its SMS. The Accountable Executive has issued a written Safety Management Policy (SMP) statement that outlines the District's safety objectives. The Director of Safety and Security, as the SMS Executive, ensures the SMP statement is distributed electronically or in hard copy to all employees and contractors. The Director also ensures the statement is readily accessible to executives, managers, supervisors, administrative staff, frontline employees, and contractor service providers.

The Director of Safety and Security, as the SMS Executive, ensures the SMP statement is distributed electronically or in hard copy to all employees and contractors. The Director also ensures the statement is readily accessible to executives, managers, supervisors, administrative staff, frontline employees, and contractor service providers.

Ongoing Communication of the SMP Statement: The Director of Safety and Security prepares and distributes reports through various committees and meetings, documenting how The District is progressing toward the safety objectives outlined in the SMP statement.

If the SMP statement is revised during the year, the Director will redistribute it across the agency following the same communication protocols to ensure all employees and contractors receive the updated version.

Authorities, Accountabilities, and Responsibilities

Accountable Executive

The District has recognized organizational accountabilities and responsibilities for its SMS, and the Accountable Executive has issued a written SMP Statement that includes safety objectives.

The General Manager/CEO serves as the Accountable Executive and holds ultimate responsibility for the implementation of the ASP and the Transit Asset Management (TAM) Plan. The General Manager/CEO supports the SMS program by:

- Controlling or directing human and capital resources needed to develop and maintain the ASP and TAM Plan
- Ensuring the SMS is effectively implemented, and that necessary action is taken to address SMS performance issues
- Designating an SMS Executive and providing a direct line to them
- Implementing safety risk mitigations for the safety risk reduction program that are included in the ASP, and receiving and considering all other safety risk mitigations recommended by the Safety Committee

SMS Executive

The Director of Safety and Security is designated by the Accountable Executive as the SMS Executive. The Director directly supports the SMS program by monitoring the day-to-day implementation and operation of the SMS, holding overall accountability for the Safety and Security Department, and managing the communication and coordination of the SMS program.

This may also include:

- Developing SMS policies and procedures
- Distributing the SMP statement to all employees and contractors covered under the SMS Plan
- Coordinating and facilitating associated committees
- Leading the review and revision process of the Agency Safety Plan
- Designating the chair of the Accident Review Committee (ARC) to determine accident Preventability (not for disciplinary purposes)
- Developing and tracking safety performance targets

Each member of the Executive Team has the authority and responsibility for the implementation and operation of the SMS within their respective business units.

Specific authorities, responsibilities, and accountabilities for Executive Management under this plan may include:

- Overseeing the safety of operations and SMS implementation within their departments
- Coordinating with the Safety and Security Department to support SMS implementation and provide subject matter expertise when requested
- Revising policies, plans, and procedures to align with SMS principles and objectives

At the request of the Accountable Executive, the SMS Executive, the SRC Committee, and SMSAC will support systemwide SMS implementation.

Key Staff

The District's Key Staff includes those positions that directly oversee the agency's operations, such as Maintenance Facilities, Training, and the People and Culture Department. Key Staff support the development, implementation, and ongoing operation of the SMS.

Specific authorities, responsibilities, and accountabilities for Key Staff under this plan may include:

- Maintaining policies and procedures consistent with The District's SMS program
- Maintaining documents that support the implementation of the ASP
- Assisting with investigation reports
- Assisting with the implementation of corrective action plans
- Verifying compliance with the ASP and reporting deviations to the Safety and Security Department

3. Safety Risk Management

Safety Risk Management Process

Hazard Identification

All employees are held accountable to demonstrate the highest level of safety from Executive Management to every staff member of the District.

The San Mateo County Transit District is committed to:

The objective of hazard identification is to define those conditions that have the potential to cause injury, accident, incident, or property damage.

The hazard identification process includes the use of various sources of information, including the input of operating and maintenance personnel, such as:

- Observation of work practices, work areas, and equipment for obvious or potential unsafe conditions
- Periodic facility inspections
- Worker safety suggestions or complaints
- Reports of hazards by employees
- Accident or near-miss investigations
- Post-accident analysis

The District provides all employees and contractors with both verbal and written means to communicate with management and the Safety and Security Department regarding potential hazards or unsafe conditions. State law protects individuals who report unhealthy and unsafe conditions or practices. The District will maintain an Injury Illness and Prevention Program (IIPP) as required by California Labor Code section 6401.7 or section 3203 of Title 8 of the California Code of Regulations (8 CCR 3203).

Employees are encouraged to use the Hazard Reporting Tool posted at Base and Headquarters locations, also accessible by QR code on the District HUB.

Employees may also access the Work Order Website on the District Hub to review their past work orders.

Facility Work Orders: All District employees may submit an online Facilities Work Order to request services ranging from moving heavy objects (e.g., furniture or boxed documents) to reporting unhealthy or unsafe conditions, such as buckled carpeting, exposed wiring, leaks, or other health hazards. System users receive confirmation emails to advise of the following:

- That their work order has been received
- When it has been assigned and to whom
- That the work has been completed

Injury and Illness Prevention Program (IIPP): The IIPP is located in Article 1.9 of the Employee Safety Manual, maintained by the Safety and Security Department. A soft copy is available on the District Hub and accessible to all employees. The program includes instructions for reporting hazards and the QR code for the District's Hazard Reporting Tool. All employees are encouraged to report all known hazards to both management and the Safety and Security Department. In accordance with State law, employees may also report hazards anonymously.

Service Change Request (SCR): Bus Operators complete a Service Change Request to report operational

and safety issues related to runs, routes, schedules, bus stops, tree trimming, on-time performance, and similar matters. They are categorized as “Suggestions, Normal Business, or Urgent Business” by the Bus Operator, who then submits the report online. The report is then forwarded to the appropriate department for review and response.

Oversight Authority: The District will consider all information provided by the Federal Transit Administration (FTA) through on-site triennial audits, including but not limited to associated findings and recommendations.

Operator Incident Report: An Operator Incident Report is completed by Bus Operators who wish to report unusual incidents or passenger interaction issues that need to be communicated to the Base Manager. The form is submitted to the Bus Transportation Dispatcher, who forwards it to the Bus Transportation Manager for review, evaluation, and processing.

SamTrans Operation Safety (SOS): These are joint management-labor monthly meetings chaired by the Director of Bus Transportation to discuss and resolve safety issues affecting employees or the riding public. They may also address scheduling and maintenance issues and include updates from other departments, including security and transit police services. The procedures are documented in SOP T-11, “S.O.S Team.”

Bus Maintenance Supervisor Safety Talks: Held twice monthly (on payday Fridays) for all shifts and departments within the Bus Maintenance Department. Employees may raise new safety concerns during the meetings or request that safety topics be added to future agendas. Hard Copies of the “Supervisor’s Report of Maintenance Meeting” forms are distributed to the Director of Bus Maintenance, the Base Maintenance Managers, and the Safety and Security Department for review. These reports include the officiating supervisor’s name, date, shift, and discussion topics and serve as the official sign-in sheet in accordance with SOP M-2, “Maintenance Safety,” and electronic copies will be stored in SharePoint.

Vehicle Safety Inspection Report: The Vehicle Safety Inspection Report is printed on card stock and provided to Bus Operators or Mechanics before operating a coach off District property. These cards are used daily for the recording of all pre-trip and post-trip inspection findings by the employee assigned to operate the coach for all or part of their work shift. They are official documents and are used as a guide to verify the coach is safe and roadworthy. Bus Maintenance staff collect the reports each night from the Bus Transportation Dispatchers, and any noted defects are scheduled for repair. These procedures are documented in SOP D-27, “Vehicle Inspection Procedure.”

Radio Control: The Radio Control Center is located at North Base. Dispatching for Bus Transportation’s directly operated service is performed by North and South Base Dispatchers. Radio Control operates Monday through Friday from 4:45 a.m. to 8:00 p.m.; coverage outside these hours is handled by each Base Dispatcher. Both Radio Control and Dispatchers utilize two-way radio and phone communications systems on recorded lines. All hazard reports are documented and can either be addressed by the Radio Controllers/Dispatchers or forwarded to the Base Managers for review and evaluation as deemed appropriate.

Hazard Reporting: The Hazard Reporting Tool can be accessed via a QR code at the North and South Base maintenance and operations dispatch windows. It can also be scanned in the 2nd-floor kitchen at

Central. It is also available on the home page of the district hub, an automated online application used to track all entered Safety or Security hazards or concerns through resolution.

Workplace Violence Prevention Plan: The San Mateo County Transit District (“District”) is committed to providing a safe workplace free from acts and/or threats of violence. The purpose of this policy is to maintain a safe work environment for all employees and comply with applicable law. Violence, threats, harassment, intimidation, bullying, hazing, or other disruptive behavior will not be tolerated. The District's Workplace Violence Prevention Plan (WVPP) addresses the hazards associated with the four types of workplace violence, as defined by California Labor Code (LC) Section 6401.9.

De-escalation: Training on de-escalation provided to front-line employees by the Safety and Security department, partnering with the training department and the Transit P.D.

Safety Risk Assessment: For hazards not addressed by the various procedures outlined in Section 7.1, an ad hoc committee is convened by the Department Director most affected. This section includes a method for categorizing identified hazards, typically in terms of:

- Probability of occurrence: Frequent, Probable, Occasional, Remote, Improbable, Design Resolved
- Severity of consequences: Catastrophic, Critical, Serious, Marginal, Negligible

Each hazard is evaluated using a risk assessment matrix to determine the appropriate disposition.

Hazard Severity: Hazard severity is defined as a subjective measure of the worst credible level of damage resulting from a particular hazard and is categorized as follows (Figure A):

Hazard Severity Categories

Description	Category	Definition
CATASTROPHIC	I	Death, system loss, severe environmental damage, or complete and extended disruption of service
CRITICAL	II	Severe injury, severe occupational illness, major system environmental damage, or major disruption of service
MARGINAL	III	Minor injury, minor occupational illness, minor system environmental damage, or minor disruption of service
NEGLIGIBLE	IV	Less than minor injury or occupational illness; less than minor system or environmental damage; or less than minor disruption of service

Figure A. Hazard Severity Categories

Disruption of Service refers to a disruption resulting from reported damage to equipment, facilities, and/or other property due to a collision, derailment, or another event not addressed by routine operations.

Hazard Probability: Hazard probability is defined as the probability that a specific hazard will occur during the planned life expectancy of the system element, subsystem, or component. It may be described subjectively in potential occurrences per unit of time, events, population, items, or activity. A qualitative hazard probability may be derived from research, analysis, and evaluation of safety data from the operating experience of The District or historical safety data from similar systems. An example of qualitative hazard probability ranking is shown below in Figure B:

Hazard Probability Levels

Description	Level	Specific Item	Fleet Inventory
FREQUENT	A	Likely to occur frequently	Continuously Experienced
PROBABLE	B	It will occur several times in the life of an item	Will occur frequently
OCCASIONAL	C	It is likely to occur sometime in the life of an item	It will occur several times
REMOTE	D	Unlikely but possible to occur in the life of an item	Unlikely, but it may occur
IMPROBABLE	E	So unlikely, it can be assumed that an occurrence may not be experienced	Unlikely to occur, but possible

Hazard Resolution

Once a hazard is identified, an analysis is performed to define its potential severity and probability of occurrence as outlined in the previous sections. Hazard resolution is defined as the analysis and subsequent actions taken to reduce to the lowest level practical the risk associated with an identified hazard. Procedures have been established to address and resolve potential hazards. When a supervisor receives a hazard report from any staff member, they must notify their respective Director, who in turn must inform the Director of Safety and Security if the situation falls outside pre-established response procedures. The Director of Safety and Security, in coordination with Risk Management, will notify the affected Deputy CEO and the General Manager/CEO, as appropriate.

The District uses MIL-STD-882E to analyze identified hazards and determine necessary mitigation based on the results.

Following standard methodology, each hazard will be categorized by both the probability of occurrence and the severity of consequences. Categories include:

- Probability: Frequent, Probable, Occasional, Remote, Improbable
- Severity: Catastrophic, Critical, Marginal, Negligible

- Each aspect is evaluated using a matrix to determine the required disposition.

Hazard Risk Assessment Index (Figure c) and Hazard Rating Table (Figure d) charts show which actions need to be taken as follows:

Hazard Risk Assessment Index

Frequency of occurrence	I	II	III	IV
	Catastrophic	Critical	Marginal	Negligible
(A) Frequent	IA	IIA	IIIA	IVA
(B) Probable	IB	IIB	IIIB	IVB
(C) Occasional	IC	IIC	IIIC	IVC
(D) Remote	ID	IID	IIID	IVD
(E) Improbable	IE	IIE	IIIE	IVE

Figure C. Hazard Risk Assessment Index

Hazard Rating Table

Risk Category	Hazard Risk Index	Acceptance Criteria
1	IA, IB, IC, IIA, IIB, IIIA	Unacceptable
2	ID, IIC, IID, IIIB, IIIC	Undesirable
3	IE, IIE, IIID, IIIE, IVA, IVB	Acceptable with review
4	IVC, IVD, IVE	Acceptable without review

Figure D. Hazard Rating Table

Hazard Tracking and Control: The process of identifying, controlling, tracking, and eliminating hazards is recorded on the hazard log. All hazard entries must include:

- A Corrective Action Plan (CAP)
- A tracking number
- A brief description
- A projected completion date
- An initial hazard rating, based on the severity/probability methodology described above

Hazards will be prioritized to address the highest-risk categories first.

Safety Risk Mitigation

The District has established a Risk Reduction Program to improve safety in transit operations by reducing the number and rates of accidents, injuries, and assaults on transit workers based on data submitted to the National Transit Database (NTD). Data on accidents, injuries, Workplace Violence Prevention Plan (WVPP), and assaults are tracked and reviewed on a monthly or quarterly basis. The Risk Reduction Program considers mitigation actions to reduce:

- Vehicular and pedestrian accidents involving buses, such as measures to reduce visibility impairments for bus operators that contribute to accidents
- Assaults on transit workers, such as deployment of assault mitigation infrastructure and technology on buses.

The close-out process is the most critical for safety risk mitigation. The managers responsible, internal subject matter experts (where applicable), and the Safety and Security Department will collaborate to develop corrective actions. The accountable manager must also ensure that internal budgeting, cost assessments, and capital project prioritization are initiated, as required by the hazard resolution. The Safety and Security Department will be responsible for tracking the status of hazard resolutions in the Safety Risk Register.

As hazards are identified, a variety of strategies may be used to reduce the risk to an acceptable level. To the greatest extent practical, controls should be considered in the following order of precedence:

- ELIMINATION:** Remove the hazard entirely by eliminating equipment or processes through design or procedural change. If the hazard cannot be eliminated, the hazard will be reduced to an acceptable level(as defined by the Risk Assessment Index) through design selection.
- SUBSTITUTION:** Replacement of a hazardous substance or process with one that presents less risk.
- ENGINEERING CONTROLS:** Use physical devices or equipment to modify the existing condition.

This includes:

- Incorporating safety devices
- Using fixed, automatic, or protective design features
- Installing warning systems to detect conditions and alert personnel in a timely manner

Warning devices should be standardized across similar systems to minimize the likelihood of incorrect responses by personnel.

- D. **ADMINISTRATIVE CONTROLS:** Procedures, policies, and training can be used to eliminate or reduce the identified risk to an acceptable level. Tasks and activities that are determined to be critical require certification of personnel proficiency.
- E. **PERSONAL PROTECTIVE EQUIPMENT (PPE):** PPE may be used to eliminate or reduce the risk of the identified hazard. Employees must receive training in the proper use of PPE before being assigned to environments that require its use.

If system design standard revisions are warranted, or changes to long-term capital maintenance and improvement programs are needed, these shall be reviewed through the Configuration Management process described below.

Once a hazard is identified, an analysis is conducted to determine its potential severity and probability of occurrence, in accordance with the Safety Risk Management Process, as defined in section 3 of the plan. The results are presented to the SRC for review and comment. If external expertise is required, it will be coordinated by the Safety and Security Department. The final results of the SRC's review, including proposed mitigations or recommendations, will be presented to the SMSAC by the Director of Safety and Security.

4. Safety Assurance

Safety Performance Monitoring and Measurement

The District utilizes Safety Performance Monitoring and Measurement to assess compliance with operations and maintenance procedures and to determine whether existing rules and procedures are sufficient to mitigate risk. The District also utilizes Safety Performance Monitoring and Measurement to evaluate the effectiveness of safety risk mitigations and ensure that the mitigations are appropriate and implemented as intended.

District bus operations are governed by rules, notices, and standard operating procedures (SOPs). Rules govern the daily operations of the bus system, while SOPs provide detailed information and instructions for performing specific tasks. All rules and procedures are reviewed and approved. District bus maintenance is governed by maintenance manuals, instructions, and vendor-provided information. Maintenance procedures are established by Bus Maintenance and modified by Bus Engineering. To ensure compliance with and sufficiency of operations and maintenance procedures, the District carries out the following activities:

- Ride Checks: These checks provide an opportunity for one-on-one interaction between District Operators and staff. District personnel observe operators' driving habits and provide immediate verbal and written feedback. Ride checks are used to identify areas for improvement and reinforcement for safe driving practices.
- Verification of Transit Training Compliance: Bus Technical Training personnel ensure that bus operators comply with training requirements. Accordingly, Bus Technical Training personnel are responsible for notifying operators of available classes scheduled throughout the year so that they can complete the required refresher training annually.
- Random Observations: Transportation Supervisors may observe Bus Operators for compliance with traffic laws, District operating rules, and procedures. Any violations are documented and filed electronically.

Reviews: Trained personnel from each District department or division conduct monthly safety inspections of vehicles and maintenance/operations facilities. They also conduct records reviews and trend analyses. Results are documented on standard District forms.

Monitoring Safety Risk Mitigation

The Safety and Security Department oversees and tracks the assignment of responsibilities and timelines for implementing new mitigations and discontinuing those that are no longer effective or necessary. Where appropriate, the Safety and Security Department and/or the SRC will assign an SRM task force comprising the appropriate managers and subject matter experts to determine if certain safety risk mitigations are effective.

To assess the effectiveness of existing safety risk mitigations, especially those not yet assessed through the SRM process, the Safety and Security Department and the SRC also:

- Review accident/incident investigations to mitigate pedestrian safety events involving transit vehicles.
- Monitor employee safety reporting
- Review reports of assaults on transit workers, unsafe acts, and hazardous conditions.
- Analyze internal safety audits and inspection results
- Evaluate public health data (e.g., exposure to infectious diseases) provided by the Centers for Disease Control and Prevention (CDC) or the California Department of Public Health (CDPH).
- Follow guidance from the oversight authority, when applicable.
- Review external safety inspection results.

- Evaluate customer safety reports via Electronic Hazard Management software.
- Train new review committee members in ASP and their roles.
- Assess measures to reduce operator visibility impairments, including retrofits and bus procurement specs.
- Review assault mitigation strategies, such as infrastructure, technology, and barriers

Employee Reporting

All employees have the opportunity to report safety concerns, including hazards, unsafe practices, or ineffective policies, directly to their supervisor, through safety committee meetings, via the hazard reporting tool, or by contacting a Safety and Security Department representative. No disciplinary action will be taken against employees who report safety conditions unless the report involves an illegal act, gross misconduct, negligence, or a violation of District policies.

Management of Change

The District understands that organizational changes may affect the appropriateness or effectiveness of existing risk mitigation strategies and may introduce new hazards or risks. To address this, the District has implemented a formal Management of Change process to assess the impact of such changes. If it is determined that a change may affect safety performance, the proposed change is evaluated through the SRM process.

The Management of Change Committee (MoCC) leads this effort.

Management of change refers to the systematic process of evaluating all components of the SamTrans system, including hardware, software, rules, procedures, training programs, infrastructure, and documentation, to ensure they continue to meet safety requirements, and that documentation is accurate and up to date.

This process ensures that all design and configuration changes, whether for a single subsystem or fleet-wide, are documented in as-built drawings, training materials, maintenance manuals, and Standard Operating Procedures (SOPs) in a timely and accurate manner. Configuration management procedures include:

- Defining the authority to approve configuration changes
- Incorporating approved changes into documentation
- Ensuring all relevant personnel are informed of changes

The following are examples of Configuration Management elements applied:

- Vehicle Acceptance Program: Originates in Bus Maintenance. All records related to equipment life cycle and rolling stock are maintained. Oversight is provided for changes subject to Configuration Management.
- Build of Materials (BOM) documents: Maintained in Document Control at North Base by the Manager of Bus Maintenance. All modifications are interfaced equally with the assets through SPEAR, or other Enterprise Asset Management (EAM) system, and or the Bus Maintenance database software.
- Modification Records: All changes are documented and made available to personnel responsible for maintenance and repair.
- New Asset Delivery: New agency assets arrive pre-documented in quality-assured status.
- Campaign Bulletins: Issued by Bus Maintenance to document equipment changes, modifications, or adjustments. Approved by the Chief Operating Officer, following submission by the Deputy Director of Maintenance.
- Service Bulletins: Document maintenance procedures, inspections, or maintenance services. Their content originates from the OEM to address specific subsystem issues. Availability to review changes in configuration for all providers of asset maintenance.
- Technical Bulletins: Used to revise Bus Maintenance procedures.

Preventative Maintenance Inspection (PMI) Cycles changes are initiated via the original manufacturers (OEM) and distributed by the Deputy Director, Bus Maintenance after the Bus Maintenance instruction team has made final recommendations to be followed. Managers provide approved checklists to Supervisors, and the Supervisors provide the work orders to assigned mechanics.

The District applies a continuous improvement process to monitor and enhance SMS and safety performance. Each fiscal year begins with a safety performance assessment. If improvement areas are identified, the Accountable Executive will oversee the development and evaluation of a corrective action plan. The Safety performance assessment includes:

Continuous Improvement

Monitoring the achievement of safety objectives, indicators, and targets.
Reviewing the effectiveness of:

- Hazard identification, risk assessment, and mitigation efforts
- Management of Change processes
- Operations and maintenance monitoring
- Safety risk mitigation monitoring activities
- Safety investigation activities
- Voluntary Employee Safety Reporting Program (ESRP)
- Safety training and competency programs
- Safety communication efforts
- The Safety and Security Department conducts safety performance assessments due to its technical expertise and independence from the Bus Transportation and Bus Maintenance

departments. Assessment methods include:

- Reviewing safety data (objectives, indicators, and targets)
- Conducting employee surveys to evaluate training, ESRP, and communication
- Using audit checklists to assess SMS tools and practices
- Interviewing key staff and support teams
- Attending safety and committee meetings
- Conducting field observations
- Auditing regulatory compliance
- Reviewing SMS documentation

The District may use an external independent auditor to support its safety assessments. The Safety and Security Department provides assessment reports to the Accountable Executive and SMSAC and maintains documentation, including checklists and audit tools.

To support continuous improvement, the District develops corrective action plans for identified safety and SMS performance gaps. These plans are led by the SMS Executive, who reports progress to the Accountable Executive.

Under the District's paratransit service agreements, the contractors are required to maintain a continuous improvement process in compliance with 49 CFR Part 673. The Bus Contracts Manager is responsible for monitoring compliance with this requirement.

5. Safety Promotion

Competencies and Training

Proper qualifications of operating and maintenance personnel are a crucial aspect of maintaining a safe transit environment. The District's Transit Operations Training Department, located at North Base and West Training Facility, maintains all training documentation and records. Full-time instructors are certified by the Transportation Safety Institute (TSI) and the Department of Motor Vehicles Employer Testing Program (ETP). Full-time instructors are also certified by the National Safety Council to conduct four-hour and eight-hour Defensive Driving programs.

An adjunct staff of qualified Bus Operators, known as Bus Operator Trainers, who are also certified by TSI, assist in completing training assignments when demand exceeds departmental capacity. At least one Instructor is certified by the American Red Cross to conduct First Aid, CPR, and AED training.

All employees also receive de-escalation training as part of ongoing professional development.

Bus Operator Training

Bus Operators: Bus Operators receive up to 10 calendar weeks (50 workdays) of training under U.S. DOT-certified instructors. The hours of training received by trainees include both classroom/theory and behind-the-wheel training, as outlined by the FMCSA requirements for Entry-Level Driver Training. The District material includes the District's Standard Operating Procedures, Training Guide, SamTrans equipment (bus fleet), and other information exclusive to the District.

All Instructors and Bus Operator Trainers are fully certified trainers, and all training hours are certifiable on a DL-260 "Transit Driver Training Record. The DL-260 document is completed by the employer to ensure proper annual training hours are recorded for each holder of a Verification of Transit Training (VTT) card. A typical training day consists of both classroom and behind-the-wheel (BTW) training. The target trainer-to-trainee ratio is 1 to 2.

Written exams are administered throughout the training program, and trainees must achieve a minimum passing score of 80 percent. Trainees are allowed one retake. Instructors review all incorrect answers with the trainees, after which the trainees initial the correct answers to indicate they understand and accept the corrections. The exam schedule is as follows:

1. Pre/post knowledge test administered on the first and last day of training
2. Theory tests -given after ELDT requirements are met
3. Mid-term exam – administered after four weeks of classroom and BTW training
4. Safety Critical Knowledge and Proficiency exams were taken prior to the commercial driving test. A score of 100 percent is required. One retake is permitted.
5. The Final Exam was administered in the last week of training
6. DMV Testing - Bus Operator Trainees take the California Department of Motor Vehicles (DMV) Pre-trip, Skills, and Driving Performance Examinations around the 5th week of training (regardless of whether they already hold a Commercial Class B driver's license). Passing scores must comply with DMV Employer Testing Program standards.

Training includes, but is not limited to:

- The District Policies, Procedures, Rules, and Regulations
- National Safety Council Defensive Driving Course 8-hour program
- Air Brakes System
- Bus Pre-trip and Post-trip Inspections
- Bus Maneuvers
- Left, Right Turns, Out Sweep, and Big Picture Concept/scanning ahead
- Use of Mirrors
- Following distance and a safe cushion around the vehicle
- Customer Relations, including de-escalation training
- Boarding and deboarding procedures
- Bus fleet familiarity

- Route training
- Bus Accident Procedures and Reporting of Accidents
- Americans with Disabilities Act requirements
- Fare Structure and Passenger Relations
- In-service training conducted during weeks 8 and 9 of the training program
- Title VI and Title 13 requirements
- De-escalation
- Human Trafficking
- Safety concern identification and reporting training

New bus operators must demonstrate proficiency in all vehicle sub-fleets they will operate. All classroom and BTW training hours are recorded and filed using weekly training log sheets. These logs are reviewed by Training Management and summarized on the DMV form DL-260.

A certified DMV Examiner in good standing with the California Employer Testing Program (ETP) administers the Driver Performance Evaluation Test in accordance with the DMV guidelines. Test score sheets are part of the operator's training record. A DMV Certificate of Driving Skill (form DL-170) is issued to successful operator trainees. Trainees who do not already hold a Class B license may exchange the DL-170 and DL-260 forms for a Commercial Class B license at a local DMV office.

Specialized Training: Specialized training is provided upon request to help Bus Operators improve individual performance skills.

Annual Refresher Training: Bus operators receive 8 hours of annual refresher training to maintain compliance with Verification of Transit Training (VTT) certification requirements, in compliance with California DMV regulations.

Vehicle Accident Reduction Program: An ongoing program to mitigate preventable vehicle collisions consists of:

- Follow-up training to correct deficiencies identified during ride checks
- The four-hour National Safety Council Defensive Driving course is taught to all operators of District non-revenue service support vehicles on a five-year cycle
- Analysis of both preventable and non-preventable collision data, proactive awareness campaigns, and risk mitigation efforts conducted through a proactive SMS

Mechanic Training

New Mechanics receive up to 280 hours of training from certified instructors, which includes:

- District Policies, Procedures, Rules, and Regulations
- Eight (8) hours of forklift training and work area orientation
- Eight (8) hours of initial Hazardous Materials “First Responder” training, pursuant to 8 CCR 5192
- Four (4) hours of annual Hazardous Material training
- Eight(8) hours National Safety Council Defensive Driving Course
- Sixteen (16) hours of vehicle orientation and driving in and around the shop area, vehicle lifts, bus stalls, and bus yards
- One hundred twenty (120) hours of BTW training on the road before completing the DMV Pre-trip, Skills, and Driver’s Performance Evaluation tests
- Eighty (80) hours of mechanic training, including Shop Safety and Procedures, and Air and Brake Systems (for all Mechanic Classifications)
- Forty (40) hours of mechanic training on Heating, Ventilation, and Air Conditioning Systems (for Mechanics B and A), required to obtain 608/609 certifications
- All Mechanic Classifications receive twenty-four (24) hours of initial general High Voltage (HV) Training

Mechanic driver training hours are recorded in their training folders, and test score sheets are retained as part of the mechanics’ training records. A DMV Certificate of Driving Skill (form DL-170) is issued to each successful mechanic. Mechanics then exchange the DL-170 for a Commercial Class B driver's license at a local DMV office.

Bus Maintenance Training

Upon delivery of new rolling stock, mechanics receive training from the vehicle manufacturer or component representative. Mechanics are selected based on job classification and shift coverage requirements. District-contracted personnel (e.g., MV Transportation employees) are also invited to attend.

The District Maintenance Training Program consists of 18 Core classes:

- Shop Safety
- Repair Skills
- Diesel Engine Tune Up
- High Voltage Battery Electric (BEB/FCEB)
- Hydrogen Fuel Cell Training (FCEB)
- Hydrogen Fueling Procedures
- Hydrogen High Pressure Familiarization
- Basic Electrical
- Multiplex Systems
- Charging Systems

- Diesel Electronic Controls and After-treatment
- Air Systems and Brakes
- Hydraulic Braking Systems
- Steering and Suspension Systems
- Automatic Transmission
- Advanced Communication System (ACS radio systems)
- Subsystems
- HVAC 608 & 609

Classes are actively reviewed to ensure they remain current with fleet and industry trends. Every month, the Joint Labor Management (JLM) Committee (comprised of Management personnel and Labor Representatives) meets to assess training needs for the mechanics and the Maintenance Department. Based on JLM feedback, a training calendar has been developed. Based on any classroom training needs discussed, Bus Maintenance Instructors will also provide any requested on-the-job training. Mechanics are assigned to classes based on skill needs and career development, and attendance is recorded in the Bus Maintenance Training Matrix.

Utility Worker Training

New Utility Workers receive up to 200 hours of training from certified instructors, which includes:

- Sixteen (16) hours on District Policies, Procedures, Rules, and Regulations
- Eight (8) hours of forklift training and work area orientation
- Eight (8) hours of Hazardous Materials “First Responder” training pursuant to 8 CCR 5192
- Eight (8) hour National Safety Council Defensive Driving Course
- Up to forty (40) hours of vehicle orientation and driving in and around the shop area, bus stalls, and bus yards
- Up to eighty (80) hours of BTW training on the road before taking the DMV Pre-trip, Skills, and Driver’s Performance Evaluation test

Driver training hours are recorded in the maintenance personnel’s training folder. The DMV test score sheets are retained as part of the utility worker’s training record, and a DMV Certificate of Driving Skill(form DL-170) is issued to the successful mechanic. Mechanics then exchange forms DL-170 for a Commercial Class B driver's license at a local DMV office.

All maintenance personnel, regardless of classification, are required to obtain and maintain a Commercial Class B driver’s license as a condition of employment.

All Bus Operators are required to possess a DMV form DL-260A VTT card. The FTA has determined that “Safety-Sensitive” functions are performed by those who:

- Operate revenue service vehicles, including when not in service
- Operate non-revenue service vehicles that require a Commercial Driver's License
- Dispatch or control revenue service vehicles
- Maintain revenue service vehicles or equipment used in revenue service

Compliance is verified through monthly license checks.

Certification Review/Audit

Pull Notice Program: Pursuant to California Vehicle Code Section 1808.1, the District maintains the required program elements and submits to annual inspections by the California Highway Patrol for participation in the DMV's Pull Notice Program. The purpose of this program is to verify that each employee in a "Safety-Sensitive" function has a valid driver's license that:

- Has not been suspended or revoked
- Does not carry disqualifying restrictions (e.g., DUIs, accidents, failures to appear, and convictions)
- Lists traffic violation points
- Indicates any conviction under California Vehicle Code Sections 23152 or 23153

The People and Culture office notifies the appropriate Base Managers of any DMV pull notices.

Employer Testing Program: Pursuant to California Vehicle Code Section 15250, the District complies with all Employer Testing Program (ETP) requirements and maintains all required records at the North Base training department for inspection. All ETP instructors have completed DMV Commercial Driving Performance Evaluation Training.

The Transit Operations Training Department: Undergoes annual DMV on-site inspections and audits to verify ETP compliance. The DMV audit may include a review of the following:

- Form DL-65 ETP Part I – "ETP CDL Pre-trip Inspection Evaluation Score Sheet," DMV form DL-65 ETP Part II – "ETP CDL Driving Performance Evaluation Score Sheet"
- Form DL170 – "Certificate of Driving Skill"
- "ETP Commercial Driving Performance Evaluation Route and Directions"
- Employment verification documents

Contractor Training Programs:

The District maintains separate contracts with MV Transportation and Transdev for the following services:

- Contracted Urban Bus Service (fixed route)
- Redi-Wheels Paratransit Service
- Coastside Transportation Services (fixed route, RediCoast paratransit, SamCoast demand response)
- Microtransit Service "Ride Plus"
- Shuttles Service

Contractors are required to meet or exceed all training elements outlined in their respective Scopes of Work (SOW), complying with State, Federal, and District standards, including the Employee Testing Program. Each contract specifies minimum training hours necessary to satisfy regulatory requirements.

Training components align with Section 12.1 "Bus Operator Training," subsections a–f, and are typically

delivered through each contractor’s internal training programs—OET for MV Transportation and the PDOD, including the Smith System, for Transdev. These programs are presented to and approved by the District Transit Operations Training Manager.

The District’s Training Department audits contractor training records biannually (spring and fall). Audit results are submitted to the Manager of Bus Contracts and MV/Transdev Management, with copies provided to the Director of Bus Transportation. Each audit includes follow-up action items with required resolutions within 30 days.

Certifications for contractor training personnel are submitted to the Manager of Bus Contracts and are reviewed during audits conducted in coordination with the Manager of Transit Operations Training and DMV standards. Oversight is supported by internal District subject matter experts.

Capital Projects and Construction Contractor Safety

The District’s construction contracts include general conditions and special provisions that outline the requirements for the following:

- Site-Specific Workplans
- Injury and Illness Prevention Program (IIPP)
- Supervision and construction procedures
- Permits and licenses
- Contractor oversight
- Construction schedule
- Worksite maintenance
- Site access
- Subsurface excavations
- Trench excavation safety plan
- Hazardous chemicals and waste handling
- Public safety and emergencies

6. Safety Communication

Safety Communication

In accordance with the District’s Safety Management Policy statement, the District actively encourages the open sharing of information regarding all safety issues across the organization. To ensure effective communication throughout the agency, the District has established formal processes and strategies,

including:

- Dissemination of safety performance information throughout the organization. Communication of safety performance follows the top-down, agency-wide model established under the agency's SMS. The Director of Safety and Security is responsible for reporting on safety performance to the Accountable Executive. These reports may include, but are not limited to, performance relative to the agency's safety performance targets, updates on mitigation monitoring plans, corrective action plans, and unusual events.
- In accordance with guidance from the Director of Safety and Security, leaders across the agency (including executive management, directors, managers, and supervisors) are responsible for communicating safety performance information with their teams.
- The Safety and Security Department is responsible for using the safety management system to develop reports on safety risk mitigations and open corrective actions, which are then disseminated to all safety-related committees.
- Communicating hazards and safety risks information relevant to employees' roles and responsibilities. As part of new-hire training, the District distributes safety policies and procedures, including those found in the District Employee Safety Manual, to all new employees. The District provides training on these policies and procedures and discusses them during safety talks between supervisors, bus operators, and vehicle technicians. For newly emerging safety issues or events, the District's Director of Safety and Security issues bulletins or messages tailored to employees' roles and responsibilities. These bulletins are reinforced by supervisors in one-on-one or group discussions. The District's Training Department also develops materials and courses to explain the rationale behind updates to policies, procedures, and work instructions addressing hazards and safety risks.

The Safety and Security Department collaborates with the District's executive and management teams (representing all relevant functions) to define safety-related information that should be communicated to various employee groups. The District uses multiple channels to communicate safety information to the Board of Directors, management, and individual employees across all agency functions and, as appropriate, to explain actions taken in response to employee reporting. The District also provides targeted communications to inform employees about actions taken in response to reports submitted through the Employee Safety and Reporting Program (ESRP). This includes committee updates, anonymous reporting via Safety Dropbox QR Codes and Quick links, and one-on-one discussions between employees and supervisors.

The Safety and Security Department coordinates with each operating function to ensure that all SMS and safety communication activities occur as scheduled. The department also maintains documentation of communication processes, procedures, and records of safety communications.

The Bus Contracts Manager routinely monitors contractor safety communication efforts to ensure alignment with the District's Safety Management System (SMS) and safety mission. These monitoring activities are documented through formal reports and audits.

7. Additional Information

Acronyms	
ADA	Americans with Disabilities
BEB	Battery Electric Bus
CDC	Centers for Disease Control
DISTRICT	San Mateo County Transit District
DOT	Department of Transportation
ELDT	Entry Level Driver Training
ESRP	Employee Safety and Reporting Program
FCEB	Fuel Cell Electric Bus
FMCSA	Federal Motor Carrier Safety Administration
FTA	Federal Transit Administration
MoCC	Management of Change Committee
MPO	Metropolitan Planning Organization
MTC	Metropolitan Transportation Committee
NTD	National Transit Database
PTASP	Public Transit Agency Safety Plan
PTASP	Public Transportation Agency Safety Plan
SCR	Service Change Request
SMS	Safety Management System
SOP	Standard Operating Procedures
SOS	SamTrans Operations Safety Committee
SRC	Safety Review Committee
SRM	Safety Risk Mitigation
VRM	Vehicle Revenue Miles
VTT	Verification of Transit Training
WVPP	Workplace Violence Prevention Plan

Glossary of Terms

Accident

Is any Safety Event that involves any of the following: A loss of life; a report of a serious injury to a person; a collision of a District transit vehicle, or an evacuation for life safety reasons.

Assault on a Transit Worker

Is as defined under 49 U.S.C. 5302, a circumstance in which an individual knowingly, without lawful authority or permission, and with intent to endanger the safety of any individual, or with a reckless disregard for the safety of human life, interferes with, disables, or incapacitates a transit worker while the transit worker is performing the duties of the transit worker.

Employee Safety Reporting Program

It is a confidential and accessible method for employees to report safety concerns without fear of retribution.

Federal Transit Administration

Is the United States Department of Transportation operating an administration.

Hazard

Any real or potential condition that can cause injury, illness, or death, damage to or loss of the facilities, equipment, rolling stock, infrastructure, or damage to the environment.

Incident

It is a Safety Event that involves any of the following: A personal injury that is not a serious injury; one or more injuries requiring medical transport; or damage to facilities, equipment, rolling stock, or infrastructure that disrupts operations.

Investigation

The process is used to determine the causal and contributing factors of a Safety Event or hazard, to prevent recurrence, and mitigate safety risk.

Mitigation

Strategies or measures adopted to eliminate or reduce the likelihood or severity of a hazard or its consequences.

Occurrence

Is any accident, incident, or near miss involving transit vehicles, personnel, or infrastructure.

Operator of a Public Transportation System

Means a provider of public transportation as defined under 49 U.S.C. 5302(14).

Public Transportation Agency Safety Plan

The documented comprehensive agency safety plan is required by 49 U.S.C. 5329.

Risk

The composite of the likelihood of a hazardous condition occurring and the severity of its potential consequences.

Safety Event

A collision, fire, hazardous material spill, or other major safety incident that must be reported.

Safety Management System

A formal, top-down, organization-wide approach to managing safety risk and ensuring the effectiveness of safety risk controls.

Safety Risk Management

A process within SMS that includes hazard identification, risk assessment, and development of mitigations.

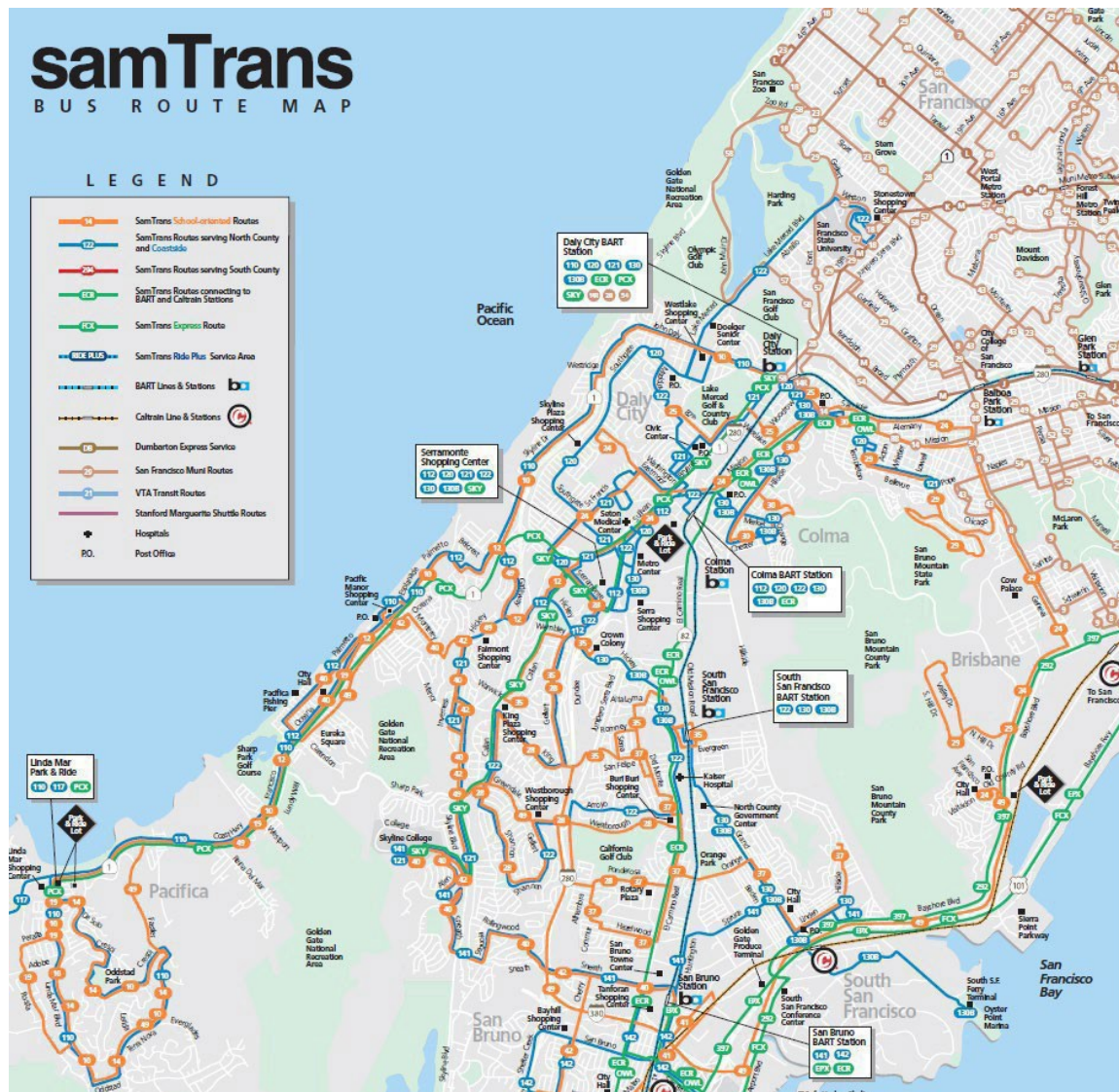
SMS Executive

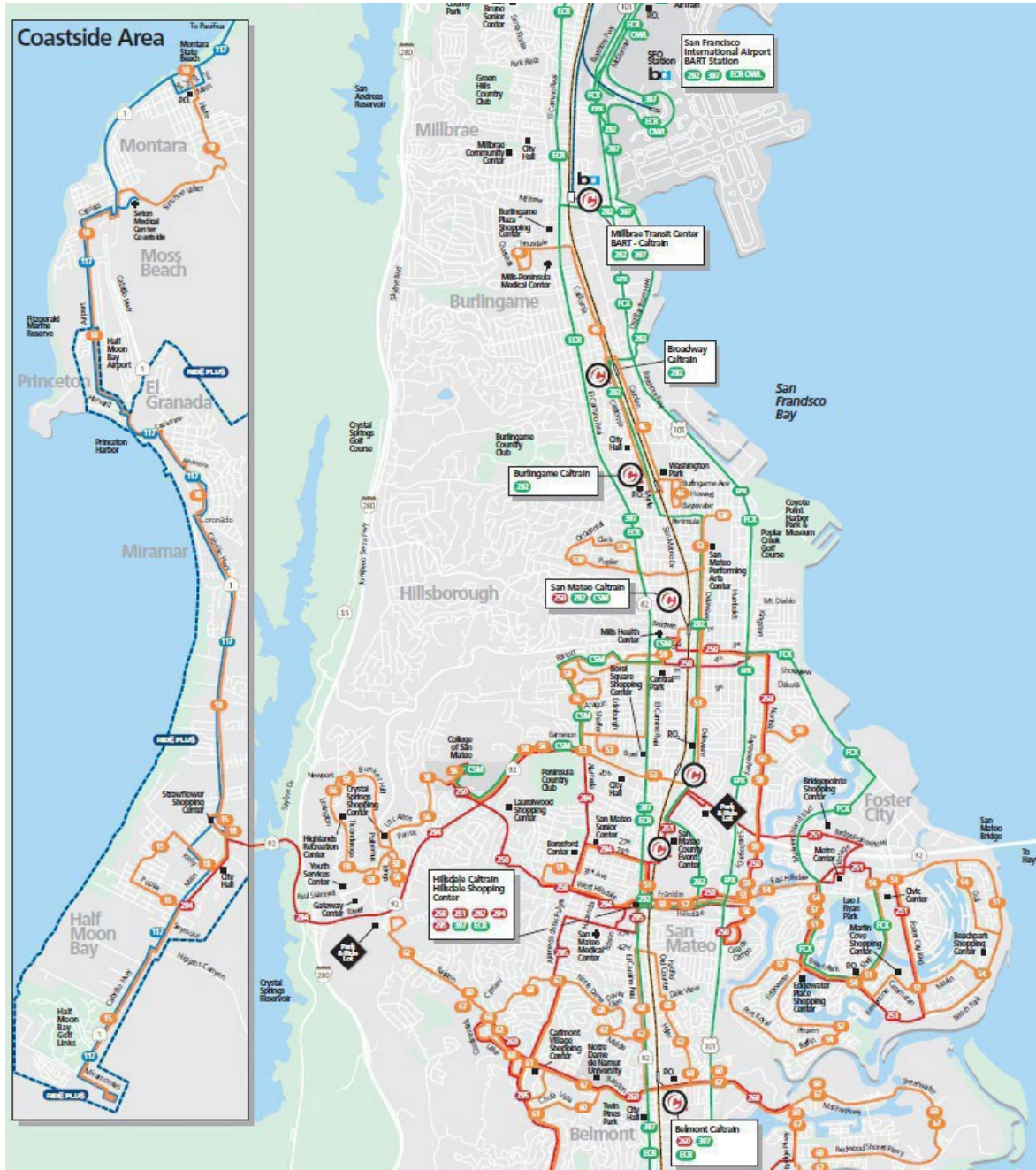
Director of Safety and Security.

Vehicle

Any rolling stock used on District transportation systems, including, but not limited to, passenger and maintenance vehicles. It also means any Transit vehicle used to transport revenue passengers on the bus system.

SamTrans Bus Route Map





**San Mateo County Transit District
Staff Report**

To: Board of Directors

Through: April Chan, General Manager/CEO

From: Kate Jordan Steiner, Chief Financial Officer
David Santoro, Deputy General Manager

Subject: **Authorizing Submittal of Three Applications for San Mateo County Transportation Authority Cycle 3 Measure A Alternative Congestion Relief and Measure W Transportation Demand Management Program Funding**

Action

Staff recommends the Board of Directors (Board) of the San Mateo County Transit District (District) adopt a resolution:

1. Supporting applications to the San Mateo County Transportation Authority (TA) for Cycle 3 Measure A Alternative Congestion Relief (ACR) and Measure W Transportation Demand Management (TDM) Funding for the following projects:
 - a. Project 1: \$475,000 for the Bus Stop Improvement Plan (BSIP) Implementation – Near Term Phase 1 Project for construction of five construction-ready bus stops in Daly City, South San Francisco, and San Mateo.
 - b. Project 2: \$500,000 for the BSIP Implementation – Near Term Phase 2 Project for construction of five bus stops currently in 35 percent design phase in Belmont, Half Moon Bay, Daly City, East Palo Alto, and South San Francisco.
 - c. Project 3: \$367,200 for the BSIP Implementation – Near Term Phase 3 Project to design 34 bus stop locations in Burlingame, Daly City, East Palo Alto, Millbrae, Redwood City, San Bruno, San Carlos, San Mateo, South San Francisco, and Unincorporated San Mateo County.
2. Committing matching funds as follows:
 - a. \$35,000 for Project 1.
 - b. \$25,000 for Project 2.
 - c. \$36,720 for Project 3.

3. Authorizing the Deputy General Manager, or designee, to execute funding agreements or other documents required for the District to receive any Measure A ACR and/or Measure W TDM funding awarded.
4. Directing staff to commence work on funded projects within one year of receiving an award.

Significance

In June 2025, TA released a call for projects for the Measures A and W ACR/TDM Program. This program funds strategies that encourage the use of sustainable transportation options and enhance mobility across San Mateo County. Eligible projects must provide congestion relief, increase sustainable transportation options, promote sustainability and health, encourage economic development opportunities, and invest funding equitably.

The three proposed projects are part of the SamTrans BSIP approved in April 2024. The BSIP identified bus stop features and amenities that SamTrans riders, local governments, and community members value, and provides a plan for improving bus stops across the SamTrans network. All bus stops included in the proposed projects were identified in the BSIP's near-term implementation strategy and are either in design or ready for construction.

Budget Impact

Adoption of the proposed resolution has no immediate budget impact. If funding is awarded, staff will return to the Board to request the necessary budget authority and amend the Fiscal Years 2026 and 2027 Capital Budgets to include requisite matching funds.

Background

Project 1: BSIP Implementation – Near-Term Phase 1 Project

Project 1 will implement bus stop improvements at five bus stop locations from Phase 1 of the BSIP. Phase 1 locations are SamTrans' top-priority bus improvements, selected by scoring the maximum points based on BSIP ranking criteria such as ridership, location within SamTrans Equity Priority Areas, and heat vulnerability. Design for the Phase 1 improvements is complete. Project 1 includes the following bus stop enhancements:

- Bus Stop 332323 (Southgate Avenue and Windsor Drive in Daly City): Serving routes 120 and 122, this Frequent category stop will be upgraded with a new standard shelter with a bench, solar powered lighting, and system map.
- Bus Stop 341544 (West Hillsdale Boulevard and Edison Street-Bay in San Mateo): Serving routes 250, 251, 292, and 295, this Frequent category stop will receive a new narrow shelter with bench, solar powered lighting, and system map.
- Bus Stop 334002 (Airport Boulevard and Baden Avenue in South San Francisco): Serving routes 292 and 397, improvements for this Standard category stop include a new

standard shelter with bench, solar powered lighting, system map, and bicycle lane improvements.

- Bus Stop 341103 (South Delaware Street and 2nd Avenue in San Mateo): Serving routes 53, 53P, and 292, this Standard category stop will be enhanced with a new narrow shelter with bench, solar powered lighting, and system map.
- Bus Stop 341612 (North Delaware Street and East Poplar Avenue in San Mateo): Serving routes 53 and 292, this Standard category stop will be enhanced with a new narrow shelter with bench, solar powered lighting, and system map.

Project 2: BSIP Implementation – Near-Term Phase 2 Project

Project 2 will construct bus stop improvements at five bus stop locations from Phase 2 of the BSIP. Phase 2 locations are SamTrans' next-highest-priority bus stop improvements, chosen based on high scores in BSIP ranking criteria. Phase 2 is currently at 35 percent design. Project 2 includes the following bus stop enhancements:

- Bus Stop 342097 (Ralston Avenue and El Camino Real in Belmont): Serving routes 60, 67 and 260, this Standard category stop will be upgraded with a shelter with bench and lighting, system map, and route schedule.
- Bus Stop 315617 (Kelly Avenue and Church Street in Half Moon Bay): Serving routes 15 and 117, this Standard category stop will receive a narrow shelter with bench and lighting, system map, and route schedule.
- Bus Stop 332214 (Mission Street and Bismark Street in Daly City): Serving routes 24, ECR and ECR-Owl, improvements for this Frequent category stop include a shelter with bench and lighting, system map, route schedule, and boarding bulb out.
- Bus Stop 363005 (Bay Road and University Avenue in East Palo Alto): Serving routes 281, 296, 296-Owl and 397, this Frequent category stop will be enhanced with a narrow shelter with bench and lighting, system map, route schedule, and bus boarding bulb out.
- Bus Stop 334124 (Grand Avenue and Linden Avenue in South San Francisco): Serving routes 37, 130, 141, this Frequent category stop will be enhanced with a narrow shelter with bench and lighting, system map, route schedule, and bus boarding bulb out.

Project 3: BSIP Implementation – Near-Term Phase 3 Project

Project 3 will complete design activities for improvements at 34 bus stop locations across San Mateo County. These locations are under the Amenities Recommendation section in the BSIP. The improvements will be designed to enhance the experience of SamTrans riders in response to stakeholder and public feedback. The planning for Phase 3 was completed as part of the BSIP and this Project 3 will initiate the design phase.

Prepared By:	Heather Salem	Acting Director, Grant and Fund Management	650-730-8099
	Perry Chavez	Principal Grants Analyst	650-730-7716

Resolution No. 2025-

**Board of Directors, San Mateo County Transit District
State of California**

* * *

**Authorizing Submittal of Three Applications for San Mateo County Transportation Authority
Cycle 3 Measure A Alternative Congestion Relief and Measure W Transportation Demand
Management Program Funding**

Whereas, the San Mateo County Transit District (District) has developed the Bus Stop Improvement Plan (BSIP) that identifies and prioritizes bus stop improvements throughout the SamTrans service area; and

Whereas, the District has developed three projects to begin implementation of the BSIP, including:

1. BSIP Implementation – Near Term Phase 1 (Project 1), which will construct five construction-ready bus stop improvements in Daly City, South San Francisco, and San Mateo;
2. BSIP Implementation – Near Term Phase 2 (Project 2), which will construct five bus stop improvements, currently at the 35 percent design stage, in Belmont, Half Moon Bay, Daly City, East Palo Alto, and South San Francisco; and
3. BSIP Implementation – Near Term Phase 3 (Project 3), which has completed the planning phase and is ready to move into design, and which will construct bus stop improvements at 34 locations in Burlingame, Daly City, East Palo Alto, Millbrae, Redwood City, San Bruno, San Carlos, San Mateo, South San Francisco, and Unincorporated San Mateo County within San Mateo County; and

Whereas, it will cost \$510,000 to construct the Project 1 improvements, \$1,555,000 to complete the design and construct the Project 2 improvements, and \$403,920 to complete the design of the Project 3 improvements, for a total of \$2,468,920; and

Whereas, the San Mateo County Transportation Authority (TA) issued a Call for Projects for the Measure A Alternative Congestion Relief and Measure W Transportation Demand Management (ACR/TDM) Program on June 5, 2025; and

Whereas, a Primary Grant Agreement between the District and the TA was executed on February 27, 2025; and

Whereas, the District now desires to apply for ACR/TDM funds as follows: \$475,000 for Project 1, \$500,000 for Project 2, and up to \$367,200 for Project 3, for a total request of \$1,342,200; and

Whereas, the TA requires the District's governing board to adopt a resolution:

1. Supporting the three Projects and authorizing the filing of funding applications;
2. Committing to the completing funded Projects, including with use of matching funds;
3. Certifying that any funds awarded by the TA will be used to supplement existing funds for ACR/TDM program activities, and will not replace existing funds or resources;
4. Authorizing the Deputy General Manager, or designee, to sign project supplements with the TA for ACR/TDM Program funding and to take any other actions necessary to give effect to this resolution; and
5. Committing to commence work on the Projects, if funds are awarded, within one year of the TA Board of Directors allocating 2025 Cycle 3 ACR/TDM Program funding.

Now, Therefore, Be It Resolved that the San Mateo County Transit District:

1. Directs staff to submit three applications for San Mateo County Transportation

Authority Measure A Alternative Congestion Relief and Measure W Transportation

Demand Management Program funds in the amounts of \$475,000 for BSIP

Implementation – Near Term Phase 1 (Project 1); \$500,000 for BSIP Implementation –

Near Term Phase 2 (Project 2); and up to \$367,200 for BSIP Implementation – Near

Term Phase 3 (Project 3), all as described above, for a total request of \$1,342,200.

2. Authorizes the Deputy General Manager, or designee, to execute project supplements with the TA for ACR/TDM Program funding and to take any other actions necessary to give effect to this resolution.

3. Commits to the completion of the Projects for the proposed phases and contribution of matching funds of \$35,000 for construction of Project 1; \$25,000 for construction of Project 2; and \$36,720 for design of Project 3, for a total of up to \$96,720 of matching funds needed for implementation of the three Projects, if awarded the requested TA funds.

4. Certifies that any funds awarded by the TA will be used to supplement exiting funds for the Projects and will not replace existing funds or resources.

5. Commits to commencing work on the Projects, if funds are awarded, within one year of the TA Board of Directors allocating the 2025 Cycle 3 ACR/TDM Program funds.

Regularly passed and adopted this 6th day of August, 2025 by the following vote:

Ayes:

Noes:

Absent:

Chair, San Mateo County Transit District

Attest:

District Secretary

BOARD OF DIRECTORS 2025



JEFF GEE, CHAIR
MARIE CHUANG, VICE CHAIR
DAVID J. CANEPA
BROOKS ESSER
MARINA FRASER
RICO E. MEDINA
JOSH POWELL
PETER RATTO
JACKIE SPEIER

APRIL CHAN
GENERAL MANAGER/CEO

Memorandum

Date: July 30, 2025
To: SamTrans Board of Directors
From: April Chan, General Manager/CEO
Subject: Report of the General Manager/CEO

SamTrans fixed-route bus ridership achieved a 97.7 percent recovery rate for the first eleven months in Fiscal Year (FY) 2025, ending May 2025, which is above the 83.3 percent experienced throughout the nation. Local and commuter rail ridership continues its slow recovery rate.

	11 Months Prior To COVID	11 Months Ended May 2025	Ridership Recovery Rate
SamTrans	10,165,070	9,931,061	97.7%
AC Transit	50,643,987	37,678,224	74.4%
SFMTA	194,437,520	151,005,718	77.7%
VTA	25,365,937	20,982,450	82.7%
Dallas	34,711,940	26,041,132	75.0%
Seattle - King	112,291,073	79,454,948	70.8%
Chicago	220,262,065	168,614,843	76.6%
Atlanta	47,272,142	31,470,221	66.6%
New York MTA	672,629,405	636,923,863	94.7%
National Bus	4,213,217,909	3,509,501,499	83.3%
Caltrain	17,146,909	9,554,338	55.7%
BART Extension	12,274,836	5,570,414	45.4%
BART System	116,798,775	52,013,981	44.5%
National Rail	4,518,255,579	3,362,781,095	74.4%
Total NTD Trips	9,183,316,914	7,228,769,887	78.7%

Bus Operator Staffing

	Approved FTEs	Trainees	No. Bus Operators*
Bus Operators	350	22	338

* This number excludes the 22 Bus Operator Trainees.

Miles Between Preventable Accidents

The table below illustrates the miles between accidents performance by mode and location for the month of June 2025 and for FY25.

An *accident* is defined as an event that involves any of the following: fatality, serious injury, collision of a District vehicle, or major property damage. A *preventable accident* is one in which the driver failed to do everything reasonable to prevent it.

	June 2025			Fiscal Year 2025
	Total Miles	Preventable Accidents	Miles Between Preventable Accidents	Miles Between Preventable Accidents
North Base	347,865	3	115,955	55,980
South Base	239,229	7	34,176	46,864
CUB	225,004	3	75,001	46,987
Fixed Route Total	812,098	13	62,469	49,896
ADA	192,769	0	192,769	70,981
Micro Transit	15,373	0	15,373	55,873

Safety Updates

The new Safety Campaign is “Rock and Roll.” It is a technique used to increase the field of vision by moving the head and upper body in a back and forth, and side to side motion to expose blind spots and visual obstructions. This is especially helpful in congested areas where pedestrians, vehicles, and fixed objects become obscured by the changing environment.

Safety Stand Downs at North Base and South Base have expanded the participation which now includes staff from the Employee Relations Department, Training Department, Transportation Department, and our transit partners at MV Transportation. The collaboration and support promote a positive safety culture, and the Safety Stand Downs are being well received by the Bus Operators.

Regional/MTC Matters

Senate Bill (SB) 63 was heard and passed by both the Assembly Transportation and the Assembly Revenue and Taxation committees. It is likely that SB 63 will return to Assembly Transportation before September 9, which is the last date to amend bills this year. At last month's meetings, both the SamTrans and San Mateo County Transportation Authority (TA) Boards of Directors received a presentation on the results of a poll the TA conducted and a staff presentation on how a potential sales tax expenditure would look like at a 1/2 cent and at a 1/4 cent, as well as how to possibly fund Caltrain via the renewal of Measure A. Staff continues to work with other transit agencies and legislative staff to develop amendments on issues including fund recipient accountability, expenditure plans, and revenue measure governance. The TA and City/County Association of Governments of San Mateo County (C/CAG) Boards will vote on whether to recommend SamTrans to opt-in at their respective July 30 meetings, and the SamTrans Board will vote whether to opt in at the August Board meeting.

Employee of the Month (EOM) Recognitions, June 2025

Bus Operator EOM for North Base is **Victor Moro**. This is Victor's second EOM Award during his 6 years of service with the District.

Bus Operator EOM for South Base is **Cesar Gonzales**. This is Cesar's fourth EOM Award during his nearly 26 years of service with the District.

Bus Maintenance EOM for North Base is **Utility Worker Eddie Vargas**. This is Eddie's fourth EOM Award during his nearly 12 years of service with the District.

Bus Maintenance EOM for South Base is **Utility Worker Erick Torres**. This is Erick's first EOM Award during his 1 year of service with the District.

SamTrans Mobile App Update for Quarter 4 FY2025

The SamTrans mobile app was launched in September 2018 and sells paratransit and most fixed-route bus service products except monthly passes. In the fourth quarter of FY25, the app was downloaded 2,704 times, representing a 17 percent decrease compared to the same quarter the previous year. Additionally, 2,616 new accounts were created during the period, reflecting a 12 percent year-over-year decline. Ticket sales through the app totaled 38,509 during this quarter, representing an 8 percent decrease from the same period last year. These sales generated \$91,296 in revenue, down 4 percent from the previous year's fourth quarter.

Despite the quarterly declines, annual metrics showed positive trends. For the full FY25, the app supported 175,674 rides — an increase of approximately 7 percent compared to the prior fiscal year. Total fare revenue through the app reached \$383,988, reflecting an 8 percent year-over-year increase. This growth is consistent with the overall upward trend in SamTrans ridership across the system.

The app's revenue contribution has consistently accounted for approximately 3 percent of total revenue over the past few quarters.



SamTrans Service Changes

Effective August 3:

- School-oriented routes returning to service
 - Schedule adjustments to match adjusted school bell times
- Schedule adjustments on select routes serving Daly City BART and Palo Alto Transit Center
 - Effort to align with recommendations of regional Transfer Plan

About the TRANSFER Plan



The Bay Area
Transit
**Reliability and
Accessibility
Network
Scheduling
Framework and
Equitable
Regional Plan**

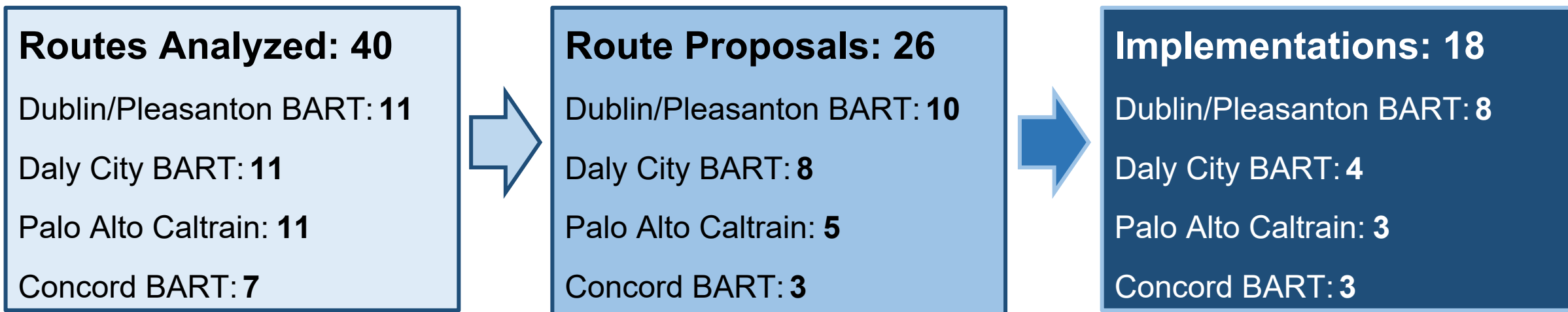
Project Background

The Bay Area TRANSFER Plan is a transit-operator led, near-term, operations-focused regional effort that aims to improve transfer timing at key regional hubs throughout the Bay Area.

Primary Objectives

- Advance **service change alignment** for all Bay Area transit providers, aligning changes each year in January and August
- **Improve transfer timing** for customers within the existing transit network
 - January 2025 Pilot Hubs: El Cerrito del Norte and San Rafael Transit Center
 - August 2025 Hubs: Palo Alto Caltrain, Daly City BART, Dublin/Pleasanton BART, Concord BART
- **Highlight efforts** made by service providers to improve regional connectivity
- **Develop a framework** for better schedule alignment throughout the region

Implementation for August 2025



*Includes routes that have proposals that are partially implemented.

Implementation for August 2025



Route Schedule Changes at Daly City BART and Palo Alto Caltrain:

- SamTrans #110 (weekday schedule)
- SamTrans #117 (weekday schedule)
- SamTrans #121 (weekday schedule)
- SamTrans #280 (weekend schedule)
- SamTrans #281 (weekend schedule)
- SamTrans SKY (weekday schedule)



Implementation for August 2025

Key Travel Time Improvements:

Riders from the coastside to Downtown SF will **save 17 minutes** in the AM peak and will **save 14 minutes** returning in the PM peak.

Riders from the coastside to Millbrae will **save 20 minutes** in the AM peak and will **save 14 minutes** returning in the PM peak.

Throughout the weekday, riders from the coastside to Daly City will on average **save 10 minutes** in the northbound direction and **save 3 minutes** in the southbound direction.

DALY CITY
BART

Weekend riders from north Menlo Park to Downtown SF will on average **save 5 minutes** in the northbound direction and will **save 16 minutes** in the southbound direction.

Weekend riders from East Palo Alto to Downtown SF will on average **save 6 minutes** on their journey to the City.

Riders from San Leandro and Hayward will **save 6 minutes** in the PM peak on trips to Stanford University.

Midday travelers from Union City to San Mateo will **save 3 minutes** in the westbound direction and **save 19 minutes** in the eastbound direction.

PALO ALTO CALTRAIN

Project Next Steps

Over the next few months, the TRANSFER Plan Project Working Group will focus on:

- **Communications Plan**
 - With the help of the Blue Ribbon Task Force Regional Marketing and Communications group, we are developing a plan to communicate transfer time improvements to the public and stakeholders.
- **TRANSFER Plan Project Framework**
 - We will draft a Project Framework that incorporates key learnings and outlines how the successes from the plan can be streamlined, improved upon, and scaled across the region.



Item #8.b.
8/6/2025

Thank You



Please email TollesonM@samTrans.com with any questions.

SamTrans Millbrae Headquarters Project



EXECUTIVE MONTHLY PROGRESS REPORT July 2025

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Section 2: Progress and Schedule	4
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Project Introduction

On December 18, 2023, the Board approved the acquisition of a 180,000 square-foot headquarters (HQ), consisting of approximately 157,000 square feet of office space and 23,000 square feet of retail space, through a lease-to-purchase agreement. (The original developer has since sold its interest in the HQ building to a new owner/landlord.) The new HQ building is located at the Gateway at Millbrae Station, right next to the Millbrae BART and Caltrain Station, with SamTrans Routes ECR and 292 conveniently close-by. The first three floors of the building include a lobby, retail space, loading facilities, and parking, while the 4th, 5th, and 6th floors consist of office space. As part of this agreement, the District agreed to lease the entirety of the office space, after the landlord completes all necessary tenant improvements, for at least 8 months, with an option to purchase the entire building after 8 months, and before 30 months, for \$126M. The building is located on a 99-year ground lease from the Bay Area Rapid Transit District (BART) which requires that the prevailing wages be paid for all construction work on site, including tenant improvements.

Section 1: Cost and Budget

Tenant Improvement

The total budget for the tenant improvement is \$48,320,294. This is comprised of the Lease's Tenant Improvement Allowance of \$36,850,820 (inclusive within the \$126M purchase price) and \$11,469,474 approved by the Board on December 4, 2024. The total tenant improvement budget includes contingency, which amount will be determined after the Guaranteed Maximum Price (GMP) is executed in April 2025.

Non-Tenant Improvement

The total budget for the non – tenant improvement is \$26,116,619 inclusive of \$4,113,696 / 15.75% Contingency. This contingency will be reported monthly when used.

Category/Item	Budget (in 1000 of \$)		Expended + Committed %
	Approved	Expended + Committed	
Owner Allowance for TI	36,851	36,851	100.00%
HQ Tenant Improvement (TI)	11,469	10,427	90.91%
Non-TI, Furniture, Fixtures, & Equipment (FF&E), and Auxiliary Equipment	9,380	5,499	58.63%
Non-TI, Information, Communications, & Technology (ICT), Audio/Visual, and Security Systems	6,794	969	14.26%
Non-TI, Parking Garage Fencing, EV Charging, Ticket Booth, and Owner Paid Permit Fees	1,735	0	0.00%

Category/Item	Budget (in 1000 of \$)		Expended + Committed %
	Approved	Expended + Committed	
Non-TI, Moving Services, Move Management, Digitization, Equipment & Furniture Disposal, and Document Disposal	1,793	501	27.94%
Non-TI, Project Management, Construction Management, Change Management, Procurement, and Legal Services	3,790	1,773	46.79%
Non-TI, Architectural & Engineering Design	2,625	2,516	95.84%
Total	74,437	58,536	78.63%

Section 2: Progress and Schedule

Summary Activities	Baseline Start	Est/ Act. Start	Baseline Finish	Est/Act. Finish	Start Var. (Days)	Finish Var. (Days)
	(A)	(B)	(C)	(D)	A-B	C-D
TI, 100%CDs + Value Engineering Drawings			01/23/25	01/23/25	0	0
TI, Subcontractor Bidding and Pricing Schedule Review	01/24/25	01/24/25	04/02/25	04/02/25	0	0
TI, Execute GMP			04/02/25	04/02/25	0	0
TI, Submit for Permit / Permit Approval (2 rounds)	01/24/25	01/24/25	04/28/25	04/28/25	0	0
TI, Construction Mobilization and Buildout: Level 1, 5, 4, 6	04/18/25	04/18/25	01/02/26	01/02/26	0	0
TI, Final Inspections	10/07/25	10/07/25	01/05/26	01/05/26	0	0
TI, Substantial Completion / Lease Commencement			01/05/26	01/05/26	0	0
TI, Closeout	01/05/26	01/05/26	01/28/26	01/28/26	0	0
Non - TI FF&E, Design Approval			01/21/25	01/21/25	0	0
Non - TI FF&E, Contract Procurement	01/21/25	01/21/25	05/06/25	05/06/25	0	0
Non - TI FF&E, Contract for Board Approval			05/07/25	05/07/25	0	0
Non - TI FF&E, Procurement	05/08/25	05/08/25	01/02/26	01/02/26	0	0
Non - TI FF&E, Installation	01/05/26	01/05/26	04/24/26	04/24/26	0	0
Non - TI GC, Design	01/24/25	01/24/25	03/31/25	03/31/25	0	0
Non - TI GC, Contract Procurement	04/01/25	04/01/25	10/01/25	10/01/25	0	0
Non - TI GC, General Contract for Board Approval			10/01/25	10/01/25	0	0

Summary Activities	Baseline Start	Est/ Act. Start	Baseline Finish	Est/Act. Finish	Start Var. (Days)	Finish Var. (Days)
	(A)	(B)	(C)	(D)	A-B	C-D
Non - TI GC, Permit Approval	10/02/25	10/02/25	01/05/26	01/05/26	0	0
Non - TI GC, GC Mobilization / Buildout	01/06/26	01/06/26	05/05/26	05/05/26	0	0
Non - TI Move, Complete Questionnaires and Name Ambassadors	03/03/25	03/03/25	04/07/25	04/07/25	0	0
Non - TI Move, Finalize RFP and Contract Procurement	04/08/25	04/08/25	10/31/25	10/31/25	0	0
Non - TI Move, Move Services Contract for Board Approval			11/05/25	11/05/25	0	0
Non - TI Move, Move Services Contract Award	11/17/25	11/17/25	11/21/25	11/21/25	0	0
Non - TI Move, Moving Process	12/01/25	12/01/25	05/30/26	05/30/26	0	0

Section 3: Accomplishments and Upcoming Work

KEY ACTIVITIES - Current Reporting Month (top 5)	
Tenant Improvement	Move management
In the Field: Framing walls, rough-in mechanical, electrical, and plumbing work	Working through Mover RFP process
Continue to process construction submittals for product release	Coordinated Faces to Spaces
Verify furniture, audio/visual, and power dimensions in the field	Continued Discussions with IT
Continue procurement activities for the Non-Tenant Improvement Work	Continued Discussions with Facilities
	Working through Change Management award

KEY ACTIVITIES - Next Reporting Month (top 5)	
Tenant Improvement	Move management
In the Field: Finalizing rough-in mechanical, electrical, plumbing on lower floors. Upper floors include drywall, trim, ceiling grid and painting.	Mover Procurement Process
Continue to process construction submittals and RFIs	Change Management Procurement
Finalize furniture order and room identification signage.	Complete Seating Assignments
Continue procurement activities for the Non-Tenant Improvement Work	Compare Seating Assignments w/ Origin Data

Section 4: Risk Register / Critical Issues

Risk	Mitigation
Budget: Tariffs are imposed by the federal government.	SamTrans leadership has proactively secured volatile market pricing items and long-lead materials through early release. This approach includes potential storage solutions to expedite overseas procurement and mitigate cost risks. While tariffs remain a pricing threat, these measures help minimize exposure.
Schedule: Long lead items are delayed due to industry-wide and/or product-specific constraints.	The Project Team is actively processing submittals and coordinating with manufacturers to maintain schedule alignment. Where necessary, alternate products equal to or higher-quality equivalents are under review to reduce or eliminate delays.
Budget: With the subcontractors now onboard, detailed trade and field coordination with the design team and drawings is underway. If coordination conflicts arise, adjustments to the design or construction approach may be required, potentially resulting in a change order.	The Design Team and Trades are closely coordinating to address conflicts and adjacencies. Collaborative solutions are being implemented to resolve issues with minimal impact on the budget.

SamTrans' HQ August Update



August Agenda

Project Scope

Project Budget

Project Schedule & Milestones

Project Updates through July 2025

Upcoming Activities through August 2025

Risk Register

Anticipated Board Approvals

Project Scope

SamTrans is transforming approximately **157,000 square feet** across three floors at the **Gateway at Millbrae Station** into a modern headquarters.

The buildout includes **office space, Public Hearing Room**, conference and training rooms, specialized areas for **Redi-Wheels** and **Transit Police**, and upgraded amenities such as break rooms, wellness spaces, and market ready suites. With integrated **security, audio-visual** and **branding** elements, the new facility will support a dynamic work environment while enhancing operational capabilities.

Project Budget

Tenant Improvements Budget: \$48,320,294

1. \$36.8M allowance provided by Owner/Landlord as part of the \$126 M building purchase price
2. \$11.5M by SamTrans approved by the Board in December 2024

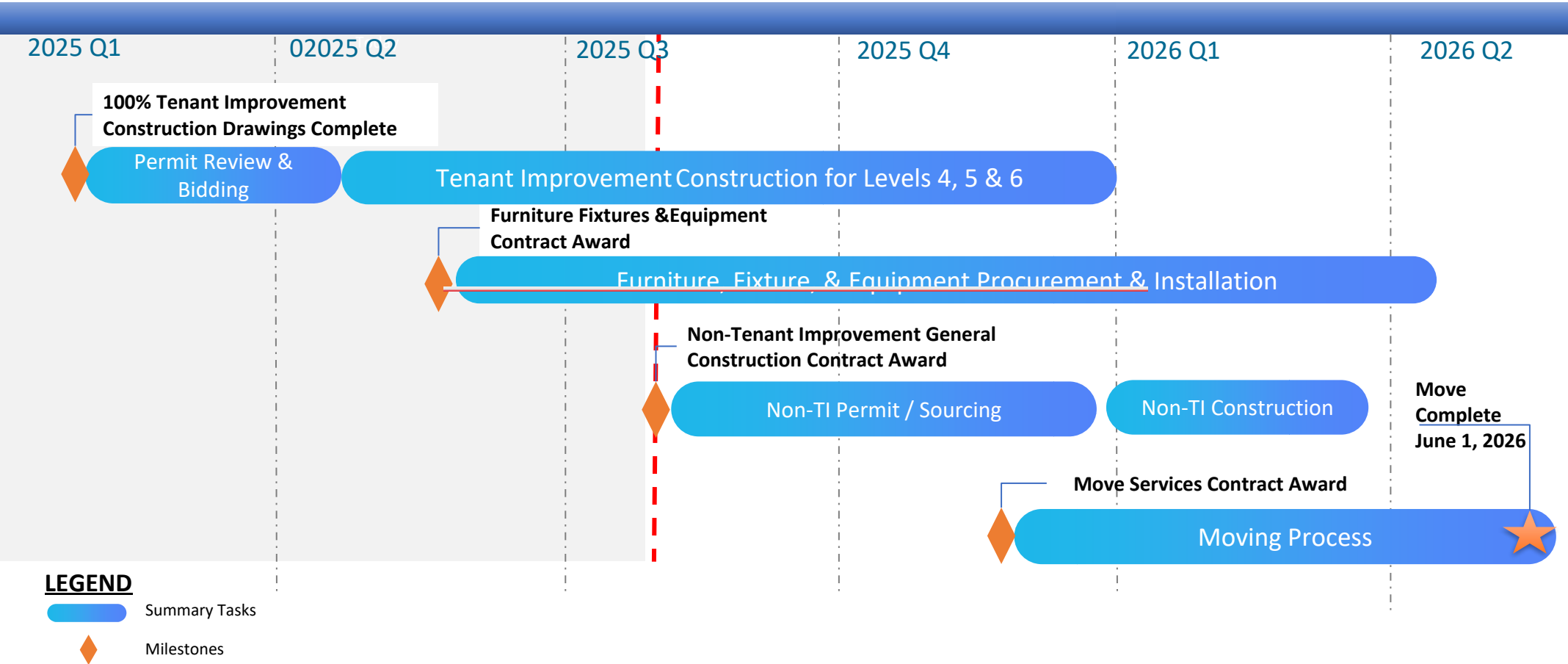
Non-Tenant Improvement Budget: \$26.1M

Total Budget Approved: \$74.4M

Committed / Percent Complete

Category/Item	Budget (in 1000 of \$)		Expended + Committed %
	Approved	Expended + Committed	
Tenant Improvement (TI)	48,320	47,278	97.84%
Non-TI, Furniture, Fixtures, & Equipment (FF&E), and Auxiliary Equipment	9,380	5,499	58.63%
Non-TI, Information, Communications, & Technology (ICT), Audio Visual, and Security Systems	6,794	969	14.26%
Non-TI, Parking Garage Fencing, EV Charging, Ticket Booth, and Owner Paid Permit Fees	1,735	0	0.00%
Non-TI, Moving Services, Move Management, Digitization, Equipment & Furniture Disposal, and Document Disposal	1,793	501	27.94%
Non-TI, Project Management, Construction Management, Change Management, Procurement, and Legal Services	3,790	1,773	46.79%
Non-TI, Architectural & Engineering Design	2,625	2,516	95.84%
Total	74,437	58,536	78.63%

Project Schedule



ThePhoto by PhotoAuthor is licensed under CCYYSA.

Project Updates through July 2025

- In the Field: Finalized rough-in mechanical, electrical, plumbing on lower floors. Upper floors began drywall, trim, ceiling grid and painting.
- Continued to process construction submittals and RFIs.
- Finalized furniture order and room identification signage.
- Continued procurement activities for the Non-Tenant Improvement Work

Construction Progress Photos



Construction Progress Photos



Upcoming Activities in August 2025

In the Field: Finalizing framing and drywall on lower floors.

Upper floors include trim, ceiling grid and painting.

Process RFIs and conduct ongoing field coordination

Place furniture order and develop signage/branding.

Continue procurement activities for the Non-Tenant Improvement Work

Award Day 2 GC Scope of Work

Day 2 Non-Tenant Improvement GC Scope of Work

SamTrans Specific Scope

- Ticket Booth for fare purchases

- Data / Communications and Devices

- Security Systems

Timeline

- Permitting: September-December 2025

- Active Construction: January 6th-April 14th, 2026

Recommend Award to Skyline Construction

Contract Amount

\$7,836,070.85

Benefits

Schedule continuity, consistent workmanship and warranties

This contract honors the terms and conditions that were negotiated during the competitive bid for the larger T.I. scope

Risk Register: Key Items

Item #8.c.
8/6/2025

Risk	Mitigation
Budget: Tariffs are imposed by the federal government.	SamTrans leadership has proactively secured volatile market pricing items and long-lead materials through early release. This approach includes potential storage solutions to expedite overseas procurement and mitigate cost risks. While tariffs remain a pricing threat, these measures help minimize exposure.
Schedule: Long lead items are delayed due to industry-wide and/or product-specific constraints.	The Project Team is actively processing submittals and coordinating with manufacturers to maintain schedule alignment. Where necessary, alternate products equal to or higher-quality equivalents are under review to reduce or eliminate delays.
Budget: With the subcontractors now onboard, detailed trade and field coordination with the design team and drawings is underway. If coordination conflicts arise, adjustments to the design or construction approach may be required, potentially resulting in a change order.	The Design Team and Trades are closely coordinating to address conflicts and adjacencies. Collaborative solutions are being implemented to resolve issues with minimal impact on the budget.

Anticipated Board Approvals

August 2025: Non-Tenant Improvement General Construction (Day 2)

Summer 2025: Caltrain Lease

November 2025: Move Service Contract

TBD: Off-Site Agency Vehicle Parking

TBD: Leasing of Market Ready Suites

TBD: Leasing of Retail Spaces

Questions



JEFF GEE, CHAIR
MARIE CHUANG, VICE CHAIR
DAVID J. CANEPA
BROOKS ESSER
MARINA FRASER
RICO E. MEDINA
JOSH POWELL
PETER RATTO
JACKIE SPEIER

APRIL CHAN
GENERAL MANAGER/CEO

AGENDA

San Mateo County Transit District

Community Relations Committee Meeting
Committee of the Whole
(Accessibility, Senior Services, and Community Issues)

August 6, 2025 – 2:30 pm

Bacciocco Auditorium, 2nd Floor
1250 San Carlos Avenue, San Carlos, CA 94070

Committee Members: David J. Canepa (Chair), Marina Fraser, Jackie Speier

- | | | |
|--------|--|---------------|
| 9.a.1. | Call to Order | |
| 9.a.2. | Approval of Minutes of the Community Relations Committee Meeting of July 2, 2025 | Motion |
| 9.a.3. | Accessible Services Update | Informational |
| 9.a.4. | Citizens Advisory Committee Update | Informational |
| 9.a.5. | Paratransit Advisory Council Update | Informational |
| 9.a.6. | Monthly State of Service Report - June 2025 | Informational |
| 9.a.7. | Adjourn | |

Note:

- This Committee meeting may be attended by Board Members who do not serve on this Committee. In the event that a quorum of the entire Board is present, this Committee shall act as a Committee of the Whole. In either case, any item acted upon by the Committee or the Committee of the Whole will require consideration and action by the full Board of Directors as a prerequisite to its legal enactment.
- All items appearing on the agenda are subject to action by the Board. Staff recommendations are subject to change by the Board.

**San Mateo County Transit District
1250 San Carlos Avenue, San Carlos, California**

**Community Relations Committee Meeting / Committee of the Whole
DRAFT Minutes of July 2, 2025**

Members Present (In Person): M. Fraser, D. Canepa (Chair)

Members Present (Via Teleconference): J. Speier

Members Absent: None

Other Board Members Present Constituting Committee of the Whole: M. Chuang, B. Esser, R. Medina, J. Powell, P. Ratto

Other Board Members Absent: J. Gee

Staff Present: E. Bit, J. Cassman, A. Chan, T. Dubost, L. Lumina-Hsu, B. McMullan, M. Tolleson, M. Tseng

11.a.1. Call to Order

Committee Chair Canepa called the meeting to order at 3:19 pm.

11.a.2. Approval of Minutes of the Community Relations Committee Meeting of June 4, 2025

Motion/Second: Chuang/Esser

Ayes: Canepa, Esser, Fraser, Medina, Powell, Ratto, Speier, Chuang

Noes: None

Absent: Gee

11.a.3. Approve Appointment of James Ganner, Representing Bus Riders, to the Citizens Advisory Committee

Committee Chair Canepa stated the CAC Nominating Committee recommended James Ganner for appointment to the CAC.

Motion/Second: Medina/Speier

Ayes: Canepa, Esser, Fraser, Medina, Powell, Ratto, Speier, Chuang

Noes: None

Absent: Gee

Public Comment

James Ganner commented on providing a youth rider and micro-mobility user perspective to the CAC if appointed.

11.a.4. Accessible Services Update

Tina Dubost, Manager, Accessible Services, shared an update on community and paratransit eligibility outreach efforts and stated July is Disability Pride Month.

11.a.5. Citizens Advisory Committee Update - Deferred.

11.a.6. Paratransit Advisory Council Update

Ben McMullan, PAC Chair, stated that elections were held last month, with Ben McMullan re-appointed to Chair and Sandra Lang appointed to Vice Chair. PAC retreat to take place in October.

11.a.7. Monthly State of Service Report | May 2025

Millie Tolleson, Director, Planning, provided the presentation, which included the following:

- Average weekday ridership 4.4 percent increase for all SamTrans modes
- Ridership recovery exceeded 100 percent of pre-pandemic ridership
- RidePlus weekday ridership increased 38.6 percent
- On-time systemwide performance 81.8 percent
- Service calls and preventable accidents were above goal of one or fewer calls per 25,000 miles
- Seven scheduled buses did not operate (DNO)

11.a.8. Adjourn – The meeting adjourned at 3:25 pm.

An audio/video recording of this meeting is available online at <https://www.samtrans.com/about-samtrans/video-board-directors-cac-and-measure-w-coc>. Questions may be referred to the District Secretary's office by phone at 650-551-6108 or by email to board@samtrans.com.

**San Mateo County Transit District
Staff Report**

To: Community Relations Committee

Through: April Chan, General Manager/CEO

From: David Olmeda, Chief Operating Officer, Bus
Tina Dubost, Manager, Accessible Transit Services

Subject: **Accessible Services Update**

Action

This item is for information only. No action is required.

Significance

Several groups advise SamTrans on accessible service issues. The Paratransit Advisory Council (PAC) provides a forum for consumer input on paratransit issues. The Policy Advocacy and Legislative Committee (PAL-Committee) is the advocacy arm of the PAC.

The PAC and the PAL meet monthly (except for August).

The minutes from the PAC and PAL meeting in June 2025 are attached.

Budget Impact

There is no impact to the budget.

Background

No additional information.

Prepared By: Lynn Spicer Accessibility Coordinator 650-508-6475

SAN MATEO COUNTY
PARATRANSIT COORDINATING COUNCIL (PCC)
Minutes of June 10, 2025, Meeting

ATTENDANCE:

Members in person:

Benjamin McMullan, Chair, CID; Tina Dubost, SamTrans; Michele Epstein, OSS; Sandra Lang, Community Member; Marie Violet, Dignity Health; Larisa Vaserman, Consumer; Susan Capeloto, Dept. of Rehabilitation; Rajkumar Agarwal, Consumer

Members on Zoom: Dao Do, Rosenor House

Members Absent: Carmen Santiago, Catholic Charities; Kathy Uhl, CoA
(Member in-person attendance = 8/11, Quorum = Yes)

Guests:

Marvin Randalson, Nelson\Nygaard (Zoom); Jane Stahl, PAC Staff; Lynn Spicer, SamTrans (Zoom); Ana Vasudeo, SamTrans; Kenneth Richardson, TransDev/Redi-Wheels; Kelly Shanks, SamTrans; Jocelyn Feliciano, TransDev/Redi-Wheels.

WELCOME/INTRODUCTIONS:

The meeting was held in person and via Zoom conference call. Introductions were made.

APPROVAL OF MAY MINUTES:

Sandra Lang moved to approve the May meeting minutes; Marie Violet seconded the motion. The minutes were approved.

PUBLIC COMMENTS:

None.

PRESENTATION: Grand Boulevard Initiative

Charlsie Chang and Asiya Patel gave a comprehensive overview of the Grand Boulevard Initiative and the Central El Camino Real Intermodal Plan (see attached fact sheet). The plan fact sheet can be found at this link: <https://www.samtrans.com/media/35262/>. Members were invited to complete the online survey at [samtrans.com/centralelcamino](https://www.samtrans.com/centralelcamino)

Larisa requested that signage be included in the project and commented that the lack of sidewalks in places is a problem.

COMMITTEE REPORTS:

Policy/Advocacy/Legislative (PAL) – Ben McMullan, Chair

See page 8.

Education - Tina Dubost

The committee met on May 6th. The July meeting has been cancelled to enable planning on the retreat. The next meeting is on September 2, 2025.

Executive – Ben McMullan

The committee met on June 3rd. They talked about future presentations:

June - the Grand Boulevard Initiative for June

July – A tour of a new transit vehicle before the PAC meeting; a presentation related to research on paratransit

They discussed AB1250.

Marvin asked how many vehicles were being replaced; Lynn confirmed replacement of 21 vehicles. The vehicles will have a side lift and be used throughout the county.

Nominations were invited for Chair and Vice Chair. Ben McMullan was nominated as PAC chair for 2025-26, and Sandra Lang as Vice Chair. Tina moved to approve the nominations; Michele seconded the motion. It was approved.

The next Executive Committee will be replaced with an ad hoc retreat planning committee meeting. The next Executive Committee meeting will be on September 2, at 2pm.

OPERATIONAL REPORTS

None.

PERFORMANCE REPORT

Total ridership increased by 1.8%; average weekday ridership increased by 1.7% compared to April 2024. Ridership is stabilizing (the new normal) and is consistent with other transit agencies. Subscription trips were at 25%, and agency trips at 7%. Trips on taxis were about 10.7% - a little higher but lower than pre-COVID. Same-day cancels were at typical levels; productivity was 1.4 passengers per hour.

COMMENT STATISTICS REPORT

Comment patterns are typical with an increase in comment cards received. No systemic issues were identified.

SAFETY REPORT

Jocelyn reported that there was 1 preventable safety event in May, and 5 non-preventable safety events.

UPDATES AND ITEMS OF INTEREST

Marvin reported that a new staff assistant was hired. Mary Thomas Meyer will be at the July meeting.

Agencies – Dao Do & Marie Violet

No report.

Commission on Aging – Kathy Uhl

No report

Commission on Disabilities (CoD) – Ben McMullan

They are preparing a report for the Board of Supervisors' July meeting.

Center for Independence (CID) – Ben McMullan

CID is planning a movie showing and a "State of Disability Services in the County" event in July.

Coastside Transportation Committee (CTC) – Tina Dubost

No report.

Department of Rehabilitation – Susan Capeloto

A new name for the district has been selected – they will be the Golden Gate, Silicon Valley District.

Citizen's Advisory Committee for the San Mateo County Transportation Authority (TA) – Sandra Lang

The committee met on June 3. The meeting included:

- A motion to establish an appropriations limit for the transit agency.
- A resolution authorizing matching contributions for El Camino Real/FasTrack corridor-wide implementation for the Grand Boulevard project.
- A resolution authorizing allocation of \$5,293,205 from Measure A funds for San Mateo County's paratransit program and the Peninsular Traffic Congestion Relief Alliance, Commute.org.
- Approved a project list under Measure A.

The next meeting is on July 1, 2025, at 4:30pm.

ADA Refresher

Tina talked about subscription trips. These are available to riders who make a trip from the same origin to the same destination on the same day. The trips are automatically

scheduled unless cancelled and the rider doesn't have to call every time. The reservationist can provide more information.

Other Business

Tina reported that Caltrain is working on an emergency planning exercise and is looking for individuals to participate. This is a "simulated accident", and they work with police, fire, etc. Let her know if anyone is interested in participating.

MTC and ABAG is sponsoring a free 2-day Accessible Features conference at their headquarters in San Francisco on June 16 and 17 to talk about disability issues. Redi-Wheels can provide transportation to the event.

There will be listening sessions on SamTrans' Central El Camino Plan, an effort to improve transportation on El Camino Real. Each event will be virtual via zoom:

- Belmont: Tuesday, July 1, 5:30-7:00 PM
- San Mateo: Tuesday, July 8, 5:30-7:00 PM
- San Carlos: Wednesday, July 9, 5:30-7:00 PM

Anyone interested in participating should contact: serena@winterconsultants.com

The council closed the meeting by thanking Jane for her support of the PAC throughout the years.

The meeting ended at 2:50pm.

The next PAC meeting is on Tuesday, July 1st, 2025, at 1:30pm, in person and remotely via Zoom.

Minutes of Policy/Advocacy/Legislative (PAL) Meeting – Ben McMullan & Sandra Lang

The minutes of the May PAL meeting were included in the meeting packet. The minutes were approved by roll call.

Advocacy

None.

Legislative

Ana Vasudeo, Manager of Government & Community Affairs at SamTrans, gave a legislative update.

She had planned to speak on the Brown Act bills going through the legislature currently. However, AB239, supported by the SamTrans Board, will not be moving forward.

AB1250 – Paratransit eligibility legislation, introduced by Assemblymember Diane Papan, would prohibit transit agencies across the state from requiring persons who are eligible based on a permanent disability from having to re-certifying their eligibility.

Transit agencies agree with the intent of the bill but feel that the bill would undermine the collection of necessary information to determine who requires paratransit services, as well as affect the staffing needed.

Proposed amendments would include:

- Creating a streamlined recertification process to collect information for verification purposes conducted via a telephone interview, mail-in form, or online survey. This would collect address, mailing address, emergency contact, mobility devices used, status of disability, and an updated photo.
- Retaining the ability to conduct a full recertification if the condition worsens or there is an additional disability, if the person was only granted temporary eligibility, or if the transit agency has implemented service changes that could impact eligibility.

The bill is expected to advance to the policy committee in mid to late June. Ana will share any updates on the bill with the PAC.

Larisa asked about the current recertification period. Tina answered that it's every five years with SamTrans but differs with other agencies. Does she need to re-certify with other agencies? Tina responded that Redi-Wheels has an arrangement with all paratransit agencies in the Bay Area to honor rider eligibility. However, not all are notified of recertification, so it is best for the rider to notify the other agencies. Recertification in the Bay Area is every five years, but that could differ with other agencies.

Ravi asked if the recertification is online or in person. Tina reported that approximately 45 days before the eligibility office will send the rider a form to complete and set up a telephone interview. Currently this happens on a 5-year cycle. He also asked if Redi-Wheels could arrange a ride to San Ramon. Tina responded yes, but that he should allow time for them to make the arrangements.

Redi-Wheels Policy Issues

On July 1, San Francisco paratransit (SF Access) is increasing fares by \$0.10 to \$2.85 one-way.

Tina advised that future meetings of the PAC need to take place in the auditorium as other meeting rooms do not provide easy public access per Brown Act requirements.

The next PAL meeting will be on July 8, 2025.

**San Mateo County Transit District
Staff Report**

To: Community Relations Committee

Through: April Chan, General Manager/CEO

From: Josh Mello, Executive Officer, Planning and Development
David Olmeda, Chief Operating Officer, Bus

Subject: **Monthly State of Service Report | June 2025**

Action

This report is for information only. No action is required.

Significance

SamTrans: Average weekday ridership across all four modes (Bus, Paratransit, Shuttles, and Ride Plus) increased by 4.1 percent in June 2025 compared to June 2024. The total monthly ridership increased by 5.2 percent in June 2025 compared to June 2024.

Post-pandemic SamTrans total fixed-route bus ridership recovery in June 2025 reached **98.6 percent** of pre-pandemic total ridership in June 2019.

Ride Plus: Average weekday ridership was 131 trips, and total ridership was 3,426 trips. The average weekday ridership increased 33.5 percent compared to June 2024, and the total ridership increased 26.7 percent compared to June 2024. Staff attributes growth in Ride Plus usage to recent expanded marketing efforts and the introduction of a new and improved app for booking the service.

Youth Unlimited Pass: For June 2025, Youth Unlimited Pass usage increased 14.1 percent compared to June 2024.

Other SamTrans Key Performance Indicators (includes Contracted Urban Bus Service [CUBS]):

- **Preventable Accidents** – There were 13 preventable accidents in June 2025 (10 from District and 3 from contracted services). The goal is to have one or fewer preventable accidents per 100,000 miles; SamTrans did not meet its goal with 1.6 accidents per 100,000 miles. However, preventable accidents were reduced 27.8 percent compared to June 2024.
- **Miles Between Service Calls (MBSC)** – There were 27 service calls in June 2025 (17 from District and 10 from contracted services). The goal is to have one or fewer service calls

per every 25,000 miles. Fixed-route service met its goal with 0.8 service calls per 25,000 miles.

- **On-Time-Performance (OTP)** – June 2025 systemwide OTP was 83.9 percent, which is below the goal of 85.0 percent. This is a 1.8 percent increase compared to June 2024.
- **Did Not Operate (DNOs)** – In June 2025, there were 8 total DNOs, or missed trips.

RIDERSHIP (ALL MODES)								
SAMTRANS Average Weekday Ridership								
Mode	Jun-23	Jun-24	Jun-25	%Δ ¹	YTD FY23	YTD FY24	YTD FY25	%Δ ²
Bus	27,680	30,231	31,328	3.6%	27,221	31,731	34,250	7.9%
Paratransit	695	733	762	4.0%	658	728	758	4.2%
Shuttles	2,012	1,599	1,776	11.1%	1,813	1,675	1,827	9.1%
Ride Plus	48	98	131	33.5%	48	108	118	9.4%
Total	30,435	32,661	33,997	4.1%	29,740	34,242	36,953	7.9%
SAMTRANS Total Ridership								
Mode	Jun-23	Jun-24	Jun-25	%Δ ¹	YTD FY23	YTD FY24	YTD FY25	%Δ ²
Bus	731,945	773,261	809,501	4.7%	8,528,698	9,970,795	10,753,840	7.9%
Paratransit	18,026	18,471	19,380	4.9%	202,425	224,053	232,294	3.7%
Shuttles	43,436	32,033	37,305	16.5%	456,030	418,294	456,049	9.0%
Ride Plus	550	2,703	3,426	26.7%	550	36,322	38,043	4.7%
Total	793,957	826,468	869,612	5.2%	9,187,703	10,649,464	11,480,226	7.8%
CALTRAIN Average Weekday Ridership								
Mode	Jun-23	Jun-24	Jun-25	%Δ ¹	YTD FY23	YTD FY24	YTD FY25	%Δ ²
Caltrain	20,453	24,583	39,902	62.3%	17,325	21,260	29,650	39.5%
CALTRAIN Total Ridership								
Mode	Jun-23	Jun-24	Jun-25	%Δ ¹	YTD FY23	YTD FY24	YTD FY25	%Δ ²
Caltrain	512,652	590,986	1,037,795	75.6%	5,136,012	6,202,673	9,102,182	46.7%
OTHER MODES in San Mateo County Average Weekday Ridership								
Mode	Jun-23	Jun-24	Jun-25	%Δ ¹	YTD FY23	YTD FY24	YTD FY25	%Δ ²
Dumbarton	93	103	95	-7.8%	82	98	93	-5.6%
BART (San Mateo County)	18,269	18,346	20,385	11.1%	16,599	17,808	19,124	7.4%
OTHER MODES in San Mateo County Total Ridership								
Mode	Jun-23	Jun-24	Jun-25	%Δ ¹	YTD FY23	YTD FY24	YTD FY25	%Δ ²
Dumbarton	2,044	2,054	2,000	-2.6%	20,701	24,925	23,567	-5.4%
BART (San Mateo County)	500,437	475,460	548,333	15.3%	5,412,354	5,747,481	6,118,746	6.5%

IMPORTANT NOTES:

Total row may not add up due to rounding.

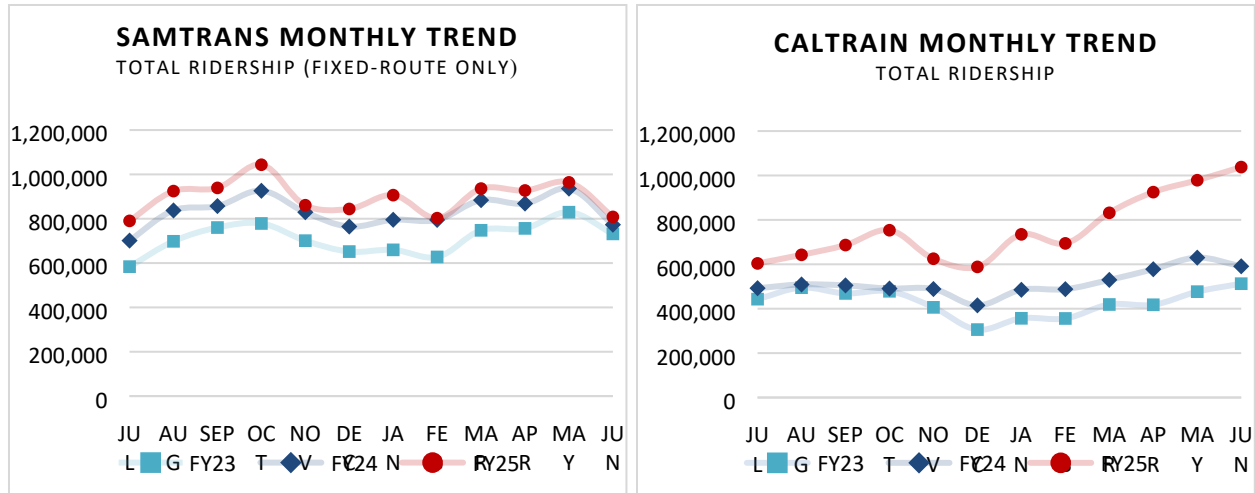
SamTrans (Bus) ridership includes Fixed-Route service, Coastside 5311, and SamCoast.

Shuttle ridership includes SamTrans shuttles, JPB Caltrain shuttles, and other Transportation Authority funded shuttles.

BART ridership in San Mateo County does not include Daly City BART Station.

%Δ¹ indicates the percentage change for the month, current year to previous year.

%Δ² indicates the percentage change current year to previous, Year to Date.



FARES

SAMTRANS (BUS) Fare Usage			
Fare Type	Jun-23	Jun-24	Jun-25
Adult	465,604	500,421	526,017
Eligible Discount	177,946	182,091	189,544
Youth	88,076	90,514	93,500
-- Youth Unlimited Pass	41,379	49,516	56,490
Total	731,626	773,026	809,061

This table illustrates the number of riders by fare category (Dumbarton Express and rural demand-response service excluded).

The **Youth Unlimited Pass** number is a subset of the Youth Fare Type. This program started in January 2022.

KEY PERFORMANCE INDICATORS

SAMTRANS (BUS) Operations Key Performance Indicators			
KPI	Jun-23	Jun-24	Jun-25
On-Time Performance	78.7%	82.4%	83.9%
Preventable Accidents	20	18	13
--- District	13	8	10
--- Contracted Services	7	10	3
Service Calls	26	29	27
--- District	17	17	17
--- Contracted Services	9	12	10
Trips Scheduled	37,419	38,772	46,342
Did Not Operate DNOs	8	3	8

SAMTRANS (BUS) Ride Plus Key Performance Indicators			
KPI	Jun-23	Jun-24	Jun-25
Total Ridership	550	2,703	3,426
--- East Palo Alto Trips	373	1,927	2,426
--- Half Moon Bay Trips	177	776	1,000
Active Users	163	338	370
New Registrations	513	145	84
Total Downloads	817	674	537
--- iOS Downloads	593	641	489
--- Android Downloads	224	33	48
Load Factor	1.5	1.2	1.2

SAMTRANS (BUS) Fleet Key Performance Indicators			
KPI	Jun-23	Jun-24	Jun-25
Revenue Hours (Sched.)	48,222	52,675	61,097
Revenue Miles (Sched.)	485,387	506,015	569,546
Total Fleet Miles (Actual)	707,418	739,996	816,704

PARATRANSIT Operations Key Performance Indicators			
KPI	Jun-23	Jun-24	Jun-25
On-Time Performance (RW)	91.6%	91.5%	90.6%
On-Time Performance (RC)	93.7%	92.9%	71.4%
Preventable Accidents (RW)	0	1	5
Preventable Accidents (RC)	0	0	0
Service Calls (RW)	5	6	2
Service Calls (RC)	0	0	0

PARATRANSIT Fleet Key Performance Indicators			
KPI	Jun-23	Jun-24	Jun-25
Revenue Miles (RW)	152,264	158,599	160,468
Revenue Miles (RC)	19,294	23,324	23,143
Fleet Miles (RW)	169,991	177,112	180,380
Fleet Miles (RC)	24,049	27,419	25,333

SamTrans' OTP goal is 85.0 percent. On-Time Performance (OTP) is calculated by evaluating time points within the route's schedules across the system for late, early, and on-time arrival and departure. A route is considered late if it exceeds 5 minutes. A route is considered early if it departs 59 seconds ahead of schedule.

SamTrans' Miles between Preventable Accidents goal is 100,000 miles. There were 62,823 miles between Preventable Accidents this month.

SamTrans' Miles between Service Calls goal is 25,000 miles. There were 30,248 miles between Service Calls this month.

Note: All KPIs include all SamTrans service operated directly and by contract.

Ride Plus started in June 2023.

The **load factor** represents the average number of passengers in a vehicle. It is calculated by dividing the total number of passengers by the number of trips in service.

Sched. = Scheduled, which includes in-service and layover.

RW = Redi-Wheels

RC = RediCoast

PRE-PANDEMIC RIDERSHIP COMPARISON

SAMTRANS Average Weekday Ridership					
Mode	Jun-19	Jun-23	Jun-24	Jun-25	% ³
Bus	32,900	27,680	30,231	31,328	95.2%
Paratransit	1,164	695	733	762	65.5%
Shuttles	11,958	2,012	1,599	1,776	14.9%
Ride Plus	-	48	98	131	-
Total	46,022	30,435	32,661	33,997	73.9%
SAMTRANS Total Ridership					
Mode	Jun-19	Jun-23	Jun-24	Jun-25	% ³
Bus	820,830	731,945	773,261	809,501	98.6%
Paratransit	27,376	18,026	18,471	19,380	70.8%
Shuttles	238,550	43,436	32,033	37,305	15.6%
Ride Plus	-	550	2,703	3,426	-
Total	1,086,756	793,957	826,468	869,612	80.0%

The following tables show the change in ridership over the last four years to encompass changes due to the COVID-19 pandemic.

%³ indicates the rate of ridership recovery, current year (FY2025) to pre-pandemic year (FY2019). For example, SamTrans Bus Average Weekday Ridership hit 95.2% of pre-pandemic levels (2019) for this month of June 2025.

CALTRAIN Average Weekday Ridership					
Mode	Jun-19	Jun-23	Jun-24	Jun-25	% ³
Caltrain	72,370	20,453	24,583	39,902	55.1%
CALTRAIN Total Ridership					
Mode	Jun-19	Jun-23	Jun-24	Jun-25	% ³
Caltrain	1,590,653	512,652	590,986	1,037,795	65.2%

OTHER MODES in San Mateo County Average Weekday Ridership					
Mode	Jun-19	Jun-23	Jun-24	Jun-25	% ³
Dumbarton	145	93	103	95	65.5%
BART (San Mateo County)	47,399	18,269	18,346	20,385	43.0%
OTHER MODES in San Mateo County Total Ridership					
Mode	Jun-19	Jun-23	Jun-24	Jun-25	% ³
Dumbarton	2,889	2,044	2,054	2,000	69.2%
BART (San Mateo County)	1,198,304	500,437	475,460	548,333	45.8%

PRE-PANDEMIC FARES COMPARISON

SAMTRANS (BUS) Fare Usage					
Fare Type	Jun-19	Jun-23	Jun-24	Jun-25	% ³
Adult	446,209	465,604	500,421	526,017	117.9%
Youth	132,107	88,076	90,514	93,500	70.8%
Eligible Discount	239,055	177,946	182,091	189,544	79.3%
Total	817,371	731,626	773,026	809,061	99.0%

%³ indicates the rate of ridership recovery, current year (FY2025) to pre-pandemic year (FY2019).

Dumbarton and demand-response service are excluded.

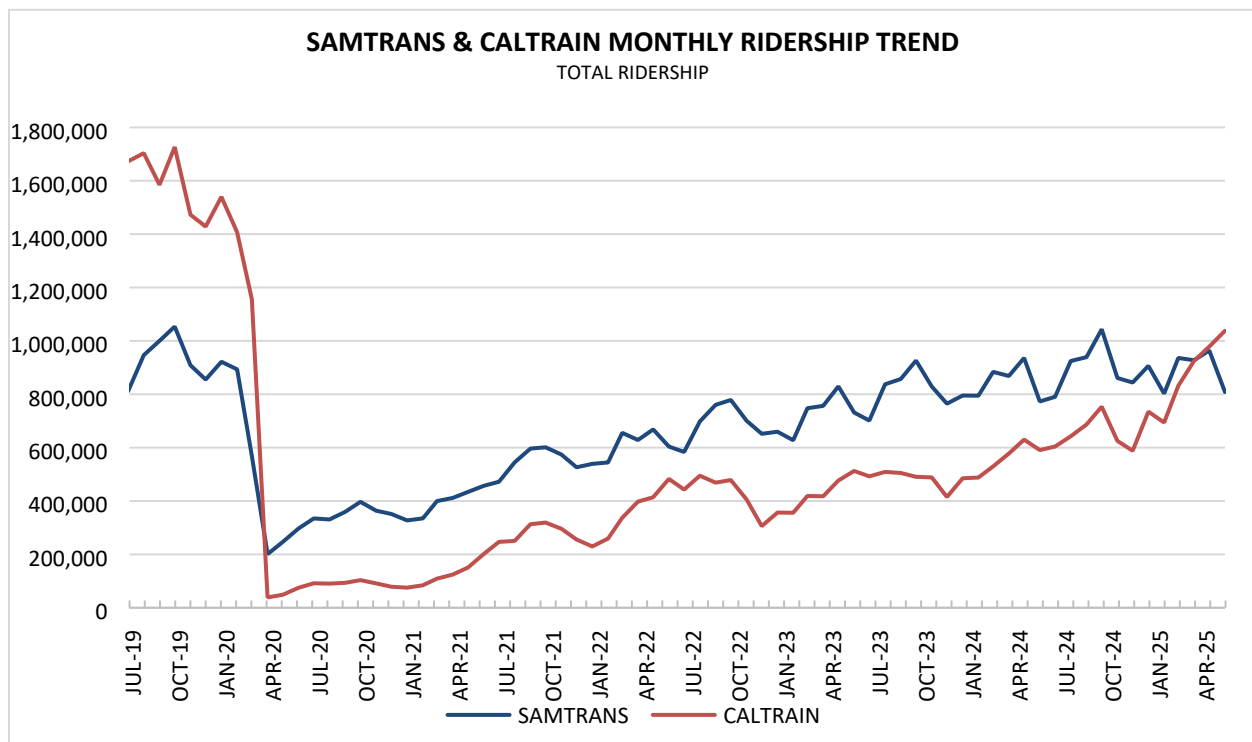
IMPORTANT NOTES:

Total row may not add up due to rounding.

SamTrans (Bus) ridership includes Fixed-Route service, Coastside 5311, and SamCoast.

Shuttle ridership includes SamTrans shuttles, JPB Caltrain shuttles, and other Transportation Authority funded shuttles.

BART ridership in San Mateo County does not include Daly City BART Station.



CUSTOMER EXPERIENCE

SAMTRANS (BUS) Customer Experience			
KPI	Jun-23	Jun-24	Jun-25
Complaints	83	72	103
Accessibility	10	12	3
Compliments	21	9	14
Service Requests	53	56	31
Reports Total	167	149	151

The table is a detailed summary of SamTrans Consumer Reports received by the Customer Experience Department.

The total number of reports for SamTrans increased 1.3% from 149 reports in June 2024 to 151 reports in June 2025.

COMMUNICATIONS & MARKETING

The following is a list of the Communications Division's marketing and promotional efforts in June 2025.

SamTrans Monthly Press Releases & Earned Media

Press Releases and Blogs:

- SamTrans Board of Directors approves two-year budget
- SamTrans celebrates Pride Month with a wrapped bus
- SamTrans adjusts summer service as school year ends
- SamTrans recognizes the Juneteenth holiday

Article Mentions:

- New budget: Patch, Mass Transit, San Mateo Daily Journal, Metro Magazine, The Almanac
- Regional measure: ABC7, NewsBreak, San Mateo Daily Journal
- Trillium contract: Mass Transit
- Half Moon Bay Pride: Coastside News
- Dumbarton West Connector: Metro Magazine, Mass Transit

Social Media Activities

Digital Marketing Report

- In June, SamTrans heavily focused on Pride Month, participating in three local Bay Area parades for the third year, including:
 - SamTrans participated in San Mateo County Pride, Coast Pride (Half Moon Bay), and San Francisco Pride
 - Promotional posts leading up to the events and live day-of content was pushed across all platforms
 - Social media icons and graphics were pushed to align the branding with the theme of Pride
 - Photography was taken at all events and posted on all platforms
- The Summer Youth Pass campaign was in full swing in June with continuation of rotational messaging from late May
- On June 15, SamTrans implemented their seasonal service changes as the school year ended

Other Digital Marketing Highlights

- Drive With Us Bus Operator Recruitment Campaign
- Gear Up Mechanic Utility Worker Recruitment Campaign
- Ride Plus Microtransit Campaign
- Coastside Service Program
- Class 199 Orientation
- Juneteenth

Social Metrics: (Year to Year)

An impression is anytime our content (post, webpage, Instagram (IG) photo) is seen in a user's feed or browser. Engagement is any action taken, such as a click, like, retweet or comment.

MAY 2024	MAY 2025	% Change
Impressions: 624,701	Impressions: 1,100,408	+76.1%
Engagements: 7,520	Engagements: 4,175	-44.5%
Post Link Clicks: 1,922	Post Link Clicks: 1,077	-44.0%

**Please note this does not include any web metrics*

Marketing Activity Highlights

Ride Plus Campaign

June Ride Plus Marketing Metrics

- Ride Plus web content views: 964
- Ride Plus Organic Social Impressions: 607
- Paid Social Clicks: 31
- Outreach Contacts: 85

Effortless Travel Campaign

Bay Area Newsgroups Ad Network

Running digital ads on Bay Area news websites, social media, and other ad partners. Ads are continuing to perform within industry performance indicator standards

- SamTrans ETEP Ads
 - Impressions: 18,534
 - Social Impressions: 1,020,278
 - Ad Clicks: 13,383
 - May Spend: \$4,801

Summer Youth Pass (SYP) Campaign

The SYP Campaign began in May, with sales increasing 160 percent in June compared to last month.

- June sales: 130 passes
- SYP pageviews: 4,490

Prepared By:	Emily Chen	Senior Planner, Operations Planning	650-551-6127
	Tasha Bartholomew	Director, Communications	650-508-7927

BOARD OF DIRECTORS 2025

JEFF GEE, CHAIR
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APRIL CHAN
GENERAL MANAGER/CEO



AGENDA

San Mateo County Transit District

Finance Committee Meeting Committee of the Whole

August 6, 2025 – 2:45 pm

or immediately following the Community Relations Committee meeting

Bacciocco Auditorium, 2nd Floor
1250 San Carlos Avenue, San Carlos, CA 94070

Committee Members: Brooks Esser (Chair), David J. Canepa, Rico E. Medina

- | | | |
|--------|---|--------|
| 9.b.1. | Call to Order | |
| 9.b.2. | Approval of Minutes of the Finance Committee Meeting of July 2, 2025 | Motion |
| 9.b.3. | Adopting a Disadvantaged Business Enterprise Overall Goal of 0.8 Percent for Federal Fiscal Years 2026-2028 for Federal Transit Administration-Assisted Contracts | Motion |
| 9.b.4. | Awarding a Contract to Skyline Commercial Interiors, Inc. dba Skyline Construction Inc. to Provide General Construction and Associated Services for the Millbrae Headquarters and Related Ancillary Services at the District's San Carlos Headquarters and Other District Locations for a One-Year Base Term, with up to Two Additional One-Year Option Terms, for a Total Amount of \$7,836,070.85 | Motion |

Note:

- This Committee meeting may be attended by Board Members who do not serve on this Committee. In the event that a quorum of the entire Board is present, this Committee shall act as a Committee of the Whole. In either case, any item acted upon by the Committee or the Committee of the Whole will require consideration and action by the full Board of Directors as a prerequisite to its legal enactment.
- All items appearing on the agenda are subject to action by the Board. Staff recommendations are subject to change by the Board.

- 9.b.5. Authorizing an Agreement with Clark Construction Group - CA, LP for Phase 1 Construction Services under the Construction Manager General Contractor Services for the South Base Battery Electric Bus Charging Infrastructure Project in the Amount of \$36,276,673 and Amending the Fiscal Year 2026 Capital Budget to Increase it by \$13,868,679, from \$4,698,405 to \$18,567,084

Motion

- 9.b.6. Adjourn

Note:

- This Committee meeting may be attended by Board Members who do not serve on this Committee. In the event that a quorum of the entire Board is present, this Committee shall act as a Committee of the Whole. In either case, any item acted upon by the Committee or the Committee of the Whole will require consideration and action by the full Board of Directors as a prerequisite to its legal enactment.
- All items appearing on the agenda are subject to action by the Board. Staff recommendations are subject to change by the Board.

**San Mateo County Transit District
1250 San Carlos Avenue, San Carlos, California**

**Finance Committee Meeting / Committee of the Whole
DRAFT Minutes of July 2, 2025**

Members Present (In Person): D. Canepa, R. Medina, B. Esser (Chair)

Members Absent: None

Other Board Members Present Constituting Committee of the Whole: M. Chuang, M. Fraser, J. Powell, P. Ratto

Other Board Members Present Constituting Committee of the Whole (Via Teleconference): J. Speier

Other Board Members Absent: J. Gee

Staff Present: E. Bit, J. Cassman, A. Chan, Z. Fan, L. Lumina-Hsu, D. Olmeda, M. Rush, H. Salem, M. Tseng, K. Yin

11.b.1. Call to Order

Committee Chair Esser called the meeting to order at 3:26 pm.

11.b.2. Approval of Minutes of the Finance Committee Meeting of June 4, 2025

Motion/Second: Powell/Medina

Ayes: Canepa, Esser, Fraser, Medina, Powell, Ratto, Speier, Chuang

Noes: None

Absent: Gee

11.b.3. Approving and Ratifying the Insurance Program for Fiscal Year 2026

Marshall Rush, Insurance and Claims Administrator, provided the presentation, which included the following:

- Anticipated increase in premiums due to the challenging insurance market; increased electric and hydrogen fuel cell bus values, flood insurance limits, expanded flood sublimit, bus physical damage premiums; decrease in cyber liability premiums; and inclusion of workers' compensation now directly budgeted rather than through Third Party Administrator (TPA) contract
- Maintenance of favorable risk profile, allowing preservation of low self-insurance retention (SIR) and more control over premium costs

Motion/Second: Ratto/Chuang

Ayes: Canepa, Esser, Fraser, Medina, Powell, Ratto, Speier, Chuang

Noes: None

Absent: Gee

11.b.4. Awarding Contracts to Trillium USA Company, LLC for (1) Design, Construction, and Commissioning of a Permanent Hydrogen Fueling Station for a Total Amount of \$17,365,635.39, and (2) Maintenance Services for a Not-to-Exceed Amount of \$1,696,358.16 for a Three-Year Base Term and Two One-Year Option Terms for an Additional Not-to-Exceed Amount of \$1,277,704.08

Kevin Yin, Director, Contracts and Procurement, and Zhiming Fan, Director, Bus Fleet/Facilities, provided the presentation, which included the following:

- Permanent hydrogen fueling station can fuel existing fuel cell electric buses (FCEB); scalable up to 50 buses; 108 additional FCEBs on order
- Two-step solicitation process of Request for Qualifications (RFQu) and then Request for Proposals (RFP) to the pre-qualified firms

The Committee Members had a robust discussion and staff provided further clarification in response to the committee comments and questions, which included the following:

- Funding source and reimbursements; District funds the project and reimbursed through Alliance for Renewable Clean Hydrogen Energy Systems (ARCHES). Letter of no prejudice (LONP) in place allowing for pre-award spending authority
- Contract flexibility to mitigate funding disruptions or unforeseen issues
- SamTrans' zero emissions goal and long-term fleet modernization efforts alignment

Public Comment

Geoff Smith, San Carlos, commented on hydrogen fuel sources, hydrogen bus maintenance and efficiency.

Adrian Brandt commented on hydrogen fuel sources, energy loss, and environmental impacts.

Roland commented on natural hydrogen use over hydrogen production.

Motion/Second: Fraser/Powell

Ayes: Canepa, Esser, Fraser, Medina, Powell, Ratto, Speier, Chuang

Noes: None

Absent: Gee

11.b.5. Adjourn – The meeting adjourned at 3:45 pm.

An audio/video recording of this meeting is available online at <https://www.samtrans.com/about-samtrans/video-board-directors-cac-and-measure-w-coc>. Questions may be referred to the District Secretary's office by phone at 650-551-6108 or by email to board@samtrans.com.

DRAFT

**San Mateo County Transit District
Staff Report**

To: Finance Committee

Through: April Chan, General Manager/CEO

From: Wendy Lau, Deputy Director, Office of Civil Rights

Subject: **Adopting a Disadvantaged Business Enterprise Overall Goal of 0.8 Percent for Federal Fiscal Years 2026-2028 for Federal Transit Administration-Assisted Contracts**

Action

Staff proposes that the Committee recommend the Board of Directors (Board) of the San Mateo County Transit District (District):

1. Adopt the proposed overall Disadvantaged Business Enterprise (DBE) race/gender-neutral goal of 0.8 percent applicable to Federal Transit Administration (FTA) assisted contracts for Federal Fiscal Years (FFYs) 2026-2028; and
2. Authorize the General Manager/CEO, or designee, to submit the overall DBE goal to the FTA by September 1, 2025, if no further consideration or modifications to the proposed goal are warranted.

Significance

The United States Department of Transportation (DOT) regulations require DOT grantees to establish a DBE overall goal as a percentage of all FTA funds expected to be expended in the three forthcoming FFYs. Pursuant to the goal-setting methodologies set forth in federal regulations and guidance, staff proposes a DBE overall goal of 0.8 percent for FTA-assisted contracts, as detailed in the Overall DBE Goal Calculation for FFYs 2026-2028 included as Attachment 1 to this report. This proposed DBE overall goal is based upon staff's assessment of anticipated FTA-assisted contracting activity for FFYs 2026-2028, and the projected availability of ready, willing, and able DBEs to participate in the activity, in accordance with applicable federal requirements.

Budget Impact

The proposed goal will not impact the budget.

Background

Methodology for Setting the Overall DBE Goal

The DOT regulations pertaining to the DBE Program, Part 26 of Title 49 of the Code of Federal Regulations (the "Regulations"), require DOT grantees to establish an overall triennial goal for DBE participation in federally assisted contracts and prescribe various methods for doing so. For

the next three FFYs, the District expects to award contracts utilizing approximately \$80,255,732 in federal funds, primarily for services related to Redi Wheels Paratransit Service, with a small amount to be used for bus and transit van inspections. Staff also expects that other FTA-assisted contracts will be issued in the next three years that cannot, at this time, be identified, as the FTA funding is being awarded by other entities, such as the California Department of Transportation and Metropolitan Transportation Commission. FTA assistance used in transit vehicle procurements into included in the overall goal.

Staff determined the proposed overall DBE goal by way of a two-step process in accordance with the Regulations. In Step One, staff determined a Base Figure of relative availability of “ready, willing, and able” DBEs in the District's geographic market area (Alameda, Contra Costa, San Francisco, San Mateo, and Santa Clara counties) in all work categories for each federally assisted contract anticipated in FFYs 2026-2028. Data sources used to calculate the relative DBE availability included the Census Bureau’s County Business Pattern database and the California Unified Certification Program database. The District’s Step One Base Figure goal was 1.6 percent.

In Step Two, staff examined all other evidence available in the District’s jurisdiction, such as past participation, to determine whether adjustments to the Step One Base Figure would be appropriate and necessary.

For FFYs 2023-2025, the District’s overall DBE goal was 4.68 percent. This DBE goal was based on four projected capital projects of which, only one is anticipated to be awarded using FTA-assisted funds in August 2025: the South Base Charging Infrastructure Construction Contract. While not initially anticipated in the District’s previous triennial DBE Goal methodology,

99 percent of the District’s federally assisted contracts for FFYs 2023-2025 were for the Redi-Wheels Paratransit Service and contracted urban bus service. Similarly, for the upcoming FFY triennial period, staff anticipate that 99 percent of the FTA funds received by the District will be for the Redi-Wheels Paratransit Service.

Given the anticipated federally assisted contracting opportunities for FFYs 2026-2028 are likely to be very similar to the federally assisted contracts actually awarded by the District during FFYs 2023-2025, staff have determined that past rates of DBE participation are an accurate reflection of DBE capacity for work for the upcoming triennial period. Therefore, consistent with the Regulations and DOT guidance, staff adjusted the Step One Base Figure. The Step Two adjustment is done by adding the Step One base figure of 1.6 percent with the District’s historical median DBE past participation of 0 percent, then dividing that total by two. The result of this Step Two adjustment is a 0.8 percent overall DBE goal.

Race/Gender-Neutral Measures to Achieve the Overall DBE Goal

The Regulations require that the maximum feasible portion of the annual overall DBE goals be achieved using race- and gender-neutral means. Race/gender-neutral DBE participation includes any time a DBE wins a prime contract through customary competitive procurement

procedures or is awarded a subcontract on a prime contract that carries a DBE contract goal. These efforts include utilizing the District's Small Business Enterprise program that consists of providing technical assistance, outreach, and dissemination of contracting information to small businesses. Staff recommend continuing to use race/gender-neutral means to achieve its DBE overall goal for FFYs 2026-2028.

Public Participation

The Regulations require the District to consult with "minority, women's and general contractor groups, community organizations, and other officials or organizations which could be expected to have information concerning the availability of disadvantaged and non-disadvantaged businesses, the effects of discrimination on opportunities for DBEs, and [the District's] efforts to establish a level playing field for the participation of DBEs."

Staff participated in five public consultation events in 2025: two online meetings sponsored by the Business Outreach Committee (BOC) on May 7, a BOC-sponsored in-person meeting at the Metropolitan Transportation Commission on May 13, a District-hosted in-person meeting on June 17, and a Santa Clara Valley Transportation Authority (VTA)-hosted in-person meeting on June 26. More than 200 representatives from DBEs, non-DBEs, small business owners, advocacy organizations, general contractors, professional services contractors, trade association groups, community organizations, and other officials or organizations attended these events. Staff presented information about the District's anticipated projects and DBE participation opportunities, and requested comments on the availability of DBEs, the effects of discrimination on opportunities for DBEs, and efforts made to level the playing field. Comments are included in Attachment 1, Appendix A.

The proposed overall goal was published on the District's website on July 7, 2025, for public comment. Prior to formal adoption of the proposed goal, the District will consider all public comments that it receives, including those that may result from its publication of the proposed goal.

With the Board's adoption, the proposed FFY 2026-2028 overall DBE goal of 0.8 percent and the methodology used to develop that goal will be submitted for approval by the FTA. If changes to the overall DBE goal are required, staff will return to the Board with a revised recommendation. The deadline for the District to submit the proposed FFY 2026-2028 overall DBE goal to the FTA is September 1, 2025.

Prepared By: Michael Wozniak

Manager, Civil Rights Programs

650-508-7915



Proposed DBE Goal FFYs 2026-2028

Item #9.b.3.
8/6/2025



Board of Directors | August 6, 2025

What is a DBE?

Disadvantaged Business Enterprise (DBE) is defined in 49 CFR Part 26 as:

- Small business with less than \$31.84 million in gross annual receipts.
- Majority owned by “socially & economically disadvantaged” individuals.
- Each owner’s personal net worth under \$2.047 million.
- "Any individual who is a citizen (or lawfully admitted permanent resident) of the United States who has been subjected to racial or ethnic prejudice or cultural bias within American society because of their identity as a member of a group and without regard to their individual qualities."

DBE Goal Setting

- DBE goals are set for three federal fiscal years (FFYs).
- Current goal for FFYs 2023-2025 is 4.68%.
- Proposed goal for FFYs 2026-2028 is 0.8%.
- DBE goals are set for federally funded contracting only.
- DBE goals do not include purchases from Transit Vehicle Manufacturers.
- Goals should represent the availability of ready, willing, and able DBEs in the market area.

DBE Goal Setting Methodology

- Methodology is prescribed by federal regulations.
- Step 1 base figure calculation using contract, census and directory data.
- Step 2 adjustments if warranted.
- Race/gender-neutral portion.
- Public consultation.

Step 1: FTA Contracts

Contract Name	FTA Dollar Amount
Inspection Services and Buy America Audits (ISBAA) 29 Fuel Cell Electric Buses	\$179,220
ISBAA 13 Paratransit Vans	\$6,802
ISBAA 26 Paratransit Vans	\$12,854
ISBAA 10 Transit Vans	\$5,376
ISBAA 33 Zero Emission Buses	\$209,880
Redi Wheels Paratransit Service	\$79,841,600
FTA Total	\$80,255,732

Step 1: FTA Scopes

NAICS Code	NAICS Category	FTA Dollar Amount	% of Total
441110	New Car Dealers	\$303,072	0.4%
485991	Special Needs Transportation	\$79,500,407	99.1%
541611	Administrative Management and General Management Consulting	\$414,132	0.5%
811192	Car Wash	\$27,402	0.0%
812331	Linen Supply (Uniforms)	\$10,719	0.0%

Step 1: DBE Availability

- Identify all businesses, including non-DBEs, available to perform the work.
- Identify the available DBEs to perform the work
- Market area: Alameda, Contra Costa, San Francisco, San Mateo, and Santa Clara counties.

Example FFYs 2026-2028 DBE Availability for Consulting Services

$$\frac{117 \text{ market area certified DBE firms}}{3,254 \text{ all market area firms}} = 3.6\% \text{ DBE availability}$$

Step 1: DBE Availability (continued)

NAICS Code	NAICS Category	DBEs Available	All Firms	Relative DBE Availability
441110	New Car Dealers	0	282	0.0%
485991	Special Needs Transportation	1	64	1.6%
541611	Administrative Management and General Management Consulting	117	3,254	3.6%
811192	Car Wash	0	246	0.0%
812331	Linen Supply (Uniforms)	0	14	0.0%

Step 1: Calculate Base Figure

Weighted Base Figure = Weight x Availability

NAICS Category	% of Total FTA Funds	Relative Availability	Weighted Base Figure
New Car Dealers	0.4%	0.0%	0.0%
Special Needs Transportation	99.1%	1.6%	1.6%
Administrative Management and General Management Consulting	0.5%	3.6%	0.0%
Car Wash	0.0%	0.0%	0.0%
Linen Supply (Uniforms)	0.0%	0.0%	0.0%
Weighted Base Figure			1.6%

Step 2: Adjustments

FTA: Examine all available evidence in the jurisdiction to determine what adjustment, if any, is needed to the base figure. Evidence includes:

- Past participation
- Disparity studies
- Goals from other similar agencies
 - AC Transit – 19.5%
 - County Connection- 3.5%
 - Golden Gate – 1.1%
 - Santa Cruz Metro – 0%
 - WestCAT – 2.0%

Step 2: Adjust for Past Participation

- Adjustment of figure represents the median of actual participation over the past three FFYs.
- Median = 0%
- Adjusted Figure= $(0\% + 1.6\%)/2 = 0.8\%$
- Staff determined an adjustment is warranted due to similar types of work performed in recent FFYs.

FFY	DBE Awards
2022	0%
2023	0%
2024	5%

Race/Gender-Neutral Portion

- District must meet the maximum feasible portion of its overall goal by using race/gender-neutral means of facilitating DBE participation.
- Race/gender-neutral = small business enterprise (SBE) preference, outreach, support services, etc.
- Race/gender conscious = DBE contract goals
- Contract goals may not be available due to court cases and executive orders.
- District intends to use only race/gender-neutral methods such as SBE preference and targeted outreach to achieve the proposed overall goal of 0.8%

Public Consultation

- In-person consultation was held June 17, 2025.
- 45 attendees were asked about:
 - The availability of disadvantaged and non-disadvantaged businesses;
 - The effects of discrimination on opportunities for DBEs; and
 - District efforts to establish a level playing field for the participation of DBEs.
- Notice on website invited comments until July 3, 2025.
- Staff presented at four other events with over 200 combined attendees.

Public Comments

Participants were interested in the following:

- Types of contracting opportunities for DBEs.
- Distinction of set-asides for SBEs.
- The preference for race-neutral or race-conscious goals.
- Training or technical assistance offered to DBEs in preparation for contract bids/procurements.
- Improved prime and contractor communication regarding scopes and timelines.
- Potential of more federally funded contracts.



Item #9.b.3.
8/6/2025
Thank You



Please email compliance@samTrans.com with any questions

**San Mateo County Transit District
Staff Report**

To: Finance Committee

Through: April Chan, General Manager/CEO

From: Kate Jordan Steiner, Chief Financial Officer
David Olmeda, Chief Operating Officer

Subject: **Awarding a Contract to Skyline Commercial Interiors, Inc. dba Skyline Construction Inc. to Provide General Construction and Associated Services for the Millbrae Headquarters and Related Ancillary Services at the District's San Carlos Headquarters and Other District Locations for a One-Year Base Term, with up to Two Additional One-Year Option Terms, for a Total Amount of \$7,836,070.85**

Action

Staff proposes that the Finance Committee recommend that the Board of Directors (Board) of the San Mateo County Transit District (District):

1. Award a single-source contract to Skyline Commercial Interiors, Inc. dba Skyline Construction Inc. (Skyline) to provide general construction and associated services (Services) for the new District Headquarters Building in Millbrae, California (Millbrae HQ), and related ancillary services at the District's San Carlos Headquarters (San Carlos HQ) and other District locations, for a one-year base term and up to two additional one-year option terms, for a total amount of \$7,836,070.85.
2. Authorize the General Manager/CEO or designee to execute a contract with Skyline in conformity with the terms and conditions set forth in the negotiated agreement, and in a form approved by legal counsel.
3. Authorize the General Manager/CEO or designee to exercise up to two additional one-year option terms, if in the best interest of the District.

Significance

Skyline is constructing tenant improvements at the Millbrae HQ building under contract with the building's current property owner, and the District's future landlord, Swift Real Estate Partners (Swift). Award of this single-source contract will provide the District with a qualified and experienced general contractor to provide the Services upon substantial completion of Swift's tenant improvement project.

The Services include general construction services, procurement of materials and installation for audio-visual systems, data and telecommunications systems, security systems, artwork, wayfinding, branding, fitness equipment, and a ticket booth at the Millbrae HQ. Additionally, the Services include the privatization of the parking structure at the Millbrae HQ. Finally, the Services include ancillary services related to the District's planned relocation to the new Millbrae HQ at the San Carlos HQ and other District locations.

Budget Impact

On December 18, 2023, pursuant to Resolution No. 2023-59, the Board approved the acquisition of the Millbrae HQ through a lease-to-purchase agreement, including all necessary tenant improvements, for a price not to exceed \$126 million. On December 4, 2024, pursuant to Resolution No. 2024-58, the Board added the "New SamTrans Headquarters" project to the Fiscal Year 2025 Capital Budget for additional tenant improvement costs and other costs not covered by the landlord, and established an associated project budget of \$39.2 million. Funds to support the proposed contract are available in the current adopted project budget.

Background

Millbrae Headquarters Acquisition

In 2023, the District initiated the acquisition of a new headquarters facility in response to the functional obsolescence and significant deferred maintenance of its existing San Carlos HQ Building. Internal evaluations concluded that rehabilitating the current headquarters facility would not be cost-efficient. At the same time, a downturn in the commercial real estate market presented a unique opportunity to secure a high-quality office property at a favorable price. The selected location, 166 Rollins Road in Millbrae, is strategically situated at the intersection of Bay Area Rapid Transit (BART) and Caltrain, aligning with the District's goals around transit-oriented development and supporting employee recruitment and retention, particularly for staff commuting from the East Bay. A lease-to-purchase agreement for the Millbrae HQ facility was executed with the then-owner of the property, Urban Republic Properties (Urban), on December 18, 2023.

Skyline Selection and Continued Engagement

In 2024, the District participated in a competitive solicitation process for general construction services related to initial tenant improvements at the Millbrae HQ facility, led by Urban. During this process, Urban sold the building to Swift. Following the property's transfer to Swift, the District and Swift completed the competitive solicitation process for general construction services related to the initial tenant improvements and selected Skyline based on its competitive pricing, proven performance, and experienced team of subcontractors. Since its selection, Skyline has served as a reliable and collaborative partner in delivering the landlord-managed tenant improvements (referred to as "day 1 work").

As the District prepares to move forward with the next phase of tenant improvements, District-led tenant improvements (referred to as "day 2 work"), there are strong operations and financial reasons to continue Skyline's involvement. The day 2 work includes installation of audio-visual systems, data and telecommunications systems, security systems, artwork,

wayfinding, branding, fitness equipment, a ticket booth, and associated services such as privatization of the parking structure. The day 2 work also will include additional ancillary services at other District-owned properties related to the move to the new Millbrae HQ, including the disassembly and preservation of historic property from the District's current San Carlos HQ as well as other District locations, and reinstallation at the new Millbrae HQ.

The City of Millbrae permits only one general contractor to be active on a building site at a time. Engaging a separate contractor for the day 2 work would require waiting for Skyline to complete its work on landlord-led tenant improvements and demobilize, resulting in an estimated minimum delay of three months. Such a delay would significantly impact project schedules and drive additional costs, including rent payments to Swift before the District can occupy the Millbrae HQ.

Staff successfully negotiated contract terms to provide favorable terms to the District, including pricing that is at least as beneficial to the District as that established during the original solicitation process for landlord-managed tenant improvements. Given the District's prior vetting of Skyline; Skyline's demonstrated performance and cost efficiencies; and the site-specific logistical limitations that apply to the Millbrae HQ project, staff recommends directly engaging Skyline for the District-led day 2 tenant improvement work. This approach ensures cost efficiency, maintains project momentum, and supports the District's goal of relocating to the Millbrae HQ on schedule, while upholding responsible fiscal management.

Prepared By:	Deborah Cordova	Procurement Administrator	650-678-8152
	Zhiming Fan	Director of Infrastructure	650-730-4696

Resolution No. 2025-

**Board of Directors, San Mateo County Transit District
State of California**

* * *

Awarding a Contract to Skyline Commercial Interiors, Inc. dba Skyline Construction Inc. to Provide General Construction and Associated Services for the Millbrae Headquarters and Related Ancillary Services at the District's San Carlos Headquarters and Other District Locations for a One-Year Base Term, with up to Two Additional One-Year Option Terms, for a Total Amount of \$7,836,070.85

Whereas, pursuant to Resolution No. 2023-59, the Board of Directors (Board) authorized the San Mateo County Transit District (District) to enter into a lease-to-purchase agreement for the Gateway at Millbrae Station located at 166 N. Rollins Road, Millbrae, California (Millbrae HQ) to relocate the District's headquarters in response to the San Carlos Headquarters (San Carlos HQ) Building's functional obsolescence and significant deferred maintenance; and

Whereas, the District participated in a competitive solicitation for general construction services related to the landlord-managed tenant improvements needed before the Millbrae HQ can be occupied; and

Whereas, Skyline Commercial Interiors, Inc. dba Skyline Construction Inc. (Skyline) was selected for the work based on its competitive pricing, proven performance, and experienced team of subcontractors to perform landlord-managed tenant improvements; and

Whereas, before it can move into the Millbrae HQ, the District requires additional tenant-led improvements involving general construction services at the Millbrae HQ, and related ancillary services at other District locations (together, the "Services"); and

Whereas, the City of Millbrae permits only one general contractor to be active on a building site at a time; and

Whereas, engaging and procuring a separate contractor to complete District-led tenant improvements would require Skyline to complete its current work, demobilize, obtain an additional permit from the City of Millbrae, leading to schedule impacts and significant cost impacts due to delay up to a minimum of three months, including rent payments without occupancy; and

Whereas, the District solicited and has received a proposal from Skyline to conduct tenant-led improvements, and found the proposal to be responsive and responsible; and

Whereas, the project management team, composed of District staff and consultants, reviewed and evaluated Skyline's proposal in accordance with the criteria set forth in the Scope of Work, and determined Skyline possesses the requisite experience and qualifications to successfully perform the Services; and

Whereas, in delivering the landlord-managed tenant improvements, Skyline has proven to be a reliable and collaborative partner; and

Whereas, Skyline has agreed to honor the competitive rates established during the original solicitation for landlord-led improvements, and District staff has successfully negotiated contract terms, including pricing for the Services; and

Whereas, District staff conducted a price analysis and determined the negotiated prices to be fair, reasonable, and consistent with those charged for similar work and products in the Bay Area; and

Whereas, staff recommends that the Board award a contract to Skyline to provide the Services at Millbrae HQ, San Carlos HQ, and other District locations for a total amount of \$7,836,070.85 for a one-year base term, with up to two additional one-year option terms.

Now, Therefore, Be It Resolved that the Board of Directors of the San Mateo County Transit District hereby awards a single-source contract to Skyline Commercial Interiors, Inc. dba Skyline Construction Inc. for general construction and associated services, which includes general contracting management; procurement of materials; installation of audio-visual, data and telecommunications, and security systems; installation of a ticket booth, artwork, wayfinding, branding, fitness equipment; privatization of the parking structure; and associated services, at the new District Headquarters at the Gateway at Millbrae Station located at 166 N. Rollins Road, Millbrae, California and ancillary related services at other District locations for a total amount of \$7,836,070.85 for a one-year base term, with up to two additional one-year option terms; and

Be It Further Resolved that the Board authorizes the General Manager/CEO or designee to execute a contract on behalf of the District with Skyline to provide the Services in conformity with the terms and conditions set forth in the negotiated agreement, and in a form approved by legal counsel; and

Be It Further Resolved that the Board authorizes the General Manager/CEO or designee to execute up to two additional one-year option terms, if in the best interest of the District.

Regularly passed and adopted this 6th day of August 2025, by the following vote:

Ayes:

Noes:

Absent:

Chair, San Mateo County Transit District

Attest:

District Secretary

**San Mateo County Transit District
Staff Report**

To: Finance Committee

Through: April Chan, General Manager/CEO

From: Kate Jordan Steiner, Chief Financial Officer
David Olmeda, Chief Operating Officer, Bus

Subject: **Authorizing an Agreement with Clark Construction Group - CA, LP for Phase 1 Construction Services under the Construction Manager General Contractor Services for the South Base Battery Electric Bus Charging Infrastructure Project in the Amount of \$36,276,673 and Amending the Fiscal Year 2026 Capital Budget to Increase it by \$13,868,679, from \$4,698,405 to \$18,567,084**

Action

Staff proposes that the Finance Committee recommend that the Board of Directors (Board) of the San Mateo County Transit District (District):

1. Authorize an agreement with Clark Construction Group - CA, LP of San Francisco, California (Clark) for Construction Manager General Contractor (CMGC) Services for the South Base Battery Electric Bus (BEB) Charging Infrastructure Project (Project) for Phase 1 Construction Services (Services) for a total amount of \$36,276,673.
2. Amend to increase the Fiscal Year (FY) 2026 Capital Budget by \$13,868,679, from \$4,698,405 to \$18,567,084, as reflected in Attachment B.
3. Authorize the General Manager/CEO or designee to execute the agreement in full conformity with the terms and conditions set forth in the negotiated agreement, and in a form approved by legal counsel.

Significance

Authorization of this agreement will allow the District's selected CMGC for the Project to perform the construction services required to install charging infrastructure for the District's 37 BEBs operating out of the South Base operations and maintenance facility in San Carlos.

As part of the Services, Clark will continue to partner with the District and the District's Project designer to expand on the deliverables produced by Clark under the Pre-Construction Services Contract. The proposed agreement will require Clark to furnish and install all materials, equipment, tools, labor, and incidentals necessary to complete the construction work for Phase 1 of the Project. More specifically, the Services include, but are not limited to:

- Construction of BEB charging bay gantry structures;
- Procurement and installation of BEB chargers and overhead pantograph dispensers;
- Installation of electrical and communication infrastructure and distribution systems sized to accommodate the optional future construction of Phase 2 of the Project, which would include the installation of chargers for up to an additional 110 BEBs;
- Replacement of existing asphalt paving with concrete; and
- Construction of the South Base entrance gate modifications.

Should the District choose to implement Phase 2 of the Project, staff will return to the Board to request additional approval.

Budget Impact

The Project was originally approved by the Board in Fiscal Year 2022. Since then, the Board has approved a series of budget amendments to increase the Project budget to \$37,506,970 with funding from Measure W Sales Tax and various federal and state funds.

The recommended action proposes a budget amendment to the FY26 Capital Budget by \$13,868,679, from \$4,698,405 to \$18,567,084, to incorporate additional grant funding secured from Bay Area Air Quality Management District (BAAQMD) in the amount of \$13,336,000 and Local Partner Program Competitive (LPP-C) funds in the amount of \$532,679. This adjustment will bring the total Project budget to \$51,375,649.

Funds to support the proposed agreement are included in approved capital budgets and the additional funds included in this recommended budget amendment. Funding sources include the Federal Transit Administration (FTA), LPP-C, and BAAQMD.

Background

In December 2022, pursuant to Resolution No. 2022-85, the Board authorized the use of the CMGC project delivery method for the Project to charge 37 BEBs purchased in accordance with the SamTrans Innovative Clean Transit (ICT) Plan, which guides the District's transition from diesel- and gasoline-powered vehicles to a 100 percent zero-emission fleet by 2040, as mandated by the California Air Resources Board.

In March 2023, at a Board workshop, staff recommended several changes to the ICT Plan, including for the District to defer a decision on which type of zero-emission buses would replace the remaining 110-bus diesel-powered fleet until late 2024, after the District had experience with both BEBs and hydrogen fuel cell electric buses (FCEBs).

In July 2023, pursuant to Resolution No. 2023-39, the Board authorized updating the scope of the Project to include an option to construct charging infrastructure for up to an additional 110 BEBs at South Base. This action would eliminate the need for the District to issue a new solicitation to construct the charging infrastructure for additional BEBs at South Base, should the Board choose to purchase additional BEBs in the future.

In December 2023, the Board approved an update to the ICT Plan to align with staff's recommendations at the March 2023 Board workshop and provide the District with sufficient flexibility to meet the infrastructure needs of either type of zero-emission bus.

In April 2024, pursuant to Resolution No. 2024-11 and at the conclusion of the solicitation of proposals in response to Request for Proposals (RFP) 23-S-C-049, the Board approved staff's recommendation to award a contract for Pre-Construction Services of the Project to Clark for a lump sum amount of \$975,681.

During the Pre-Construction Services, Clark successfully completed its contractual obligations and produced the following deliverables:

- Constructability reviews and constructability means and methods recommendations throughout the Design Development progression process;
- A Final Total Contract Price (TCP) Estimate priced through Phase 1 100 percent Design, dated March 31, 2025;
- A detailed construction schedule for delivery of Phase 1 of the Project; and
- A comprehensive Value Engineering Log with projected savings. (The District then incorporated select items into the Phase 1 100 percent Design).

The District engaged with the San Mateo County Building and Trades Council, trade unions, and Clark regarding the local craft unions' working conditions, wages, and dispute resolution mechanisms for Phase 1 of the Project. As a result, the parties successfully negotiated a Project Labor Agreement (PLA), which was approved by the Board on May 7, 2025, pursuant to Resolution No. 2025-22. Clark and its selected subcontractors will perform Phase 1 of the Project in accordance with the terms of the PLA.

Although the Services were initially contemplated as an amendment to the Pre-Construction Services Contract, staff has prepared the document as a stand-alone agreement, which is consistent with the CMGC statute and the requirements of BAAQMD, the granting entity. The decision to change the structure of the document is not a substantive change to the CMGC structure or the agreement between the parties.

The Office of Civil Rights reviewed Clark's proposed subcontractor list for the Services. Though the District's contract with Clark does not include a Disadvantaged Business Enterprise goal, Clark committed to utilizing one DBE and four certified small businesses.

Additionally, coordination between the District's Facilities and Infrastructure divisions identified a scheduling overlap between the Facilities-led South Base front entrance gate modifications project and Phase 1 of the Project. To optimize efficiency and achieve cost-savings for the District, staff have incorporated the South Base gate modifications projects as part of the scope for the Services, which allows a single contractor to deliver both components. As a result, the front entrance gate modifications project scope has been added to the Project scope.

Staff utilized Independent Cost Estimate services to evaluate Clark's iterative TCP estimates at both the 95 percent design and 100 percent design stages. Based on this analysis, staff have determined the proposed Phase 1 TCP estimate is fair, reasonable, and consistent with pricing for comparable services procured by other public agencies in the Bay Area.

Staff will provide Project updates to the Board at future meetings.

Prepared By: Ehab Azab	Senior Procurement Officer	650-508-7732
Zhiming Fan	Director of Infrastructure	650-508-7771

Resolution No. 2025-

**Board of Directors, San Mateo County Transit District
State of California**

* * *

**Authorizing an Agreement with Clark Construction Group - CA, LP for Phase 1
Construction Services under the Construction Manager General Contractor
Services for the South Base Battery Electric Bus Charging Infrastructure Project
in the Amount of \$36,276,673 and Amending the Fiscal Year 2026 Capital
Budget to Increase it by \$13,868,679, from \$4,698,405 to \$18,567,084**

Whereas, on December 7, 2022, pursuant to Resolution No. 2022-85, the Board of Directors (Board) of the San Mateo County Transit District (District) authorized the use of the Construction Manager General Contractor (CMGC) project delivery method for the South Base Battery Electric Bus (BEB) Charging Infrastructure Project (Project); and

Whereas, on November 8, 2023, the District issued Request for Proposals (RFP) 23-S-C-049 for CMGC Services for the Project, which included both initial pre-construction services (such as design advice, cost estimating, scheduling and construction planning) and optional construction services during later Project phases; and

Whereas, in April 2024, pursuant to Resolution No. 2024-11, the Board awarded the CMGC pre-construction services contract for the Project to Clark Construction Group – CA, LP of San Francisco, California (Clark) for a total lump sum amount of \$975,681; and

Whereas, Clark successfully completed its contractual obligations for the pre-construction services; and

Whereas, the District is ready to proceed to construction of Phase 1 of the Project, which will provide charging infrastructure for the 37 BEBs operating out of the District's South

Base operations and maintenance facility, and which includes, but is not limited to, construction of BEB charging bay gantry structures; procurement and installation of BEB chargers and overhead pantograph dispensers; installation of electrical and communication infrastructure and distribution systems sized to accommodate the optional future construction of Phase 2 of the Project, and replacement of existing asphalt paving with concrete; and

Whereas, the District also desires for Clark to construct South Base entrance gate modifications as part of the same mobilization; and

Whereas, on May 7, 2025, pursuant to Resolution No. 2025-22, the Board authorized the District to execute a Project Labor Agreement (PLA) with the San Mateo County Building and Trades Council, trade unions, and the construction contractor (now identified as Clark) regarding the local craft unions' working conditions, wages, and dispute resolution mechanisms for Phase 1 of the Project; and

Whereas, Clark and the District have agreed to a Final Total Contract Price for construction services required to deliver Phase 1 of the Project, and now desire to enter into an agreement for Phase 1 Construction Services of the Project; and

Whereas, staff conducted a price analysis and determined that Clark's proposed prices to deliver the Phase 1 Construction Services are fair and reasonable; and

Whereas, staff recommends that the Board authorize an agreement to the CMGC contract with Clark for the Phase 1 Construction Services for a total amount of \$36,276,673; and

Whereas, on June 4, 2025, pursuant to Resolution No. 2025-27, the Board adopted the Fiscal Year (FY) 2026 Capital Budget in the amount of \$4,698,405; and

Whereas, staff recommends that the Board amend the FY26 Capital Budget to increase it by \$13,868,679, from \$4,698,405 to \$18,567,084, to incorporate additional grant funding secured from Bay Area Air Quality Management District and Local Partner Program Competitive, along with prior years approved capital budgets to fund the agreement.

Now, Therefore, Be It Resolved that the Board of Directors of the San Mateo County Transit District hereby authorizes an agreement with Clark Construction Group - CA, LP for Construction Manager General Contractor Services for the South Base Battery Electric Bus Charging Infrastructure Project for Phase 1 Construction Services for a total amount of \$36,276,673, which includes furnishing and installing all materials, equipment, tools, labor, and incidentals necessary to complete the construction work for Phase 1 of the Project and the South Base front entrance gate modifications project; and

Be It Further Resolved that the Board hereby amends the Fiscal Year 2026 Capital Budget to increase it by \$13,868,679, from \$4,698,405 to \$18,567,084, as reflected in Attachment B, which is attached hereto and incorporated herein; and

Be It Further Resolved that the Board authorizes the General Manager/CEO or designee to execute the agreement in full conformity with the terms and conditions set forth in the negotiated agreement, and in a form approved by legal counsel.

Regularly passed and adopted this 6th day of August 2025, by the following vote:

Ayes:

Noes:

Absent:

Chair, San Mateo County Transit District

Attest:

District Secretary



San Mateo County Transit District
Fiscal Year 2026 Revised Capital Budget

	PROJECT TITLE	PROJECT DESCRIPTION / SCOPE	FY26 Adopted	FY26 Amendment # 1	FY26 Revised	FUNDING			
						STA SOGR	District Sales Tax (Prior Years' Surpluses)	Measure W Sales Tax (Prior Years' Unallocated)	Other State/Regional
1	REVENUE VEHICLE REPLACEMENT / SUPPORT								
1	Major Bus Components	Purchase new or rebuilt bus parts not accounted for in the operating budget and that exceed \$5,000.	\$ 606,520		\$ 606,520			\$ 606,520	
	Subtotal		\$ 606,520	\$ -	\$ 606,520	\$ -	\$ -	\$ 606,520	\$ -
2	NON-REVENUE VEHICLE REPLACEMENT / SUPPORT								
2	Maintenance Equipment	Procurement of key maintenance equipment, including electric carts, vehicle lifts, diagnostic tools, EV-specific tooling, and safety systems, to replace outdated assets and support maintenance operations for both existing and new bus fleets, including zero-emission vehicles.	\$ 759,353		\$ 759,353			\$ 759,353	
3	Replacement Non-Rev Svc Support Vehicles	Replace (10) 2016 Toyota Siennas and (3) 2016 Ford Fusions with newer hybrid vehicle technology to help the District reduce green house gas emissions.	\$ 479,232		\$ 479,232			\$ 479,232	
	Subtotal		\$ 1,238,585	\$ -	\$ 1,238,585	\$ -	\$ -	\$ 1,238,585	\$ -
3	FACILITIES / CONSTRUCTION								
4	Brewster Office Trailers and Furnishings	Relocate two existing office trailers and furnish two new trailers with office furniture to accommodate District staff at Brewster, supporting CUB/Paratransit operations over a period of 7-10 years.	\$ 136,800		\$ 136,800			\$ 136,800	
5	Concrete Replacement at NB, SB, and Sequoia Station	Replace failed concrete at District properties.	\$ 342,000		\$ 342,000			\$ 342,000	
6	NB and SB Steam Bay Hydraulic Lifts	Assess eight (8) hydraulic lifts at North and South Base steam bays, including equipment functionality and environmental conditions. The review will inform a repair/replacement strategy, which may include replacing in-ground lifts with surface-mounted scissor lifts if warranted.	\$ 256,500		\$ 256,500			\$ 256,500	
7	Replace NB Underground Utilities	Replace corroded utilities (e.g., electrical system) at North Base caused by saltwater intrusion, currently pose safety and environmental risks.	\$ 342,000		\$ 342,000			\$ 342,000	
8	North Base Sewer Line: Assess, Repair, and/or Replace	Assess and remediate the corroded North Base sewer line, in service since 1984, due to saltwater intrusion. Replace the line if necessary to address health and safety risks.	\$ 114,000		\$ 114,000			\$ 114,000	
9	NB and SB In-shop Hydraulic Lifts	Assess 56 in-shop hydraulic lifts at North and South Base to determine condition and develop a repair/replacement strategy.	\$ 342,000		\$ 342,000			\$ 342,000	
	Subtotal		\$ 1,533,300	\$ -	\$ 1,533,300	\$ -	\$ -	\$ 1,533,300	\$ -
4	INFRASTRUCTURE								
15	Battery Electric Bus (BEB) Infrastructure ¹	Complete final design and award a pre-construction services contract to a selected Construction Manager General Contractor (CMGC), and procure long lead BEB infrastructure equipment at South Base for the 37 BEBs. Total Project Budget (Post-Amendment): \$51,375,649	\$ -	\$ 13,868,679	\$ 13,868,679				\$ 13,868,679
	Subtotal		\$ -	\$ 13,868,679	\$ 13,868,679	\$ -	\$ -	\$ -	\$ 13,868,679
5	INFORMATION TECHNOLOGY / ITS								
	Subtotal		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
6	SAFETY AND SECURITY								
10	Base Security	Implement engineering controls to enhance base security, including electronic gate access, key card entry for buildings and off-site restrooms, upgraded lighting, perimeter fencing, and new CCTV systems.	\$ 285,000		\$ 285,000		\$ 285,000		
11	Security Assessment at SamTrans Bases	Fund a consultant to conduct a threat and vulnerability assessment and develop a security plan, including upgrades to CCTV, lighting, gates, locks, and evaluation of cyber threats.	\$ 285,000		\$ 285,000		\$ 285,000		
	Subtotal		\$ 570,000	\$ -	\$ 570,000	\$ -	\$ 570,000	\$ -	\$ -
7	PLANNING / DEVELOPMENT								
12	Capital Contingency Fund	Fund unforeseen capital expenditures such as urgent requests/emergencies, and/or seed funds for studies that need to be done immediately.	\$ 250,000		\$ 250,000		\$ 250,000		
13	Capital Program Management	Fund for programs and project controls support, including monitoring project performance and delivery.	\$ 250,000		\$ 250,000		\$ 250,000		
14	Capital Project Development	Fund activities that include but are not limited to capital budget and programming process, grant development, and development of capital program management systems.	\$ 250,000		\$ 250,000		\$ 250,000		
	Subtotal		\$ 750,000	\$ -	\$ 750,000	\$ -	\$ 750,000	\$ -	\$ -
	GRAND TOTAL		\$ 4,698,405	\$ 13,868,679	\$ 18,567,084	\$ -	\$ 1,320,000	\$ 3,378,405	\$ 13,868,679

Notes

1. \$13,336,000 is funded by Bay Area Air District (BAAD) and \$532,679 is funded by Local Partner Program Competitive (LPP-C)



Authorizing an Agreement for CMGC Services for the South Base Battery Electric Bus Charging Infrastructure Project and Increase the Capital Budget

Item #9.b.5
8/6/2025



Background

- ✓ December 2022: Board authorized use of the CMGC project delivery method for the Project
- ✓ March 2023 Board workshop: staff recommended changes to the ICT Plan, including for the District to defer a decision on which type of zero-emission buses would replace the remaining 110 diesel buses until the District had sufficient experience with both type of ZEBs

Background (cont.)

- ✓ July 2023: Board authorized updating the scope of the Project to include an option to construct charging infrastructure for up to an additional 110 BEBs at South Base
- ✓ December 2023: Board approved an update to the ICT Plan to align with staff's recommendations at the March 2023 Board workshop

BEB Charging Infrastructure Contract Scope

- ✓ Steel infrastructure
- ✓ 37 BEB chargers and overhead pantograph dispensers
- ✓ Electrical and communication infrastructure and distribution systems, including underground infrastructure for additional 110 BEBs Chargers
- ✓ SB New concrete pavement
- ✓ SB New Entrance Gate



BEB Charging Infrastructure Contract Overview

- ✓ CMGC Contract
- ✓ 37 Charging Dispensers
- ✓ Anticipated completion:
Fall 2027
- ✓ Board approved
negotiated PLA in May
2025



Solicitation Process

- ✓ In April 2024, pursuant to Resolution No. 2024-11 and at the conclusion of the solicitation process, the Board approved staff's recommendation to award a contract for Pre-Construction Services under the Construction Manager General Contractor Services for the South Base Battery Electric Bus (BEB) Charging Infrastructure Project to Clark Construction for a lump sum amount of \$975,681
- ✓ Clark successfully completed its contractual obligations and deliverables under the Pre-Construction Services
- ✓ Staff negotiated the Total Contract Price (TCP) with Clark Construction to deliver Phase 1 Construction Services

Price Analysis

Staff conducted a price analysis by utilizing Independent Cost Estimate services to evaluate Clark's iterative TCP estimates at both the 95% design and 100% design stages. Based on this analysis, staff determined the proposed Phase 1 TCP estimate is fair, reasonable, and consistent with pricing for comparable services procured by other public agencies in the Bay Area

Budget Impact

- ✓ Funds to support the proposed agreement are included in approved capital budgets and the additional funds included in this recommended budget amendment
- ✓ Proposed amendment to increase the FY26 Capital Budget by \$13,868,679 to incorporate additional grant funding secured from Bay Area Air District in the amount of \$13,336,000 and Local Partner Program Competitive funds in the amount of \$532,679. This adjustment will bring the total Project budget to \$51,375,649

Proposed Motion

1. **Authorize an agreement with Clark Construction Group - CA, LP for Construction Manager General Contractor Services for the South Base Battery Electric Bus Charging Infrastructure Project for **Phase 1 Construction Services** for a total amount of \$36,276,673.**
2. **Authorize the General Manager/CEO or designee to amend the Fiscal Year (FY) 2026 Capital Budget to increase it by \$13,868,679, from \$4,698,405 to \$18,567,084, as reflected in Attachment B.**
3. **Authorize the General Manager/CEO or designee to execute the agreement in full conformity with the terms and conditions set forth in the negotiated agreement, and in a form approved by legal counsel.**





JEFF GEE, CHAIR
MARIE CHUANG, VICE CHAIR
DAVID J. CANEPA
BROOKS ESSER
MARINA FRASER
RICO E. MEDINA
JOSH POWELL
PETER RATTO
JACKIE SPEIER

APRIL CHAN
GENERAL MANAGER/CEO

AGENDA

San Mateo County Transit District

Strategic Planning, Development, and Sustainability Committee Meeting Committee of the Whole

August 6, 2025 – 3:00 pm

or immediately following the Finance Committee meeting

Bacciocco Auditorium, 2nd Floor
1250 San Carlos Avenue, San Carlos, CA 94070

Committee Members: Rico E. Medina (Chair), Marie Chuang, Peter Ratto

- | | | |
|--------|---|---------------|
| 9.c.1. | Call to Order | |
| 9.c.2. | Approval of Minutes of the Strategic Planning, Development,
and Sustainability Committee Meeting of July 2, 2025 | Motion |
| 9.c.3. | Ride Plus Microtransit Evaluation Key Findings | Informational |
| 9.c.4. | Adjourn | |

Note:

- This Committee meeting may be attended by Board Members who do not serve on this Committee. In the event that a quorum of the entire Board is present, this Committee shall act as a Committee of the Whole. In either case, any item acted upon by the Committee or the Committee of the Whole will require consideration and action by the full Board of Directors as a prerequisite to its legal enactment.
- All items appearing on the agenda are subject to action by the Board. Staff recommendations are subject to change by the Board.

**San Mateo County Transit District
1250 San Carlos Avenue, San Carlos, California**

**Strategic Planning, Development, and Sustainability Committee Meeting /
Committee of the Whole
DRAFT Minutes of July 2, 2025**

Members Present (In Person): M. Chuang, P. Ratto, R. Medina (Chair)

Members Absent: None

Other Board Members Present Constituting Committee of the Whole: D. Canepa, B. Esser, M. Fraser, J. Powell

Other Board Members Present Constituting Committee of the Whole (Via Teleconference): J. Speier

Other Board Members Absent: J. Gee

Staff Present: E. Bit, J. Cassman, A. Chan, C. Espiritu, L. Lumina-Hsu, D. Olmeda, C. Schultz, M. Tolleson, N. Tolmie, M. Tseng

11.c.1. Call to Order

Committee Chair Medina called the meeting to order at 3:45 pm.

11.c.2. Approval of Minutes of the Strategic Planning, Development, and Sustainability Committee Meeting of June 4, 2025

Motion/Second: Esser/Powell

Ayes: Canepa, Esser, Fraser, Medina, Powell, Ratto, Speier, Chuang

Noes: None

Absent: Gee

11.c.3. Adopting the San Mateo County Transit District Fiscal Years 2026-2029 Capital Improvement Plan and Fiscal Years 2026-2035 10-Year Capital Program

Millie Tolleson, Director, Planning, and Chelsea Schultz, Principal Planner, provided the presentation, which included the following:

- Top investment interests: zero emission fleet transition, State of Good Repair (SOGR) projects (fleet replacement, maintenance facility upgrades), customer experience enhancements (bus stop improvements), and service expansion projects (Dumbarton Busway)
- New Capital Reserve Policy and Fund will be developed to support future project delivery and financial planning

Motion/Second: Chuang/Ratto

Ayes: Canepa, Esser, Fraser, Medina, Powell, Ratto, Speier, Chuang

Noes: None

Absent: Gee

11.c.4. Introduction to the Bus Stop Improvement Project Amenity Design Refresh Project

Christopher Espiritu, Principal Planner, and Nicholette Tolmie, Planning Analyst III, provided the presentation, which included the following:

- Bus stop amenities modernization and standardization to improve rider experience, safety, accessibility, maintenance, branding, material consistency, enhanced visibility
- Upcoming continued stakeholder engagement and finalization of amenity concepts

Board Chair Gee joined the meeting at 3:58 pm.

The Committee Members had a robust discussion and staff provided further clarification in response to the committee comments and questions, which included:

Importance of uniformity across jurisdictions, efficiency in implementation, and prioritizing high traffic or underserved stops in the initial phases of roll out.

Public Comment

Roland commented on prioritizing rider safety at bus shelter and inclusion of mobility hubs.

11.c.5. Adjourn – The meeting adjourned at 4:06 pm.

An audio/video recording of this meeting is available online at <https://www.samtrans.com/about-samtrans/video-board-directors-cac>. Questions may be referred to the District Secretary's office by phone at 650-551-6108 or by email to board@samtrans.com.

**San Mateo County Transit District
Staff Report**

To: Strategic Planning, Development, and Sustainability Committee

Through: April Chan, General Manager/CEO

From: Josh Mello, Executive Officer, Planning and Development

Subject: **Ride Plus Microtransit Evaluation Key Findings**

Action

This report is for information only. No action is required.

Significance

SamTrans launched its Ride Plus microtransit service in June 2023. After two years of service operations, SamTrans has undertaken an evaluation of how well Ride Plus is achieving SamTrans's goals to expand mobility, ensure high quality service, provide efficient and sustainable service, and advance equity.

The evaluation team examined trends in ridership, service efficiency, and service quality and reviewed the Ride Plus rider survey conducted in spring 2024. Key findings include:

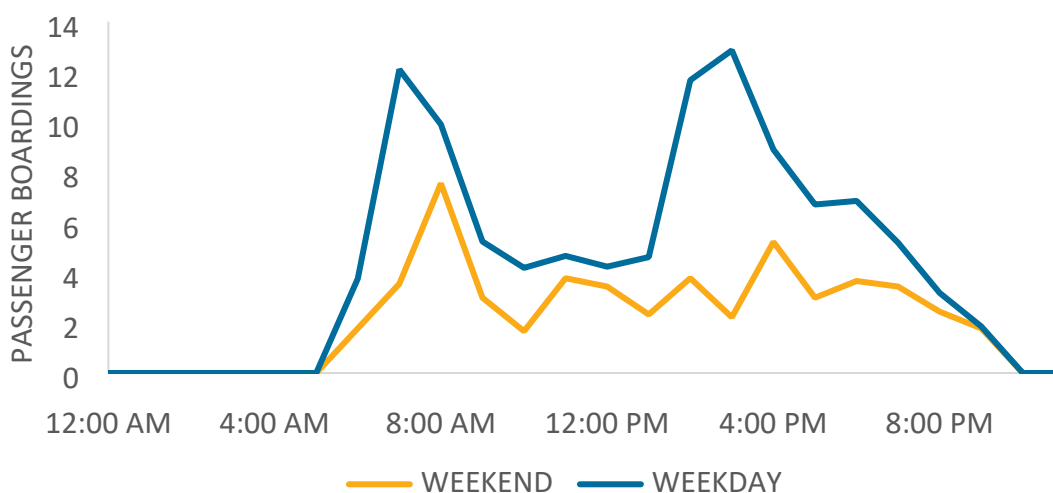
- There is an overall high level of satisfaction with the Ride Plus service. 88 percent of riders rated Ride Plus 5- and 4-stars with an average of 4.3-star rating.
- Ride Plus is broadly performing well. Of the goals with specific metrics, Ride Plus meets most of them. There are opportunities to increase service efficiency and sustainability by increasing the number of pooled, or shared, trips.
- Ride Plus operates at under capacity (1-1.9 passengers/hour) compared to peer agencies (2-3 passengers/hour). There are opportunities to increase ridership into the current system to improve productivity.
- Some customers supported expanding operating hours and service areas.

East Palo Alto/Belle Haven Service Area: This service area is primarily northeast of Highway 101, in the southeast corner of San Mateo County, comprising a roughly triangular three-square miles of land. With an approximate population of 35,000, the East Palo Alto/Belle Haven service area is both more populated and denser than Half Moon Bay, and as such, is served by several SamTrans fixed routes (280, 281, 296, and EPX) in addition to one school-oriented route. Of these, Routes 281 and 296 run every 20 minutes or better, serving the Palo Alto Transit Center

and Redwood City, respectively. Ride Plus service is provided by three vehicles with two shifts per vehicle, from 6:00 a.m. to 10:00 p.m. every day.

Most rides are to and from schools not served by SamTrans school-oriented service and across US-101. East Palo Alto/Belle Haven is averaging 1.6-1.8 riders per service hour, which is lower than other peer microtransit systems¹. The service area has also had consistent ridership since shortly after service started. On average, there have been about 80 passengers per weekday and 40 passengers per weekend day since the service started. Weekday ridership experience peaks at about 7:00 a.m. and 3:00 p.m., mainly due to students taking Ride Plus to and from school or after-school activities, primarily in the opposite direction of the school-oriented services provided at the same time. Mid-day and evening ridership is much lower (Figure 1).

Figure 1 East Palo Alto/Belle Haven Hourly Riders, March 2025

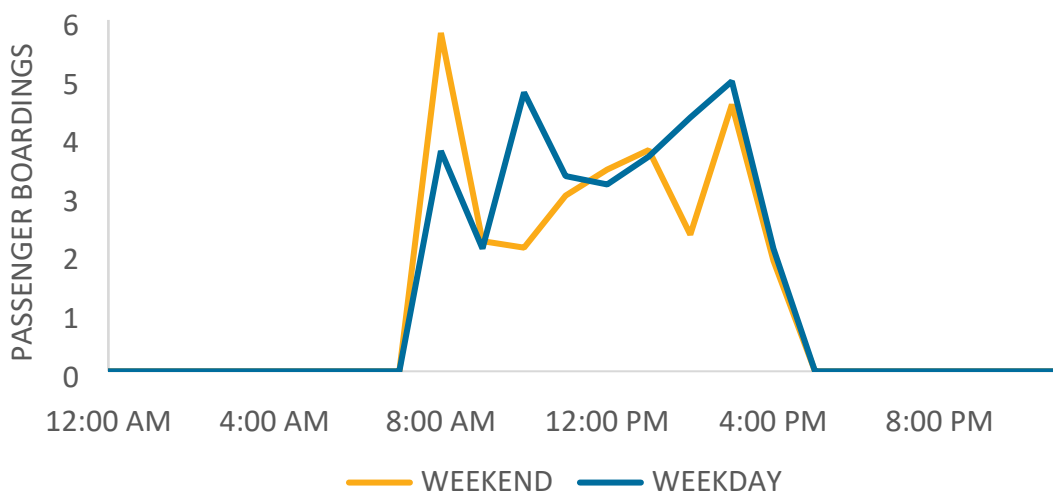


Half Moon Bay/El Granada Service Area: The Half Moon Bay/El Granada service area comprises approximately seven square miles of coastline between the communities of Half Moon Bay and El Granada, a narrow strip which follows Highway 1. Approximately 12,000 residents live in the service area. In addition to Ride Plus, the area is served by two SamTrans fixed routes (the hourly Route 117 to Linda Mar Park & Ride and the hourly Route 294 to Hillsdale Shopping Center), as well as two school-oriented routes. Ride Plus service in the area is provided by two vehicles, with one shift per vehicle, between 8:00 a.m. and 5:00 p.m. every day.

Most rides are between downtown Half Moon Bay and El Granada and between downtown and the Ritz Carlton. There are between 1.5 and 1.8 riders per service hour, which is lower than other peer microtransit systems with 2 to 3 riders per service hour. The Half Moon Bay service area has seen consistent ridership since shortly after the launch of service. On average, there have been around 30 passengers per weekday and about 25 passengers per weekend day. There is consistent ridership throughout the day on all day types, except for the high ridership in the first hour of service at 8:00 a.m., indicating possible demand for earlier service (Figure 2).

¹ Peer agencies include DART's GoLink, LA Metro's Micro, and Pierce Transit's Runner.

Figure 2: Half Moon Bay Hourly Riders, March 2025



Ride Plus Goals: Microtransit is a distinct service from fixed route, so staff developed unique goals to determine if the service is successful. The four goals established in 2024 include expanding mobility, ensuring high quality service, providing efficient and sustainable service, and advancing equity. Data from the first 18 months of service show Ride Plus is achieving those goals (Figures 3-6).

Figure 3. Goal 1

Expand Mobility		
Metric	Target	Result
Trips from locations without fixed-route transit	High	Very few trips made from locations without any fixed-route transit (<1% in East Palo Alto, 5% in Half Moon Bay)
Trips made which connect to fixed-route transit	High	46% of trips in Half Moon Bay 54% of trips in East Palo Alto
Overall transit trips within the zone	Increase	20% larger growth in ridership compared to fixed-route service in Half Moon Bay 7% larger growth in ridership compared to fixed-route service in East Palo Alto

Figure 4. Goal 2

Ensure High Quality Service		
Metric	Target	Result
Average Wait Time	<25 minutes	15-20-minute average wait in both zones, depending on the day
Completed Search Requests	90%	92% in Half Moon Bay 99% in East Palo Alto
High Ratings	High	88% of riders rated 5- and 4-stars, average rating of 4.3
Low Complaints	Low	<5 complaints per month

Figure 5. Goal 3

Provide Efficient and Sustainable Service		
Metric	Target	Result
Pooled Trips	High	45% of trips are pooled
Reduced drive-alone trips	Reduction	20% of survey respondents indicated Ride Plus replaced drive-alone trips

Figure 6. Goal 4

Advance Equity		
Metric	Target	Result
Rider demographics align with priority communities	Serving equity priority areas	Riders are much more likely to be Black, Indigenous, or People of Color (BIPOC) than county average . Low-income household usage was difficult to determine because many riders preferred not to answer.
Reduced transportation costs	Reduce	40% of respondents say they are paying less using Ride Plus compared to non-Ride Plus trips they made before. 22% of riders say they are paying more.

Next Steps: Staff are reviewing potential service adjustments to right size the Ride Plus service, including possible boundary and span expansion and reduction of vehicles during low demand times, with the intention to increase ridership and pooling. Staff will return to the Board of Directors with proposed service modifications.

Budget Impact

No budget impacts.

Background

Ride Plus was recommended as part of Reimagine SamTrans and approved by the Board of Directors in March 2022. In January 2023, the Board approved the initial Ride Plus contract with Transdev. Ride Plus designated two service areas, one in East Palo Alto/Belle Haven and the other in Half Moon Bay/El Granada. Ride Plus launched on June 18, 2023 with a free fare promotion until February 2024. A rider survey was administered by SamTrans and EMC Research in spring 2024.

Prepared By:	Millie Tolleson	Director, Planning	(650) 622-7815
	Kate Christopherson, AICP	Principal Planner, Operations Planning	(650) 622-7877
	Emily Chen	Senior Planner, Operations Planning	(650) 551-6127



Background

March 2022

- Reimagine SamTrans approved

June 2023

- Ride Plus service starts with free fare promotion

Spring 2024

- Ride Plus survey

January 2023

- Ride Plus contract approved

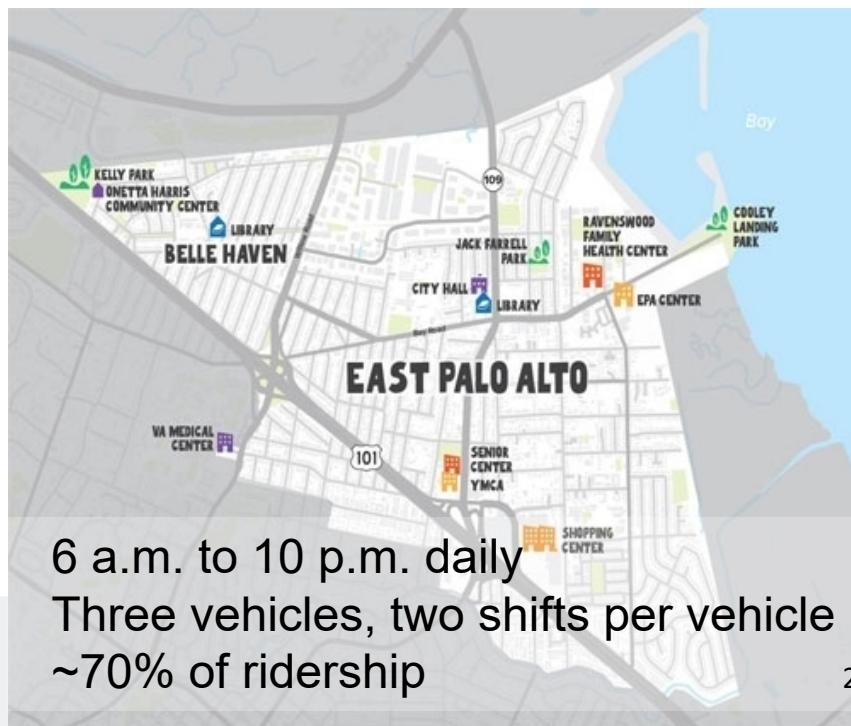
February 2024

- Free fare promotion ends

Spring 2025

- Ride Plus assessment

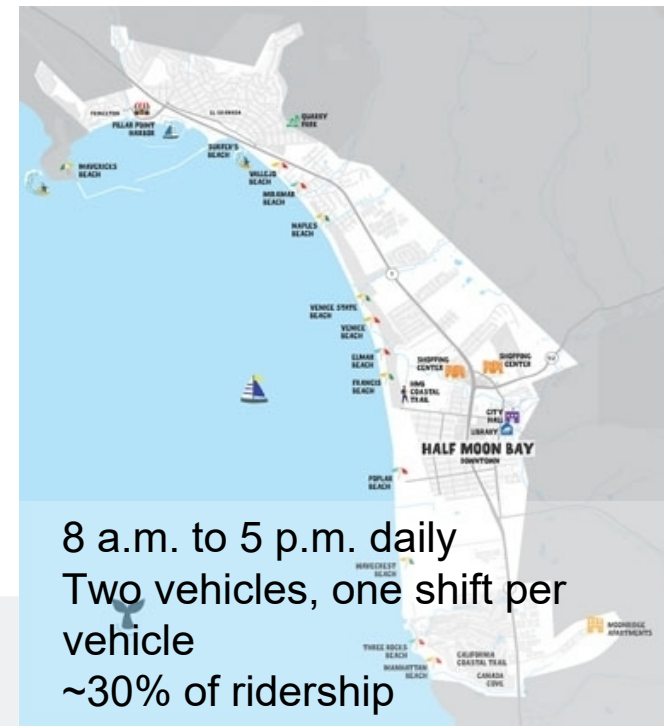
East Palo Alto (pop. 30,000)



6 a.m. to 10 p.m. daily
Three vehicles, two shifts per vehicle
~70% of ridership

245

Half Moon Bay (pop. 11,800)

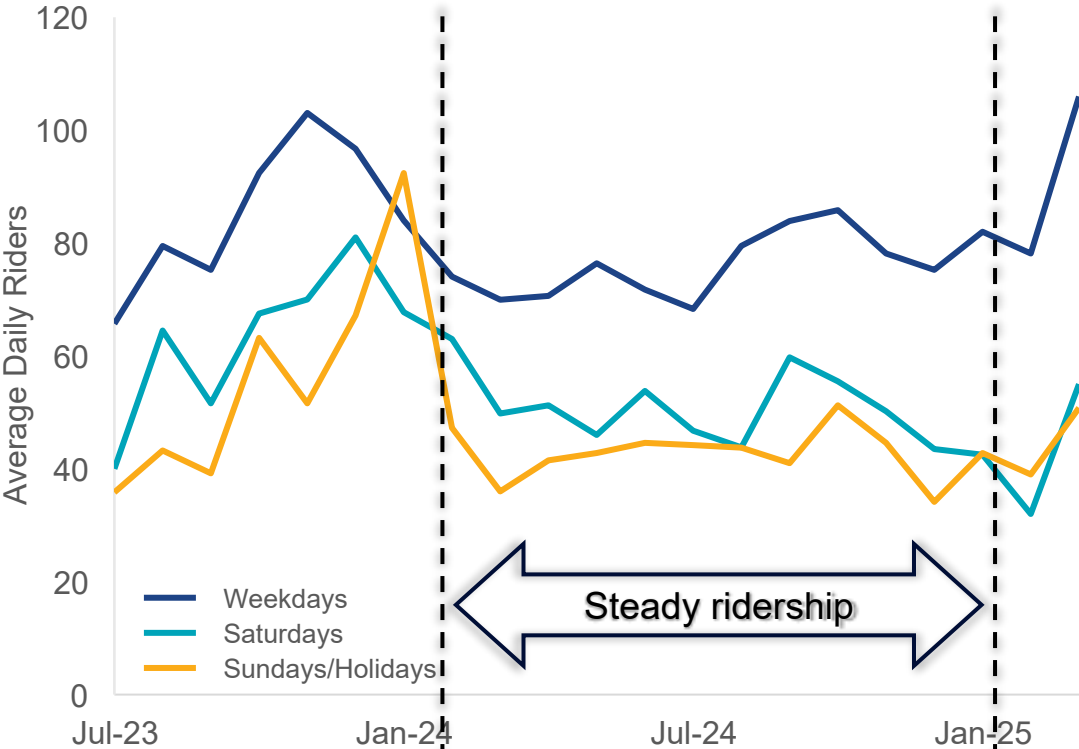


8 a.m. to 5 p.m. daily
Two vehicles, one shift per vehicle
~30% of ridership



East Palo Alto Ridership Trends

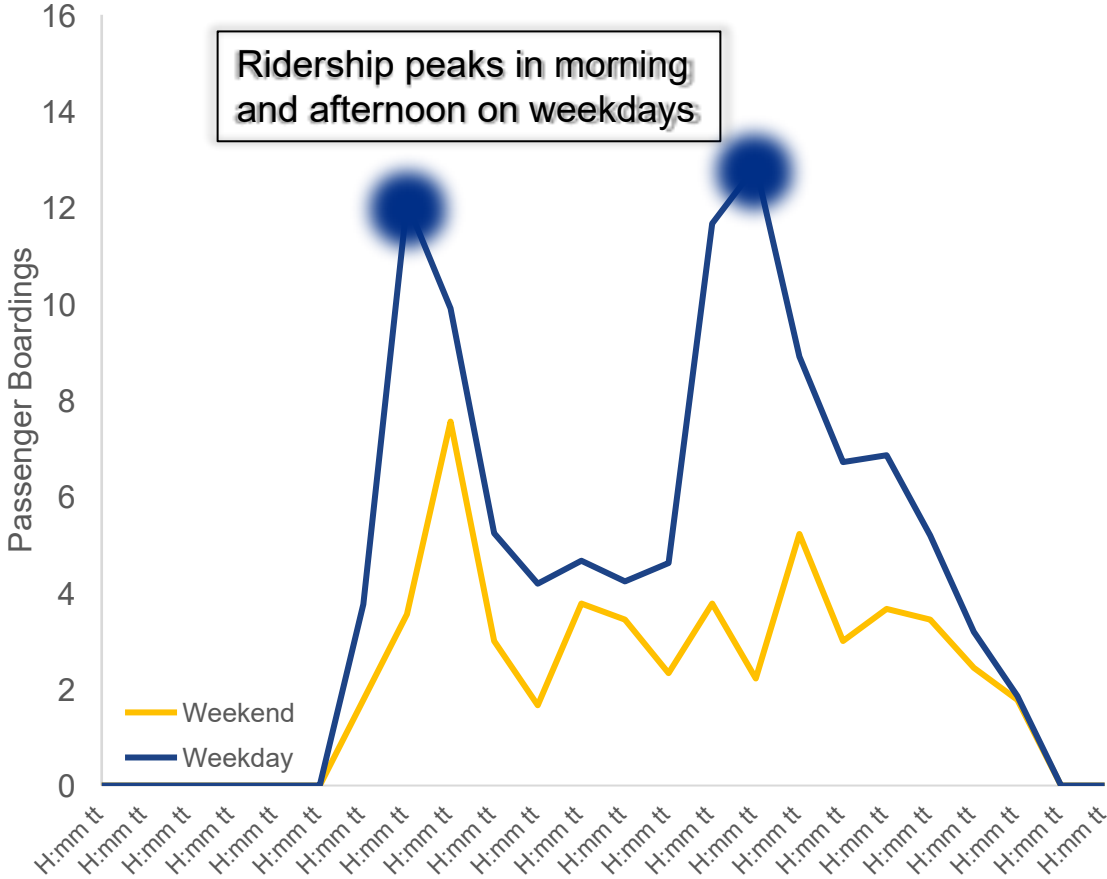
Monthly Ridership



Ridership initially declined once free fare promotion ended

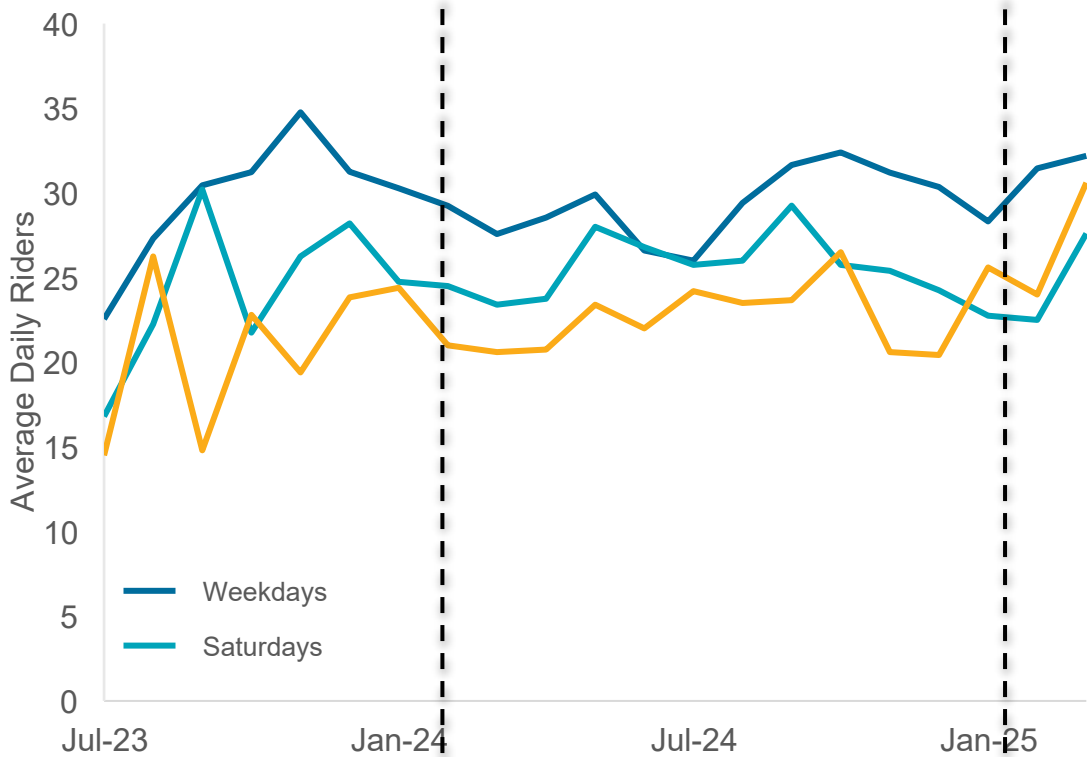
Increasing ridership after marketing push and new app

Hourly Ridership (March 2025)



Half Moon Bay Ridership Trends

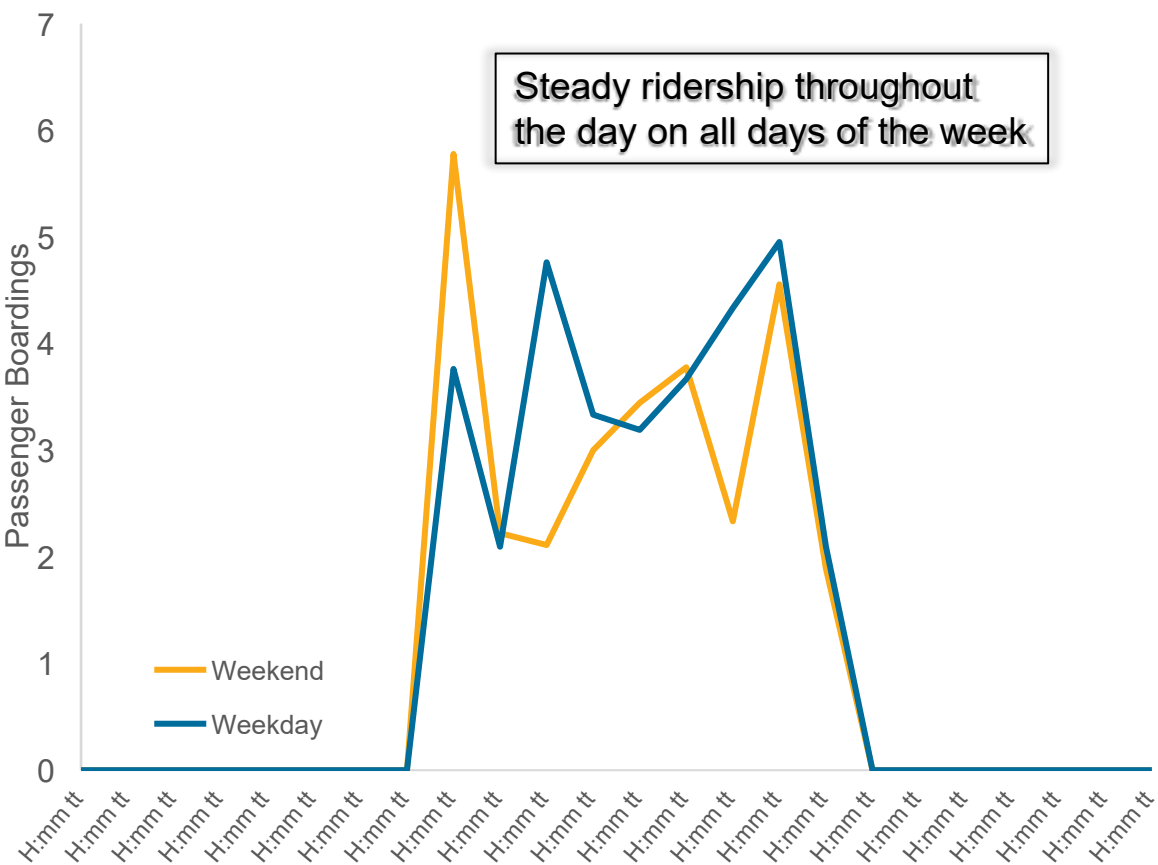
Monthly Ridership



Steady ridership since fare promotion ended

Increasing ridership after marketing push and new app

Hourly Ridership (March 2025)



Steady ridership throughout the day on all days of the week



East Palo Alto Travel Patterns



Ride Plus Origin-Destination Flows

Monthly Passengers

15-29 Monthly Passengers

30-44 Monthly Passengers

45+ Monthly Passengers

SamTrans All-Day Route

Ride Plus Service Area

Miles 0 0.25 0.5



- Highest ridership origin-destination pairs:

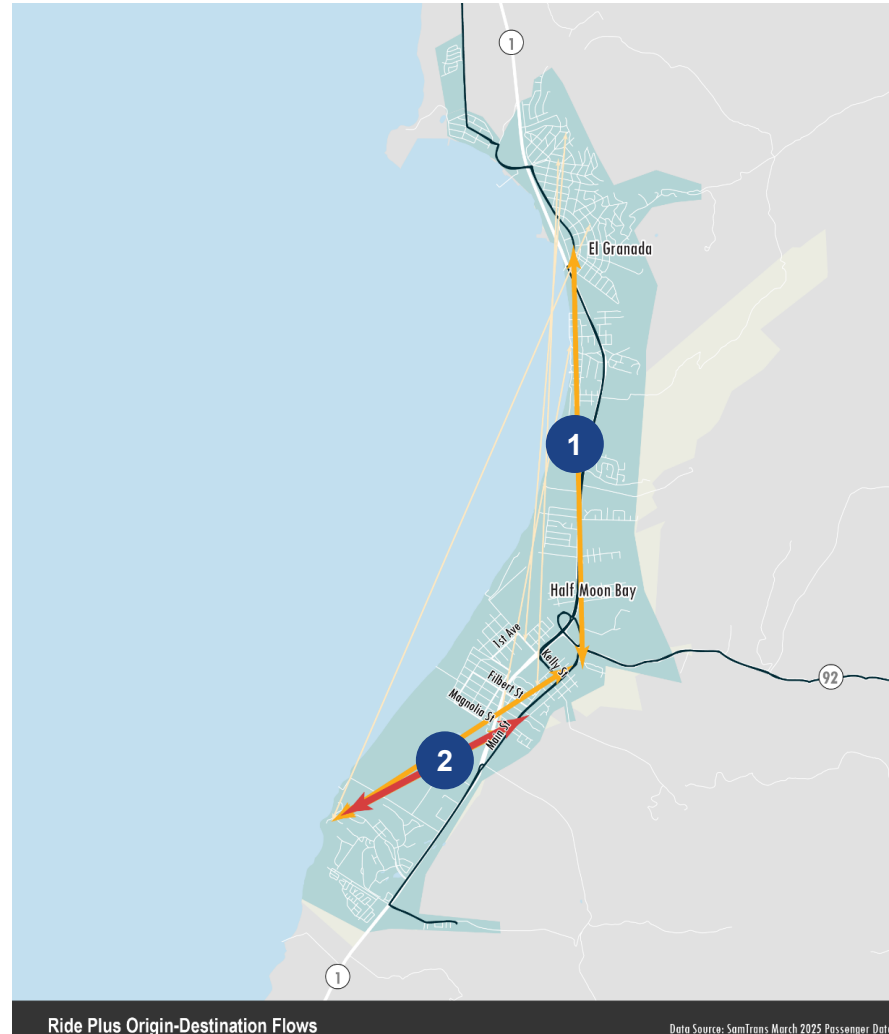
- 1 Silicon Valley Intl School / KIPP Valiant ↔ Boys & Girls Club
- 2 Woodland Ave Apts ↔ Los Robles-Ronald McNair Academy
- 3 Euclid Ave Residential / YMCA ↔ La Scoula Intl School

- Strongest markets:

- Students attending schools not served by SamTrans School-oriented routes
- Cross-freeway trips



Half Moon Bay Travel Patterns



Monthly Passengers

- 15-29 Monthly Passengers
- 30-44 Monthly Passengers
- 45+ Monthly Passengers

SamTrans All-Day Route
Ride Plus Service Area

Miles 0 0.6 1.2



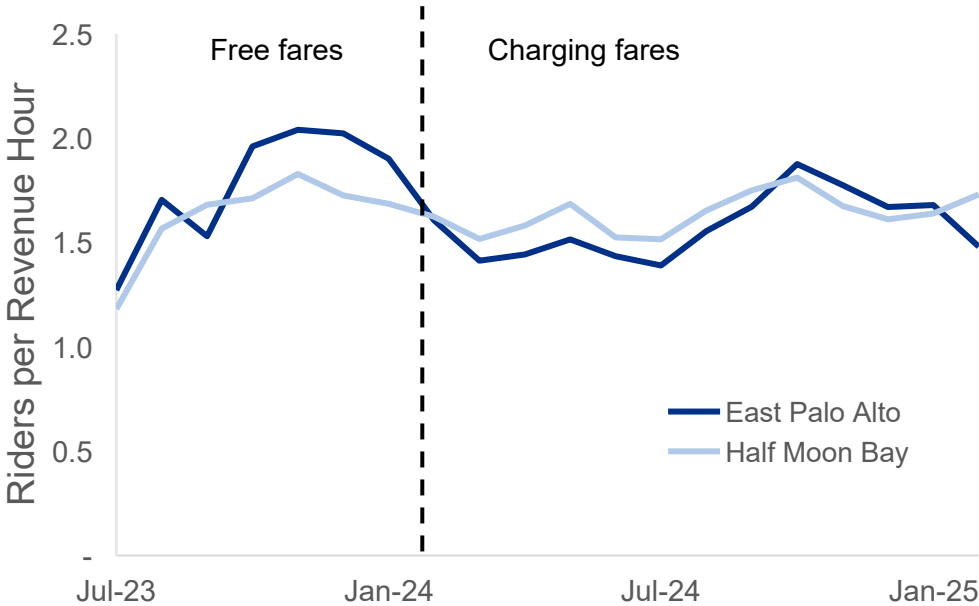
- Highest ridership origin-destination pairs
 - ① Downtown Half Moon Bay ↔ El Granada
 - ② Ritz-Carlton ↔ Downtown Half Moon Bay
- Strongest markets:
 - Consistent, all-day ridership
 - Worker and tourist ridership base



System Productivity

- Ride Plus productivity is lower than peer systems*
- Capacity is underutilized many hours of the day
 - Closer to target on some months

Ride Plus (lower than peers)	Target (average peers)	Upper Achievable Limit (rare)
1.5-1.9 riders/hour	2-3 riders/hour	5 riders/hour



*Peer agencies include DART's GoLink, LA Metro's Micro, and Pierce Transit's Runner.



Rider Feedback

88% of riders are satisfied with service and experience.

- Replaced trips formerly made by fixed-route transit, walking, biking, ride-hail services, or solo driving
- Mainly used for shopping, commuting, and recreation
- Support for expanding service hours
- Support for expanding service areas
 - Other areas of Menlo Park
 - Palo Alto Transit Center
 - Moss Beach
 - Montara

*Ride Plus has **changed my life**. I was trapped at home seven days a week. It has opened my world.*

-Ride Plus customer



Evaluation Goals and Criteria



Expand mobility

- Trips made from locations not served by fixed route (high)
- Trips made that connect to fixed route (high)
- Increase in transit trips in the zone with Ride Plus, compared to prior trips on fixed route alone



Ensure high quality service

- Average wait time (<25 min)
- Completed requests (90%+)
- Star rating for trip (high)
- Star rating for app (high)
- Complaints (low)



Provide efficient and sustainable service

- Pooled trips percentage (high)
- Reduced solo vehicle trips



Advance equity

- Demographics of riders & alignment with equity priority communities (high)
- Reduced transportation costs of riders (compared to other modes they were using)





Expand mobility

Ride Plus helped both service areas achieve larger ridership growth than just fixed-route service alone.

Ridership increase between June 2023-March 2025	East Palo Alto	Half Moon Bay
Fixed-route bus systemwide	Systemwide: +25%	
Fixed-route buses only in Ride Plus service areas	+27%	+38%
Fixed-route buses + Ride Plus in Ride Plus service areas	+35%	+58%

Most Ride Plus trips connected to fixed-route service. *However, few Ride Plus trips provided access to areas not served by fixed-route, and nearly half of trips duplicate an existing fixed route trip.*

	East Palo Alto	Half Moon Bay
Ride Plus trips connecting to fixed-route service	54%	46%
<i>Ride Plus trips not served by fixed-route service</i>	<1%	5%
<i>Ride Plus trips duplicating fixed-route service</i>	46%	49%





Ensure high quality service

- **Ride Plus is meeting all targets.**
- **Riders are satisfied with their trips and app experience.**
- **Complaints are low and not trending upwards.**

Measure	East Palo Alto	Half Moon Bay
Average wait time	~20 minutes	
Completed requests	>99.9%	91-93%
Trip high star rating	94% (86% 5-star and 7% 4-star)	
App high star rating	85% (59% 5-star and 26% 4-star)	



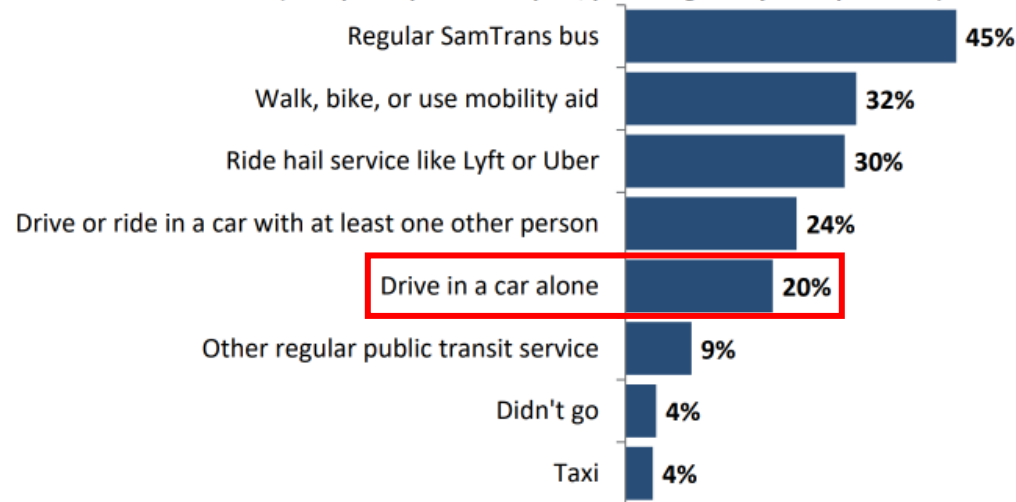


Provide efficient and sustainable service

- Nearly half (40-45%) of trips are shared trips (>1 person in the van at a time).
- 20% of riders report replacing solo vehicle trips with Ride Plus trips.
- 55% of riders did not replace SamTrans fixed-route trips.

Prior to using the Ride Plus service, how did you typically make the trips that you now make with Ride Plus?

(Multiple responses accepted; percentages may not equal 100%)

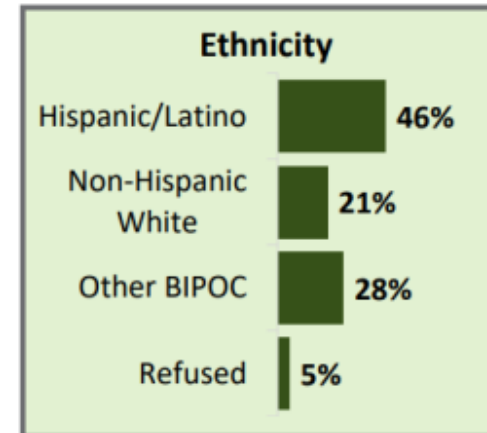




Advance equity

Riders are more likely to be people of color.

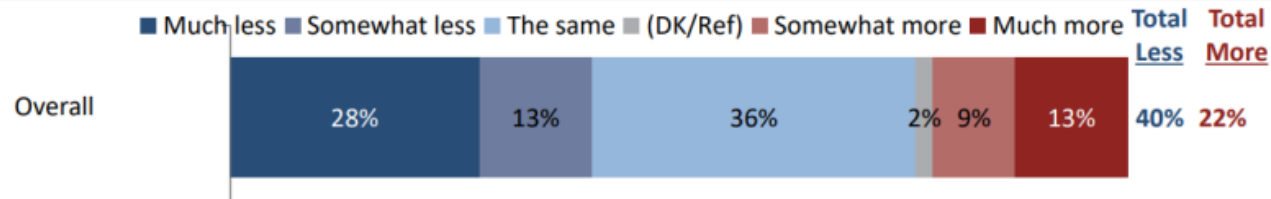
Low-income household usage was hard to determine when large number of riders preferred not to answer.



Riders are saving money with Ride Plus.

40% of riders say they are paying less using Ride Plus compared to trips they made prior to Ride Plus.

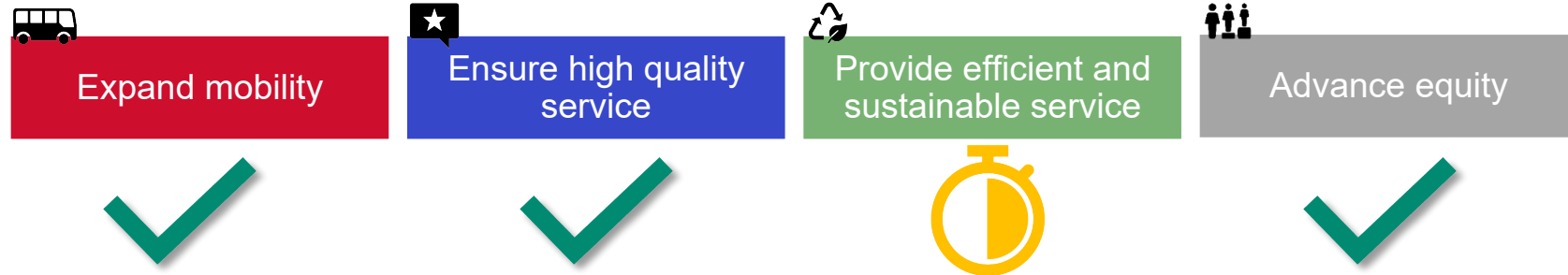
Compared to similar trips you would make prior to using Ride Plus, do you pay more, less, or the same amount when you use Ride Plus?



Key Takeaways

- 88% rider satisfaction 

- Most goals met



- Opportunities to increase ridership and trip pooling 

Opportunities for Service Refinement

- Staff is exploring potential service refinements to increase ridership, boost productivity, and address customer requests:
 - Targeted service area expansions
 - Minor expansions of service hours to meet demand earlier in the day
 - Adjusting use of vehicles throughout the week to better meet demand patterns





Operated by:
transdev
CA# 303695

Thank You

Please email christophersonk@samTrans.com with any questions.

BOARD OF DIRECTORS 2025

JEFF GEE, CHAIR
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MARINA FRASER
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PETER RATTO
JACKIE SPEIER

APRIL CHAN
GENERAL MANAGER/CEO



AGENDA

San Mateo County Transit District

Legislative Committee Meeting Committee of the Whole

August 6, 2025 – 3:15 pm

or immediately following the Strategic Planning, Development, and Sustainability Committee meeting

Bacciocco Auditorium, 2nd Floor
1250 San Carlos Avenue, San Carlos, CA 94070

Committee Members: Josh Powell (Chair), Peter Ratto, Jackie Speier

- 9.d.1. Call to Order
- 9.d.2. Approval of Minutes of the Legislative Committee Meeting of July 2, 2025 Motion
- 9.d.3. Receive Legislative Update and Approve Legislative Proposal: Assembly Bill 1250 (Papan) Motion
- 9.d.4. Receive Updates and Consider Staff Recommendation on Regional Transportation Funding Motion
 - i. Receive Update on and Consider Approval of Caltrain Proposal for Member Agencies' Contributions
 - ii. Receive Update on and Consider Opting In to Senate Bill 63 Regional Transportation Funding Measure
- 9.d.5. Adjourn

Note:

- This Committee meeting may be attended by Board Members who do not serve on this Committee. In the event that a quorum of the entire Board is present, this Committee shall act as a Committee of the Whole. In either case, any item acted upon by the Committee or the Committee of the Whole will require consideration and action by the full Board of Directors as a prerequisite to its legal enactment.
- All items appearing on the agenda are subject to action by the Board. Staff recommendations are subject to change by the Board.

**San Mateo County Transit District
1250 San Carlos Avenue, San Carlos, California**

**Legislative Committee Meeting / Committee of the Whole
DRAFT Minutes of July 2, 2025**

Members Present (In Person): P. Ratto, J. Powell (Chair)

Members Present (Via Teleconference): J. Speier

Members Absent: None

Other Board Members Present Constituting Committee of the Whole: D. Canepa, M. Chuang, B. Esser, M. Fraser, J. Gee, R. Medina

Other Board Members Absent: None

Staff Present: E. Bit, M. Bouchard, J. Cassman, A. Chan, J. Epstein, C. Fromson, L. Lumina-Hsu, D. Olmeda, M. Tseng

11.d.1. Call to Order

Committee Chair Powell called the meeting to order at 4:17 pm.

11.d.2. Approval of Minutes of the Legislative Committee Meeting of June 4, 2025

Motion/Second: Esser/Medina

Ayes: Canepa, Esser, Fraser, Medina, Powell, Ratto, Speier, Chuang, Gee

Noes: None

Absent: None

11.d.3. Receive Legislative Update and Approve Legislative Proposal: Assembly Bill 476 (González)

Jessica Epstein, Director, Government and Community Affairs, provided the presentation, which included the following:

Federal

- Senate and House passed the One Big Beautiful Bill (OB BB)
- House continuation with the Fiscal Year (FY) 2026 Transportation, Housing, and Urban Development (T-HUD) spending bill, subcommittee markup scheduled for July 14 and full committee review scheduled for July 17

State

- Significant budget deficit; affects programs funded through cap-and-trade auction revenues in the Greenhouse Gas Reduction Fund

- Key transit programs under pressure include the Reconnecting Communities/Highways to Boulevards Pilot Program, Zero-Emission Transit Capital Program, and Senate Bill (SB) 125 Competitive Funds
- Advocacy from SamTrans and other agencies in coordination with the California Transit Association (CTA) - agreement to restore budget for greenhouse gas reduction funds and establish a \$750 million in emergency loan capacity for select Bay Area transit agencies
- Assembly Bill (AB) 476 - addresses the growing problem of metal and copper wire theft from public infrastructure, requires junk dealers and recyclers to maintain more detailed transaction records and provide records to law enforcement

Motion/Second: Ratto/Esser

Ayes: Canepa, Esser, Fraser, Medina, Powell, Ratto, Speier, Chuang, Gee

Noes: None

Absent: None

11.d.4. Receive Senate Bill 63 Update

a. San Mateo County Polling Updates

Ms. Epstein and Sarah LaBatt, Senior Principal, EMC Research, provided the presentation, which included the following:

- 2,400 countywide interviews conducted
- 80 percent of participants reported using public transit with 27 percent using public transportation at least once a month
- 60 percent of voters supported a regional tax increase for local or regional transportation investments
- Two-thirds of voters supported the extension of Measure A without increasing the rate
- Over half of voters value high-quality roads and transit services at the expense of increasing taxes. Significant interest in enhanced transit connectivity across the region, road maintenance and pothole repairs, congestion relief
- Voters displayed indifference to the increases presented even if increased tax rates totaled at or above 10 percent
- Coastsiders expressed slight concern around cost and tax burden; sentiment remained directionally supportive

The Committee Members had a robust discussion and staff provided further clarification in response to Committee comments and questions, which included the following:

- Results suggested voters' support of transportation investments, if benefits are clear and tangible
- Favored extension of existing tax, significant drop-in support for slight tax increase; balancing ballot against tax threshold elasticity

- Support for Bay Area Rapid Transit (BART), as voters see transit as broader regional network rather than individual agencies
- Proportionality of surveyed sample based on geography and representation
- Cohesiveness of San Mateo County (SMC) residents' opinions; coastsiders voters showed slightly less support for increased taxes but not substantial difference from rest of SMC
- Influence from economic and political development on public

b. Presentations From Transit Agencies Seeking Senate Bill 63 Funding Regarding Their Fiscal Conditions

Michelle Bouchard, Executive Director and Casey Fromson, Chief of Staff, provided the presentation, which included the following:

- Currently 30 percent of operating deficit from fares covered, 10 Year Strategic Plan projects \$75 million annual operating deficit unaccounted
- Ridership growth strategies: expansion of fare programs, regional coordination, customer experience, compensation for electrification
- One-time funding expected to run out FY27
- If regional measure fails, need to pursue new funding, aggressive cost reduction, service cuts, reduction in force

Julie Kirschbaum, Director of Transportation, San Francisco Municipal Transportation Agency (SFMTA), provided the presentation that included the following:

- 500,000 daily Muni trips, account for 50 percent of all Bay Area ridership
- Declining Muni funding sources; currently using federal and state emergency funding
- Implemented cost control strategies: over \$100 million reduction in staffing costs with minimal layoffs, conversion to self-pay garages, fare and parking price increases (to help bridge \$322 million budget gap), investments in cleanliness and reliability (70 percent decrease in subway breakdowns), increased fare inspection, anticipated Clipper 2 adoption
- Projected deficit \$322 million in FY26-27, growing with inflation
- 11 Muni routes in SMC, 10 percent of SMC transit boardings

The Committee Members had a robust discussion and staff provided further clarification in response to the Committee comments and questions, which included the following:

- Five SamTrans routes to San Francisco primarily caters to SMC residents commuting to and from work
- Approximately 3 percent of Muni riders from SMC, per Metropolitan Transportation Commission (MTC) study
- Prioritization and fund reallocation through Caltrain internal cuts to manage funding shortfalls

c. Term Sheet Proposal on Caltrain Member Agencies Contributions - Discussion and Direction

Ms. Chan provided the presentation, which included the following:

- Term Sheet Proposal from Joint Powers Board (JPB) Ad Hoc Committee on Caltrain Member Agency contributions, outlining the shared responsibility by the three Caltrain counties (San Mateo County, County of San Francisco, and Santa Clara County) for covering Caltrain's deficit
- Cost sharing distributed to the three member agencies using all day boarding formula
- Each county given Measure RR credit
- Santa Clara Valley Transportation Authority (VTA) responsible for 100 percent of fully allocated Gilroy costs
- Ad Hoc Committee proposed alternative anchored to the status quo:
 - Deficits for Caltrain calculated by applying Measure RR funds first. Measure RR funds were approved as a systemwide funding source
 - Cost of Gilroy funded as a systemwide costs
 - Deficit distributed to three counties by all-day formula
- SamTrans drafted response: reserving all prior negotiating term positions of Joint Powers Authority (JPA), deficit shared with member agencies after Measure RR funds calculated

The Committee Members had a robust discussion and staff provided further clarification in response to Committee comments and questions, which included the following:

- Measure RR funding allocations
- Approval of term sheet by five Board members before considering adoption; minimum one Board member per county
- Proposal timeline

Motion/Second: Speier/Medina

Ayes: Canepa, Esser, Fraser, Medina, Powell, Ratto, Speier, Chuang, Gee

Noes: None

Absent: None

Public Comment

Anthony spoke in support of a regional measure and continued negotiations.

Adrian Brandt commented on The Portal as project separate from core system and diesel service part of core system to be VTA responsibility.

Adina Levin, Seamless Bay Area and Friends of Caltrain, spoke in support of SamTrans and JPB reaching an agreement, and impact on local funding.

Roland commented on service to Gilroy, Union Pacific Railroad rail ownership, and Measure RR.

d. Senate Bill 63 Opt In Decision - Discussion

Ms. Epstein provided the presentation, which included the following:

- SB 63 reviewed by Assembly Transportation Committee on July 7; reviewed by Assembly Revenue and Taxation Committee on July 14
- Opt-in at 1/4 or 1/2 cent amount, which agencies to fund and at what level
- If SamTrans opts-out, then it will need to develop new plan for how SamTrans will fund Caltrain's \$32 million annual operating deficit for FY27-FY34 and beyond
 - Pros: Fastest emergency funds, protects Measure A, likely voter approval, preserve neighboring agencies
 - Cons: Raises tax rates in 2026, SMC cities may have sales tax over 10 percent
- 1/4 cent tax generates \$60 million
 - Pros: additional revenue, limit tax burden, cover Caltrain deficit
 - Cons: nine cities tax rates over 10 percent, no transit transformation fund, no return to source for SamTrans, limited BART and Muni support
- 1/2 cent tax generates \$120 million
 - Pros: independently fund Caltrain deficit, flexible return to source funds to District, contributions to BART and Muni protecting service reduction into SMC, best protects Measure A
 - Cons: limits local tax measure appetite, eleven cities tax rate over 10 percent, overreliance potential on 10 to 15 year measure
- SMC funding ranges: Caltrain \$32 million, BART \$25-32 million, Muni \$5-10 million, MTC \$9 million
- SMC rider transit system usage: SamTrans 10 million+, BART 3 million+, Caltrain 2.3 million, Muni 2.2 million
- Muni provides nine routes into SMC to/from Daly City
- Decisions made: July 30 City/County Association of Governments of San Mateo County (C/CAG) Board of Directors (BOD) Special Meeting and TA BOD Special Meeting, August 6 SamTrans BOD Meeting

The Committee Members had a robust discussion and staff provided further clarification in response to Committee comments and questions, which included the following:

- Other counties' contributions, for similar agencies, dependent on service and ridership
- Impact of sales tax on lower socioeconomic status communities, comparison of impact of gross receipts tax affecting 2.5 percent of Bay Area businesses
- Risk of commitment of funds to agencies with no board representation in return
- Risk of delay in attempt to change the tax associated with SB 63 from sales tax to gross receipts tax

- Necessity of final board decision to meet three elements: measure passing, filling the deficit, minimal litigation risk
- Accountability metrics that ensure funded services are maintained
- Polling results show development of more support for BART and regional transit oversight over time

Public Comment

Allison Chang, San Carlos, spoke in support of a regional funding measure and the Central El Camino section of the Grand Boulevard Initiative.

Marc Slakey, Redwood City, spoke against sales tax approach for regional funding measure, in support of a gross receipt tax.

Drew Lobo, Redwood City, spoke in support of opt-in into SB 63 and a gross receipt tax approach.

Richard Sutton, San Mateo, commented on vehicular traffic congestion and in support of SB 63.

Cyrus Hall, San Francisco, spoke in support of opt-in into SB 63 and a gross receipt tax approach.

Sebastian Petty, San Francisco Planning and Urban Research Association (SPUR), San Francisco, spoke in support of SB 63 at a 1/2 cent rate.

Mike Swire, 350 Silicon Valley, San Mateo, commented on community event in support of SB 63 at a 1/2 cent rate.

Phoebe Venkat, Foster City, spoke in support of SB 63 and value of public transit availability for mental health, equity and accessibility.

Bryan Culbertson, Oakland, spoke in support of a regional transit measure and Bay Pass.

Adina Levin spoke in support of opt-in into SB 63 at 1/2 cent sales tax level.

Jenny Michel, Menlo Park, spoke in support of opt-in into SB 63 at 1/2 cent sales tax or a gross receipt tax approach, commented on importance of regional transportation in personal life.

Ryan Williams, Bay Area Forward campaign director, spoke in support of a gross receipt tax approach.

Roland spoke in support of SB 63.

Geronimo Silva, SEIU BART Chief Steward, spoke in support of opt-in into SB 63 with a gross receipt tax approach.

Karen Grove, Menlo Park, spoke in support of SB 63; coordination of fares and schedules; a gross receipt tax approach.

Don Cecil, San Mateo County Economic Development Association (SAMCEDA), commented on SB 63 and regional transportation.

Adrian Brandt commented on a gross receipt tax approach and funding Caltrain, spoke in support of opt-in into SB 63 at 1/2 cent sales tax.

Becca Wilson, Pacifica, spoke on value of Muni in personal life in support of SB 63 with gross receipts tax.

Anthony commented on regional transit funding measure and spoke in support of opt-in into SB 63 at 1/2 sales tax or a gross receipt tax.

Elinor Westfold commented on importance of regional, affordable transportation in support of SB 63 at 1/2 sales tax or gross receipt tax, using revenue for interagency efforts.

Ren Fitzgerald commented on SamTrans deficit and spoke in support of opt-in into SB 63 at 1/2 cent sales tax or gross receipts tax.

Krysta Waldrop, Foster City, spoke in support of SB 63 and value of regional transportation on community and environment.

11.d.5. Adjourn – The meeting adjourned at 7:42 pm.

An audio/video recording of this meeting is available online at <https://www.samtrans.com/about-samtrans/video-board-directors-cac-and-measure-w-coc>. Questions may be referred to the District Secretary's office by phone at 650-551-6108 or by email to board@samtrans.com.

**San Mateo County Transit District
Staff Report**

To: Legislative Committee

Through: April Chan, General Manager/CEO

From: Emily Beach, Chief Communications Officer
Jessica Epstein, Director, Government and Community Affairs

Subject: **Receive Legislative Update and Approve Legislative Proposal:
Assembly Bill 1250 (Papan)**

Action

Staff proposes the Committee:

1. Receive the attached federal and state legislative updates.
2. Approve the recommended San Mateo County Transit District (District) positions on those pieces of legislation designated for action on the attached State Legislative Matrix.

Significance

The 2025 Legislative Program establishes the principles that will guide the legislative and regulatory advocacy efforts. Based on those principles, staff coordinates closely with our federal and state advocates on a wide variety of issues that are considered in Congress and the state legislature. The attached reports highlight the recent issues and actions that are relevant to the Board and specify those bills on which staff proposes that the District take a formal position.

Prepared By: Michaela Wright Petrik Government and Community 650-730-4951
Affairs Officer

San Mateo County Transit District State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
AB 23 DeMaio R The Cost of Living Reduction Act of 2025.	This bill is in the Assembly Utilities & Energy Committee.	Existing law vests the Public Utilities Commission (PUC) with regulatory authority over public utilities, including electrical corporations and gas corporations. Existing law vests the State Energy Resources Conservation and Development Commission (Energy Commission) with various responsibilities for developing and implementing the state's energy policies. This bill, the Cost of Living Reduction Act of 2025, would require the Energy Commission and the PUC to post, and update monthly, dashboards on their internet websites that include the difference in average gasoline prices and the average total price of electricity or natural gas in California compared to national averages, and any California-specific taxes, fees, regulations, and policies that directly or indirectly contribute to higher gasoline and electricity or natural gas prices within the state, as specified. The bill would require the Energy Commission and the PUC, on or before July 1, 2026, to each submit a report to the Legislature on the governmental and nongovernmental drivers of California's higher gasoline prices and higher electricity and natural gas prices, and recommendations for policy changes to reduce the costs associated with those drivers, as specified. If the average price of gasoline in California exceeds 10% of the national average in the preceding quarter, the bill would require all taxes and fees on gasoline, as specified, to be suspended for a period of 6 months, and, if the average price of electricity or natural gas in California exceeds 10% of the national average in the preceding quarter, the bill would require the PUC to suspend the collection of all fees, as specified, charged on electricity and natural gas bills for a period of 6 months. This bill contains other related provisions and other existing laws.	Watch
AB 33 Aguiar-Curry D Autonomous vehicles.	This bill is on the Suspense File in the Senate Appropriations Committee.	Existing law authorizes the operation of an autonomous vehicle on public roads for testing purposes by a driver who possesses the proper class of license for the type of vehicle operated if specified requirements are satisfied. Existing law prohibits the operation of an autonomous vehicle on public roads until the manufacturer submits an application to the Department of Motor Vehicles, as specified, and that application is approved. A violation of the Vehicle Code or a local ordinance adopted pursuant to that code is an infraction. This bill would prohibit the delivery of commercial goods, as defined, directly to a residence or to a business for its use or retail sale through the operation of an autonomous vehicle without a human operator on any highway within the State of California. The bill would declare that a violation of this prohibition is not an infraction and is instead punishable by a civil fine not to exceed \$25,000 for each instance of the violation. The bill would make certain findings and declarations related to these provisions. This bill contains other related provisions.	Watch

San Mateo County Transit District State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
AB 61 Pacheco D Electricity and natural gas: legislation imposing mandated programs and requirements: third-party review.	This bill is in the Senate Appropriations Committee.	Existing law vests the Public Utilities Commission with regulatory authority over public utilities, including electrical corporations and gas corporations. The Public Advocate's Office of the Public Utilities Commission is established as an independent office within the commission to represent and advocate on behalf of the interests of public utility customers and subscribers within the jurisdiction of the commission. This bill would require the office to establish, by January 1, 2027, a program to, upon request of the Legislature, analyze legislation that would establish a mandated requirement or program or otherwise affect electrical or gas ratepayers, as specified. The bill would require the office to develop and implement conflict-of-interest provisions that would prohibit a person from participating in an analysis for which the person knows or has reasons to know that the person has a material financial interest. The bill would repeal these provisions on January 1, 2032.	Watch
AB 102 Gabriel D Budget Act of 2025.	This bill was signed by the Governor on June 27, 2025.	The Budget Act of 2025 would make appropriations for the support of state government for the 2025–26 fiscal year. This bill would amend the Budget Act of 2025 by amending, adding, and repealing items of appropriation and making other changes. This bill would declare that it is to take effect immediately as a Budget Bill.	Watch

San Mateo County Transit District State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
AB 259 Rubio, Blanca D Open meetings: local agencies: teleconferences.	This bill is in the Senate Judiciary Committee.	Existing law, the Ralph M. Brown Act, requires, with specified exceptions, that all meetings of a legislative body, as defined, of a local agency be open and public and that all persons be permitted to attend and participate. The act authorizes the legislative body of a local agency to use teleconferencing, as specified, and requires a legislative body of a local agency that elects to use teleconferencing to comply with specified requirements, including that the local agency post agendas at all teleconference locations, identify each teleconference location in the notice and agenda of the meeting or proceeding, and have each teleconference location be accessible to the public. Existing law, until January 1, 2026, authorizes the legislative body of a local agency to use alternative teleconferencing if, during the teleconference meeting, at least a quorum of the members of the legislative body participates in person from a singular physical location clearly identified on the agenda that is open to the public and situated within the boundaries of the territory over which the local agency exercises jurisdiction, and the legislative body complies with prescribed requirements. Existing law requires a member to satisfy specified requirements to participate in a meeting remotely pursuant to these alternative teleconferencing provisions, including that specified circumstances apply. Existing law establishes limits on the number of meetings a member may participate in solely by teleconference from a remote location pursuant to these alternative teleconferencing provisions, including prohibiting such participation for more than 2 meetings per year if the legislative body regularly meets once per month or less. This bill would extend the alternative teleconferencing procedures until January 1, 2030. This bill contains other related provisions and other existing laws.	Support June 2025
AB 334 Petrie-Norris D Operators of toll facilities: interoperability programs: vehicle information.	This bill is in the Senate Judiciary Committee.	Existing law requires the Department of Transportation, in cooperation with the Golden Gate Bridge, Highway and Transportation District and all known entities planning to implement a toll facility, to develop and adopt functional specifications and standards for an automatic vehicle identification system in compliance with specified objectives, and generally requires any automatic vehicle identification system purchased or installed after January 1, 1991, to comply with those specifications and standards. Existing law authorizes operators of toll facilities on federal-aid highways engaged in an interoperability program to provide, regarding a vehicle's use of the toll facility, only the license plate number, transponder identification number, date and time of the transaction, and identity of the agency operating the toll facility. This bill would instead authorize operators of toll facilities on federal-aid highways engaged in an interstate interoperability program to provide only the information regarding a vehicle's use of the toll facility that is license plate data, transponder data, or transaction data and that is required to implement interstate interoperability.	Watch

San Mateo County Transit District State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
AB 339 Ortega D Local public employee organizations: notice requirements.	This bill is in the Senate Appropriations Committee.	<p>Existing law, the Meyers-Milias-Brown Act, contains various provisions that govern collective bargaining of local represented employees and delegates jurisdiction to the Public Employment Relations Board to resolve disputes and enforce the statutory duties and rights of local public agency employers and employees. Existing law requires the governing body of a public agency to meet and confer in good faith regarding wages, hours, and other terms and conditions of employment with representatives of recognized employee organizations. Existing law requires the governing body of a public agency, and boards and commissions designated by law or by the governing body, to give reasonable written notice, except in cases of emergency, as specified, to each recognized employee organization affected of any ordinance, rule, resolution, or regulation directly relating to matters within the scope of representation proposed to be adopted by the governing body or the designated boards and commissions. This bill would require the governing body of a public agency, and boards and commissions designated by law or by the governing body of a public agency, to give the recognized employee organization no less than 120 days' written notice before issuing a request for proposals, request for quotes, or renewing or extending an existing contract to perform services that are within the scope of work of the job classifications represented by the recognized employee organization. The bill would require the notice to include specified information, including the anticipated duration of the contract. The bill would also require the public agency, if an emergency or other exigent circumstance prevents the public agency from providing the written notice described above, to provide as much advance notice as is practicable under the circumstances. If the recognized employee organization demands to meet and confer after receiving the written notice, the bill would require the public agency and recognized employee organization to meet and confer in good faith within a reasonable time, as specified. By imposing new duties on local public agencies, the bill would impose a state-mandated local program. This bill contains other related provisions and other existing laws.</p>	Watch

San Mateo County Transit District State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
AB 340 Ahrens D Employer-employee relations: confidential communications.	This bill is in the Senate Judiciary Committee.	Existing law that governs the labor relations of public employees and employers, including, among others, the Meyers-Milias-Brown Act, the Ralph C. Dills Act, provisions relating to public schools, and provisions relating to higher education, prohibits employers from taking certain actions relating to employee organization, including imposing or threatening to impose reprisals on employees, discriminating or threatening to discriminate against employees, or otherwise interfering with, restraining, or coercing employees because of their exercise of their guaranteed rights. Those provisions of existing law further prohibit denying to employee organizations the rights guaranteed to them by existing law. This bill would prohibit a public employer from questioning a public employee, a representative of a recognized employee organization, or an exclusive representative regarding communications made in confidence between an employee and an employee representative in connection with representation relating to any matter within the scope of the recognized employee organization's representation. The bill would also prohibit a public employer from compelling a public employee, a representative of a recognized employee organization, or an exclusive representative to disclose those confidential communications to a third party. The bill would not apply to a criminal investigation or when a public safety officer is under investigation and certain circumstances exist.	Watch
AB 370 Carrillo D California Public Records Act: cyberattacks.	This bill was signed by the Governor on July 14, 2025.	The California Public Records Act requires state and local agencies to make their records available for public inspection, except as specified. Existing law requires each agency, within 10 days of a request for a copy of records, to determine whether the request seeks copies of disclosable public records in possession of the agency and to promptly notify the person of the determination and the reasons therefor. Existing law authorizes that time limit to be extended by no more than 14 days under unusual circumstances, and defines "unusual circumstances" to include, among other things, the need to search for, collect, and appropriately examine records during a state of emergency when the state of emergency currently affects the agency's ability to timely respond to requests due to staffing shortages or closure of facilities, as provided. This bill would also expand the definition of unusual circumstances to include the inability of the agency, because of a cyberattack, to access its electronic servers or systems in order to search for and obtain a record that the agency believes is responsive to a request and is maintained on the servers or systems in an electronic format. Under the bill, the extension would apply only until the agency regains its ability to access its electronic servers or systems and search for and obtain electronic records that may be responsive to a request. This bill contains other related provisions and other existing laws.	Watch

San Mateo County Transit District State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
AB 394 Wilson D Public transportation providers.	This bill is in the Senate Judiciary Committee.	Existing law defines a battery as any willful and unlawful use of force or violence upon the person of another. Existing law provides that when a battery is committed against the person of an operator, driver, or passenger on a bus, taxicab, streetcar, cable car, trackless trolley, or other motor vehicle, as specified, and the person who commits the offense knows or reasonably should know that the victim is engaged in the performance of their duties, the penalty is imprisonment in a county jail not exceeding one year, a fine not exceeding \$10,000, or both the fine and imprisonment. Existing law also provides that if the victim is injured, the offense would be punished by a fine not exceeding \$10,000, by imprisonment in a county jail not exceeding one year or in the state prison for 16 months, 2, or 3 years, or by both that fine and imprisonment. This bill would expand this crime to apply to an employee, public transportation provider, or contractor of a public transportation provider. By expanding the scope of an existing crime, the bill would impose a state-mandated local program. This bill contains other related provisions and other existing laws.	Support March 2025
AB 421 Solache D Immigration enforcement: prohibitions on access, sharing information, and law enforcement collaboration.	This bill is in the Assembly Public Safety Committee.	Existing law, the California Values Act, generally prohibits California law enforcement agencies from investigating, interrogating, detaining, detecting, or arresting persons for immigration enforcement purposes. Existing law provides certain limited exceptions to this prohibition, including transfers of persons pursuant to a judicial warrant and providing certain information to federal authorities regarding serious and violent felons in custody. This bill would prohibit California law enforcement agencies from collaborating with, or providing any information in writing, verbally, on in any other manner to, immigration authorities regarding proposed or currently underway immigration enforcement actions when the actions could be or are taking place within a radius of one mile of any childcare or daycare facility, religious institution, place of worship, hospital, or medical office. To the extent this bill would impose additional duties on local law enforcement agencies or officials, the bill would impose a state-mandated local program. This bill contains other related provisions and other existing laws.	Watch

San Mateo County Transit District State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
AB 467 Fong D Open meetings: teleconferences: neighborhood councils.	This bill is in the Senate Judiciary Committee.	Existing law, the Ralph M. Brown Act, requires, with specified exceptions, that all meetings of a legislative body, as defined, of a local agency be open and public and that all persons be permitted to attend and participate. The act generally requires for teleconferencing that the legislative body of a local agency that elects to use teleconferencing post agendas at all teleconference locations, identify each teleconference location in the notice and agenda of the meeting or proceeding, and have each teleconference location be accessible to the public. Existing law also requires that, during the teleconference, at least a quorum of the members of the legislative body participate from locations within the boundaries of the territory over which the local agency exercises jurisdiction, except as specified. Existing law, until January 1, 2026, authorizes specified neighborhood city councils to use alternate teleconferencing provisions related to notice, agenda, and public participation, as prescribed, if, among other requirements, the city council has adopted an authorizing resolution and 2/3 of the neighborhood city council votes to use alternate teleconference provisions, as specified. This bill would extend the authorization for specified neighborhood city councils to use the alternate teleconferencing provisions described above until January 1, 2030. This bill contains other related provisions and other existing laws.	Watch
AB 476 González, Mark D Metal theft.	This bill is in the Senate Appropriations Committee.	Existing law governs the business of buying, selling, and dealing in secondhand and used machinery and all ferrous and nonferrous scrap metals and alloys, also known as “junk.” Existing law requires junk dealers and recyclers to keep a written record of all sales and purchases made in the course of their business, including the place and date of each sale or purchase of junk and a description of the item or items, as specified. Existing law requires the written record to include a statement indicating either that the seller of the junk is the owner of it, or the name of the person they obtained the junk from, as shown on a signed transfer document. Existing law prohibits a junk dealer or recycler from providing payment for nonferrous materials until the junk dealer or recycler obtains a copy of a valid driver’s license of the seller or other specified identification. Existing law requires a junk dealer or recycler to preserve the written record for at least 2 years. Existing law makes a violation of the recordkeeping requirements a misdemeanor. This bill would require junk dealers and recyclers to include additional information in the written record, including the time and amount paid for each sale or purchase of junk made, and the name of the employee handling the transaction. The bill would revise the type of information required to be included in the description of the item or items of junk purchased or sold, as specified. The bill would require the statement referenced above indicating ownership or the name of the person from whom the seller obtained the junk from to be signed and would require the statement to include specified information, including the legal name, date of birth, and place of residence of the seller. The bill would prohibit a junk dealer or recycler from purchasing nonferrous metals from a person under 18 years of age. This bill contains other related provisions and other existing laws.	Support July 2025

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Bill ID/Topic	Location	Summary	Position
AB 939 Schultz D The Safe, Sustainable, Traffic-Reducing Transportation Bond Act of 2026.	This bill is in the Assembly Transportation Committee.	The Highway Safety, Traffic Reduction, Air Quality, and Port Security Bond Act of 2006, approved by the voters as Proposition 1B at the November 7, 2006, statewide general election, authorizes the issuance of bonds in the amount of \$19,925,000,000 pursuant to the State General Obligation Bond Law for specified purposes, including high-priority transportation corridor improvements, State Route 99 corridor enhancements, trade infrastructure and port security projects, schoolbus retrofit and replacement purposes, state transportation improvement program augmentation, transit and passenger rail improvements, state-local partnership transportation projects, transit security projects, local bridge seismic retrofit projects, highway-railroad grade separation and crossing improvement projects, state highway safety and rehabilitation projects, local street and road improvement, congestion relief, and traffic safety. This bill would enact the Safe, Sustainable, Traffic-Reducing Transportation Bond Act of 2026 which, if approved by the voters, would authorize the issuance of bonds in the amount of \$20,000,000,000 pursuant to the State General Obligation Bond Law to finance transit and passenger rail improvements, local streets and roads and active transportation projects, zero-emission vehicle investments, transportation freight infrastructure improvements, and grade separations and other critical safety improvements. The bill would provide for the submission of the bond act to the voters at the November 3, 2026, statewide general election.	Watch
AB 996 Pellerin D Public Resources: sea level rise plans.	This bill is on the Suspense File in the Senate Appropriations Committee.	Existing law requires local governments lying in whole or in part within the coastal zone or within the jurisdiction of the San Francisco Bay Conservation and Development Commission to, on or before January 1, 2034, develop a sea level rise plan with specified required content as part of a local coastal program that is subject to approval by the California Coastal Commission or the San Francisco Bay Conservation and Development Commission. This bill would authorize the applicable commission, when approving a local coastal plan or an amendment to a local coastal plan, to deem existing sea level rise information or plans prepared by a local government to satisfy the content requirements for a sea level rise plan. The bill would provide that local governments are encouraged, on or before January 1, 2029, to consult with the California Coastal Commission, in a voluntary early consultation, regarding sea level rise plans in the preparation of a local coastal program or an amendment to a local coastal program.	Watch

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Bill ID/Topic	Location	Summary	Position
AB 1058 Gonzalez, Jeff R Motor Vehicle Fuel Tax Law: suspension of tax.	This bill is in the Assembly Transportation Committee.	Existing law, the Motor Vehicle Fuel Tax Law, imposes a tax upon each gallon of motor vehicle fuel removed from a refinery or terminal rack in this state, entered into this state, or sold in this state, at a specified rate per gallon. Existing unfair competition laws establish a statutory cause of action for unfair competition, including any unlawful, unfair, or fraudulent business act or practice and unfair, deceptive, untrue, or misleading advertising and acts prohibited by false advertisement laws. This bill would suspend the imposition of the tax on motor vehicle fuels for one year. The bill would require that all savings realized based on the suspension of the motor vehicle fuels tax by a person other than an end consumer, as defined, be passed on to the end consumer, and would make the violation of this requirement an unfair business practice, in violation of unfair competition laws, as provided. The bill would require a seller of motor vehicle fuels to provide a receipt to a purchaser that indicates the amount of tax that would have otherwise applied to the transaction. This bill would also direct the Controller to transfer a specified amount from the General Fund to the Motor Vehicle Fuel Account in the Transportation Tax Fund. By transferring General Fund moneys to a continuously appropriated account, this bill would make an appropriation. This bill contains other related provisions and other existing laws.	Watch

San Mateo County Transit District State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
AB 1067 Quirk-Silva D Public employees' retirement: felony convictions.	This bill is in the Senate Appropriations Committee.	<p>Existing law, the California Public Employees' Pension Reform Act of 2013, requires a public employee who is convicted of any state or federal felony for conduct arising out of, or in the performance of, the public employee's official duties in pursuit of the office or appointment, or in connection with obtaining salary, disability retirement, service retirement, or other benefits, to forfeit all accrued rights and benefits in any public retirement system from the earliest date of the commission of the felony to the date of conviction, and prohibits the public employee from accruing further benefits in that public retirement system. Existing law defines "public employee" for purposes of these provisions to mean an officer, including one who is elected or appointed, or an employee of a public employer. Existing law also requires an elected public officer, who takes public office, or is reelected to public office, on or after January 1, 2006, and who is convicted during or after holding office of any felony involving accepting or giving, or offering to give, any bribe, the embezzlement of public money, extortion or theft of public money, perjury, or conspiracy to commit any of those crimes arising directly out of their official duties as an elected public officer, to forfeit all rights and benefits under, and membership in, any public retirement system in which they are a member, effective on the date of final conviction, as provided. This bill would require a public employer that is investigating a public employee for misconduct arising out of or in the performance of, the public employee's official duties in pursuit of the office or appointment, or in connection with obtaining salary, disability retirement, service retirement, or other benefits, to continue the investigation even if the public employee retires while under investigation, if the investigation indicates that the public employee may have committed a crime. The bill would require a public employer, if the investigation indicates that the public employee may have committed a crime, to refer the matter to the appropriate law enforcement agency, and would then authorize the public employer to close the investigation. Under the bill, if a felony conviction results arising out of any conduct described above, the public employee would forfeit all accrued rights and benefits in any public retirement system pursuant to the provisions governing forfeiture described above. This bill contains other related provisions and other existing laws.</p>	Watch

San Mateo County Transit District State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
AB 1207 Irwin D Climate change: market-based compliance mechanism: price ceiling.	This bill is in the Senate Environmental Quality Committee.	The California Global Warming Solutions Act of 2006 designates the State Air Resources Board as the state agency charged with monitoring and regulating sources of emissions of greenhouse gases and requires the state board to ensure that statewide greenhouse gas emissions are reduced to at least 40% below the 1990 level by 2030. The act, until January 1, 2031, authorizes the state board to adopt a regulation establishing a system of market-based declining aggregate emissions limits for sources or categories of sources that emit greenhouse gases (market-based compliance mechanism) that meets certain requirements. Existing law requires the state board, in adopting the regulation to, among other things, establish a price ceiling for emission allowances sold by the state board. Existing law requires the state board, in establishing the price ceiling, to consider specified factors, including the full social cost associated with emitting a metric ton of greenhouse gases. This bill would require the state board to instead consider the full social cost associated with emitting a metric ton of greenhouse gases, as determined by the United States Environmental Protection Agency in November 2023.	Watch

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Bill ID/Topic	Location	Summary	Position
AB 1243 Addis D Polluters Pay Climate Superfund Act of 2025.	This bill is in the Assembly Judiciary Committee.	The California Global Warming Solutions Act of 2006, until January 1, 2031, authorizes the State Air Resources Board to adopt a regulation establishing a system of market-based declining aggregate emissions limits for sources or categories of sources that emit greenhouse gases (market-based compliance mechanism) that meets certain requirements. Existing law establishes the Greenhouse Gas Reduction Fund and requires all moneys, except for fines and penalties, collected by the state board from the auction or sales of allowances as a part of a market-based compliance mechanism to be deposited into the fund and requires the Legislature to appropriate moneys in the fund for the purpose of reducing greenhouse gas emissions in the state, as provided. Existing law, the California Climate Crisis Act, declares that it is the policy of the state both to achieve net-zero greenhouse gas emissions as soon as possible, but no later than 2045, and achieve and maintain net-negative greenhouse gas emissions thereafter, and to ensure that by 2045, statewide anthropogenic greenhouse gas emissions are reduced to at least 85% below the 1990 levels. This bill would enact the Polluters Pay Climate Superfund Act of 2025 and would establish the Polluters Pay Climate Superfund Program to be administered by the California Environmental Protection Agency to require fossil fuel polluters to pay their fair share of the damage caused by greenhouse gases released into the atmosphere during the covered period, which the bill would define as the time period between the 1990 and 2024 calendar years, inclusive, resulting from the extraction, production, refining, sale, or combustion of fossil fuels or petroleum products, to relieve a portion of the burden to address cost borne by current and future California taxpayers. The bill would require the agency, within 90 days of the effective date of the act, to determine and publish a list of responsible parties, which the bill would define as an entity with a majority ownership interest in a business engaged in extracting or refining fossil fuels that, during the covered period, did business in the state or otherwise had sufficient contact with the state, and is determined by the agency to be responsible for more than 1,000,000,000 metric tons of covered fossil fuel emissions, as defined, in aggregate globally, during the covered period. This bill contains other related provisions and other existing laws.	Watch

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Bill ID/Topic	Location	Summary	Position
AB 1250 Papan D Transit operators: paratransit: recertification of eligibility.	This bill is in the Senate Appropriations Committee.	Under the Mills-Alquist-Deddeh Act, also known as the Transportation Development Act, revenues from a 1/4 percent sales tax in each county are, among other things, available for allocation by the transportation planning agency to transit operators and for community transit services. Existing law requires a transit operator that receives funds through the Mills-Alquist-Deddeh Act and that provides dial-a-ride or paratransit service to provide those services consistent with certain requirements. This bill would prohibit, on and after January 1, 2027, those transit operators from requiring a person who receives, or is eligible to receive, paratransit services based on a disability or medical condition, and whose condition cannot reasonably be expected to improve, to recertify their eligibility, unless the person has a temporary eligibility or there is a review to broaden the person's eligibility, as specified. The bill would require a temporary eligibility to be valid for 180 days or until the date indicated by the person's medical professional, as specified. The bill would prohibit renewal of temporary eligibility more than 6 consecutive times. To the extent the bill would impose additional duties on a local agency, it would impose a state-mandated local program. The California Constitution requires the state to reimburse local agencies and school districts for certain costs mandated by the state. Statutory provisions establish procedures for making that reimbursement. This bill would provide that, if the Commission on State Mandates determines that the bill contains costs mandated by the state, reimbursement for those costs shall be made pursuant to the statutory provisions noted above.	Recommend Support
AB 1268 Macedo R Motor Vehicle Fuel Tax Law: adjustment suspension.	This bill is in the Assembly Transportation Committee.	The Motor Vehicle Fuel Tax Law, administered by the California Department of Tax and Fee Administration, imposes a tax upon each gallon of motor vehicle fuel removed from a refinery or terminal rack in this state, entered into this state, or sold in this state, at a specified rate per gallon. Existing law requires the department to adjust the tax on July 1 each year by a percentage amount equal to the increase in the California Consumer Price Index, as calculated by the Department of Finance. Article XIX of the California Constitution restricts the expenditure of revenues from the Motor Vehicle Fuel Tax Law, Diesel Fuel Tax Law, and other taxes imposed by the state on fuels used in motor vehicles upon public streets and highways to street and highway and certain mass transit purposes. This bill would authorize the Governor to suspend an adjustment to the motor vehicle fuel tax, as described above, scheduled on or after July 1, 2025, upon making a determination that increasing the rate would impose an undue burden on low-income and middle-class families. The bill would require the Governor to notify the Legislature of an intent to suspend the rate adjustment on or before January 10 of that year, and would require the Department of Finance to submit to the Legislature a proposal by January 10 that would maintain the same level of funding for transportation purposes as would have been generated had the scheduled adjustment not been suspended. This bill contains other related provisions and other existing laws.	Watch

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Bill ID/Topic	Location	Summary	Position
AB 1337 Ward D Information Practices Act of 1977.	This bill is in the Senate Judiciary Committee.	Existing law, the Information Practices Act of 1977, prescribes a set of requirements, prohibitions, and remedies applicable to agencies, as defined, with regard to their collection, storage, and disclosure of personal information, as defined. Existing law exempts from the provisions of the act counties, cities, any city and county, school districts, municipal corporations, districts, political subdivisions, and other local public agencies, as specified. This bill would recast those provisions to, among other things, remove that exemption for local agencies, and would revise and expand the definition of “personal information.” The bill would make other technical, nonsubstantive, and conforming changes. Because the bill would expand the duties of local officials, this bill would impose a state-mandated local program. This bill contains other related provisions and other existing laws.	Watch
AB 1340 Wicks D Transportation network company drivers: labor relations.	This bill is in the Senate Appropriations Committee.	Existing law declares the public policy of the state regarding labor organization, including, among other things, that it is necessary for a worker to have full freedom of association, self-organization, and designation of representatives of their own choosing, to negotiate the terms and conditions of their employment, and to be free from the interference, restraint, or coercion of employers of labor, or their agents, in the designation of such representatives or in self-organization or in other concerted activities for the purpose of collective bargaining or other mutual aid or protection. Existing law, the Protect App-Based Drivers and Services Act, added by Proposition 22, as approved by the voters at the November 3, 2020, statewide general election (the initiative), categorizes app-based drivers for network companies, as defined, as independent contractors if certain conditions are met. Existing law requires, among other things, that the network company provide a health care subsidy to qualifying app-based drivers, provide a minimum level of compensation for app-based drivers, and not restrict app-based drivers from working in any other lawful occupation or business. Existing case law holds that specified provisions of the initiative are invalid on separation of powers grounds; however, the court severed the unconstitutional provisions, allowing the rest of the initiative to remain in effect. This bill, the Transportation Network Company Drivers Labor Relations Act, would establish that transportation network company (TNC) drivers have the right to form, join, and participate in the activities of TNC driver organizations of their own choosing to engage in other concerted activities for the purpose of collective bargaining or other mutual aid or protection. The bill would provide that TNC drivers also have the right to refuse to join or participate in the activities of TNC driver organizations. The bill would require the board to enforce these provisions. This bill contains other related provisions and other existing laws.	Watch

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Bill ID/Topic	Location	Summary	Position
AB 1410 Garcia D Public utilities: service outages and updates: alerts.	This bill is in the Senate Appropriations Committee.	Existing law vests the Public Utilities Commission with regulatory authority over public utilities. If the commission finds after a hearing that the rules, practices, equipment, appliances, facilities, or service of any public utility, or the methods of manufacture, distribution, transmission, storage, or supply employed by the public utility, are unjust, unreasonable, unsafe, improper, inadequate, or insufficient, the Public Utilities Act requires the commission to determine and, by order or rule, fix the rules, practices, equipment, appliances, facilities, service, or methods to be observed, furnished, constructed, enforced, or employed. This bill would require each public utility to automatically enroll customers in alerts for service outages and updates. The bill would require customers to be provided with the opportunity to opt-out of any alerts they do not wish to receive, except as provided. The bill would require each public utility to provide information on customers' bills on how to update their preferred contact methods and to allow customers to update their contact information by email or telephone. This bill contains other related provisions and other existing laws.	Watch
SB 30 Cortese D Diesel-powered on-track equipment: decommissioning: resale and transfer restrictions.	This bill is in the Assembly Appropriations Committee.	Existing law provides various provisions applicable to all public transit and transit districts and includes specific requirements applicable to public entities that operate commuter rail or rail transit systems. This bill would prohibit a public entity that owns diesel-powered on-track equipment from selling, donating, or otherwise transferring that equipment for continued use after the public entity decommissions the equipment. The bill would exempt the sale, donation, or transfer of that equipment from the prohibition if certain criteria are satisfied, including, among others, that the equipment is deemed to be in one of specified categories of emissions standards designated by the federal government for locomotives and the public entity certifies that the transaction will lead to a net air quality benefit where the receiving entity will be using the equipment.	Watch

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Bill ID/Topic	Location	Summary	Position
SB 63 Wiener D San Francisco Bay area: local revenue measure: transportation funding.	This bill is in the Assembly Appropriations Committee.	(1)Existing law creates the Metropolitan Transportation Commission as a local area planning agency for the 9-county San Francisco Bay area with comprehensive regional transportation planning and other related responsibilities. Existing law creates various transit districts located in the San Francisco Bay area, with specified powers and duties relating to providing public transit services. This bill would establish the Transportation Revenue Measure District with jurisdiction extending throughout the boundaries of the Counties of Alameda and Contra Costa and the City and County of San Francisco and would require the district to be governed by the same board that governs the commission, thereby imposing a state-mandated local program. The bill would authorize a retail transactions and use tax applicable to the entire district to be imposed by the board of the district or by a qualified voter initiative for a duration of 10 to 15 years, inclusive, and generally in an amount of 0.5%, subject to voter approval at the November 3, 2026, statewide general election. After allocations are made for various administrative expenses, the bill would require an unspecified portion of the proceeds of the tax to be allocated by the commission to initiatives included in a specified commission plan and to the Alameda-Contra Costa Transit District, the Peninsula Rail Transit District, commonly known as Caltrain, the San Francisco Bay Area Rapid Transit District, and the San Francisco Municipal Transportation Agency for operating expenses, and would require the remaining proceeds to be subvned directly to the counties comprising the district for public transportation expenses, as prescribed. This bill contains other related provisions and other existing laws.	Watch
SB 71 Wiener D California Environmental Quality Act: exemptions: environmental leadership transit projects.	This bill is in the Assembly Appropriations Committee.	The California Environmental Quality Act (CEQA) requires a lead agency, as defined, to prepare, or cause to be prepared, and certify the completion of an environmental impact report on a project that it proposes to carry out or approve that may have a significant effect on the environment or to adopt a negative declaration if it finds that the project will not have that effect. CEQA also requires a lead agency to prepare a mitigated negative declaration for a project that may have a significant effect on the environment if revisions in the project would avoid or mitigate that effect and there is no substantial evidence that the project, as revised, would have a significant effect on the environment. CEQA, until January 1, 2030, exempts from its requirements active transportation plans, pedestrian plans, or bicycle transportation plans for the restriping of streets and highways, bicycle parking and storage, signal timing to improve street and highway intersection operations, and the related signage for bicycles, pedestrians, and vehicles. This bill would extend the operation of the above-mentioned exemption indefinitely. The bill would also exempt a transit comprehensive operational analysis, as defined, a transit route readjustment, or other transit agency route addition, elimination, or modification, from the requirements of CEQA. Because a lead agency would be required to determine whether a plan qualifies for this exemption, the bill would impose a state-mandated local program. This bill contains other related provisions and other existing laws.	Support March 2025

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Bill ID/Topic	Location	Summary	Position
SB 79 Wiener D Housing development: transit-oriented development: California Environmental Quality Act: public transit agency land.	This bill is in the Assembly Local Government Committee.	<p>Existing law, the Planning and Zoning Law, requires each county and city to adopt a comprehensive, long-term general plan for the physical development of the county or city, and specified land outside its boundaries, that contains certain mandatory elements, including a land use element and a housing element. Existing law requires that the land use element designate the proposed general distribution and general location and extent of the uses of the land, as specified. Existing law requires that the housing element consist of an identification and analysis of existing and projected housing needs and a statement of goals, policies, quantified objectives, financial resources, and scheduled programs for the preservation, improvement, and development of housing, as specified. Existing law requires that the housing element include, among other things, an assessment of housing needs and an inventory of resources and constraints that are relevant to the meeting of these needs, including an inventory of land suitable for residential development, as provided. Existing law, for the 4th and subsequent revisions of the housing element, requires the Department of Housing and Community Development to determine the existing and projected need for housing for each region, as specified, and requires the appropriate council of local governments, or the department for cities and counties without a council of governments, to adopt a final regional housing need plan that allocates a share of the regional housing need to each locality in the region. This bill would require that a housing development project, as defined, proposed within a specified distance of a transit-oriented development (TOD) stop, as defined, be an allowed use on any site zoned for residential, mixed, or commercial development, if the development complies with applicable requirements, as specified. The bill would establish requirements concerning height limits, density, and floor area ratio in accordance with a development's proximity to specified tiers of TOD stops, as provided. The bill would provide that, for the purposes of the Housing Accountability Act, a proposed development consistent with the applicable standards of these provisions shall be deemed consistent, compliant, and in conformity with prescribed requirements, as specified. The bill would provide that a local government that denies a project meeting the requirements of these provisions located in a high-resource area, as defined, would be presumed in violation of the Housing Accountability Act, as specified, and immediately liable for penalties, as provided. The bill would specify that a development proposed pursuant to these provisions is eligible for streamlined, ministerial approval pursuant to specified law, except that the bill would exempt a project under these provisions from specified requirements, and would specify that the project is required to comply with certain affordability requirements, under that law. This bill contains other related provisions and other existing laws.</p>	Watch

San Mateo County Transit District State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
SB 101 Wiener D Budget Act of 2025.	This bill was signed by the Governor on June 27, 2025.	This bill would make appropriations for the support of state government for the 2025–26 fiscal year. This bill would declare that it is to take effect immediately as a Budget Bill.	Watch
SB 131 Committee on Budget and Fiscal Review Public Resources.	This bill was signed by the Governor on June 30, 2025.	Existing law establishes the Homeless Housing, Assistance, and Prevention program, administered by the Interagency Council on Homelessness, with respect to rounds 1 to 5, inclusive, of the program, and the Department of Housing and Community Development, with respect to round 6 of the program, for the purpose of providing jurisdictions, as defined, with one-time grant funds to support regional coordination and expand or develop local capacity to address their immediate homelessness challenges, as specified. This bill would establish round 7 of the program. The bill would authorize the Department of Finance to augment Item 2240-001-0001 of the Budget Act of 2025 by \$8,000,000 from the General Fund to prepare to administer round 7 of the program, as specified. The bill would require the Department of Finance to provide notification of any augmentation within 10 days to the Joint Legislative Budget Committee. The bill would, effective July 1, 2026, appropriate \$500,000,000, as specified, provided that these funds be disbursed in accordance with specified requirements, including that funds from this appropriation be disbursed to a city, county, tribe, or continuum of care for round 7 of the program after a declaration by the director of the department, in consultation with the Director of Finance, that the department has substantially completed its initial disbursement of round 6 funds to the city, county, tribe, or continuum of care, and that the city, county, tribe, or continuum of care has obligated at least 50% of its total round 6 award. The bill would state the intent of the Legislature to enact future legislation that specifies the parameters for round 7 of the program, as specified. This bill contains other existing laws.	Watch

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Bill ID/Topic	Location	Summary	Position
SB 272 Becker D San Mateo County Transit District: job order contracting: pilot program.	This bill is on the Assembly Floor.	<p>The Local Agency Public Construction Act sets forth procedures that a local agency is required to follow when procuring certain services or work. The act also sets forth specific public contracting requirements for certain transit districts, including the San Mateo County Transit District for construction work contracts. The act authorizes certain local agencies, including school districts and community college districts, to engage in job order contracting, as prescribed. This bill would establish a pilot program to authorize the San Mateo County Transit District to use job order contracting as a procurement method. The bill would impose a \$5,000,000 cap on awards under a single job order contract and a \$1,000,000 cap on any single job order. The bill would limit the term of an initial contract to a maximum of 12 months, with extensions as prescribed. The bill would establish various procedures and requirements for the use of job order contracting under the pilot program. The bill would require the district, on or before January 1, 2030, to submit to the appropriate policy and fiscal committees of the Legislature a report on the use of job order contracting under the bill. The pilot program would be repealed on January 1, 2032. This bill would make legislative findings and declarations as to the necessity of a special statute for the San Mateo County Transit District.</p>	Sponsor February 2025
SB 419 Caballero D Hydrogen fuel.	This bill is in the Assembly Appropriations Committee.	<p>Existing state sales and use tax laws impose a tax on retailers measured by the gross receipts from the sale of tangible personal property sold at retail in this state or on the storage, use, or other consumption in this state of tangible personal property purchased from a retailer for storage, use, or other consumption in this state. The Sales and Use Tax Law provides various exemptions from those taxes. This bill would, on and after July 1, 2026, provide an exemption from the taxes imposed by the Sales and Use Tax Law for the gross receipts from the sale in this state of, and the storage, use, or other consumption in this state of, hydrogen fuel, as defined. This bill contains other related provisions and other existing laws.</p>	Watch
SB 445 Wiener D Transportation: planning: complete streets facilities: sustainable transportation projects.	This bill is in the Assembly Local Government Committee.	<p>Existing law requires the Department of Transportation to improve and maintain the state's highways. Existing law authorizes the department to issue encroachment permits and requires the department to either approve or deny an application from an applicant for an encroachment permit within 60 days of receiving a completed application, as provided. Existing law also requires the department, on or before January 1, 2027, to develop and adopt a project intake, evaluation, and encroachment permit review process for complete streets facilities that are sponsored by a local jurisdiction or a transit agency. This bill would instead require the department to develop and adopt the above-described project intake, evaluation, and encroachment review process on or before February 1, 2027. The bill would also state the intent of the Legislature to amend this bill with legislation that accelerates and makes more reliable third-party permits and approvals for preconstruction and construction activities on sustainable transportation projects.</p>	Watch

San Mateo County Transit District State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
SB 506 Committee on Transportation Transportation: omnibus bill.	This bill is in the Assembly Appropriations Committee.	Existing law establishes the Tri-Valley-San Joaquin Valley Regional Rail Authority for purposes of planning, developing, and delivering cost-effective and responsive transit connectivity between the Bay Area Rapid Transit District's rapid transit system and the Altamont Corridor Express commuter rail service in the Tri-Valley that meets the goals and objectives of the community, as specified. Existing law requires the authority's governing board to be composed of 15 representatives. The bill would replace the Mountain House Community Services District with the City of Mountain House on the authority's governing board. This bill contains other related provisions and other existing laws.	Watch
SB 512 Pérez D District elections: initiatives.	This bill is in the Assembly Elections Committee.	Existing law prescribes the procedures by which a proposed ordinance may be submitted to the governing board of a district by an initiative measure. These procedures do not apply to specified districts, including a district formed under a law that does not provide a procedure for elections. This bill would authorize the voters of any district that has authority to impose a transactions and use tax for transportation purposes to impose a retail transactions and use tax by an initiative measure. The bill would prohibit the initiative tax from exceeding the maximum authorized rate for a tax imposed by an ordinance enacted by the governing body of the district, and the bill would require the initiative measure to contain all spending limitations and accountability standards applicable to a tax imposed by an ordinance enacted by the governing body. To the extent the bill would increase the duties of county elections officials, the bill would impose a state-mandated local program.	Watch
SB 578 Smallwood-Cuevas D California Workplace Outreach Program.	This bill is in the Assembly Appropriations Committee.	Existing law establishes the Department of Industrial Relations within the Labor and Workforce Development Agency to, among other things, foster, promote, and develop the welfare of wage earners, to improve their working conditions, and to advance their opportunities for profitable employment. This bill would, until January 1, 2031, require the department, upon appropriation of funds for this purpose, to establish and maintain the California Workplace Outreach Program to promote awareness of, and compliance with, workplace protections that affect workers. The bill would require the department to issue a competitive request for application to qualified organizations, as defined, to provide education and outreach services to workers and to assist workers to assert their workplace rights. This bill contains other related provisions.	Watch
SB 642 Limón D Employment: payment of wages.	This bill is in the Assembly Appropriations Committee.	Existing law imposes varying requirements upon employers to share the pay scale for a position with an applicant or in a job posting, as provided. Existing law defines "pay scale" as the salary or hourly wage range that the employer reasonably expects to pay for the position. This bill would revise the definition of "pay scale" to mean an estimate of this expected wage range that an employer reasonably expects to pay for the position upon hire and is made in good faith.	Watch

San Mateo County Transit District State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
SB 707 Durazo D Open meetings: meeting and teleconference requirements.	This bill is in the Assembly Local Government Committee.	Existing law, the Ralph M. Brown Act, requires, with specified exceptions, that all meetings of a legislative body, as defined, of a local agency be open and public and that all persons be permitted to attend and participate. This bill would, until January 1, 2030, require an eligible legislative body, as defined, to comply with additional meeting requirements, including that, except as specified, all open and public meetings include an opportunity for members of the public to attend via a 2-way telephonic service or a 2-way audiovisual platform, as defined, and that the eligible legislative body take specified actions to encourage residents to participate in public meetings, as specified. This bill contains other related provisions and other existing laws.	Watch
SB 714 Archuleta D Zero-emission vehicles: workforce development: Clean Energy Workforce Training Council.	Pending referral to policy committee.	Existing law, upon appropriation by the Legislature, establishes the position of Deputy Secretary for Climate within the Labor and Workforce Development Agency, to be appointed by the Governor and subject to confirmation by the Senate, for the purpose of assisting in the oversight of California's workforce transition to a sustainable and equitable carbon-neutral economy. Existing law requires the deputy secretary to perform specified duties, including creating or coordinating programs with other state agencies to retrain and upskill workers for, among other jobs, clean energy jobs, as specified. This bill would state the intent of the Legislature to enact legislation that would establish a zero-emission vehicle workforce development pilot project and a Clean Energy Workforce Training Council, as provided.	Watch
SB 735 Committee on Local Government Validations.	This bill was signed by the Governor on July 14, 2025.	This bill would enact the First Validating Act of 2025, which would validate the organization, boundaries, acts, proceedings, and bonds of the state and counties, cities, and specified districts, agencies, and entities. This bill contains other related provisions.	Watch

San Mateo County Transit District State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
SB 741 Blakespear D Coastal resources: coastal development permit: exemption: Los Angeles-San Diego-San Luis Obispo Rail Corridor.	This bill is in the Assembly Natural Resources Committee.	The California Coastal Act of 1976, which is administered by the California Coastal Commission, requires any person wishing to perform or undertake any development in the coastal zone, as defined, to obtain a coastal development permit from a local government or the commission. Existing law exempts from that coastal development permitting process certain emergency projects undertaken, carried out, or approved by a public agency to maintain, repair, or restore existing highways, as provided. This bill would expand that exemption to include certain emergency projects undertaken, carried out, or approved by a public agency to maintain, repair, or restore existing railroad track along the Los Angeles-San Diego-San Luis Obispo Rail Corridor, as provided. This bill would make legislative findings and declarations as to the necessity of a special statute for the Los Angeles-San Diego-San Luis Obispo Rail Corridor.	Watch

San Mateo County Transit District
State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
AB 35 Alvarez D California Environmental Quality Act: clean hydrogen transportation projects.	This is a two-year bill.	The California Environmental Quality Act (CEQA) requires a lead agency, as defined, to prepare, or cause to be prepared, and certify the completion of an environmental impact report on a project that it proposes to carry out or approve that may have a significant effect on the environment or to adopt a negative declaration if it finds that the project will not have that effect. CEQA also requires a lead agency to prepare a mitigated negative declaration for a project that may have a significant effect on the environment if revisions in the project would avoid or mitigate that effect and there is no substantial evidence that the project, as revised, would have a significant effect on the environment. This bill would provide for limited CEQA review of an application for a discretionary permit or authorization for a clean hydrogen transportation project, as defined, by requiring the application to be reviewed through a clean hydrogen environmental assessment, unless otherwise requested by the applicant, as prescribed. The bill would, except as provided, require the lead agency to determine whether to approve the clean hydrogen environmental assessment and issue a discretionary permit or authorization for the project no later than 270 days after the application for the project is deemed complete. By imposing new duties on a lead agency, this bill would create a state-mandated local program. The bill would repeal these provisions on January 1, 2036. This bill contains other related provisions and other existing laws.	Watch
AB 99 Ta R Electrical corporations: rates.	This is a two-year bill.	Existing law vests the Public Utilities Commission with regulatory authority over public utilities, including electrical corporations. Existing law authorizes the commission to fix the rates and charges for every public utility and requires that those rates and charges be just and reasonable. This bill would prohibit an electrical corporation from proposing a rate increase above the rate of inflation, as defined, as a systemwide average for any general rate case cycle, except the bill would expressly authorize the commission to approve a rate increase above the rate of inflation if the commission determines that the costs underlying the rate increase are directly related to safety enhancements and modernization or to higher commodity or fuel costs. This bill contains other related provisions and other existing laws.	Watch

San Mateo County Transit District State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
AB 541 DeMaio R California Public Records Act Ombudsperson.	This is a two-year bill.	<p>Existing law, the California Public Records Act, requires state and local agencies to make their records available for public inspection, unless an exemption from disclosure applies. The act declares that access to information concerning the conduct of the people's business is a fundamental and necessary right of every person in this state. This bill would, until January 1, 2029, and subject to appropriation, establish the Office of the California Public Records Act Ombudsperson. The bill would require the Governor to appoint the ombudsperson subject to certain requirements. The bill would require the ombudsperson to receive and investigate requests for review, as defined, determine whether the denials of original requests, as defined, complied with the California Public Records Act, and issue written opinions of its determination, as provided. The bill would require the ombudsperson to create a process to that effect, and would authorize a member of the public to submit a request for review to the ombudsperson consistent with that process. The bill would require the ombudsperson, within 30 days from receipt of a request for review, to make a determination, as provided, and would require the state agency to provide the public record if the ombudsperson determines that it was improperly denied. The bill would require the ombudsperson to create a process through which a person whose information is contained in a record being reviewed may intervene to assert their privacy and confidentiality rights, and would otherwise require the ombudsperson to maintain the privacy and confidentiality of records, as provided. The bill would require the ombudsperson to report to the Legislature, on or before March 31, 2027, and annually thereafter, on, among other things, the number of requests for review the ombudsperson has received in the prior year.</p>	Watch
AB 778 Chen R Local Agency Public Construction Act: internet website posting.	This is a two-year bill.	<p>Existing law, the Local Agency Public Construction Act, sets forth the requirements for the payment of construction projects by local agencies. Existing law, the State Contract Act, imposes specified requirements on state agencies regarding payment of construction contracts, including requiring, within 10 days of making a construction contract payment, a state agency that maintains an internet website to post on its internet website the project for which the payment was made, the name of the construction contractor or company paid, the date the payment was made or the date the state agency transmitted instructions to the Controller or other payer to make the payment, the payment application number or other identifying information, and the amount of the payment. Existing law exempts from these provisions, among other things, construction contracts valued below \$25,000. This bill would require a local agency that maintains an internet website to post on its internet website the information described above. The bill would exempt from these provisions construction contracts valued below \$25,000. The bill would prohibit a local agency that fails to comply with these provisions from withholding any retention proceeds from any remaining payment, as specified. By adding to the duties of local agencies, the bill would impose a state-mandated local program. This bill contains other related provisions and other existing laws.</p>	Watch

San Mateo County Transit District State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
AB 810 Irwin D Local government: internet websites and email addresses.	This is a two-year bill.	Existing law requires that a local agency that maintains an internet website for use by the public to ensure that the internet website uses a “.gov” top-level domain or a “.ca.gov” second-level domain no later than January 1, 2029. Existing law requires that a local agency that maintains public email addresses to ensure that each email address provided to its employees uses a “.gov” domain name or a “.ca.gov” domain name no later than January 1, 2029. Existing law defines “local agency” for these purposes as a city, county, or city and county. This bill would recast these provisions by instead requiring a city, county, or city and county to comply with the above-described domain requirements and by deleting the term “local agency” from the above-described provisions. The bill would also require a special district, joint powers authority, or other political subdivision to comply with similar domain requirements no later than January 1, 2031. The bill would allow a community college district or community college to use a “.edu” domain to satisfy these requirements, and would specify that these requirements do not apply to a K–12 public school district. By adding to the duties of local officials, the bill would impose a state-mandated local program. This bill contains other related provisions and other existing laws.	Watch

San Mateo County Transit District
State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
AB 941 Zbur D California Environmental Quality Act: electrical infrastructure projects.	This is a two-year bill.	<p>The California Environmental Quality Act (CEQA) requires a lead agency, as defined, to prepare, or cause to be prepared, and certify the completion of an environmental impact report on a project that it proposes to carry out or approve that may have a significant effect on the environment or to adopt a negative declaration if it finds that the project will not have that effect. CEQA also requires a lead agency to prepare a mitigated negative declaration for a project that may have a significant effect on the environment if revisions in the project would avoid or mitigate that effect and there is no substantial evidence that the project, as revised, would have a significant effect on the environment. CEQA exempts certain projects from its requirements, including actions necessary to prevent or mitigate an emergency. Existing law prohibits an electrical corporation from beginning the construction of a line, plant, or system, or extensions of those facilities without first obtaining from the Public Utilities Commission a certificate that the present or future convenience and necessity require or will require the construction. Existing law specifies that the certificate is not required for the extension, expansion, upgrade, or other modification of existing electrical transmission facilities. This bill would require the commission to determine whether to certify the environmental impact report for an electrical infrastructure project that is a priority project, as defined, no later than 270 days after the commission determines that an application for an electrical infrastructure project is complete, except as specified. The bill would require a project applicant to identify an electrical infrastructure project that is a priority project and the basis for the designation in the application to the commission. The bill would require commission staff to review an application for a priority project no later than 30 days after it is filed and notify the applicant in writing of any deficiencies in the information and data submitted in the application. The bill would require the applicant to correct any deficiencies or notify the commission in writing why it is unable to, to correct those deficiencies, as specified, within 60 days of that notification. The bill would require the commission to deem an application for a priority project complete with a preliminary ruling setting the scope and schedule, as provided. This bill contains other related provisions and other existing laws.</p>	Watch

San Mateo County Transit District State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
AB 1070 Ward D Transit districts: governing boards: compensation: nonvoting members.	This is a two-year bill.	Existing law provides for the formation of various transit districts and specifies the duties and powers of their governing boards. Existing law authorizes a transit district to compensate a member of the governing board for attending a board meeting and for engaging in other district business, as provided. This bill would prohibit a transit district from compensating a member of the governing board unless the member demonstrates personal use of the transit system, as specified. The bill would require the governing board of a transit district to include 2 nonvoting members and 4 alternate nonvoting members, as specified. The bill would require nonvoting members and alternate nonvoting members to have certain rights and protections, including the right to attend and participate in all public meetings of the governing board, except as specified. The bill would require the chair of the governing board of a transit district to exclude these nonvoting members from meetings discussing, among other things, negotiations with labor organizations. By expanding the duties of transit districts, the bill would impose a state-mandated local program. This bill contains other related provisions and other existing laws.	Watch
AB 1132 Schiavo D Department of Transportation: climate change vulnerability assessment: community resilience assessment.	This is a two-year bill.	Existing law establishes the Department of Transportation to, among other things, plan, design, construct, operate, and maintain the state highway system, as provided. Pursuant to that authority, the department developed 12 district-based Climate Change Vulnerability Assessment reports designed to provide the department with a comprehensive database to help in evaluating, mitigating, and adapting to the effects of increasing extreme weather events on the state transportation system. This bill would require the department, on or before January 1, 2029, to identify key community resilience indicators for measuring the impacts of climate-induced transportation disruptions, as specified. The bill would also require the department, on or before January 1, 2030, to include in the Climate Change Vulnerability Assessment reports an evaluation of the broader social and economic impacts on communities connected to the evaluated infrastructure risks, as specified.	Watch

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Bill ID/Topic	Location	Summary	Position
AB 1198 Haney D Public works: prevailing wages.	This is a two-year bill.	Existing law requires that, except as specified, not less than the general prevailing rate of per diem wages, determined by the Director of Industrial Relations, be paid to workers employed on public works projects. Existing law requires the body awarding a contract for a public work to obtain from the director the general prevailing rate of per diem wages for work of a similar character in the locality in which the public work is to be performed, and the general prevailing rate of per diem wages for holiday and overtime work, for each craft, classification, or type of worker needed to execute the contract. Under existing law, if the director determines during any quarterly period that there has been a change in any prevailing rate of per diem wages in a locality, the director is required to make that change available to the awarding body and their determination is final. Under existing law, that determination does not apply to public works contracts for which the notice to bidders has been published. This bill would instead state, commencing July 1, 2026, that if the director determines, within a semiannual period, that there is a change in any prevailing rate of per diem wages in a locality, that determination applies to any public works contract that is awarded or for which notice to bidders is published after July 1, 2026. The bill would authorize any contractor, awarding body, or specified representative affected by a change in rates on a particular contract to, within 20 days, file with the director a verified petition to review the determination of that rate, as specified. The bill would require the director to, upon notice to the interested parties, initiate an investigation or hold a hearing, and, within 20 days after the filing of that petition, except as specified, make a final determination and transmit the determination in writing to the awarding body and to the interested parties. The bill would make that determination issued by the director effective 10 days after its issuance, and until it is modified, rescinded, or superseded by the director.	Watch
AB 1372 Papan D Renewable electrical generation facilities: electrified commuter railroads: regenerative braking: net billing.	This is a two-year bill.	Existing law vests the Public Utilities Commission with regulatory authority over public utilities, including electrical corporations. Existing law requires every electric utility, except as provided, to develop a standard contract or tariff providing for net energy metering, and to make this standard contract or tariff available to eligible customer-generators using renewable electrical generation facilities, as specified. Pursuant to its authority, the commission issued a decision revising net energy metering tariff and subtariffs, commonly known as the net billing tariff. This bill would include the regenerative braking from electric trains as a renewable electrical generation facility for those purposes, as provided.	Watch

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Bill ID/Topic	Location	Summary	Position
AB 1421 Wilson D Vehicles: Road Usage Charge Technical Advisory Committee.	This is a two-year bill.	Existing law requires the Chair of the California Transportation Commission to create a Road Usage Charge Technical Advisory Committee in consultation with the Secretary of Transportation to guide the development and evaluation of a pilot program assessing the potential for mileage-based revenue collection as an alternative to the gas tax system. Existing law additionally requires the Transportation Agency, in consultation with the commission, to implement the pilot program, as specified. Existing law repeals these provisions on January 1, 2027. This bill would extend the operation of the above-described provisions until January 1, 2035. The bill would also make related findings and declaration.	Watch
AB 1472 Hart D California Sea Level Rise State and Regional Support Collaborative.	This is a two-year bill.	Existing law creates within the Ocean Protection Council the California Sea Level Rise State and Regional Support Collaborative to provide state and regional information to the public and support to local, regional, and other state agencies for the identification, assessment, planning, and, where feasible, the mitigation of the adverse environmental, social, and economic effects of sea level rise within the coastal zone, as provided. This bill would make a nonsubstantive change to this provision.	Watch

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Bill ID/Topic	Location	Summary	Position
SB 239 Arreguín D Open meetings: teleconferencing: subsidiary body.	This is a two-year bill.	Existing law, the Ralph M. Brown Act, requires, with specified exceptions, that all meetings of a legislative body, as defined, of a local agency be open and public and that all persons be permitted to attend and participate. The act generally requires for teleconferencing that the legislative body of a local agency that elects to use teleconferencing post agendas at all teleconference locations, identify each teleconference location in the notice and agenda of the meeting or proceeding, and have each teleconference location be accessible to the public. Existing law also requires that, during the teleconference, at least a quorum of the members of the legislative body participate from locations within the boundaries of the territory over which the local agency exercises jurisdiction, except as specified. Existing law, until January 1, 2026, authorizes specified neighborhood city councils to use alternate teleconferencing provisions related to notice, agenda, and public participation, as prescribed, if, among other requirements, the city council has adopted an authorizing resolution and 2/3 of the neighborhood city council votes to use alternate teleconference provisions, as specified This bill would authorize a subsidiary body, as defined, to use alternative teleconferencing provisions and would impose requirements for notice, agenda, and public participation, as prescribed. The bill would require the subsidiary body to post the agenda at each physical meeting location designated by the subsidiary body, as specified. The bill would require the members of the subsidiary body to visibly appear on camera during the open portion of a meeting that is publicly accessible via the internet or other online platform, as specified. The bill would also require the subsidiary body to list a member of the subsidiary body who participates in a teleconference meeting from a remote location in the minutes of the meeting. This bill contains other related provisions and other existing laws.	Support June 2025

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Bill ID/Topic	Location	Summary	Position
SB 496 Hurtado D Advanced Clean Fleets Regulation: appeals advisory committee: exemptions.	This is a two-year bill.	<p>Existing law requires the State Air Resources Board to adopt and implement motor vehicle emission standards, in-use performance standards, and motor vehicle fuel specifications for the control of air contaminants and sources of air pollution that the state board has found necessary, cost effective, and technologically feasible. The California Global Warming Solutions Act of 2006 establishes the state board as the state agency responsible for monitoring and regulating sources emitting greenhouse gases and requires the state board to adopt rules and regulations to achieve the maximum technologically feasible and cost-effective greenhouse gas emission reductions from those sources. Pursuant to its authority, the state board has adopted the Advanced Clean Fleets Regulation, which imposes various requirements for transitioning local, state, and federal government fleets of medium- and heavy-duty trucks, other high-priority fleets of medium- and heavy-duty trucks, and drayage trucks to zero-emission vehicles. The Advanced Clean Fleets Regulation authorizes entities subject to the regulation to apply for exemptions from its requirements under certain circumstances. This bill would require the state board to establish the Advanced Clean Fleets Regulation Appeals Advisory Committee by an unspecified date for purposes of reviewing appeals of denied requests for exemptions from the requirements of the Advanced Clean Fleets Regulation. The bill would require the committee to include representatives of specified governmental and nongovernmental entities. The bill would require the committee to meet monthly and would require recordings of its meetings to be made publicly available on the state board's internet website. The bill would require the committee to consider, and make a recommendation on, an appeal of an exemption request denial no later than 60 days after the appeal is made. The bill would require specified information relating to the committee's consideration of an appeal to be made publicly available on the state board's internet website. The bill would require the state board to consider a recommendation of the committee at a public meeting no later than 60 days after the recommendation is made.</p>	Watch

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Bill ID/Topic	Location	Summary	Position
SB 559 Stern D Electricity: deenergization events: communications.	This is a two-year bill.	<p>Existing law requires each electrical corporation to annually prepare a wildfire mitigation plan and to submit the plan to the Office of Energy Infrastructure Safety for review and approval, as specified. Existing law requires a wildfire mitigation plan of an electrical corporation to include, among other things, protocols for deenergizing portions of the electrical distribution system that consider the associated impacts on public safety, and protocols related to mitigating the public safety impacts of those protocols, including impacts on critical first responders and on health and communications infrastructure. Existing law requires a wildfire mitigation plan of an electrical corporation to also include appropriate and feasible procedures for notifying a customer who may be impacted by the deenergizing of electrical lines and requires these procedures to consider the need to notify, as a priority, critical first responders, health care facilities, and operators of telecommunications infrastructure with premises within the footprint of a potential deenergization event. This bill would require, consistent with the above-described protocols, an electrical corporation to immediately notify, when possible and at the time a decision to conduct a deenergization event is made, public safety partners about the potential public safety impacts of the deenergization event, as specified. The bill would require detailed status information on restoration efforts to be made available to emergency management organizations, public safety officials, customers, and the public, where feasible, with regular progress updates issued at intervals of no more than 12 hours, for all impacted circuits, as specified. The bill would require, in advance of a deenergization event, an electrical corporation to make a reasonable effort to publish and make available weather conditions observed within the affected circuit being considered for deenergization, as provided. Once hazardous conditions subside, the bill would require an electrical corporation to prioritize the restoration of electricity and begin efforts to reenergize lines without unnecessary delays when safe to do so. The bill would make electrical corporations responsible for the continual monitoring and eventual restoration of circuits affected by a deenergization event. The bill would require each electrical corporation to submit an annual report to the Public Utilities Commission that details its compliance with the transparency and restoration requirements of these provisions, as provided. This bill contains other related provisions and other existing laws.</p>	Watch

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State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
SB 667 Archuleta D Railroads: safety: wayside detectors: train length: emergency vehicle crossing.	This is a two-year bill.	<p>The existing Federal Railroad Safety Act (FRSA) authorizes the United States Secretary of Transportation to prescribe regulations and issue orders for railroad safety and requires the United States Secretary of Homeland Security, when prescribing a security regulation or issuing a security order that affects the safety of railroad operations, to consult with the United States Secretary of Transportation. The FRSA provides for state participation in the enforcement of the safety regulations and orders issued by the United States Secretary of Transportation or the United States Secretary of Homeland Security, pursuant to an annual certification, and authorizes the respective secretaries to make an agreement with a state to provide investigative and surveillance activities. The FRSA provides that, to the extent practicable, laws, regulations, and orders related to railroad safety and security are required to be nationally uniform, but authorizes a state to adopt or continue in force a law, regulation, or order related to railroad safety or security until the United States Secretary of Transportation, with respect to railroad safety matters, or the United States Secretary of Homeland Security, with respect to railroad security matters, prescribes a regulation or issues an order covering the subject matter of the state requirement. A state is additionally authorized to adopt or continue in force an additional or more stringent law, regulation, or order related to railroad safety or security, when necessary to eliminate or reduce an essentially local safety or security hazard, that is not incompatible with a federal law, regulation, or order, and that does not unreasonably burden interstate commerce. This bill would require a railroad corporation to install and operate a network of wayside detector systems on or adjacent to any track used by a freight train with maximum spacing specified for individual detection devices along a continuous track. The bill would define “wayside detector system” to mean an electronic device or series of connected devices that scans passing freight trains and their component equipment and parts for defects. The bill would require the Public Utilities Commission to (1) establish a process for freight train crews to receive alerts from wayside detectors, (2) create standards for freight train inspections to be conducted following the receipt of an alert from a wayside detector, as provided, and (3) adopt rules necessary to implement these provisions. This bill contains other related provisions.</p>	Watch

San Mateo County Transit District State Legislative Matrix 7/16/2025

Bill ID/Topic	Location	Summary	Position
SB 752 Richardson D Sales and use taxes: exemptions: California Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project: transit buses.	This bill was held on the Senate Appropriations Suspense File.	Existing state sales and use tax laws impose a tax on retailers measured by the gross receipts from the sale of tangible personal property sold at retail in this state or on the storage, use, or other consumption in this state of tangible personal property purchased from a retailer for storage, use, or other consumption in this state. The Sales and Use Tax Law provides various exemptions from those taxes, including, until January 1, 2026, an exemption from those taxes with respect to the sale in this state of, and the storage, use, or other consumption in this state of, specified zero-emission technology transit buses sold to specified public agencies that are eligible for specified incentives from the State Air Resources Board. This bill would extend the exemption for specified zero-emission technology transit buses until January 1, 2028. This bill contains other related provisions.	Support April 2025



July 16, 2025

TO: Board of Directors
San Mateo County Transit District

FM: Matt Robinson, Michael Pimentel and Brendan Repicky
Shaw Yoder Antwih Schmelzer & Lange

RE: **STATE LEGISLATIVE UPDATE – August 2025**

General Update

The Legislature is currently hearing bills in policy committees and has until July 18 to do so. July 18 also marks the start of the Legislature's month-long Summer Recess, with members returning to their districts until August 18. Once they reconvene from Summer Recess, fiscal committees will have until August 29 to hear and pass bills to the floor of each house. The Legislature will recess the first year of the two-year 2025-26 Legislative Session on September 12. For information about key legislative and budget deadlines, please see the 2025 Legislative Calendar available [here](#).

State Budget Agreement

On June 24, the Governor and Legislative Leaders announced that they had reached a "three-party agreement" on the FY 2025-26 budget. The Legislature subsequently passed two budget bill "juniors" (bills that amend the main spending bills) and more than a dozen budget trailer bills (bills that contain policy proposals implementing the budget) on June 27, which were then signed into law by the Governor. All told, the Budget Act of 2025 comprises \$321.1 billion in total spending and contains total reserves of \$15.7 billion.

Of significance to SamTrans, the FY 2025-26 budget staves off cuts initially proposed by the Governor in the May Revise and maintains \$1.078 billion in Greenhouse Gas Reduction Fund (GGRF) commitments for the SB 125 Transit Intercity Rail and Capital Program (TIRCP) and the Zero-Emission Transit Capital Program (ZETCP) funds and TIRCP Cycle 6, inclusive of the following line-items:

- FY 2025-26: \$188M for SB 125 - TIRCP
- FY 2025-26: \$180M for TIRCP Cycle 6
- FY 2026-27: \$230M for SB 125 - ZETCP
- FY 2027-28: \$460M for SB 125 - ZETCP

As a technical matter, the preservation of this funding is not reflected in appropriations from the GGRF just yet. Those appropriations will be made later this summer as part of the larger Cap-and-Trade Expenditure Plan.

The budget also appropriates \$1.196 billion in General Fund for SB 125 - TIRCP and TIRCP Cycle 6, inclusive of the following line-items:

- FY 2025-26: \$812M for SB 125-TIRCP (note that this investment, combined with the commitment above, fully funds SB 125 - TIRCP)
- FY 2025-26: \$384M for TIRCP Cycle 6 (note that this investment, combined with the commitment above, fully funds TIRCP Cycle 6)

In addition, the budget includes a \$750 million emergency loan program from the General Fund for select Bay Area transit agencies (AC Transit, BART, Caltrain, and SF Muni) "as they work through fiscal challenges until local revenues stabilize." This loan was included in the budget in lieu of the \$2 billion ask for new transit monies championed by Senator Jesse Arreguín (D-Berkeley) and Assemblymember Mark Gonzalez (D-Los Angeles). The Budget Act conditions this funding on several things, including that agencies have approved repayment plans and that SB 63 (Wiener and Arreguín) is signed by the Governor.

Finally, the budget appropriates \$132.2 million from the Hino Settlement in FY 2025-26 to the California Air Resources Board's Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP).

Cap-and-Trade Update

The Legislature largely punted taking action on the Cap-and-Trade program and its corresponding Greenhouse Gas Reduction Fund (GGRF) proceeds. As a refresher, while announcing his May Revise, the Governor also proposed extending the Cap-and-Trade program an additional 15 years and making major changes to the GGRF:

- \$1 billion a year for the high-speed rail project
- \$1.5 billion for CAL FIRE (which, as an essential government agency, has always previously been funded through the General Fund)
- Reset all other expenditures, including continuous LCTOP and TIRCP funding

The Legislature beat back some of his proposed changes (the \$1.078 billion in restored transit funding, as detailed above), acquiesced on others (by appropriating \$1.25 billion from the GGRF for CAL FIRE for FY 2025-26), but left most issues to deal with later this Summer.

These issues include high-speed rail funding, continuous TIRCP and LCTOP funding, and all additional programs that receive GGRF monies. The stakes for reaching an agreement are high: there are concerns that the next Cap-and-Trade auction, scheduled for August, may again produce tepid proceeds. The last auction, in May, was the worst performing since 2021. These proceeds directly fund the GGRF, and thus, the pot of money the Legislature, the Governor, and advocates are fighting over.

Bay Area Regional Measure

The Bay Area Regional Measure, ensconced in SB 63 (Wiener and Arreguín), continues to move through the legislative process. This bill seeks to generate additional revenue to support the Bay Area's public transit systems. After passing the Senate Floor on June 2, the bill passed to the Assembly, where it was heard in its first policy committee – the Assembly Transportation Committee – on July 7. The bill passed the Committee on a party-line vote of 11-4, with Assembly Member Papan supporting. However, before passing, the author accepted Committee amendments that prioritize the operations of the San Francisco Bay Ferry (WETA) service and the East Bay bus systems over funding for transit transformation, while also reducing the transit transformation pot from 10 percent to 5 percent. Additionally, because the

legislation is not in its final form, the author and the Chair agreed that the bill would again be heard in the Committee before the end of the Legislative Session, which is September 12.

The bill was next heard on July 14 in the Assembly Revenue and Taxation Committee, where it passed out 4-2. It now moves to the Assembly Appropriations Committee and then to the Assembly Floor. Once on the Assembly Floor, it is assumed that it will be pulled back to the Assembly Transportation Committee for a hearing on the substance.

The bill, as currently drafted, would authorize a citizens' initiative, which may only require a simple majority vote, for a sales tax of one-half cent in Alameda and Contra Costa Counties, and up to one cent in San Francisco County. These taxes could be applied for 10-15 years. The bill is currently a three-county measure (Alameda, Contra Costa, San Francisco) but provides a path for San Mateo and Santa Clara counties to opt-in before August 11, 2025.

The bill now proposes to allocate revenues to AC Transit, BART, Caltrain, Muni, County Connection, Tri Delta Transit, LAVTA, Union City Transit, WestCAT and SF Bay Ferry, and those revenues may only be used for transit operations. The measure would also provide up to 5 percent (down from 10 percent) of the revenues for transit transformation to be controlled by MTC and up to 1 percent of revenues for administration of the regional measure for the Transportation Revenue Measure District Board. The bill also currently requires performance audits of the major transit systems facing fiscal cliffs (AC Transit, BART, Caltrain, SF Muni), as well as provisions for stronger regional network management and authorizes a regional network manager to implement the network management framework in exchange for access to SB 63 funds.

CARB LCFS Amendments Take Effect

On July 1, the California Air Resources Board's amendments to the Low Carbon Fuel Standard (LCFS) went into effect, following approval by the Office of Administrative Law. These amendments were adopted by CARB in November 2025 to strengthen the program, which aims to reduce the carbon intensity of the state's transportation fuel supply. Among other things, the program provides transit and rail agencies in the state the opportunity to generate credits for their use of low and no emission fuels, like electricity or hydrogen, which can be sold to create revenue that supports zero-emission operations.

SamTrans-Sponsored Legislation

SamTrans is sponsoring SB 272 (Becker), which would give SamTrans the authority to use the job-order contract (JOC) method of procurement. JOC is a competitively solicited, fixed-price contracting method used for small maintenance and repair work. JOC results in on-call construction service contracts subject to a project labor agreement under which public agencies issue work orders for specific jobs at pre-determined prices. This contracting method provides accelerated project delivery, reduces administrative costs, and lowers construction costs. The bill passed the Assembly Local Government Committee on June 18 and has now moved to the Assembly Floor for consideration.

Bills with Recommended Action

AB 1250 (Papan) Paratransit Operators: Recertification of Eligibility – RECOMMEND SUPPORT

This bill was amended on June 30 to require transit operators, by June 1, 2027, to establish and use a streamlined recertification process for persons with permanent disabilities who were previously determined to be eligible for paratransit service. Previously, the bill would have prohibited transit operators from requiring a person who receives, or is eligible to receive, paratransit services based on a disability or medical condition, and whose condition cannot reasonably be expected to improve, to recertify their eligibility for the services. Recertification is important because it ensures transit agencies

have accurate information and can adjust services as needed when a person moves, experiences changes in their disability, begins using additional mobility aids, or needs to use the service differently.

Bills with Positions

AB 394 (Wilson) Enhanced Penalties for Transit Employee Assaults – SUPPORT

This bill would enhance the safety and security of California's public transportation systems by strengthening protections for transit operators, employees, and passengers. The bill accomplishes this goal by expanding existing law (Penal Code Section 243.3) to protect all transit employees against battery. In addition, AB 394 clarifies that transit agencies are in fact employers for purposes of acquiring a temporary restraining order. The bill passed out of its final policy committee on July 15 and now heads to the Senate Appropriations Committee. The bill is co-sponsored by the California Transit Association, the Amalgamated Transit Union (ATU), the Teamsters, and SMART-TD.

Bills of Interest

SB 512 (Perez) District Elections Initiatives

This bill was gut-and-amended on June 16 to clarify and reaffirm existing law that voters of a district already authorized to impose local transaction and use taxes for transportation purposes may propose and approve such a tax for transportation purposes through an initiative process.

**SamTrans
Federal Report
August 2025**

Congressional Update

Congress Passes Reconciliation Bill; President Trump Signs into Law

- Following a marathon round of votes on amendments to the bill offered by Democrats and Republicans, the Senate passed the One Big, Beautiful Bill (OBBB) Act on Monday, June 30, with substantial changes to the initial version passed by the House on May 22. The Senate passed the bill with a narrow, 51-50 vote that required Vice President Vance to cast the tie-breaking vote. Three Republicans voted against the measure: Senators Susan Collins (R-ME), Rand Paul (R-KY), and Thom Tillis (R-NC).
- While lawmakers on Capitol Hill expected the Senate to remove some of the most controversial provisions of the House version of the bill, Senate Republicans instead sharpened some of these provisions, making the bill more controversial. For example, the Senate included steeper cuts to Medicaid and accelerated the cuts to various energy tax credits as a means of supporting a suite of business-related tax cuts made permanent.
- While Senator Lisa Murkowski (R-AK) was an initial holdout on the bill, she ultimately voted in favor of the bill after negotiating to include exceptions for the state of Alaska to cuts to clean energy tax credits, SNAP, Medicaid, and more.
- Between Tuesday, July 1, and Thursday, July 3, House Republican leadership and the White House worked to sway members of the House Freedom Caucus to vote in favor of the bill, many of whom were opposed due to estimates that the Senate-passed legislation would add more than \$600 billion to the national deficit. However, ultimately several Freedom Caucus members voted in favor of the bill after assurance from President Trump that the Administration would utilize executive action to place additional restrictions on Inflation Reduction Act (IRA) tax credits for wind and solar projects.
- After almost 24 hours of debate – including a nearly nine-hour speech by House Democratic Leader Hakeem Jeffries (D-NY) in opposition to the bill – the House passed H.R. 1 with a narrow, 218-214 vote. President Trump signed H.R. 1 into law on July 4.
- Holland and Knight has prepared a comprehensive summary of key provisions in the final version of H.R. 1, which can be found [here](#).

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FY26 Appropriations Update

- During the week of July 14, the House Appropriations Committee released its FY26 Transportation-HUD appropriations bill ahead of holding markups at the subcommittee and full-committee levels.
- The Transportation-HUD bill provided the following funding levels for transportation programs relevant to SamTrans:
 - Federal Transit Administration (FTA): \$14.9B (FY25 enacted level: \$16.6B)
 - Transit Infrastructure Formula Funding: \$14.64B (FY25 enacted level: \$14.28B)
 - Capital Investment Grants (CIG): \$53.7M (FY25 enacted level: \$2.205B)
 - BUILD Discretionary Grant Program: \$0 (FY25 enacted level: \$345M)
 - The bill also includes new funding for the Federal Highway Administration (FHWA) at \$62.657B versus the \$61B FY25 enacted level.
- The committee also directed FTA to encourage states and metropolitan planning organizations (MPOs) to strongly consider transit-oriented development in their project selections. Policies include reducing or eliminating minimum lot sizes, height limits, or parking minimums, or establishing by-right and objective approval processes in areas located in the vicinity of transit facilities.
- Included in the House's bill is a \$250,000 community project funding request/earmark for SamTrans Bus Stop Amenity Improvements project. Sponsored by Rep. Kevin Mullin (D-CA), the project's inclusion in the House bill is a crucial step in the appropriations process as members work to advance and pass FY26 appropriations bills.

House T&I Chairman Graves Op-Ed Previews a Return to Basics in Next Surface Transportation Reauthorization

- On June 26, House Transportation and Infrastructure (T&I) Committee Chair Sam Graves (R-MO) released his focus for the next surface transportation reauthorization bill. His [press release](#) focused heavily on restructuring the permitting process to make projects more efficient and less costly.
- Rep. Graves pointed to what he believes is bloat in the current surface transportation programs, which he stated has diluted the efficiency of the program and favored progressive political projects. He also stated that the House reauthorization bill would reestablish the role that states have in meeting their unique transportation and infrastructure needs.
- Another focus would be reforming the Highway Trust Fund (HTF). The HTF is based upon a user-pays principle. However, many believe the gas tax is no longer a sufficient funding source given the increasing fuel efficiency of vehicles and increased usage of electric vehicles (EVs).

Administration Update

Federal Judge Rules Against DOT Directive to Make DOT Grant Funding Contingent on Cooperation with Federal Immigration Operations

- On June 20, Judge John McConnell Jr. (U.S. District Court for Rhode Island) temporarily halted the Trump Administration's attempt to withhold DOT funding from states that don't comply with its immigration enforcement policies. A coalition of 20 states, mostly led by Democratic governors and attorneys general, [sued the Administration last month](#), arguing it was overstepping its authority by tying transportation federal funds to immigration policy compliance.
- Judge McConnell issued a [preliminary injunction](#) stating that the Administration's actions violate the U.S. Constitution and federal statutes. He wrote, "Congress did not authorize or grant authority to the Secretary of Transportation to impose immigration enforcement conditions on federal dollars specifically appropriated for transportation purposes."
- Transportation Secretary Sean Duffy posted his reaction to the judge's ruling, stating, "I directed states who want federal DOT money to comply with federal immigration laws. But, no surprise, an Obama-appointed judge has ruled that states can openly defy our federal immigration laws. This is judicial activism pure and simple, and I will continue to fight in the courts."

DOT Announces New NEPA Implementing Procedures

- On June 30, DOT Secretary Sean Duffy released new revisions to the Department's NEPA implementing procedures. The revisions announced by Duffy aim to reduce project costs, shorten delays, and cut DOT's NEPA procedures in half overall.
- The reforms will implement deadlines and page limits on environmental reviews, provide clarification that NEPA does not apply to every action that a Federal agency takes, and ensure an expeditious process to create categorical exclusions (CEs). The specific updates to NEPA implementing procedures are [Department-wide Order 5610.1D](#); and Joint [FHWA, FRA, and FTA procedures](#), 23 CFR Part 771.
- The press release emphasized that NEPA implementing procedures have not been modernized in the past 45 years. Duffy cites the President's [Unleashing American Energy](#) Executive Order as context for his actions to reduce NEPA-related requirements.

DOT Announces TIFIA Update

- DOT's Build America Bureau [announced](#) an update to the [Transportation Infrastructure Finance and Innovation Act \(TIFIA\)](#) credit program that will allow all types of transportation infrastructure projects to finance up to 49 percent of eligible costs as

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authorized by TIFIA legislation. Previously, only a limited number of projects could be financed up to 49 percent, and most were capped at 33 percent.

- With this change, DOT aims to simplify, expedite, and reduce the cost of building infrastructure. The TIFIA credit program offers flexible, long-term, low-interest loans that enable public and private project sponsors to accelerate infrastructure delivery at lower financing costs.