AGENDA

San Mateo County Transit District

Board of Directors Meeting

August 5, 2026, 2:00 pm

Public Hearing Room, 5th Floor
166 North Rollins Road, Millbrae, CA 94030

Members of the public may attend in person at the noticed location(s) or participate remotely via Zoom at: **https://us02web.zoom.us/j/86938147935?pwd=yBjq6YBO0HplQvQFJaNNy7sIOut2yY.1** or by entering Webinar ID: **869 3814 7935**, Passcode: **882894** 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. 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.

Public Comments: Written public comments may be emailed to publiccomment@samtrans.com or mailed to 166 North Rollins Road, Millbrae, CA 94030, and will be compiled and posted weekly along with any Board correspondence. Any written public comments received within two hours prior to the start of the meeting will be included in the weekly Board correspondence reading file, 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.

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

Wednesday, August 5, 2026 **2:00 pm**

1. Call to Order / Pledge of Allegiance

2. Roll Call

3. Report Out from Closed Session at July 8, 2026 Board of Directors Meeting

   3.a. Closed Session Pursuant to Government Code Section 54957(b)(1): Public Employee Performance Evaluation
   Title: General Manager/Chief Executive Officer

   3.b. Closed Session Pursuant to Government Code Section 54957(b)(1): Public Employee Performance Evaluation
   Title: General Counsel

4. Consent Calendar

   4.a. Approval of Minutes of the Board of Directors Meeting of July 8, 2026 — Motion

   4.b. Accept Quarterly Report for On-Call Contracts for Fiscal Year 2026 Quarter 4 — Motion

   4.c. Accept Contracts and Procurement Quarterly Report on Technology Purchases for Fiscal Year 2026 Quarter Four — Motion

   4.d. Accept Quarterly Investment Report — Motion

   4.e. Awarding a Contract to Power Engineering Construction Company to Provide Inspection and Maintenance Services for the Dumbarton Rail Bridge Navigation Lights for a Not-to-Exceed Amount of $220,900 for a Two-Year Term — Resolution

5. 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.

6. Report of the Chair

7. Report of the General Manager/CEO

   7.a. Report of the General Manager/CEO | July 29, 2026 — Informational

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

7.b.	San Mateo County Sheriff's Office Transit Police Bureau – 2025 Annual Report	Informational
7.c.	Onboard Bus Safety Update	Informational

8. Recess to Committee Meetings

9. Community Relations Committee / Committee of the Whole
Peter Ratto (Chair), Rico E. Medina, Jeff Gee

9.a.	Call to Order	
9.b.	Approval of Minutes of the Community Relations Committee Meeting of July 8, 2026	Motion
9.c.	Accessible Services Update	Informational
9.d.	Citizens Advisory Committee Update	Informational
9.e.	Paratransit Advisory Council Update	Informational
9.f.	Monthly State of Service Report - June 2026	Informational
9.g.	Adjourn	

10. Finance Committee / Committee of the Whole
Rico E. Medina (Chair), Josh Powell, Jackie Speier

10.a.	Call to Order	
10.b.	Approval of Minutes of the Finance Committee Meeting of July 8, 2026	Motion
10.c.	Approving and Ratifying the Insurance Program for Fiscal Year 2027	Motion
10.d.	Adjourn	

11. Legislative Committee / Committee of the Whole
Marina Fraser (Chair), Peter Ratto, David J. Canepa

11.a.	Call to Order	
11.b.	Approval of Minutes of the Legislative Committee Meeting of July 8, 2026	Motion

11.c. Receive Legislative Update — Informational

11.d. Adjourn

12. Strategic Planning, Development, and Sustainability Committee / Committee of the Whole
Josh Powell (Chair), David J. Canepa, Brooks Esser

12.a. Call to Order — Informational

12.b. Approval of Minutes of the Strategic Planning, Development, and Sustainability Committee Meeting of July 8, 2026 — Motion

12.c. Reimagine Dumbarton Feasibility Study Project Update — Informational

12.d. Adjourn

13. Reconvene Board of Directors Meeting

14. Matters for Board Consideration: Finance Committee

14.a. Approving and Ratifying the Insurance Program for Fiscal Year 2027 — Resolution

15. Communications to the Board of Directors

16. Board Members Requests

17. Date / Time of Next Regular Meeting: Wednesday, September 2, 2026, at 2:00 pm
The meeting will be accessible via Zoom and in person at the San Mateo County Transit District, Public Hearing Room, 5th Floor, 166 North Rollins Road, Millbrae, CA 94030.

18. Report of the General Counsel

18.a. Amending the Rules of Procedure for the San Mateo County Transit District Board of Directors — Resolution

19. Adjourn

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

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 Regular Board and Committees 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, Board Committees, and CAC are available on the website.

Location of Meeting
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. Written public comments may be emailed to publiccomment@samtrans.com or mailed to 166 North Rollins Road, Millbrae, CA 94030, and will be compiled and posted weekly along with any Board correspondence. Any written public comments received within two hours prior to the start of the meeting will be included in the weekly Board correspondence reading file, posted online at: https://www.samtrans.com/meetings.

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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, 166 North Rollins Road, Millbrae, CA 94030; 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 166 North Rollins Road, Millbrae, CA 94030 at the same time that the public records are distributed or made available to the legislative body.

Note: 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
Board of Directors
Regular Meeting

166 North Rollins Road, Millbrae, California 94030
17907 Holli Blue Road, Champion, Michigan 49814

DRAFT Minutes of July 8, 2026

Members Present:	David J. Canepa (arrived at 2:04 pm), Marina Fraser, Jeff Gee, Rico E. Medina, Peter Ratto, Brooks Esser (Vice Chair), Marie Chuang (Chair)
Members Present via Teleconference:	Jackie Speier (arrived at 2:05 pm)
Members Absent:	Josh Powell
Staff Present:	J. Cassman, A. Chan, L. Lumina-Hsu, J. Mello, M. Tseng

1. Call to Order / Pledge of Allegiance
Chair Marie Chuang called the meeting to order at 2:01 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. Report Out from Closed Session at June 3, 2026 Board of Directors Meeting
3.a. Closed Session: Conference with Legal Counsel – Anticipated Litigation (Government Code § 54956.9(d)(4)) [Initiation of Litigation, Number of Potential Cases: 1]

Joan Cassman, General Counsel, stated no reportable action was taken.

4. Consent Calendar
4.a. Approval of Minutes of the Board of Directors Meeting of June 3, 2026
4.b. Accept Annual Citizens' Oversight Committee Report on the Use of Measure W Tax Revenues for the Fiscal Year Ended June 30, 2025
4.c. Reauthorizing Remote Meetings for the Citizens Advisory Committee and the Paratransit Advisory Council under Senate Bill 707 – *Approved by Resolution No. 2026-35*
4.d. Awarding a Contract to FBD Vanguard Construction, Inc. for Concrete Replacement at the Redwood City Transit Center for a Total Amount of $540,703 – *Approved by Resolution No. 2026-36*

4.e. Awarding a Contract to DSI Medical Services, Inc. to Provide Third Party Administration for Drug and Alcohol Testing Services for a Not-To-Exceed Amount of $281,453 for a Three-Year Base Term, with up to Two Additional One-Year Option Terms for a Not-To-Exceed Amount of $200,062, for an Aggregate Not-To-Exceed Amount of $481,515 – *Approved by Resolution No. 2026-37*

Motion/Second: Medina/Esser
Ayes: Fraser, Gee, Medina, Ratto, Speier, Esser, Chuang
Noes: None
Absent: Canepa, Powell, Speier

Director Canepa arrived at 2:04 pm.
Director Speier arrived at 2:05 pm.

5. Public Comment for Items Not on the Agenda

Chuck Harvey, Manteca, commented on SamTrans 50th Anniversary, technology and human capital investments, and public transit services and funding.

Aleta Dupree, Team Folds, Oakland, commented on public transit transfers and Clipper 2.0.

Geoff Smith commented on public transit funding, SamTrans service levels, and connections to Daly City and routes on El Camino Real.

6. Report of the Chair

Chair Chuang stated there was no report.

7. Report of the General Manager/CEO

7.a. Report of the General Manager/CEO | July 1, 2026

April Chan, General Manager/CEO, stated the report was in the packet and provided the following highlights:

- July 1, official SamTrans 50th anniversary; Free Fare Day attracted more than 38,500 riders - 27 percent above pre-pandemic weekday ridership
- June 17 new headquarters ribbon cutting ceremony; September 26 community celebration for the District's 50th anniversary
- Free K-12 school field trip pass program; provided free rides to over 1,863 students and 401 chaperones on 45 field trips
- Clipper 2.0 update: Metropolitan Transportation Commission (MTC) and Cubic Corporation (Cubic) continued work on resolving software issues; fewer service disruptions
- Pride parade participation featured SamTrans Pride-wrapped bus and joined by Caltrain and San Mateo County Transportation Authority (SMCTA)

7.b. District Headquarters and Leasing Update
Joshuah Mello, Chief, Planning and Development, provided the presentation that included the following:

- Headquarters project under budget; approximately $5.4 million remaining for Day 3 work
- BayPass employee pilot program through December 31, 2026; will return to Board of Directors (Board) with recommendations
- Market-ready office space available for lease; CBRE Group, Inc. marketing to private sector; retail space marketing; ongoing potential daycare center discussions
- Financing plan, debt issuance, purchase notice timeline, building manager contract, and purchase agreement updates

Staff provided further clarification in response to the Board comments and questions regarding remaining punch list items, Public Hearing Room improvements, retail and office space leasing, and the upcoming financing presentation.

<u>Public Comment</u>
Aleta Dupree, Team Folds, Oakland, commented on BayPass program, new headquarter building purchase, and art wrapped buses.

8. Recess to Committee Meetings
The Board meeting recessed to Committee Meetings at 2:28 pm.

9. Community Relations Committee / Committee of the Whole
The Community Relations Committee meeting was held.

10. Finance Committee / Committee of the Whole
The Finance Committee meeting was held.

11. Legislative Committee / Committee of the Whole
The Legislative Committee meeting was held.

12. Strategic Planning, Development, and Sustainability Committee / Committee of the Whole
The Strategic Planning, Development, and Sustainability Committee meeting was held.

13. Reconvene Board of Directors Meeting
Chair Chuang reconvened the Board meeting at 4:07 pm.

14. Matters for Board Consideration: Finance Committee
Director Medina led the Board in voting on the following items:

14.a. Awarding a Cooperative Purchasing Contract to The Gordian Group, Inc. to Provide Job Order Contracting Program Management and Consulting Services for a Not-To-Exceed Amount of $2.5 Million for a Five-Year Term – *Approved by Resolution No. 2026-38*

14.b. Awarding a Cooperative Purchasing Contract to Gillig, LLC, for the Purchase and Delivery of 25 Model Year 2027 40-Foot Gillig Battery Electric Buses, Including Optional Features Required for Compatibility and Integration with the District's Bus System, for a Total Not-To-Exceed Amount of $39,580,500, with an Option to Purchase and Deliver up to 37 Additional New Gillig Buses for an Estimated Not-To-Exceed Amount of $68,336,413, for an Aggregate Not-To-Exceed Amount of $107,916,913, and Authorizing Disposition of up to 25 Diesel Hybrid and Diesel Buses from Model Year 2013 – *Approved by Resolution No. 2026-39*

Motion/Second: Canepa/Esser
Ayes: Canepa, Fraser, Gee, Medina, Ratto, Speier, Esser, Chuang
Noes: None
Absent: Powell

15. Matters for Board Consideration: Legislative Committee
Director Fraser led the Board in voting on the following items:

15.a. Receive Legislative Update and Recommend Support of Legislative Proposal: Senate Bill 741 (Blakespear)

Motion/Second: Chuang/Medina
Ayes: Canepa, Fraser, Gee, Medina, Ratto, Speier, Esser, Chuang
Noes: None
Absent: Powell

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

17. Board Member Requests – There were none.

18. Date / Time of Next Regular Meeting: Wednesday, August 5, 2026 at 2:00 pm

19. Report of the General Counsel

19.a. Amending the Rules of Procedure for the San Mateo County Transit District Board of Directors – *Approved by Resolution No. 2026-40*

Ms. Cassman provided the presentation that included updates to public comment, Citizens Advisory Committee (CAC) name change, and board member participation on multiple agencies' Boards.

Staff provided further clarification in response to the Board comments and questions regarding revised agency representation language, CAC name change and consistency across agencies, and additional CAC feedback before returning to the Board for action.

Public Comment

David Rabinovich commented on Citizens Advisory Committee's motions.

Ben Mangiafico spoke in opposition to reduced public comment time period.

Motion to continue to item to August meeting: Ratto/Fraser
Ayes: Canepa, Fraser, Gee, Medina, Ratto, Speier, Esser, Chuang
Noes: None
Absent: Powell

19.b. Closed Session: Conference with Legal Counsel – Existing Litigation Pursuant to Government Code Section 54956.9(d)(1): Jamilet Lira Calderon v. San Mateo County Transit District et. al., Superior Court of California, County of San Francisco, Case No. CGC-25-624886

19.c. Closed Session: Conference with Real Property Negotiators Pursuant to Government Code Section 54956.8:
Property: 166 North Rollins Road, Millbrae, California
Agency Negotiator: April Chan, Joan Cassman, Joshuah Mello
Negotiating Parties: SFIII Millbrae, LLC; Swift Real Estate Partners
Under Negotiation: Price and terms of payment

19.d. Closed Session: Conference with Legal Counsel – Anticipated Litigation Pursuant to Government Code Section 54956.9(d)(4):
Initiation of Litigation: One potential case regarding purchase of 166 North Rollins Road, Millbrae, California

19.e. Closed Session Pursuant to Government Code Section 54957(b)(1): Public Employee Performance Evaluation
Title: General Manager/Chief Executive Officer

19.f. Closed Session Pursuant to Government Code Section 54957(b)(1): Public Employee Performance Evaluation
Title: General Counsel

Ms. Cassman all of the announced the closed sessions items and stated the Board will recess to closed session for Items 19.b., 19.c., and 19.d., and will then return to open session.

The Board recessed to closed session at 4:22 pm.
The Board reconvened to open session at 5:20 pm.

Ms. Cassman reported the Board discussed Items 19.b. and 19.c. and there are no reportable actions on those items. For Item 19.d., the Board unanimously authorized the filing of a declaratory relief action against SFIII Millbrae, LLC, dba, Swift Real Estate Partners, the owner and landlord of the office building at 166 North Rollins Road in Millbrae, California, to resolve various disputed issues pertaining to the District's exercise of its option to purchase the office building under the lease between the parties. The District intends to commence such an action in the near future if the parties are unable to reach an understanding.

Ms. Cassman announced the Board will return to closed session to discuss Items 19.e. and 19.f. and stated any action taken will be reported at the next regular Board meeting.

The Board adjourned to closed session at 5:22 pm.

20. Adjourn – The meeting adjourned at 7:27 pm.

San Mateo County Transit District
Staff Report

To: Board of Directors

Through: April Chan, General Manger/CEO

From: David Santoro, Chief Administration Officer

Subject: **Accept Quarterly Report for On-Call Contracts for Fiscal Year 2026 Quarter 4**

Action

Staff recommends that the San Mateo County Transit District (District) Board of Directors (Board) accept the quarterly report for Board-awarded on-call contracts for Fiscal Year 2026 Quarter 4 (FY26Q4).

Significance

Attached to this report are on-call contracts that had work directives (WD) issued during the reporting period. The individual reports provide details on the scope of services as well as the following five tables:

- Table 1 summarizes the contract capacity status.
- Table 2 provides the percentage of capacity used against the percentage time elapsed.
- Table 3 shows the Board approved dates and amounts.
- Table 4 aggregates the WD amounts issued to each of the vendors.
- Table 5 describes each of the WDs issued since the last reporting period.

The below on-call contracts had work directives and/or purchase orders issued during the reporting period.

1. Construction Management Services (CMS) for Battery Electric Bus (BEB), Hydrogen Fuel Cell Electric Bus (FCEB), and Bus Facility Infrastructure Projects Contract No. 23-S-P-025
2. Environmental Planning, Permitting, and Support Services Contract No. 19-S-P-072
3. Executive Recruitment Services Contract No. 22-S-S-004
4. General Commercial Real Estate Brokerage Services Contract No. 24-S-P-105
5. General Engineering Consultant (GEC) Design Services Contract No. 21-S-P-028

6. General Engineering Consultant (GEC) Design Services Contract No. 23-S-P-038

7. General Engineering Consultant (GEC) Design Services No. 25-S-P-125

8. Market Research Services Contract No. 25-S-P-018

9. Printing Services Contract No. 21-S-P-031

10. Temporary Staffing Services Contract No. 25-S-P-014

11. Transportation Planning and Support Services Contract No. 20-S-P-007

The list above does not include on-call contracts issued after the subject quarter nor contracts that have been awarded but not utilized.

<u>Budget Impact</u>
There is no impact on the budget.

Prepared By: Kevin Yin Director, Contracts and Procurement 650-622-7860

Attachment 1

Contract Name: Construction Management Services (CMS) for Battery Electric Bus (BEB), Hydrogen Fuel Cell Electric Bus (FCEB), and Bus Facility Infrastructure Projects Contract No. 23-S-P-025

Scope of Services
This contract is to provide On-Call Construction Management Services for its current and future BEB, FCEB, and bus facility infrastructure projects at various District facilities.

Table 1

Contract Summary	Years	Amount
Total Capacity:	8.0	$18,000,000
Exercised:	6.0	$18,000,000
Work Directives Issued:		$9,952,608
Remaining Exercised Capacity:		$8,047,392

Table 2

Contract Days	Days Elapsed	% Time Elapsed	Capacity Used
2192	1147	52%	55%

Table 3

Contract Information	Start	End	Years	Capacity	Resolution/ Authorized
Base	6/1/2023	5/31/2029	6.0	$9,000,000	2023-26
Option 1	6/1/2029	5/31/2030	1.0		2023-26
Option 2	6/1/2030	5/31/2031	1.0		2023-26
Amendment	2/4/2026	5/31/2029		$9,000,000	2026-10
Total:			**8.0**	**$18,000,000**	

Table 4

Vendor	Jacobs	TOTAL
Contract #	23-S-P-025	$18,000,000
Total WDs Issued		$9,952,608
Current Reporting Period	$0	$0

<u>Attachment 2</u>

Contract Name: Environmental Planning, Permitting, and Support Services Contract No. 19-S-P-072

<u>Scope of Services</u>

The actual services to be provided shall be described in specific Work Directives (WD) for each assignment. Potential work could include staffing and management services as well as completion of formally defined tasks, project and plans for the following areas of environmental planning:

- Environmental Scoping, Clearance, and Compliance
- Wetland delineation maps and reports
- Traffic Studies
- Noise and Vibration Studies
- Environmental Permitting and Resource Agencies Coordination
- Third-Party Environmental Reviews
- Environmental Justice Analyses and Assessments (Phase I/Phase II Studies)
- Environmental Sustainability
- Energy Analysis
- Climate Action Planning
- Greenhouse Gas (GHG) Management
- Grant Applications
- National Environmental Policy Act (NEPA) / California Environmental Quality Act (CEQA) Public Outreach Efforts
- External Stakeholder Coordination
- Geographic Information Systems (GIS)
- On-Site Staffing and Project Management Support

Table 1

Contract Summary	Years	Amount
Total Capacity:	7.0	$6,000,000
Exercised:	7.0	$6,000,000
Work Directives Issued:		$4,287,859
Remaining Exercised Capacity:		$1,712,141

Table 2

Contract Days	Days Elapsed	% Time Elapsed	Capacity Used
2556	2420	95%	71.46%

Table 3

Contract Information	Start	End	Years	Capacity	Resolution/ Authorized
Base	12/1/2019	11/30/2024	5.0	$3,000,000	2019-31
Amendment					2023-53
Option 1	12/1/2024	11/30/2025	1.0	$1,500,000	2023-53
Option 2	12/1/2025	11/30/2026	1.0	$1,500,000	2023-53
Total:			**7.0**	**$6,000,000**	

Table 4

Vendor	HDR Engineering	ICF Jones and Stokes	WSP USA Solutions, Inc. (FKA Louis Berger U.S., INC.)	TOTAL
Contract #	19-S-P-072A	19-S-P-072B	19-S-P-072C	
Total WDs Issued	$1,344,537	$0	$2,943,322	**$4,287,859**
Previous Reporting Period	$0	$0	$0	**$0**
Current Reporting Period	$0	$0	$0	**$0**

Table 5

WD#	Title	Description (Updates in Bold)	Vendor	Updated	Start	(Revised) End	Amount This Period
20291-A3	Regional Sea Level Rise Mitigation Alternative and North Base Erosion Control Feasibility Analysis	Consultant shall prepare the North County Sea Level Rise Mitigation Alternatives Feasibility Analysis. **Amendment 3 is to extend the period of performance from June 30, 2026, up to November 30, 2026. No changes to the scope of work or compensation**	WSP USA Inc.	5/12/2026	3/8/2024	11/30/2026	$0
18533-A5	SamTrans Zero Emission Bus – Battery Electric Bus (BEB) Environmental Review Process	Consultant shall support the SamTrans Manager of Capital Project and Environmental Planning in developing and implementing environmental technical studies, preparing documentation and materials necessary to obtain NEPA environmental clearance from the Federal Transit Administration (FTA) and SamTrans Board approval of CEQA clearance. **Amendment 5 is to extend the period of performance from June 30, 2026, up to November 30, 2026. No changes to the scope of work of compensation**	WSP USA Inc.	6/4/2026	3/15/2022	12/30/2026	$0
						Total Amount This Period	**$0**

Attachment 3

Contract Name: Executive Recruitment Services Contract No. 22-S-S-004

Scope of Services

Contract to provide an On-Call Executive Recruitment Services. In the performance of its work, the Contractor represents that it (1) has and will exercise the degree of professional care, skill, efficiency, and judgment of Contractors with special expertise in providing an On-Call Executive Recruitment Services; (2) carries all applicable licenses, certificates, and registrations in current and good standing that may be required to perform the work; and (3) will retain all such licenses, certificates, and registrations in active status throughout the duration of this engagement.

Table 1

Contract Summary	Years	Amount
Total Capacity:	5.0	$2,371,155
Exercised:	5.0	$2,371,155
Work Directives Issued:		$405,125
Remaining Exercised Capacity:		$1,966,030

Table 2

Contract Days	Days Elapsed	% Time Elapsed	Capacity Used
1825	1590	87%	17%

Table 3

Contract Information	Start	End	Years	Capacity	Resolution/ Authorized
Base	02/21/2022	02/20/2025	3.0	$1,423,053	2022-5
Option 1	02/21/2025	02/20/2026	1.0	$474,351	2022-5
Option 2	02/21/2026	02/20/2027	1.0	$474,351	2022-5
Amendment					
Total:			**5.0**	**$2,371,755**	

Table 4

Vendor	Krauthamer & Associates	Did not renew other agreements past 3-year base term	TOTAL
Contract #	22-S-S-004E		
Total WDs Issued	$405,125		**$405,125**
Current Reporting Period	$50,000	$0	**$50,000**

Table 5

WD#	Title	Description (Updates in Bold)	Vendor	Updated	Start	(Revised) End	Amount This Period
22554	CFO Recruitment	CFO Recruitment	Krauthamer & Associates		4/17/2026	7/9/2026	$50,000
						Total Amount This Period	**$50,000**

Attachment 4

Contract Name: General Commercial Real Estate Brokerage Services Contract No. 24-S-P-105

Scope of Services

Services primarily consist of legal and strategic advice and support, when the District's General Legal Counsel is unable to represent the District due to a conflict of interest, for matters related to litigation, condemnation, insurance law, and construction law.

Table 1

Contract Summary	Years	Amount
Total Capacity:	5.0	$1,237,500
Work Directives Issued:		$466,035
Remaining Exercised Capacity:		$771,465

Table 2

Contract Days	Days Elapsed	% Time Elapsed	Capacity Used
1825	623	34%	37.66%

Table 3

Contract Information	Start	End	Years	Capacity	Resolution/ Authorized
Base	11/1/2024	10/31/2029	5.0	$1,237,500	2024-33
Amendment					
Total:			**5.0**	**$1,237,500**	

Table 4

Vendor	CBRE, Inc.	CU Advisory Corp D/B/A Century|Urban	TOTAL
Contract #	24-S-P-105A	24-S-P-105B	
Total WDs Issued	$300,000	$166,035	**$466,035**
Previous Reporting Period	$0	$0	**$0**
Current Reporting Period	$0	$166,035	**$166,045**

Table 5

WD#	Title	Description (Updates in Bold)	Vendor	Updated	Start	(Revised) End	Amount This Period
22551	North Base Relocation – Site Acquisition Services	**Consultant shall provide preacquisition, due diligence, valuation, and site acquisition services to the DISTRICT related to the potential relocation of the North Base facility**	CU ADVISORY CORP	5/1/2026	5/1/2026	5/11/2028	$166,035
						Total Amount This Period	**$166,035**

<u>Attachment 5</u>
Contract Name: General Engineering Consultant (GEC) Design Services Contract No. 21-S-P-028

<u>Scope of Services</u>
The District will use an as-needed WD process to authorize individual projects under this agreement. For each WD, the Consultant will review the requested services, assign and manage the appropriate staff, and direct day-to-day work and deliverables under the overall guidance of the District's Project Manager. Each WD will define the specific scope, schedule, deliverables, and level of effort for that project.

<u>Scope of Services (As-Needed Design and Engineering)</u>
Under the agreement and individual WDs, the Consultant may provide professional services including:

- **Engineering studies and facility assessments** for District bus operating facilities, parking/park-and-ride locations, bus stops, and administrative buildings.
- **Surveying and mapping**, including legal descriptions and related exhibits as needed.
- **Civil/site design**, such as pavement rehabilitation and site improvements at North Base, South Base, and park-and-ride facilities.
- **Mechanical engineering** (e.g., plumbing, heating, ventilation, and air conditioning (HVAC), elevators, emergency generators, fueling systems, and other mechanical systems).
- **Electrical and communications design** (e.g., lighting, communications, fire alarm, security, and related electrical systems).
- **Architectural and space planning** to improve functionality, modernization, and space efficiency.
- **Structural engineering and analysis** to support equipment installations or space reconfigurations (e.g., rooftop equipment/antenna supports).
- **Constructability/bid-ability reviews** to improve constructability and encourage competitive bidding.
- **Construction specifications and procurement documents**, including technical specifications and bid package support.
- **Cost estimates and schedules** at both conceptual and detailed levels.
- **Design Support During Construction (DSDC)** as needed to support the District through bidding and construction.

<u>Work Directive Phases (Typical)</u>

WDs may authorize any or all project phases, including:

- Conceptual, Preliminary, Interim, and Final Design
- Preparation of Invitation for Bids (IFB)
- Design Support During Construction (DSDC)

Table 1

Contract Summary	Years	Amount
Total Capacity:	7.0	$8,000,000
Work Directives Issued:		$7,643,521
Remaining Exercised Capacity:		$356,479

Table 2

Contract Days	Days Elapsed	% Time Elapsed	Capacity Used
2,557	1,936	76%	96%

Table 3

Contract Information	Start	End	Years	Capacity	Resolution/ Authorized
Base	4/1/2021	3/31/2028	7.0	$3,000,000	2021-7
Contingency	1/21/2025			$300,000	CEO
Amendment	4/2/2025			$4,700,000	2025-13
Total:			**7.0**	**$8,000,000**	

Table 4

Vendor	Group 4	Total
Contract #	21-S-P-028	
Total WDs Issued	$7,643,521	**$7,643,521**
Previous Reporting Period	$2,379	**$2,379**
Current Reporting Period	$0	**$0**

Table 5

No WDs issued this reporting period.

Attachment 6

Contract Name: General Engineering Consultant (GEC) Design Services Contract No. 23-S-P-038

Scope of Services

Pursuant to Resolution No. 2023-34, the San Mateo County Transit District Board of Directors awarded a contract for On-Call General Engineering Consultant (GEC) Design Services for Various Projects for a six-year term with up to two one-year option terms, for an aggregate not-to-exceed amount of $15 million, including the option years. This contract is for the firms to support On-Call General Engineering Consultant (GEC) Design Services for Various Projects at District facilities.

Table 1

Contract Summary	Years	Amount
Total Capacity:	8.0	$15,000,000
Exercised:	6.0	$15,000,000
Work Directives Issued:		$7,064,309
Remaining Exercised Capacity:		$7,935,691

Table 2

Contract Days	Days Elapsed	% Time Elapsed	Capacity Used
2192	1086	50%	55%

Table 3

Contract Information	Start	End	Years	Capacity	Resolution/ Authorized
Base	8/1/2023	7/31/2029	6.0	$15,000,000	2023-34
Option 1	8/1/2029	7/31/2030	1.0		2023-34
Option 2	8/1/2030	7/31/2031	1.0		2023-34
Amendment					
Total:			**8.0**	**$15,000,000**	

Table 4

Vendor	Stantec	STV	TOTAL
Contract #	23-S-P-038A	23-S-P-038B	$15,000,000
Total WDs Issued			$7,064,309
Previous Reporting Period	$0	**$0**	**$0**
Current Reporting Period	$0	**$0**	**$0**

Table 5

No WDs issued this reporting period.

Attachment 7

Contract Name: General Engineering Consultant (GEC) Design Services No. 25-S-P-125

Scope of Services
The District will use an as-needed WD process to authorize individual projects under this agreement. For each WD, the Consultant will review the requested services, assign and manage the appropriate staff, and direct day-to-day work and deliverables under the overall guidance of the District's Project Manager. Each WD will define the specific scope, schedule, deliverables, and level of effort for that project.

Scope of Services (As-Needed Design and Engineering)
Under the agreement and individual WDs, the Consultant may provide professional services including:

- **Engineering studies and facility assessments** for District bus operating facilities, parking/park-and-ride locations, bus stops, and administrative buildings.

- **Surveying and mapping**, including legal descriptions and related exhibits as needed.

- **Civil/site design**, such as pavement rehabilitation and site improvements at North Base, South Base, and park-and-ride facilities.

- **Mechanical engineering** (e.g., plumbing, heating, ventilation, and air conditioning (HVAC), elevators, emergency generators, fueling systems, and other mechanical systems).

- **Electrical and communications design** (e.g., lighting, communications, fire alarm, security, and related electrical systems).

- **Architectural and space planning** to improve functionality, modernization, and space efficiency.

- **Structural engineering and analysis** to support equipment installations or space reconfigurations (e.g., rooftop equipment/antenna supports).

- **Constructability/bid-ability reviews** to improve constructability and encourage competitive bidding.

- **Construction specifications and procurement documents**, including technical specifications and bid package support.

- **Cost estimates and schedules** at both conceptual and detailed levels.

- **Design Support During Construction (DSDC)** as needed to support the District through bidding and construction.

Work Directive Phases (Typical)
WDs may authorize any or all project phases, including:

- Conceptual, Preliminary, Interim, and Final Design
- Preparation of Invitation for Bids (IFB)
- Design Support During Construction (DSDC)

Table 1

Contract Summary	Years	Amount
Total Capacity:	5.0	$18,000,000
Work Directives Issued:		$493,506
Remaining Exercised Capacity:		$17,506,494

Table 2

Contract Days	Days Elapsed	% Time Elapsed	Capacity Used
1,825	110	6%	0%

Table 3

Contract Information	Start	End	Years	Capacity	Resolution/ Authorized
Base	4/1/2026	3/31/2031	5.0	$18,000,000	2026-18
Amendment					
Total:			**5.0**	$18,000,000	

Table 4

Vendor	Group 4 Architecture	TOTAL
Contract #	25-S-P-125	$18,000,000
Total WDs Issued	$0	**$493,506**
Current Reporting Period	$0	**$0**

Table 5

WD#	Title	Description (Updates in Bold)	Vendor	Updated	Start	(Revised) End	Amount This Period
22633	North Base Maintenance Building 100 Settlement Evaluation and Structural Assessment	Engineering services to assess the current condition of the SamTrans North Base Maintenance Building (Building 100) with respect to floor elevation differentials, apparent settlement related distress, and the resulting implications for continued occupancy.	Group 4		7/17/2026	1/22/2027	$0
22760	Bus Stop Improvement Plan (BSIP) – Phase 3 Non-El Camino Real (ECR)	Detailed technical specifications and cost estimates for the removal of old sidewalk, installation of code compliant concrete sidewalk and bus shelter concrete pad, installation of an ADA compliant bus shelter and bench as specified by the District.	Group 4		7/9/2026	5/31/2027	$0
22571	Design of Bus Operator Restrooms (Colma, South San Francisco, San Carlos)	Provide design service, detailed technical specifications/drawings, and cost estimates for construction of three new permanent restroom facilities	Group 4		6/1/2026	5/28/2027	$0
						Total Amount This Period	**$0**

Attachment 8
Contract Name: Market Research Services Contract No. 25-S-P-018

Scopes of Services
This contract is to provide SamTrans with a bench of qualified and experienced on-call market research firms to conduct rider and non-rider research, passenger satisfaction studies, and various surveys on a project-by-project basis. Through these services, SamTrans 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.

Table 1

Contract Summary	Years	Amount
Total Capacity:	5.0	$2,100,000
Exercised	3.0	$2,100,000
Work Directives Issued:		$199,008
Remaining Exercised Capacity:		$1,900,992

Table 2

Contract Days	Days Elapsed	% Time Elapsed	Capacity Used
1,826	289	16%	9%

Table 3

Contract Information	Start	End	Years	Capacity	Resolution/ Authorized
Base	9/15/2025	9/14/2028	3.0	$2,100,000	2025-39
Option 1	9/15/2028	9/14/2029	1.0		2025-39
Option 2	9/15/2029	9/14/2030	1.0		2025-39
Amendment					
Total:			**5.0**	**$2,100,000**	

Table 4

Vendor	Corey, Canapary & Galanis	EMC Research	TOTAL
Contract #	25-S-P-018A	25-S-P-01B	
Total WDs Issued	$0	$199,008	**$199,008**
Previous Reporting Period	$0	$199,008	**$199,008**
Current Reporting Period	$0	$0	**$0**

Table 5

WD#	Title	Description (Updates in Bold)	Vendor	Updated	Start	(Revised) End	Amount This Period
22400	2026 SamTrans Website User Experience Study	The purpose of this WD is to support preparation for compliance with the upcoming 2027 federal website accessibility requirements under Web Content Accessibility Guidelines (WCAG) 2.1 Level AA. This work will also provide District staff with quantitative and qualitative data that characterizes the SamTrans website user profile and user experience, to inform website redesign and content changes. Completed tasks 2 and 3 **User Survey and Personas (Task 2)** Conducted an online website user survey and analysis that provided actionable insight into customer needs, pain points, satisfaction, and sentiment. Consultant deliverables include a findings report, crosstabs,	EMC Research	Revised end date to allow for additional work on survey deliverables as requested by SamTrans. No impact on budget.	1/22/2026	**5/27/2026 (06/29/2026)**	$ 171,657

WD#	Title	Description (Updates in Bold)	Vendor	Updated	Start	(Revised) End	Amount This Period
22400 (cont.)		raw data, and customer persona posters. **Moderated Baseline Study (Task 3)** Conducted moderated user interviews and usability testing to identify current website usability issues, customer barriers, and priority improvements. Consultant deliverables include a findings report, redesign recommendations, benchmark metrics, supporting documentation, and session recordings.					
						Total Amount This Period	**$171,657**

Attachment 9

Contract Name: Printing Services Contract No. 21-S-P-031

Scope of Services
This contract is to provide On-Call printing services of timetables, bus shelter system maps, bus shelter ad posters, posters, brochures, take-ones, newsletters, time cards, dispatch log books and marketing materials.

Table 1

Contract Summary	Years	Amount
Total Capacity:	6.2	$630,500
Exercised:	6.2	$630,500
Work Directives Issued:		$564,319
Remaining Exercised Capacity:		$66,181

Table 2

Contract Days	Days Elapsed	% Time Elapsed	Capacity Used
1825	1710	94%	90%

Table 3

Contract Information	Start	End	Years	Capacity	Resolution/ Authorized
Base	6/1/2021	5/31/2026	5.0	$380,500	2021-15
Amendment	3/5/2025	5/31/2026	1.2	$250,000	
Total:			**6.2**	**$630,500**	

Table 4

Vendor	Dakota Press	Essence	Eyekick Visuals	TOTAL
Contract #	21-S-P-031-A	21-S-P-031-B	21-S-P-031-C	
Total WDs Issued	$0	$0	$0	**$0**
Previous Reporting Period	$0	$0	$0	**$0**
Current Reporting Period	$7,431	$18,604	$0	**$26,035**

Table 5
No WDs issued this reporting period.

Attachment 10

Contract Name: Temporary Staffing Services Contract No. 25-S-P-014

Scope of Services

Contract to provide an On-Call Temporary Staffing Services. In the performance of its work, the Contractor represents that it (1) has and will exercise the degree of professional care, skill, efficiency, and judgment of Contractors with special expertise in providing an On-Call Temporary Staffing Services; (2) carries all applicable licenses, certificates, and registrations in current and good standing that may be required to perform the work; and (3) will retain all such licenses, certificates, and registrations in active status throughout the duration of this engagement.

Table 1

Contract Summary	Years	Amount
Total Capacity:	7.0	$10,500,000
Exercised:	5.0	$7,500,000
Work Directives Issued:		$548,568
Remaining Exercised Capacity:		$6,951,432

Table 2

Contract Days	Days Elapsed	% Time Elapsed	Capacity Used
2,555	261	10.2%	2.5%

Table 3

Contract Information	Start	End	Years	Capacity	Resolution/ Authorized
Base	7/1/2025	6/30/2030	5.0	$7,500,000	2025-15
Option 1	7/1/2030	6/30/2031	1.0	$1,500,000	2025-15
Option 2	7/1/2031	6/30/2032	1.0	$1,500,000	2025-15
Amendment					
Total:			**7.0**	**$10,500,000**	

Table 4

Vendor	AppleOne, Inc.	SearchPros Staffing LLC	Tellus Solutions Inc.	TOTAL
Contract #	25-S-P-014A	25-S-P-014B	24-S-P-014C	
Total WDs Issued	$79,000	$145,369	$324,199	**$548,568**
Previous Reporting Period	$0	$0	$0	**$0**
Current Reporting Period	$12,211	$58,366	$0.00	**$70,577**

Table 5

WD#	Title	Description (Updates in Bold)	Vendor	Updated	Start	(Revised) End	Amount This Period
22536	Temp Payroll- Fiscal Year 2026	Payroll Temp- Lorraine Campos	SearchPros		04/07/2026	05/11/2026	$54,500
22676	Temp Admin	Temp W. Omi (IT Support)	SearchPros		06/10/2026	06/12/2026	$3,866
22415	Temp Support	Temp- Michelle Flores (Safety and Security)	AppleOne		01/01/2026	06/30/2026	$12,211
Total Amount This Period							**$70,577**

Attachment 11
Contract Name: Transportation Planning and Support Services Contract No. 20-S-P-007

Scope of Services
The District will use an as-needed WD process to authorize individual projects under this agreement. The actual services to be provided shall be described in specific WD for each assignment. Potential work could include staffing management services as well as completion of formally defined tasks, projects and plans for the following areas of transportation planning and services:

- Strategic Plans
- Policy Development
- Ridership Analysis
- Transit Corridor Studies
- System Capacity Studies
- Site Planning
- Capital Improvement Program Planning
- Short Range and Long-Range Transit Planning
- Land Use/Transportation Integration
- Complete Streets
- Transit Oriented Development
- Market Demand and Assessment Studies
- Mobility Management
- Multimodal Access Planning
- Specialized Planning for Seniors and Persons with Disabilities
- Transportation Demand Management
- Vehicle Miles Traveled (VMT) Analysis
- Transit Service Planning/Comprehensive Operational Analysis

- Infrastructure Planning and Financing
- Real Estate Economic/Financial Analysis
- Alternative Congestion Relief Plans
- Performance Measures and Monitoring
- Community Based Transportation Planning
- Regional Transit Analysis
- Bike Planning and Analysis
- Communication and Public Outreach
- Graphic Design and Geographic Information Systems (GIS)
- Active Transportation Plans
- Pedestrian Access Analysis
- Emerging Mobility Analysis and Planning
- Data Collection (Surveys, traffic counts, etc.)
- Bus Stops Assessment
- Fare Structure Analysis
- Organizational Design
- Autonomous Technology in Transportation Planning
- Grant Applications/Benefit Cost Analysis

Table 1

Contract Summary	Years	Amount
Total Capacity:	7.0	$11,250,000.00
Exercised:	7.0	$11,250,000.00
Work Directives Issued:		$9,032,271.61
Remaining Exercised Capacity:		$2,217,728.39

Table 2

Contract Days	Days Elapsed	% Time Elapsed	Capacity Used
2555	2206	86%	76.30%

Table 3

Contract Information	Start	End	Years	Capacity	Resolution/ Authorized
Base	4/1/2020	3/31/2025	5.0	$7,500,000	2020-6
Option 1	4/1/2025	3/31/2026	1.0	$1,875,000	2020-6
Option 2	4/1/2026	3/31/2027	1.0	$1,875,000	2020-6
Amendment					
Total:			**7.0**	**$11,250,000**	

Table 4

Vendor	Fehr & Peers	Nelson/ Nygaard	Stantec Consulting, Inc.	TOTAL
Contract #	20-S-P-007A	20-S-P-007B	20-S-P-007C	
Total WDs Issued	$6,025,715	2,877,192	$129,364	**$9,032,272**
Previous Reporting Period	$10,719	$0	$0	**$10,719**
Current Reporting Period	$99,883	$10,061	$0	**$109,944**

Table 5

WD#	Title	Description (Updates in Bold)	Vendor	Updated	Start	(Revised) End	Amount This Period
21561-A1	2025 SamTrans Fare Study	Consultant shall provide services to complete the 2025 SamTrans Fare Study. **Amendment 1 is to authorize Optional Task 1.1 for the Paratransit Fare Analysis**	Nelson/ Nygaard	5/13/2026	12/19/2025	1/31/2027	$10,061
22072	Redwood City Bus Boarding Islands Program Management Support (Fiscal Year 2026-2027)	**Consultant shall provide interim program management and staffing support for the implementation of the Redwood City Bus Boarding Islands Project on El Camino Real during fiscal year 2026-2027**	Fehr & Peers	6/22/2026	6/23/2026	3/31/2027	$69,256

WD#	Title	Description (Updates in Bold)	Vendor	Updated	Start	(Revised) End	Amount This Period
22068-A3	North Base Relocation Analysis	Consultant shall provide a comprehensive relocation analysis of SamTrans' North Base operations**.** **Amendment 3 is to extend the period of performance up to December 31, 2026, and add consulting services related to the relocation analysis of SamTrans' North Base operations**	Fehr & Peers	6/24/2026	8/25/2025	12/31/2026	$30,627
						Total Amount This Period	**$109,944**

San Mateo County Transit District
Staff Report

To: Board of Directors

Through: April Chan, General Manager/CEO

From: David Santoro, Chief Administrative Officer

Subject: **Accept Contracts and Procurement Quarterly Report on Technology Purchases for Fiscal Year 2026 Quarter Four**

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 on Technology Purchases for the Fiscal Year 2026 Quarter Four.

Significance
Pursuant to Resolution No. 2025-23, 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. 2025-23, 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: Kevin Yin Director, Contracts and Procurement 650-622-7860

C&P Quarterly Report of Technology Purchases for the Fourth Quarter of Fiscal Year 2026 **SAMTRANS**

The purchases listed below are for Information Technology Licenses, License Renewal fees, Maintenance Service, and Professional Services > $250K.

Resolution #2025-23
Total Board Approved Authority
$8,000,000

C&P Quarterly Report of Technology Purchases for First Quarter of Fiscal Year 2026

July 1, 2025 - September 30, 2025			1st Quarter			
Date	Contract # or PO#	Vendor	Contract or PO Description	Contract Authority Amount Deducted from IT Resolution#2025-23	Total Contract or PO Amount (latest change included)	Remaining Authority
9/2/2025	25-S-T-022	Triune Infomatics	Exercise option year 1 of 1 and add funds for option year 1 of 1 for the payroll pass-through services for System Administrator	$ 262,799.28	$ 525,598.56	
9/8/2025	19-S-S-10	Motorola Solutions	Amendment 1 to the contract for the maintenance and support of Motorola radios extends the base term by three years from five to eight years and adds funds for the three-year extension.	$ 219,288.94	$ 405,882.94	
			Subtotal	$ 482,088.22	$ 931,481.50	$ 7,517,911.78

C&P Quarterly Report of Technology Purchases for Second Quarter of Fiscal Year 2026

October 1, 2025 - December 31, 2025			2nd Quarter			
Date	Contract # or PO#	Vendor	Contract or PO Description	Contract Authority Amount Deducted from IT Resolution#2025-23	Total Contract or PO Amount (latest change included)	Remaining Authority
10/1/2025	26-S-L-028	ePlus	Darktrace AI Cybersecurity Subscription for 3-years.	$ 316,500.00	$ 949,500.00	
10/7/2025	SAMTR-000022060A	Dell Marketing	FY26 Annual Blanket PO for Dell hardware.	$ 350,000.00	$ 350,000.00	
10/8/2025	25-S-T-031	Triune Informatics	Exercise option year 1 of 1 and add funds for option year 1 of 1 for the payroll pass-through services for Hastus Developer.	$ 207,797.74	$ 415,595.48	
11/24/2025	24-S-T-032	Presidio Networked Solutions	Exercise option year 2 of 2 for technology professional services. Time only extension.	$ -	$ 1,600,000.00	
12/1/2025	26-S-T-052A	Triune Infomatics	GSA RFQ Payroll Passthrough Services for Business Analyst/Programmer for a three-year base term plus two one-year options.	$ 567,028.80	$ 567,028.80	
12/1/2025	26-S-T-059	Triune Infomatics	GSA RFQ Payroll Passthrough Services for Two IT Project Manager for a one-year base term plus one option year.	$ 434,707.52	$ 869,415.04	
			Subtotal	$ 1,876,034.06	$ 4,751,539.32	$ 5,641,877.72

C&P Quarterly Report of Technology Purchases for Third Quarter of Fiscal Year 2026

January 1, 2026 - March 31, 2026			3rd Quarter			
Date	Contract # or PO#	Vendor	Contract or PO Description	Contract Authority Amount Deducted from IT Resolution#2025-23	Total Contract or PO Amount (latest change included)	Remaining Authority
1/15/2026	26-S-S-092	Presidio Network Solutions, Inc.	Head Quarters Network Equipment	$ 796,679.13	$ 796,679.13	
1/21/2026	SAMTR-22420	Oracle America Corporation	Enterprise Performance Management (EPM)	$ 78,000.00	490,000	
2/23/2026	26-S-T-069	Konica Minolta	Maintenance and Support Services for Multi-Functional Devices (Copier-Printer-Scanner)	$ 120,000.00	$ 423,288.00	
3/26/2026	21-S-L-026	CDT	Microsoft 365 G5 and other online products (Amendment 1)	$ 524,474.89	$ 1,811,478.02	
3/27/2026	26-S-L-133	SHI International Corporation	Microsoft 365 G5 and other online products	$ 853,019.03	$ 2,559,057.09	
			Subtotal	$ 2,372,173.05	$ 6,080,502.24	$ 3,269,704.67

C&P Quarterly Report of Technology Purchases for Fourth Quarter of Fiscal Year 2026

April 1, 2026 - June 30, 2026			4th Quarter			
Date	Contract # or PO#	Vendor	Contract or PO Description	Contract Authority Amount Deducted from IT Resolution#2025-23	Total Contract or PO Amount (latest change included)	Remaining Authority
4/16/2026	25-S-L-035	Carahsoft Technology	Amendment 1 to add Compliance Quest licenses.	$ 396,451.42	$ 1,151,796.37	

4/22/2026	26-S-T-079	Info-Tech Research	Info-Tech Research Group was engaged to assess the District's long-term artificial intelligence strategy, related policies, and enterprise-wide alignment.	$ 600,000.00	$ 1,500,000.00	
5/19/2026	SAMTR-21249B	Triune Infomatics	Change Order 1 to add $111,600 to the PO for the PeopleSoft Techno Functional Consultant.	$ 111,600.00	$ 350,000.00	
	26-S-T-009	Insight Public Sector	Microsoft Unified Enterprise Support Services 1-year term. This is a subscription-based support service (professional services) providing proactive guidance, technical resources for implementation, configuration, optimization and proactive maintenance services for Microsoft products used by the Agency.	$ 251,974.85	$ 251,974.85	
5/27/2026	26-S-T-083	DLT Solutions, LLC	On-Call Oracle Professional Services to provide as-needed services to implement, maintain, and support all Oracle software products and boundary systems in the District's IT ecosystem, (e.g., Oracle Primavera, Oracle Enterprise Performance Management, Oracle PeopleSoft, Oracle Aconex) over the two-year term of this contract.	$ 1,000,000.00	$ 2,000,000.00	
			Subtotal	$ 2,360,026.27	$ 5,253,771.22	$ 909,678.40
			TOTAL CONTRACT & PO AMT TO DATE	**$ 7,090,321.60**		**$ 909,678.40**

San Mateo County Transit District
Staff Report

To: Board of Directors

Through: April Chan, General Manager/CEO

From: Ladi Millard-Olmeda, Interim Chief Financial Officer

Subject: **Accept Quarterly Investment Report**

Action

Staff propose that the San Mateo County Transit District (District) Board of Directors (Board) accept and enter into the record the Quarterly Investment Report for the quarter ending June 30, 2026.

Significance

The 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, 2026, 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, 2026;
- Compliance with the Investment Policy and California Government Code; and,
- Certification of the District's ability to meet its six-month expenditure requirements.

Portfolio Balances and Performance Highlights

The District's total portfolio is valued at $586.3 million. During the fourth quarter of Fiscal Year 2026 (FY26Q4), the entire portfolio earned $5.42 million in interest income, with $2.43 million generated from PFM Asset Management LLC (PFM) managed holdings and $2.15 million from California Asset Management Program (CAMP). The remaining $838,000 was Bank Interest Earnings and Local Agency Investment Fund (LAIF).

1. $237.3 million Investment Portfolio in FY26Q4 (Exhibit 1); managed by (PFM) comprised of fixed income securities:
   a. $206 million in operating funds: 4.35 percent market yield on June 30, 2026
   b. $31.3 million in paratransit funds: 4.34 percent market yield on June 30, 2026

2. $349 million Liquidity Portfolio in FY26Q4, managed by the District staff, composed of short-term investments such as:
   a. $6.2 million LAIF: 3.82 percent market yield
   b. $9.9 million United States (U.S.) Bank Money Market Funds (MMF): 3.28 percent market yield
   c. $102.8 million Bank of America and J.P. Morgan bank unrestricted checking and cash balances: 3.58 percent market yield
   d. $230.1 million CAMP: 3.77 percent market yield

<u>**Market Conditions**</u>
Federal Reserve Actions:

- The Federal Reserve (FR) held rates steady throughout 2026, maintaining a restrictive stance as Chair Warsh prioritized restoring price stability.
- June's dot plot reflected a more tightening-leaning outlook, with most participants expecting at least one rate increase and the median year-end rate rising to 3.8 percent.

Market and Economic Indicators:

- Treasury yields moved higher across the curve during FY26Q4, driven by firmer inflation data and a more restrictive policy tone from the FR.
- The 10-year Treasury climbed to roughly 4.47 percent and short-term yields rose more sharply, reflecting expectations for persistent inflation and tighter financial conditions.
- Long-term yields remained elevated amid uncertainty over U.S. growth and continued inflation pressure.

Labor Market and Consumer Spending:

- Labor market conditions softened modestly, with payroll gains slowing and unemployment holding near 4.2 percent – 4.4 percent, signaling gradual cooling rather than broad deterioration.

- The FR’s June projections maintained a 4.2 percent unemployment forecast for 2026 and revised real GDP growth up to 2.3 percent, supported by artificial intelligence (AI)-related investment and easing supply constraints.

- Consumer spending remained under pressure as higher energy prices and rising borrowing costs strained household budgets, with the savings rate falling to just 3.0 percent.

Portfolio Compliance

The District’s investment portfolio remains in full compliance with the Investment Policy and applicable California Government Code requirements. Managed portfolio holdings are valued using market prices sourced from Intercontinental Exchange (ICE) Data Services, while liquidity holdings continue to be carried at book value due to their short-term nature. The District further certifies that it can meet all anticipated expenditure for the next six months.

Prepared By: Nazeea Rahman Principal Financial Analyst 650 508 7981

Investment Glossary

Asset Backed Securities - An asset-backed security (ABS) is 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 Federal Deposit Insurance Corporation (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 funds 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 U.S. Treasury debt. This yield curve is used as a benchmark for other debts 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 schedule.

EXHIBIT 1
SAN MATEO TRANSIT DISTRICT
REPORT OF INVESTMENTS
FOR QUARTER ENDING JUNE 30, 2026

Security Type	Identifier	Description	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
ABS	02007NAC2	ALLYA 2024-2 A3	57,814.05	09/27/2024	07/16/2029	57,810.33	57,766.58	57,872.97
ABS	02007NAC2	ALLYA 2024-2 A3	366,155.67	09/27/2024	07/16/2029	366,132.08	365,855.03	366,528.79
ABS	02582JKH2	AMXCA 2024-1 A	244,984.82	04/23/2024	04/16/2029	244,949.78	247,016.35	247,585.84
ABS	02582JKH2	AMXCA 2024-1 A	1,609,900.21	04/23/2024	04/16/2029	1,609,669.95	1,623,250.30	1,626,992.66
ABS	02582JKP4	AMXCA 2025-2 A	209,997.29	05/13/2025	04/15/2030	209,996.20	209,787.90	210,187.37
ABS	02582JKP4	AMXCA 2025-2 A	1,389,982.09	05/13/2025	04/15/2030	1,389,974.84	1,388,596.10	1,391,240.19
ABS	05522RDH8	BACCT 2023-2 A	99,998.04	12/14/2023	11/16/2026	99,986.57	100,320.00	100,541.33
ABS	05522RDH8	BACCT 2023-2 A	639,987.48	12/14/2023	11/16/2026	639,914.05	642,048.00	643,464.53
ABS	05522RDJ4	BACCT 2024-1 A	229,996.00	06/13/2024	05/15/2029	229,987.10	231,483.50	231,987.46
ABS	05522RDJ4	BACCT 2024-1 A	1,564,972.75	06/13/2024	05/15/2029	1,564,912.20	1,575,094.25	1,578,523.34
ABS	05522RDK1	BACCT 2025-1 A	134,999.48	06/12/2025	05/15/2030	134,999.49	134,950.05	135,208.65
ABS	05522RDK1	BACCT 2025-1 A	914,996.46	06/12/2025	05/15/2030	914,996.52	914,661.45	916,414.18
ABS	05594BAD8	BAAT 2025-1 A3	39,998.44	05/12/2025	11/20/2029	39,997.24	40,019.20	40,072.37
ABS	05594BAD8	BAAT 2025-1 A3	279,989.06	05/12/2025	11/20/2029	279,980.68	280,134.40	280,506.57
ABS	14041NGE5	COMET 2024-1 A	264,978.62	09/24/2024	09/17/2029	264,948.27	264,000.95	264,462.64
ABS	14041NGE5	COMET 2024-1 A	1,674,864.86	09/24/2024	09/17/2029	1,674,673.04	1,668,685.25	1,671,603.47
ABS	14041NGF2	COMET 2025-1 A	179,975.57	09/16/2025	09/15/2028	179,965.87	177,908.40	178,214.00
ABS	14041NGF2	COMET 2025-1 A	1,204,836.49	09/16/2025	09/15/2028	1,204,771.53	1,190,997.90	1,193,043.72
ABS	161571HT4	CHAIT 2023-1 A	219,995.51	09/15/2023	09/15/2028	219,939.02	220,554.40	221,058.93
ABS	161571HT4	CHAIT 2023-1 A	1,449,970.44	09/15/2023	09/15/2028	1,449,598.06	1,453,654.00	1,456,979.33
ABS	161571HV9	CHAIT 241 A	239,992.88	01/31/2024	01/16/2029	239,963.45	240,528.00	241,018.67
ABS	161571HV9	CHAIT 241 A	1,564,953.59	01/31/2024	01/16/2029	1,564,761.65	1,568,443.00	1,571,642.56
ABS	17305EHA6	CCCIT 2025-A1 A1	299,944.35	06/26/2025	06/21/2030	299,918.61	299,493.00	299,851.33
ABS	17305EHA6	CCCIT 2025-A1 A1	1,999,628.99	06/26/2025	06/21/2030	1,999,457.40	1,996,620.00	1,999,008.89
ABS	31680EAD3	FITAT 2023-1 A3	62,728.33	08/23/2023	08/15/2028	62,725.20	63,000.08	63,154.25
ABS	31680EAD3	FITAT 2023-1 A3	406,929.94	08/23/2023	08/15/2028	406,909.63	408,692.82	409,692.97
ABS	34535KAD0	FORDO 2025-A A3	229,988.12	03/25/2025	10/15/2029	229,977.64	230,333.50	230,788.39
ABS	34535KAD0	FORDO 2025-A A3	1,444,925.41	03/25/2025	10/15/2029	1,444,859.55	1,447,095.25	1,449,953.14
ABS	362549AD9	GMCAR 2025-2 A3	49,967.38	05/14/2025	04/16/2030	49,940.86	50,006.00	50,095.17
ABS	362549AD9	GMCAR 2025-2 A3	329,784.73	05/14/2025	04/16/2030	329,609.69	330,039.60	330,628.10
ABS	437918AC9	HAROT 2024-1 A3	81,542.02	02/21/2024	08/15/2028	81,539.41	81,927.03	82,115.85
ABS	437918AC9	HAROT 2024-1 A3	526,316.70	02/21/2024	08/15/2028	526,299.85	528,801.72	530,020.45
ABS	437921AD1	HAROT 252 A3	64,995.97	05/08/2025	10/15/2029	64,992.74	64,857.00	64,976.89
ABS	437921AD1	HAROT 252 A3	419,973.97	05/08/2025	10/15/2029	419,953.09	419,076.00	419,850.67
ABS	438123AC5	HAROT 2023-4 A3	18,545.63	11/08/2023	06/21/2028	18,543.09	18,660.42	18,689.63
ABS	438123AC5	HAROT 2023-4 A3	127,758.79	11/08/2023	06/21/2028	127,741.30	128,549.54	128,750.77
ABS	43813QAD1	HAROT 2025-3 A3	170,007.19	08/12/2025	02/21/2030	169,996.45	169,250.30	169,441.08
ABS	43813QAD1	HAROT 2025-3 A3	1,150,048.62	08/12/2025	02/21/2030	1,149,975.97	1,144,928.50	1,146,219.06
ABS	43813YAC6	HAROT 2024-3 A3	143,654.42	08/21/2024	03/21/2029	143,639.33	143,946.35	144,128.72
ABS	43813YAC6	HAROT 2024-3 A3	896,869.46	08/21/2024	03/21/2029	896,775.28	898,692.08	899,830.66
ABS	448981AD2	HART 2026-A A3	84,994.98	02/18/2026	02/18/2031	84,994.26	83,871.20	84,014.38
ABS	448981AD2	HART 2026-A A3	574,966.06	02/18/2026	02/18/2031	574,961.19	567,364.00	568,332.56
ABS	44935CAD3	HART 2025-A A3	184,986.67	03/12/2025	10/15/2029	184,972.71	185,085.10	185,440.30
ABS	44935CAD3	HART 2025-A A3	1,169,915.74	03/12/2025	10/15/2029	1,169,827.43	1,170,538.20	1,172,784.60
ABS	44935JAD8	HART 2025-C A3	144,983.27	09/17/2025	04/15/2030	144,976.34	143,954.55	144,204.59
ABS	44935JAD8	HART 2025-C A3	959,889.24	09/17/2025	04/15/2030	959,843.33	953,078.40	954,733.87
ABS	65479UAD0	NAROT 2024-A A3	129,429.03	05/22/2024	12/15/2028	129,421.48	130,113.09	130,416.83
ABS	65479UAD0	NAROT 2024-A A3	884,933.36	05/22/2024	12/15/2028	884,881.73	889,610.45	891,687.17
ABS	65481GAD7	NAROT 2025-A A3	209,975.63	05/27/2025	12/17/2029	209,959.68	210,495.60	210,914.67
ABS	65481GAD7	NAROT 2025-A A3	1,409,836.39	05/27/2025	12/17/2029	1,409,729.28	1,413,327.60	1,416,141.33
ABS	73329KAD8	PILOT 251 A3	99,995.02	05/21/2025	10/20/2028	99,989.29	100,285.00	100,425.86
ABS	73329KAD8	PILOT 251 A3	359,982.07	05/21/2025	10/20/2028	359,961.44	361,026.00	361,533.10
ABS	89231HAD8	TAOT 2025-B A3	109,996.32	04/30/2025	11/15/2029	109,993.70	110,039.60	110,251.78
ABS	89231HAD8	TAOT 2025-B A3	744,975.04	04/30/2025	11/15/2029	744,957.31	745,268.20	746,705.22
ABS	89237QAD2	TAOT 2024-C A3	95,781.03	07/30/2024	03/15/2029	95,781.06	96,164.24	96,371.97
ABS	89237QAD2	TAOT 2024-C A3	602,622.29	07/30/2024	03/15/2029	602,622.47	605,033.32	606,340.34

ABS	89240KAD0	TAOT 2026-A A3	74,994.59	01/21/2026	09/15/2030	74,993.61	74,280.00	74,408.67
ABS	89240KAD0	TAOT 2026-A A3	489,964.64	01/21/2026	09/15/2030	489,958.25	485,296.00	486,136.62
ABS	92348KDY6	VZMT 2025-3 A1A	224,996.24	03/31/2025	03/20/2030	224,990.33	225,380.25	225,690.31
ABS	92348KDY6	VZMT 2025-3 A1A	1,509,974.76	03/31/2025	03/20/2030	1,509,935.07	1,512,551.90	1,514,632.76
ABS	92868MAD1	VALET 2025-1 A3	189,996.58	03/25/2025	08/20/2029	189,993.54	190,385.70	190,646.95
ABS	92868MAD1	VALET 2025-1 A3	1,189,978.57	03/25/2025	08/20/2029	1,189,959.54	1,192,415.70	1,194,051.95
ABS	92970QAA3	WFCIT 2024-1 A	274,983.23	03/01/2024	02/15/2029	274,925.36	276,278.75	276,882.53
ABS	92970QAA3	WFCIT 2024-1 A	1,799,890.27	03/01/2024	02/15/2029	1,799,511.48	1,808,370.00	1,812,322.00
ABS	92970QAE5	WFCIT 2024-2 A	139,990.34	10/24/2024	10/15/2029	139,979.20	140,084.00	140,350.93
ABS	92970QAE5	WFCIT 2024-2 A	889,938.59	10/24/2024	10/15/2029	889,867.75	890,534.00	892,230.93
ABS	92970QAJ4	WFCIT 2025-1 A	265,046.04	06/10/2025	05/15/2030	264,995.60	265,082.15	265,593.31
ABS	92970QAJ4	WFCIT 2025-1 A	1,765,306.64	06/10/2025	05/15/2030	1,764,970.70	1,765,547.15	1,768,951.64
ABS	**---**	**---**	**39,589,272.47**	**---**		**39,585,736.12**	**39,611,184.35**	**39,684,542.73**

CASH

Security Type	Identifier	Description	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
CASH	CCYUSD	Cash	0.00	---	06/30/2026	0.00	0.00	0.00
CASH	CCYUSD	Receivable	431.42	---	06/30/2026	431.42	431.42	431.42
CASH	CCYUSD	Receivable	2,326.11	---	06/30/2026	2,326.11	2,326.11	2,326.11
CASH	CCYUSD	Receivable	26,418.26	---	06/30/2026	26,418.26	26,418.26	26,418.26
CASH	**---**	**---**	**29,175.79**		**12/31/2025**	**29,175.79**	**29,175.79**	**29,175.79**

CORP

Security Type	Identifier	Description	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
CORP	009158BH8	AIR PRODUCTS AND CHEMICALS INC	179,868.50	02/08/2024	2/8/2029	179,760.60	180,624.60	183,913.60
CORP	009158BH8	AIR PRODUCTS AND CHEMICALS INC	1,224,105.07	02/08/2024	2/8/2029	1,223,370.75	1,229,250.75	1,251,634.22
CORP	023135CT1	AMAZON.COM INC	324,691.30	11/20/2025	11/20/2030	324,652.25	319,410.00	320,927.57
CORP	023135CT1	AMAZON.COM INC	1,998,100.29	11/20/2025	11/20/2030	1,997,860.00	1,965,600.00	1,974,938.89
CORP	025816ED7	AMERICAN EXPRESS CO	95,000.00	04/25/2025	4/25/2029	95,000.00	95,245.10	96,069.08
CORP	025816ED7	AMERICAN EXPRESS CO	130,000.00	04/25/2025	4/25/2029	130,000.00	130,335.40	131,462.96
CORP	025816ED7	AMERICAN EXPRESS CO	645,000.00	04/25/2025	4/25/2029	645,000.00	646,664.10	652,258.51
CORP	025816ED7	AMERICAN EXPRESS CO	855,000.00	04/25/2025	4/25/2029	855,000.00	857,205.90	864,621.74
CORP	02665WFQ9	AMERICAN HONDA FINANCE CORP	224,821.61	09/05/2024	9/5/2029	224,730.00	222,635.25	225,825.25
CORP	02665WFQ9	AMERICAN HONDA FINANCE CORP	1,398,890.03	09/05/2024	9/5/2029	1,398,320.00	1,385,286.00	1,405,134.89
CORP	032654BE4	ANALOG DEVICES INC	224,839.45	06/16/2025	6/15/2030	224,802.00	224,451.00	224,901.00
CORP	032654BE4	ANALOG DEVICES INC	1,448,965.33	06/16/2025	6/15/2030	1,448,724.00	1,446,462.00	1,449,362.00
CORP	04636NAF0	ASTRAZENECA FINANCE LLC	199,853.79	03/03/2023	3/3/2028	199,596.00	201,668.00	204,863.83
CORP	04636NAF0	ASTRAZENECA FINANCE LLC	1,299,049.66	03/03/2023	3/3/2028	1,297,374.00	1,310,842.00	1,331,614.92
CORP	05565EBW4	BMW US CAPITAL LLC	149,998.93	08/16/2021	8/12/2026	149,955.00	149,472.00	150,195.96
CORP	05565EBW4	BMW US CAPITAL LLC	849,993.91	08/16/2021	8/12/2026	849,745.00	847,008.00	851,110.43
CORP	06406RBA4	BANK OF NEW YORK MELLON CORP	424,887.56	01/28/2022	1/26/2027	424,056.50	419,891.50	423,642.72
CORP	06406RBA4	BANK OF NEW YORK MELLON CORP	2,699,285.68	01/28/2022	1/26/2027	2,694,006.00	2,667,546.00	2,691,377.25
CORP	084664CZ2	BERKSHIRE HATHAWAY FINANCE CORP	398,877.71	03/17/2022	3/15/2027	392,496.00	394,724.00	397,432.89
CORP	084664CZ2	BERKSHIRE HATHAWAY FINANCE CORP	2,692,424.52	03/17/2022	3/15/2027	2,649,348.00	2,664,387.00	2,682,672.00
CORP	09290DAA9	BLACKROCK INC	24,974.23	03/14/2024	3/14/2029	24,954.75	25,248.00	25,597.24
CORP	09290DAA9	BLACKROCK INC	174,819.63	03/14/2024	3/14/2029	174,683.25	176,736.00	179,180.65
CORP	09290DAA9	BLACKROCK INC	250,073.12	03/14/2024	3/14/2029	250,122.50	252,480.00	255,972.36
CORP	09290DAA9	BLACKROCK INC	1,675,489.91	03/14/2024	3/14/2029	1,675,820.75	1,691,616.00	1,715,014.82
CORP	14913R2U0	CATERPILLAR FINANCIAL SERVICES CORP	199,890.55	01/13/2022	1/8/2027	198,990.00	197,522.00	199,155.89
CORP	14913R2U0	CATERPILLAR FINANCIAL SERVICES CORP	1,349,261.21	01/13/2022	1/8/2027	1,343,182.50	1,333,273.50	1,344,302.25
CORP	17275RBR2	CISCO SYSTEMS INC	214,957.83	02/26/2024	2/26/2029	214,924.75	217,283.30	220,903.96

CORP	17275RBR2	CISCO SYSTEMS INC	1,484,708.70	02/26/2024	2/26/2029	1,484,480.25	1,500,770.70	1,525,778.51
CORP	17325FBB3	CITIBANK NA	399,038.19	10/04/2023	9/29/2028	398,016.00	411,536.00	417,467.96
CORP	17325FBB3	CITIBANK NA	2,593,748.21	10/04/2023	9/29/2028	2,587,104.00	2,674,984.00	2,713,541.71
CORP	24422EXB0	JOHN DEERE CAPITAL CORP	200,670.93	07/25/2023	7/14/2028	201,528.00	202,478.00	207,070.50
CORP	24422EXB0	JOHN DEERE CAPITAL CORP	1,304,361.03	07/25/2023	7/14/2028	1,309,932.00	1,316,107.00	1,345,958.25
CORP	437076DJ8	HOME DEPOT INC	44,862.02	09/15/2025	9/15/2030	44,838.45	44,097.75	44,621.13
CORP	437076DJ8	HOME DEPOT INC	179,283.53	09/15/2025	9/15/2030	179,161.20	176,391.00	178,484.50
CORP	437076DJ8	HOME DEPOT INC	314,034.15	09/15/2025	9/15/2030	313,869.15	308,684.25	312,347.88
CORP	437076DJ8	HOME DEPOT INC	1,180,283.23	09/15/2025	9/15/2030	1,179,477.90	1,161,240.75	1,175,022.96
CORP	46647PFL5	JPMORGAN CHASE & CO	255,000.00	04/23/2026	4/23/2030	255,000.00	252,832.50	254,955.69
CORP	46647PFL5	JPMORGAN CHASE & CO	1,595,000.00	04/23/2026	4/23/2030	1,595,000.00	1,581,442.50	1,594,722.82
CORP	539830BZ1	LOCKHEED MARTIN CORP	29,978.11	05/25/2023	5/15/2028	29,946.00	30,034.20	30,204.78
CORP	539830BZ1	LOCKHEED MARTIN CORP	204,850.44	05/25/2023	5/15/2028	204,631.00	205,233.70	206,399.35
CORP	571676AY1	MARS INC	64,945.82	03/12/2025	3/1/2030	64,929.80	65,193.70	66,233.70
CORP	571676AY1	MARS INC	399,666.61	03/12/2025	3/1/2030	399,568.00	401,192.00	407,592.00
CORP	58933YBH7	MERCK & CO INC	79,974.14	05/17/2023	5/17/2028	79,935.20	79,767.20	80,163.20
CORP	58933YBH7	MERCK & CO INC	514,833.50	05/17/2023	5/17/2028	514,582.85	513,501.35	516,050.60
CORP	61748UAR3	MORGAN STANLEY	110,000.00	01/20/2026	1/9/2030	110,000.00	108,563.40	110,648.26
CORP	61748UAR3	MORGAN STANLEY	735,000.00	01/20/2026	1/9/2030	735,000.00	725,400.90	739,331.56
CORP	61776NU43	MORGAN STANLEY PRIVATE BANK NA	250,000.00	02/02/2026	2/8/2030	250,000.00	246,735.00	251,094.28
CORP	61776NU43	MORGAN STANLEY PRIVATE BANK NA	1,065,000.00	02/02/2026	2/8/2030	1,065,000.00	1,051,091.10	1,069,661.65
CORP	63743HFS6	NATIONAL RURAL UTILITIES COOPERATIVE FINANCE CORP	81,987.88	09/16/2024	6/15/2029	83,099.20	81,239.20	81,422.31
CORP	63743HFS6	NATIONAL RURAL UTILITIES COOPERATIVE FINANCE CORP	123,021.37	09/16/2024	6/15/2029	124,711.20	121,858.80	122,133.47
CORP	63743HFS6	NATIONAL RURAL UTILITIES COOPERATIVE FINANCE CORP	553,418.21	09/16/2024	6/15/2029	560,919.60	548,364.60	549,600.60
CORP	63743HFS6	NATIONAL RURAL UTILITIES COOPERATIVE FINANCE CORP	881,653.17	09/16/2024	6/15/2029	893,763.60	873,321.40	875,289.84
CORP	63743HGC0	NATIONAL RURAL UTILITIES COOPERATIVE FINANCE CORP	144,877.51	12/10/2025	12/10/2030	144,863.70	143,030.90	143,394.61
CORP	63743HGC0	NATIONAL RURAL UTILITIES COOPERATIVE FINANCE CORP	155,056.31	12/10/2025	12/10/2030	155,062.00	152,895.10	153,283.89
CORP	63743HGC0	NATIONAL RURAL UTILITIES COOPERATIVE FINANCE CORP	964,184.78	12/10/2025	12/10/2030	964,092.90	951,895.30	954,315.84
CORP	63743HGC0	NATIONAL RURAL UTILITIES COOPERATIVE FINANCE CORP	1,040,377.80	12/10/2025	12/10/2030	1,040,416.00	1,025,876.80	1,028,485.47
CORP	665859AY0	NORTHERN TRUST CORP	64,971.74	11/19/2025	11/19/2030	64,968.15	64,060.75	64,375.46
CORP	665859AY0	NORTHERN TRUST CORP	259,720.84	11/19/2025	11/19/2030	259,685.40	256,243.00	257,501.83
CORP	665859AY0	NORTHERN TRUST CORP	399,826.09	11/19/2025	11/19/2030	399,804.00	394,220.00	396,156.67
CORP	665859AY0	NORTHERN TRUST CORP	1,598,282.11	11/19/2025	11/19/2030	1,598,064.00	1,576,880.00	1,584,626.67
CORP	66989HAY4	NOVARTIS CAPITAL CORP	533,587.20	11/05/2025	11/5/2030	533,395.00	525,616.10	529,028.21
CORP	66989HAY4	NOVARTIS CAPITAL CORP	3,555,585.72	11/05/2025	11/5/2030	3,554,305.00	3,502,469.90	3,525,206.68
CORP	67066GAR5	NVIDIA CORP	219,584.62	06/18/2026	6/15/2031	219,582.00	219,221.20	219,578.70
CORP	67066GAR5	NVIDIA CORP	1,427,300.05	06/18/2026	6/15/2031	1,427,283.00	1,424,937.80	1,427,261.55
CORP	69371RT71	PACCAR FINANCIAL CORP	224,724.47	05/08/2025	5/8/2030	224,651.25	226,426.50	227,933.69
CORP	69371RT71	PACCAR FINANCIAL CORP	1,448,224.39	05/08/2025	5/8/2030	1,447,752.50	1,459,193.00	1,468,905.99
CORP	79466LAR5	SALESFORCE INC	324,935.69	03/13/2026	3/15/2029	324,928.50	324,831.00	329,364.75
CORP	79466LAR5	SALESFORCE INC	1,999,604.22	03/13/2026	3/15/2029	1,999,560.00	1,998,960.00	2,026,860.00
CORP	822905AN5	SHELL FINANCE US INC	129,560.27	11/06/2025	11/6/2030	129,500.80	127,650.90	128,470.17
CORP	822905AN5	SHELL FINANCE US INC	469,205.20	11/06/2025	11/6/2030	469,097.60	461,507.10	464,469.08
CORP	822905AN5	SHELL FINANCE US INC	882,006.45	11/06/2025	11/6/2030	881,601.60	869,008.05	874,585.39
CORP	822905AN5	SHELL FINANCE US INC	3,109,732.36	11/06/2025	11/6/2030	3,109,019.20	3,058,711.95	3,078,342.94
CORP	857477DB6	STATE STREET CORP	110,000.00	04/24/2025	4/24/2030	110,000.00	111,101.10	112,090.73

CORP	857477DB6	STATE STREET CORP	700,000.00	04/24/2025	4/24/2030	700,000.00	707,007.00	713,304.63
CORP	87612EBM7	TARGET CORP	34,993.26	01/24/2022	1/15/2027	34,940.50	34,591.20	34,905.91
CORP	87612EBM7	TARGET CORP	239,953.82	01/24/2022	1/15/2027	239,592.00	237,196.80	239,354.80
CORP	89158TAA7	TOTALENERGIES CAPITAL USA LLC	189,979.51	01/13/2026	1/13/2031	189,977.58	186,798.50	190,565.06
CORP	89158TAA7	TOTALENERGIES CAPITAL USA LLC	260,407.79	01/13/2026	1/13/2031	260,445.12	255,619.00	260,773.24
CORP	89158TAA7	TOTALENERGIES CAPITAL USA LLC	1,264,863.55	01/13/2026	1/13/2031	1,264,850.73	1,243,684.75	1,268,762.11
CORP	89158TAA7	TOTALENERGIES CAPITAL USA LLC	1,737,721.21	01/13/2026	1/13/2031	1,737,970.32	1,705,765.25	1,740,159.89
CORP	89236TLL7	TOYOTA MOTOR CREDIT CORP	84,940.42	01/05/2024	1/5/2029	84,887.80	85,406.30	87,338.63
CORP	89236TLL7	TOYOTA MOTOR CREDIT CORP	114,916.33	01/05/2024	1/5/2029	114,842.45	115,549.70	118,164.03
CORP	89236TLL7	TOYOTA MOTOR CREDIT CORP	574,596.93	01/05/2024	1/5/2029	574,241.00	577,748.50	590,820.17
CORP	89236TLL7	TOYOTA MOTOR CREDIT CORP	774,436.14	01/05/2024	1/5/2029	773,938.25	778,704.50	796,322.83
CORP	931142FB4	WALMART INC	139,901.73	04/18/2023	4/15/2028	139,742.40	139,342.00	140,494.67
CORP	931142FB4	WALMART INC	929,347.17	04/18/2023	4/15/2028	928,288.80	925,629.00	933,286.00
CORP	**---**	**---**	**62,105,844.71**	**---**		**62,052,317.55**	**61,802,707.35**	**62,438,374.66**

FHLMC

Security Type	Identifier	Description	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
FHLMC	3132CWMM3	FH SB0364	98,928.52	06/25/2021	06/01/2035	100,676.83	90,464.32	90,736.85
FHLMC	3132CWMM3	FH SB0364	532,977.41	06/25/2021	06/01/2035	542,396.44	487,376.55	488,844.75
FHLMC	3133L7LB1	FH RC1222	105,702.41	10/19/2021	12/01/2034	107,873.62	97,262.87	97,555.55
FHLMC	3133L7LB1	FH RC1222	587,235.61	10/19/2021	12/01/2034	599,297.88	540,349.27	541,975.27
FHLMC	3133L9AJ2	FH RC2709	93,308.57	10/18/2022	09/01/2037	93,110.02	94,371.72	94,727.32
FHLMC	3133L9AJ2	FH RC2709	575,459.65	10/18/2022	09/01/2037	574,235.09	582,016.32	584,209.45
FHLMC	3137H8B42	FHMS K-J40 A1	78,318.25	07/14/2022	06/25/2028	78,421.96	77,580.64	77,802.84
FHLMC	3137H8B42	FHMS K-J40 A1	469,909.49	07/14/2022	06/25/2028	470,531.78	465,483.85	466,817.04
FHLMC	3137H8H79	FHMS K-J41 A1	200,022.44	08/04/2022	01/25/2029	200,279.33	195,304.73	195,828.30
FHLMC	3137H8H79	FHMS K-J41 A1	1,200,134.67	08/04/2022	01/25/2029	1,201,675.97	1,171,828.38	1,174,969.80
FHLMC	3137H92N8	FHMS K-J42 A1	100,782.28	09/15/2022	07/25/2029	100,930.33	99,935.93	100,264.13
FHLMC	3137H92N8	FHMS K-J42 A1	601,969.83	09/15/2022	07/25/2029	602,854.15	596,914.61	598,874.96
FHLMC	3137H9MM8	FHMS K-J43 A1	140,496.24	12/15/2022	12/25/2028	140,810.57	140,548.24	141,061.86
FHLMC	3137H9MM8	FHMS K-J43 A1	919,611.75	12/15/2022	12/25/2028	921,669.22	919,952.12	923,313.97
FHLMC	3137H9QT9	FHMS K-J44 A1	117,471.54	02/23/2023	01/25/2029	117,644.36	117,525.65	117,972.52
FHLMC	3137H9QT9	FHMS K-J44 A1	768,904.62	02/23/2023	01/25/2029	770,035.78	769,258.79	772,183.74
FHLMC	3137HA4K9	FHMS K-J45 A1	207,446.05	05/25/2023	11/25/2028	207,807.61	207,330.07	208,101.56
FHLMC	3137HA4K9	FHMS K-J45 A1	1,357,828.70	05/25/2023	11/25/2028	1,360,195.27	1,357,069.53	1,362,119.27
FHLMC	3137HACX2	FHMS K-505 A2	275,619.69	07/20/2023	06/25/2028	277,746.70	276,229.25	277,333.60
FHLMC	3137HACX2	FHMS K-505 A2	1,804,056.17	07/20/2023	06/25/2028	1,817,978.40	1,808,046.00	1,815,274.50
FHLMC	3137HAD45	FHMS K-J46 A1	212,849.46	07/27/2023	06/25/2028	213,294.49	213,754.15	214,603.26
FHLMC	3137HAD45	FHMS K-J46 A1	1,371,696.48	07/27/2023	06/25/2028	1,374,564.46	1,377,526.72	1,382,998.77
FHLMC	3137HAGY6	FHMS K-752 A1	100,023.77	08/24/2023	01/25/2029	98,397.58	101,107.70	101,469.67
FHLMC	3137HAGY6	FHMS K-752 A1	646,307.44	08/24/2023	01/25/2029	635,799.74	653,311.30	655,650.20
FHLMC	3137HAMH6	FHMS K-506 A2	272,701.17	09/14/2023	08/25/2028	270,931.93	275,528.00	276,593.63
FHLMC	3137HAMH6	FHMS K-506 A2	1,784,953.08	09/14/2023	08/25/2028	1,773,372.60	1,803,456.00	1,810,431.00
FHLMC	3137HAMS2	FHMS K-507 A2	273,007.42	09/28/2023	09/25/2028	271,712.93	276,427.25	277,527.25
FHLMC	3137HAMS2	FHMS K-507 A2	1,786,957.65	09/28/2023	09/25/2028	1,778,484.60	1,809,342.00	1,816,542.00
FHLMC	3137HAQ74	FHMS K-508 A2	271,739.22	10/19/2023	08/25/2028	268,967.60	276,072.50	277,158.75
FHLMC	3137HAQ74	FHMS K-508 A2	1,778,656.73	10/19/2023	08/25/2028	1,760,515.20	1,807,020.00	1,814,130.00
FHLMC	3137HAST4	FHMS K-509 A2	201,515.24	10/31/2023	09/25/2028	198,463.98	206,143.90	206,972.44
FHLMC	3137HAST4	FHMS K-509 A2	1,327,051.60	10/31/2023	09/25/2028	1,306,957.95	1,357,533.00	1,362,989.25
FHLMC	3137HB3D4	FHMS K-510 A2	99,687.11	11/21/2023	10/25/2028	99,710.90	101,068.00	101,490.42
FHLMC	3137HB3D4	FHMS K-510 A2	652,950.58	11/21/2023	10/25/2028	653,106.40	661,995.40	664,762.23
FHLMC	3137HDV56	FHMS K-524 A2	240,695.81	07/25/2024	05/25/2029	241,575.76	241,190.40	242,134.40
FHLMC	3137HDV56	FHMS K-524 A2	1,524,406.80	07/25/2024	05/25/2029	1,529,979.81	1,527,539.20	1,533,517.87
FHLMC	3137HDXL9	FHMS K-526 A2	271,326.38	08/15/2024	07/25/2029	272,525.58	270,434.70	271,456.88
FHLMC	3137HDXL9	FHMS K-526 A2	1,713,375.84	08/15/2024	07/25/2029	1,720,948.57	1,707,745.05	1,714,199.90
FHLMC	3137HKXJ8	FHMS K-539 A2	104,926.36	04/24/2025	01/25/2030	104,996.33	104,826.75	105,212.63
FHLMC	3137HKXJ8	FHMS K-539 A2	664,533.56	04/24/2025	01/25/2030	664,976.73	663,902.75	666,346.63
FHLMC	**---**	**---**	**25,535,545.61**	**---**		**25,525,454.44**	**25,530,773.61**	**25,626,154.42**

FHLMC CMO

Security Type	Identifier	Description	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
FHLMC CMO	3133Q5GZ3	FHS 370 A3	341,423.86	12/29/2020	09/25/2033	343,987.22	322,495.87	322,778.53
FHLMC CMO	3137F7DH5	FHR 5048 B	59,189.95	11/30/2020	05/25/2033	59,472.53	54,496.62	54,545.56
FHLMC CMO	3137F7DH5	FHR 5048 B	279,807.03	11/30/2020	05/25/2033	281,142.86	257,620.39	257,851.75
FHLMC CMO	3137HB3G7	FHMS K-511 A2	149,542.41	12/07/2023	10/25/2028	149,569.05	151,036.50	151,644.00
FHLMC CMO	3137HB3G7	FHMS K-511 A2	996,949.42	12/07/2023	10/25/2028	997,127.00	1,006,910.00	1,010,960.00
FHLMC CMO	3137HDJJ0	FHMS K-522 A2	0.00	06/13/2024	05/25/2029	0.00	0.00	(0.00)
FHLMC CMO	**---**	**---**	**1,826,912.67**	**---**	**01/09/2030**	**1,831,298.66**	**1,792,559.38**	**1,797,779.84**

FNMA

Security Type	Identifier	Description	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
FNMA	3140K7XA6	FN BP0672	111,368.47	05/18/2021	03/01/2035	113,860.48	101,338.95	101,604.59
FNMA	3140K7XA6	FN BP0672	631,088.01	05/18/2021	03/01/2035	645,209.37	574,254.02	575,759.32
FNMA	3140Q9FM0	FN CA1971	97,163.99	01/18/2022	06/01/2033	98,866.96	91,267.39	91,540.68
FNMA	3140Q9FM0	FN CA1971	647,759.96	01/18/2022	06/01/2033	659,113.06	608,449.29	610,271.22
FNMA	3140QGKN6	FN CA8400	126,882.42	03/22/2021	12/01/2035	130,921.88	115,788.64	116,137.67
FNMA	3140QGKN6	FN CA8400	648,252.83	03/22/2021	12/01/2035	668,890.80	591,573.82	593,357.02
FNMA	3140X92C8	FN FM6170	81,446.81	06/25/2021	07/01/2035	82,985.45	75,388.69	75,643.93
FNMA	3140X92C8	FN FM6170	434,383.00	06/25/2021	07/01/2035	442,589.07	402,073.03	403,434.32
FNMA	3140X9K46	FN FM5714	55,237.93	03/25/2021	11/01/2035	56,166.77	50,655.40	50,827.27
FNMA	3140X9K46	FN FM5714	309,332.39	03/25/2021	11/01/2035	314,533.93	283,670.26	284,632.69
FNMA	3140XALC4	FN FM6622	152,471.27	03/29/2021	02/01/2036	155,345.57	138,991.68	139,299.44
FNMA	3140XALC4	FN FM6622	813,180.13	03/29/2021	02/01/2036	828,509.72	741,288.95	742,930.37
FNMA	3140XC4K1	FN FM8925	128,434.25	11/16/2021	08/01/2034	132,732.53	120,646.91	121,054.93
FNMA	3140XC4K1	FN FM8925	684,982.68	11/16/2021	08/01/2034	707,906.84	643,450.19	645,626.27
FNMA	3140XHQQ3	FN FS2262	986,224.86	06/30/2022	06/01/2037	989,415.74	952,955.90	956,212.74
FNMA	3140XJHF3	FN FS2929	168,949.43	10/18/2022	09/01/2037	168,070.42	168,545.75	169,123.22
FNMA	3140XJHF3	FN FS2929	1,013,696.56	10/18/2022	09/01/2037	1,008,422.54	1,011,274.51	1,014,739.32
FNMA	3140XJJ87	FN FS2986	91,928.08	10/21/2022	10/01/2032	91,307.87	92,822.67	93,136.34
FNMA	3140XJJ87	FN FS2986	649,281.07	10/21/2022	10/01/2032	644,900.52	655,599.43	657,814.87
FNMA	**---**	**---**	**7,832,064.16**	**---**	**08/01/2035**	**7,939,749.53**	**7,420,035.50**	**7,443,146.21**

FNMA CMO

Security Type	Identifier	Description	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
FNMA CMO	31394CP22	FNR 2005-33 QE	151,375.62	03/31/2023	04/25/2035	152,191.13	149,826.29	150,448.44
FNMA CMO	31394CP22	FNR 2005-33 QE	997,298.18	03/31/2023	04/25/2035	1,002,670.94	987,090.86	991,189.73
FNMA CMO	**---**	**---**	**1,148,673.80**	**03/31/2023**	**04/25/2035**	**1,154,862.06**	**1,136,917.16**	**1,141,638.17**

SUPRANATIONAL

Security Type	Identifier	Description	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
SUPRANATIONAL	459058KJ1	INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPM	274,969.34	07/19/2022	06/15/2027	274,857.00	272,423.25	272,805.19
SUPRANATIONAL	459058KJ1	INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPM	1,799,799.35	07/19/2022	06/15/2027	1,799,064.00	1,783,134.00	1,785,634.00
SUPRANATIONAL	**---**	**---**	**2,074,768.69**	**07/19/2022**	**06/15/2027**	**2,073,921.00**	**2,055,557.25**	**2,058,439.19**

US GOV

Security Type	Identifier	Description	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
US GOV	912828U24	UNITED STATES TREASURY	49,617.39	10/11/2022	11/15/2026	46,082.03	49,639.00	49,766.72
US GOV	912828U24	UNITED STATES TREASURY	99,282.72	01/06/2023	11/15/2026	93,035.16	99,278.00	99,533.43
US GOV	912828U24	UNITED STATES TREASURY	1,538,882.16	01/06/2023	11/15/2026	1,442,044.92	1,538,809.00	1,542,768.24
US GOV	912828U24	UNITED STATES TREASURY	1,787,376.29	12/07/2022	11/15/2026	1,674,914.07	1,787,004.00	1,791,601.83
US GOV	91282CCH2	UNITED STATES TREASURY	95,523.25	09/06/2024	06/30/2028	91,714.84	94,469.00	94,472.40
US GOV	91282CCH2	UNITED STATES TREASURY	329,200.21	06/11/2024	06/30/2028	309,599.61	330,641.50	330,653.39
US GOV	91282CCH2	UNITED STATES TREASURY	331,986.26	08/05/2024	06/30/2028	316,066.41	330,641.50	330,653.39
US GOV	91282CCH2	UNITED STATES TREASURY	492,867.17	07/03/2024	06/30/2028	463,497.07	495,962.25	495,980.08
US GOV	91282CCH2	UNITED STATES TREASURY	1,098,517.36	09/06/2024	06/30/2028	1,054,720.70	1,086,393.50	1,086,432.56
US GOV	91282CCH2	UNITED STATES TREASURY	1,549,011.10	07/03/2024	06/30/2028	1,456,705.08	1,558,738.50	1,558,794.55
US GOV	91282CCH2	UNITED STATES TREASURY	2,022,229.86	06/11/2024	06/30/2028	1,901,826.17	2,031,083.50	2,031,156.53
US GOV	91282CCH2	UNITED STATES TREASURY	2,086,770.78	08/05/2024	06/30/2028	1,986,703.13	2,078,318.00	2,078,392.73
US GOV	91282CCP4	UNITED STATES TREASURY	149,704.54	08/15/2022	07/31/2026	136,593.75	149,620.50	150,011.56
US GOV	91282CCP4	UNITED STATES TREASURY	199,637.46	07/08/2022	07/31/2026	183,085.94	199,494.00	200,015.41
US GOV	91282CEN7	UNITED STATES TREASURY	644,971.46	02/03/2023	04/30/2027	625,853.52	643,051.50	646,063.05
US GOV	91282CEN7	UNITED STATES TREASURY	4,365,960.68	02/03/2023	04/30/2027	4,236,546.88	4,352,964.00	4,373,349.87
US GOV	91282CEV9	UNITED STATES TREASURY	514,913.86	08/05/2025	06/30/2029	512,080.08	511,528.50	511,574.87
US GOV	91282CEV9	UNITED STATES TREASURY	586,332.48	03/06/2025	06/30/2029	580,781.25	584,604.00	584,656.99
US GOV	91282CEV9	UNITED STATES TREASURY	617,568.23	09/05/2025	06/30/2029	615,649.41	608,962.50	609,017.70
US GOV	91282CEV9	UNITED STATES TREASURY	3,334,680.21	08/05/2025	06/30/2029	3,316,328.13	3,312,756.00	3,313,056.27
US GOV	91282CEV9	UNITED STATES TREASURY	3,908,883.23	03/06/2025	06/30/2029	3,871,875.00	3,897,360.00	3,897,713.26
US GOV	91282CEV9	UNITED STATES TREASURY	3,952,436.72	09/05/2025	06/30/2029	3,940,156.25	3,897,360.00	3,897,713.26
US GOV	91282CFB2	UNITED STATES TREASURY	221,351.65	07/07/2023	07/31/2027	212,115.23	221,703.75	224,284.72
US GOV	91282CFB2	UNITED STATES TREASURY	245,303.40	09/15/2023	07/31/2027	234,179.69	246,337.50	249,205.25
US GOV	91282CFB2	UNITED STATES TREASURY	296,158.40	06/06/2023	07/31/2027	286,101.56	295,605.00	299,046.30
US GOV	91282CFB2	UNITED STATES TREASURY	867,029.17	05/05/2023	07/31/2027	845,434.57	862,181.25	872,218.37
US GOV	91282CFB2	UNITED STATES TREASURY	1,500,272.30	07/07/2023	07/31/2027	1,437,669.92	1,502,658.75	1,520,152.02
US GOV	91282CFB2	UNITED STATES TREASURY	1,569,941.76	09/15/2023	07/31/2027	1,498,750.00	1,576,560.00	1,594,913.59
US GOV	91282CFB2	UNITED STATES TREASURY	1,875,669.88	06/06/2023	07/31/2027	1,811,976.56	1,872,165.00	1,893,959.89
US GOV	91282CFB2	UNITED STATES TREASURY	4,904,907.89	05/05/2023	07/31/2027	4,782,744.14	4,877,482.50	4,934,263.92
US GOV	91282CFZ9	UNITED STATES TREASURY	323,390.47	12/05/2023	11/30/2027	320,696.29	323,719.50	324,786.18
US GOV	91282CFZ9	UNITED STATES TREASURY	449,349.76	01/05/2024	11/30/2027	448,277.34	448,227.00	449,703.95
US GOV	91282CFZ9	UNITED STATES TREASURY	3,084,647.56	12/05/2023	11/30/2027	3,058,949.22	3,087,786.00	3,097,960.52
US GOV	91282CFZ9	UNITED STATES TREASURY	3,095,520.57	01/05/2024	11/30/2027	3,088,132.81	3,087,786.00	3,097,960.52
US GOV	91282CGP0	UNITED STATES TREASURY	173,757.28	04/05/2024	02/29/2028	172,217.77	174,534.50	176,874.17
US GOV	91282CGP0	UNITED STATES TREASURY	225,405.22	02/06/2024	02/29/2028	225,940.43	224,401.50	227,409.65
US GOV	91282CGP0	UNITED STATES TREASURY	419,715.96	05/06/2024	02/29/2028	413,445.31	423,869.50	429,551.57
US GOV	91282CGP0	UNITED STATES TREASURY	1,502,701.43	02/06/2024	02/29/2028	1,506,269.53	1,496,010.00	1,516,064.35
US GOV	91282CGP0	UNITED STATES TREASURY	2,085,087.34	04/05/2024	02/29/2028	2,066,613.28	2,094,414.00	2,122,490.09
US GOV	91282CGP0	UNITED STATES TREASURY	2,666,430.80	05/06/2024	02/29/2028	2,626,593.75	2,692,818.00	2,728,915.83
US GOV	91282CJR3	UNITED STATES TREASURY	321,993.16	11/05/2024	12/31/2028	320,150.39	321,776.00	321,809.12
US GOV	91282CJR3	UNITED STATES TREASURY	394,287.87	01/07/2025	12/31/2028	391,171.87	396,032.00	396,072.76
US GOV	91282CJR3	UNITED STATES TREASURY	665,864.58	02/06/2025	12/31/2028	661,130.86	668,304.00	668,372.78
US GOV	91282CJR3	UNITED STATES TREASURY	793,341.49	12/06/2024	12/31/2028	789,468.75	792,064.00	792,145.52
US GOV	91282CJR3	UNITED STATES TREASURY	2,526,407.87	11/05/2024	12/31/2028	2,511,949.22	2,524,704.00	2,524,963.85
US GOV	91282CJR3	UNITED STATES TREASURY	2,661,443.18	01/07/2025	12/31/2028	2,640,410.16	2,673,216.00	2,673,491.14
US GOV	91282CJR3	UNITED STATES TREASURY	4,660,881.27	12/06/2024	12/31/2028	4,638,128.91	4,653,376.00	4,653,854.94
US GOV	91282CJR3	UNITED STATES TREASURY	4,833,683.60	02/06/2025	12/31/2028	4,799,320.31	4,851,392.00	4,851,891.32
US GOV	91282CLS8	UNITED STATES TREASURY	751,121.96	03/03/2026	10/31/2026	752,197.27	750,420.00	755,632.30

US GOV	91282CLS8	UNITED STATES TREASURY	4,531,769.12	03/03/2026	10/31/2026	4,538,256.84	4,527,534.00	4,558,981.52
US GOV	91282CMG3	UNITED STATES TREASURY	152,881.84	10/06/2025	01/31/2030	153,421.88	150,328.50	152,987.69
US GOV	91282CMG3	UNITED STATES TREASURY	1,019,212.23	10/06/2025	01/31/2030	1,022,812.50	1,002,190.00	1,019,917.90
US GOV	91282CNX5	UNITED STATES TREASURY	343,086.41	06/30/2026	08/31/2030	343,082.03	342,412.00	346,652.66
US GOV	91282CNX5	UNITED STATES TREASURY	517,212.20	05/06/2026	08/31/2030	516,940.43	513,618.00	519,978.99
US GOV	91282CNX5	UNITED STATES TREASURY	635,666.48	06/04/2026	08/31/2030	635,425.78	635,908.00	643,783.51
US GOV	91282CNX5	UNITED STATES TREASURY	691,633.42	04/07/2026	08/31/2030	691,195.31	684,824.00	693,305.32
US GOV	91282CNX5	UNITED STATES TREASURY	2,205,555.47	06/30/2026	08/31/2030	2,205,527.34	2,201,220.00	2,228,481.38
US GOV	91282CNX5	UNITED STATES TREASURY	3,792,889.46	05/06/2026	08/31/2030	3,790,896.48	3,766,532.00	3,813,179.25
US GOV	91282CNX5	UNITED STATES TREASURY	4,278,524.37	06/04/2026	08/31/2030	4,276,904.30	4,280,150.00	4,333,158.24
US GOV	91282CNX5	UNITED STATES TREASURY	4,446,214.88	04/07/2026	08/31/2030	4,443,398.44	4,402,440.00	4,456,962.76
US GOV	**---**	**---**	**95,486,665.12**			**94,013,755.86**	**95,285,379.00**	**95,838,761.89**

YANKEE

Security Type	Identifier	Description	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
YANKEE	63254ABE7	NATIONAL AUSTRALIA BANK LTD (NEW YORK BRANCH)	1,247,720.31	06/13/2022	06/09/2027	1,238,825.00	1,244,912.50	1,247,895.49
YANKEE	**63254ABE7**	**---**	**1,247,720.31**			**1,238,825.00**	**1,244,912.50**	**1,247,895.49**

Summary

Security Type	Identifier	Description	PAR	Settle Date	Maturity Date	Original Cost	Market Value	Base Market Value + Accrued
---	**---**	**---**	**236,876,643.34**	**---**		**235,445,096.02**	**235,909,201.89**	**237,305,908.39**

San Mateo County Transit District
Staff Report

To: Board of Directors

Through: April Chan, General Manager/CEO

From: David Santoro, Chief Administrative Officer

David Olmeda, Chief Operating Officer

Subject: **Awarding a Contract to Power Engineering Construction Company to Provide Inspection and Maintenance Services for the Dumbarton Rail Bridge Navigation Lights for a Not-to-Exceed Amount of $220,900 for a Two-Year Term**

Action

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

1. Find that the District's original cost estimate for inspection and maintenance of the navigation lights on the Dumbarton Rail Bridge (Services) was reasonable.

2. Award a contract to the lowest, responsive, and responsible bidder, Power Engineering Construction Company of Alameda, California (Power Engineering), to perform the Services for a not-to-exceed amount of $220,900 for a two-year term.

3. Authorize the General Manager/CEO or designee to execute a contract on behalf of the District with Power Engineering in full conformity with the terms and conditions of the solicitation documents, and in a form approved by legal counsel.

Significance

Approval of the above actions will ensure timely inspection and maintenance of the navigation lighting system on the Dumbarton Rail Bridge (Bridge) by a qualified and responsive contractor. Under Federal Coast Guard Bridge Law and Regulations, Title 33, Code of Federal Regulations, Part 118, the District is responsible for ensuring the navigation lights on the Bridge are lit in accordance with an approved plan to provide a navigable path for watercraft. The proposed contract provides the District with fixed-price bi-annual inspections, up to two as-needed repair visits, and an allowance for replacement parts to be used only if necessary.

Budget Impact

Funding for this contract is included in the adopted Fiscal Year 2027 Operating Budget and will be included in future operating budgets. The contract will be funded by Dumbarton rental income generated from the Dumbarton right-of-way and from approved and future operating budgets.

Background

As the owner of the Bridge, the District must maintain the navigation lights on the middle and eastern spans of the Bridge, subject to applicable Federal regulations and United States Coast Guard requirements. The lack of fully operational navigation lights could present a risk of collision between a water-going vessel and the Bridge, posing a clear and imminent danger of loss or impairment to life, health, property, and essential public services. For these reasons, it is critical for the District to retain a qualified electrical contractor to perform inspection, maintenance, repair, and replacement services, including work requiring water access by boat.

The District issued Request for Quotations (RFQ) 26S-CU-107 for the Services on April 6, 2026. The solicitation was published on the District's e-procurement website and sent to eleven area plan rooms for dissemination among contractors. As part of the outreach effort, staff also directly reached out to three electrical contractors that had been recommended by a prior service provider. A total of three bids were received by the bid due date, as follows:

Bidder	Bid Amount
Independent Cost Estimate	*$193,587*
Power Engineering Construction Company	$220,900
Manson Construction Co.	$345,000
The Dutra Group	$455,000

Under the California Uniform Public Construction Cost Accounting Act (CUPCCAA), public works contracts exceeding $220,000 require formal bidding. The District's independent cost estimate for the Services was $193,587, which was below the formal bidding threshold, so the District informally solicited bids to complete the Services. However, all three bids received by the District exceeded $220,000. In accordance with CUPCCAA, the Board may award, without rebidding, a public works contract in an amount not to exceed $235,000 that was solicited under informal procurement procedures, if the Board determines that the original cost estimate was reasonable. Staff reevaluated the independent cost estimate and confirmed it is reasonable, and the lowest, responsive and responsible bid was approximately 14 percent above the cost estimate.

Power Engineering submitted all required bid documentation, and staff and legal counsel determined that its bid is responsive. Staff conducted a price analysis and determined that Power Engineering's price is fair and reasonable to perform the work as required in the solicitation documents.

Staff contacted Power Engineering's references and confirmed its experience and competency. Based upon these findings, staff concludes that Power Engineering is appropriately qualified and capable of meeting the requirements of the contract and is, therefore, the lowest responsive and responsible bidder.

Prepared By:	Jessica Valdez	Procurement Administrator II	650-830-1599
	Dominic Brooke	Facilities Contract Administrator	650-699-6220

Resolution No. 2026-

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

* * *

Awarding a Contract to Power Engineering Construction Company to Provide Inspection and Maintenance Services for the Dumbarton Rail Bridge Navigation Lights for a Not-to-Exceed Amount of $220,900 for a Two-Year Term

Whereas, as the owner of the Dumbarton Rail Bridge (Bridge), the San Mateo County Transit District (District) must maintain navigation lights on the middle and eastern spans of the Bridge, subject to applicable Federal regulations and United States Coast Guard requirements; and

Whereas, the lack of fully operational navigation lights presents a risk of collision between a water-going vessel and the Bridge, posing a clear and imminent danger of loss or impairment to life, health, property, and essential public services; and

Whereas, the District desires to retain a qualified electrical contractor to perform inspection, maintenance, repair, and replacement services of the Dumbarton Rail Bridge navigation lights (Services), including work requiring water access by boat, to ensure continuous operation and compliance with Federal marine safety regulations; and

Whereas, on April 6, 2026, the District issued Request for Quotations (RFQ) 26S-CU-107 for the Services; and

Whereas, the District posted the solicitation documents on the District's e-procurement website and conducted outreach to qualified vendors who could provide the requested Services; and

Whereas, in response to the RFQ, the District received three bids; and

Whereas, staff reviewed the submitted bids and determined that all three bids were responsive to the RFQ requirements; and

Whereas, staff and legal counsel determined that Power Engineering Construction Company of Alameda, California (Power Engineering) submitted the lowest responsive and responsible bid; and

Whereas, under the California Uniform Public Construction Cost Accounting Act (CUPCCAA), public works contracts exceeding $220,000 require formal bidding, while public works contracts between $75,000 and $220,000 can be let through informal bidding procedures; and

Whereas, the independent cost estimate for the Services was $193,587, which is below the formal bidding threshold, so the District informally solicited bids to complete the Services; and

Whereas, all three bids received by the District exceed $220,000; and

Whereas, in accordance with CUPCCAA, the Board of Directors (Board) may award a public works contract for up to $235,000 that was solicited under the informal procurement procedures without rebidding, if the Board determines that the original cost estimate was reasonable; and

Whereas, staff reevaluated the independent cost estimate and confirmed it is reasonable; and

Whereas, staff conducted a price analysis and determined that Power Engineering's bid price was fair and reasonable in comparison to other bids received; and

Whereas, staff recommends that the Board award a contract to Power Engineering for the Services for a total not-to-exceed amount of $220,900 for a two-year term.

Now, Therefore, Be It Resolved that the Board of Directors of the San Mateo County Transit District hereby finds that the District's original cost estimate for inspection and maintenance services of the Dumbarton Rail Bridge navigation lighting system reasonable; and

Be It Further Resolved that the Board hereby awards a contract to Power Engineering Construction Company of Alameda, California to provide the Services for a total not-to-exceed amount of $220,900 for a two-year term; 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 Power Engineering in full conformity with the terms and conditions set forth in the solicitation documents, and in a form approved by legal counsel.

Regularly passed and adopted this 5th day of August, 2026, by the following vote:

Ayes:

Noes:

Absent:

____
Chair, San Mateo County Transit District

Attest:

____
District Secretary

Memorandum

Date: July 29, 2026

To: SamTrans Board of Directors

From: April Chan, General Manager/CEO

Subject: Report of the General Manager/CEO

SamTrans fixed-route bus ridership recovery comparison table (RRCT) is not available due to the region's ongoing transition to Next Generation Clipper. Once the issues are resolved, the RRCT will be updated for December 2025 onward and incorporated into future reports.

Clipper Next Generation Update

The Metropolitan Transportation Commission (MTC) and its contractor, Cubic Transportation Systems (Cubic), continue advancing the Clipper Next Generation transition. Limited customer account migration has been completed, while the broader migration remains on hold pending further system stabilization. As of July 17, approximately 2.18 million of the roughly 15 million customer accounts have been migrated. Current efforts remain focused on improving system stability and addressing outstanding operational, financial, and reporting issues. Although several software releases have resolved specific defects, agencies continue to experience intermittent service disruptions, customer account issues, and other system performance challenges that require remediation.

Ensuring the accuracy and reliability of financial settlements, and ridership reporting remains a key priority. Transit operators have identified discrepancies between Clipper settlement reports and deposited fare revenues. Additionally, ridership data issues continue to affect the reliability of reports, leading some agencies, including San Mateo County Transit District (SamTrans or District), to temporarily suspend the public release of ridership statistics pending data validation. SamTrans staff from Finance, Operations, and Planning continue to work closely with MTC and Cubic to validate financial results, support audit requirements, improve data reconciliation processes, and help ensure the system is fully operational before broader customer account migration resumes.

Bus Operator Staffing

	Approved FTEs	Trainees	No. Bus Operators*
Bus Operators	350	10	348

**Includes employees on long-term leave, does not include Trainees.*

Miles Between Preventable Accidents

The table below provides the miles between accidents by mode and location for the month of June 2026. While accidents are defined as any event that involves any of the following: fatality, serious injury, collision of a District vehicle, or major property damage. Preventable accidents are a subset of all reported accidents. A preventable accident is one in which the Bus Operator failed to do everything reasonably to prevent it. Most of the District's preventable accidents are negligible in severity.

	June 2026			FY 2026
	Total Miles	Preventable Accidents	Miles Between Preventable Accidents	Miles Between Preventable Accidents
North Base	355,358	2	177,679	74,947
South Base	220,455	3	73,485	55,348
Trainee In-service	8,152	1	8,152	23,599
CUB	240,114	6	40,019	49,349
Fixed Route Total	824,079	12	68,573	59,990
ADA	197,163	3	65,721	70,375
Micro Transit	15,403	0	No accidents	40,987

Severity Classifications

The table below provides the severity classifications for Preventable Accidents for the month of June 2026.

Severity Classification Definitions:

- **Negligible** – No Injury / No Property Damage
- **Marginal** – Minor Injury or Complaint of Pain / Minor Property Damage
- **Critical** – Serious Injury with Transport / Moderate Property Damage
- **Catastrophic** – Fatal or Life-Threatening Injuries / Severe Property Damage

June 2026	Preventable Accidents - Severity			
	Negligible	**Marginal**	**Critical**	**Catastrophic**
North Base	0	2	0	0
South Base	0	3	0	0
Trainee In-service	1	0	0	0
CUB	5	1	0	0
Fixed Route Total	**6**	**6**	0	0
ADA	2	1	0	0
Micro Transit	0	0	0	0

Safety Updates

Samsara Dashcam: The Samsara dashcam project reached a major milestone. Both the District and Samsara signed the contract, and all purchase orders were completed. Cameras for the systems were shipped, and installation and testing are ongoing.

The project is sponsored by the District's Safety Department and supported by the Amalgamated Transit Union Local 1574. It is a multi-disciplinary project involving Information Technology (IT), Intelligent Transit Systems (ITS), Bus Maintenance, and Transportation.

Emergency Management: The District conducted its first fire drill at the new District Headquarters on July 16, 2026, in coordination with Central County Fire Department. The exercise was successful, and feedback collected through the post-drill survey provided valuable insight into future improvements.

The Safety Department will also be participating in the 22nd Annual Disaster Preparedness Day on August 1 at the San Mateo County Event Center, hosted by San Mateo County Emergency Management. SamTrans will showcase its Disaster Relief Bus at the community preparedness event.

SamTrans will participate in the Transbay Joint Powers Authority (TJPA) Full-Scale Exercise (FSE) on August 26, 2026, at the Salesforce Transit Center. The exercise will utilize a SamTrans hydrogen fuel cell bus to support emergency response training and coordination.

This multi-agency exercise will be conducted in partnership with the San Francisco Fire Department (SFFD), San Francisco Police Department (SFPD), Transportation Security Administration (TSA), TJPA, Alameda-Contra Costa Transit District (AC Transit), San Francisco Municipal Transportation Agency (SFMTA or Muni), Golden Gate Bright, Highway and Transportation District (Golden Gate Transit), and San Francisco International Airport (SFO).

Connect Bay Area Update

The Connect Bay Area regional transit measure has officially qualified for the November ballot. Due to recently signed state legislation (Senate Bill 830), voters in the five participating counties will see the measure immediately after statewide ballot measures and before local measures. Each county's elections officials will select the arguments for and against the measure that appear in that county's voter information guide, allowing the information to reflect county-specific tax rates and investments.

Regional Mapping and Wayfinding Update

SamTrans staff are supporting MTC's Regional Mapping and Wayfinding Project (RMWP) to pilot new regional signage standards at the Millbrae and Palo Alto stations, along with nine other Bay Area transit centers. Scheduled for late 2026 or early 2027, the pilot installation will completely overhaul all existing station signage, including the bus areas. SamTrans and Caltrain staff have reviewed and provided comments on MTC's detailed sign plans for both locations. Staff are also reviewing the final components of the revised signage policies, which MTC expects to finalize by the end of the year. Further updates will be provided once the specific implementation dates are identified.

Grand Boulevard Initiative Update – July 2026

The District is leading the Grand Boulevard Initiative (GBI), which is a collaboration in San Mateo County between 15 local jurisdictions, four countywide agencies, and California Department of Transportation (Caltrans). The project aims to make El Camino Real (State Route 82) a safer and more comfortable place to walk, bike, and take transit by installing streetscape improvements along the corridor.

In January 2026, SamTrans and the San Mateo County Transportation Authority (SMCTA) formally adopted the GBI Action Plan, which was co-created by the District and the GBI Task Force members, which outlined the corridor-wide vision and goals that lay the foundation for a grand boulevard connecting communities in San Mateo County. Beginning in April 2026, SamTrans kicked off the next phase of work, the Project Initiation Document (PID), which begins preliminary scoping, cost estimating, and initial analysis required to begin the Caltrans project development process.

This current phase of the PID is identifying local conceptual cross-sections, which culminated in a roadshow with City Managers along the corridor in June 2026 to get initial feedback. This work will continue until Summer 2027 and is funded through a $2 million grant from the Metropolitan Transportation Commission (MTC) with half a million in local funds from District. After the PID process, the next stage in the Caltrans project development process will be the Project Approval and Environmental Document (PA&ED) phase, where each city's preferred alternative will be selected.

Employee of the Month (EOM) Recognitions – June 2026

Bus Operator EOM for North Base is **Aaron Myers**. This is Aaron's second EOM Award during his fourteen years of service with the District.

Bus Operator EOM for South Base is **Tuilatai Sevelo**. This is Tuilatai's first EOM Award during his eighteen months of service with the District.

Bus Maintenance EOM for North Base is Mechanic A **Nichola Hui.** This is Nichola's fourth EOM Award during his ten years of service with the District.

Bus Maintenance EOM for South Base is Mechanic C **Jesus Pimienta**. This is Jesus's first EOM Award during his nearly nineteen months of service with the District.

<u>Communications and Marketing Update</u>
Press Releases/Blogs/Podcasts:

- Hop Off Here podcast - featuring SamTrans 50th, Pride, and Silicon Valley Bicycle Coalition (SVBC)
- SamTrans Board adopts local transit investment plan
- SamTrans updates summer service schedule
- Take SamTrans to your next World Cup watch party
- SamTrans recognizes the Juneteenth holiday
- SamTrans joins first-ever Bay Area transit collaboration at San Francisco (SF) Pride
- Riding together with Pride

Article Mentions:

- World Cup Service - Fan Zones
    - KPIX, KTVU, Telemundo, NewsBreak, AOL, Yahoo! Sports, Hoodline, Patch, MTC
- SF Pride - regional transit coordination
    - NBC Bay Area, ABC7
- Election Day
    - News Break
- SamTrans 50th anniversary/Free Fare Day
    - San Mateo Daily Journal, ABC7, KTVU, NBC Bay Area

- Framework for funding priorities
    - NewsBreak, Metro Magazine
- Connect Bay Area
    - Yahoo! News
- Hydrogen fueling station
    - TheStreet, Fuel Cell Works, Associated Press, Patch, Europe Says, Mobility Plaza, Gasworld, Global Hydrogen Review
- Operating surplus
    - San Mateo Daily Journal
- ECR route changes
    - World News

Social Media Activities

Digital Marketing Report

- SamTrans 50th Anniversary Campaign was in full swing this month
    - Outside of throwback posts and fun facts, SamTrans had a number of events and activities highlighted heavily on social
        - Free Fare Day on July 1
        - Millbrae Headquarters Ribbon Cutting
        - SamTrans Jingle Contest
- Summer Youth Pass continued weekly messaging for sales promotion
- SamTrans participated in Pride events for the fourth year in a row, focusing efforts primarily on San Francisco Pride Parade
    - This year consisted of a unified regional messaging across all Bay Area transit agencies, led by the District. Under the theme ‘Moving the Bay Area with Pride,’ SamTrans walked in the parade alongside agency partners with the biggest crowd and interactions to date with live day-of content and promotional posts.

Organic Digital Marketing Highlights

- Gear Up Mechanic Utility Worker Recruitment Campaign
- Ride Plus Microtransit Campaign
- Coastside Service Promotion
- 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.

JUNE 2026	JUNE 2025
Impressions: 787,276	Impressions: 1,100,408
Engagements: 16,349	Engagements: 4,175
Post Link Clicks: 4,021	Post Link Clicks: 1,077

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

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

SamTrans 50th Anniversary Music Contest

- Winners have been identified and notified
- Website to be updated with winning songs week of July 20

Student Youth Pass

- Total sales: 119

Paid Digital Campaign – Performance Dashboard Synopsis
This June 2026 performance dashboard tracks Google Ads paid search results for the SamTrans Youth Pass campaign. The campaign generated 6,544 impressions and 283 clicks ($1,662.18 spend) with a 4.32 percent click-through rate (CTR) and $5.87 cost per click (CPC). Primary conversion metric was strong: 119 conversions driven to key product pages (Schedule Map and Fares), generating 125 total conversions across the month.

Key Performance Drivers: The Brand + Generic_ENG campaign significantly outperformed the Spanish variant, delivering 1,012 impressions and 245 clicks at 24.21 percent CTR versus the Spanish campaign's 5,532 impressions but only 38 clicks at 0.69 percent CTR. Top-performing keywords included "samtrans youth pass" (32.71 percent CTR), "samtrans summer youth pass" (39.44 percent CTR), and "youth unlimited samtrans" (36.25 percent CTR). Search impression share was 68.64 percent overall, indicating strong market visibility.

User Journey: Conversion data shows users engaged most with Schedule/Map pages (70 conversions) and Fares pages (49), indicating product discovery and pricing research were primary conversion drivers.

SamTrans Always On and Fédération Internationale de Football Association (FIFA) World Cup 2026 Paid Search and Web Traffic Performance Summary

Overall Assessment

The World Cup campaign drove strong reach at very low cost, generating nearly 46,000 impressions and almost 3,000 clicks at $0.47 CPC. Sitewide traffic data shows paid search delivered 9,477 sessions with a 57 percent engagement rate and 53 seconds average time on site – engagement quality that is competitive with organic search. The Spanish-language campaign reached a meaningful audience but at significantly higher cost than the English campaign, which may reflect a landing page or ad copy mismatch worth addressing for future activations.

Paid Search Performance

	Impressions	Clicks	CTR	CPC	Conversion
June 2026	38,759	2,346	6.05%	$0.46	42
July 2026 (partial)	7,170	574	8.01%	$0.50	9
Total	45,929	2,920	6.36%	$0.47	51

July data covers only the first six days of the month. The higher July CTR (8.01 percent vs. 6.05 percent) likely reflects stronger real-time search intent as matches were actively in progress.

Campaign Split: English versus Spanish

Campaign	Impressions	Clicks	CTR	CPC	Cost	Primary Conversion*	Secondary Conversion**
English	39,471	2,796	7.08%	$0.36	$1,001	33	5
Spanish	6,458	124	1.92%	$2.88	$358	7	6

**Primary conversions are the main goal events: visits to the Schedule Map and Fares pages.*
***Secondary conversions are supporting signals: visits to the Rider Information page.*

The English campaign accounted for 86 percent of impressions and 96 percent of clicks at $0.36 CPC. The Spanish campaign reached 6,458 people at significantly higher cost ($2.88 CPC) and lower CTR (1.92 percent) but produced six secondary conversions versus five for English – suggesting Spanish-speaking users who did click were highly engaged once on site. The efficiency gap warrants a review of Spanish ad copy and landing page alignment.

Key Observations

- Organic search was by far the largest traffic driver at 49,037 sessions, with strong engagement (64 percent rate, 48 second average) – suggesting people actively searching for SamTrans info found relevant content
- Paid search drove 9,477 sessions with a 57 percent engagement rate and 53 seconds average time on site – the second-highest engagement of any paid channel and competitive with organic search quality
- Display drove 3,380 sessions but nearly zero engagement (two percent rate, one second average) – typical for display but worth noting that those visits are unlikely to represent meaningful user intent
- Artificial Intelligence (AI) Assistant (ChatGPT, Gemini) sent 307 sessions with 64 percent engagement and 54 seconds average – a small but high-quality source worth monitoring as AI-driven discovery grows
- Referral traffic (14,214 sessions) had low engagement at 24 percent, suggesting visitors from partner or external sites may not be finding what they need on landing

San Mateo County Transit District
Staff Report

To: Board of Directors

Through: April Chan, General Manager/CEO

From: David Santoro, Chief Administration Officer

Subject: **San Mateo County Sheriff’s Office Transit Police Bureau – 2025 Annual Report**

Action

This report is for information only. No Board of Directors (Board) action required.

Significance

The San Mateo County Transit District (District) contracts with the San Mateo County Sheriff’s Office (Sheriff’s Office) for dedicated transit police services supporting SamTrans and Caltrain operations. The Sheriff’s Office Transit Police Bureau provides law enforcement services across the District’s transit system, including patrol response, investigations, high-visibility enforcement, K-9 support, emergency preparedness coordination, community engagement, and specialized response to transit-related public safety concerns.

The District’s partnership with the Sheriff’s Office has been in place since 2002. Under the current service model, the Transit Police Bureau provides contracted law enforcement coverage and coordinates closely with District staff, bus operators, rail personnel, local law enforcement agencies, fire departments, emergency medial services, behavioral health partners, and other regional public safety stakeholders. This partnership supports the District’s commitment to providing safe, reliable, and welcoming public transportation.

A representative from the Sheriff’s Office will provide a high-level presentation summarizing the 2025 Police Services Annual Report. The presentation will highlight the scope of contracted services, the Transit Police Bureau’s organizational structure, key service areas, community and regional partnerships, emergency preparedness activities, and current transit safety priorities. The presentation will also provide context regarding crime reporting methodology, including the use of Federal Bureau of Investigations National Incident-Based Reporting System, commonly referred to as NIBRS.

The attached San Mateo County Sheriff’s Office Transit Police Bureau 2025 Police Services Annual Report provides additional detail regarding annual police services, enforcement activity, public safety communication, response times, investigation support, Community Service Officer activity, Psychiatric Emergency Response Team coordination, K-9 operations, high-visibility patrols, training, collaboration and community outreach.

Budget Impact
There is no budget impact associated with receiving this informational report. Contracted law enforcement services are funded through the District's adopted budget.

Background
The Sheriff's Office Transit Police Bureau serves as the District's contracted law enforcement provider and is responsible for supporting public safety throughout the transit system. Services include response to calls for service, proactive patrols, investigative follow-up, transit facility and vehicle safety support, event coverage, quality-of-life enforcement, coordination with allied agencies, and support for emergency preparedness exercises.

The 2025 Annual Report reflects the Bureau's continued focus on professional, proactive, and community-oriented transit policing. It also describes the Bureau's role in maintaining public safety, supporting frontline transit workers, strengthening regional coordination, and adapting to emerging safety and operational needs across the District's service area.

Prepared By: David Santoro Chief Administrations Officer 650-551-6107

San Mateo County Sheriff's Office
Transit Police Bureau

2025 Police Services Annual Report

CRIME SUMMARY:

Reporting Methodology:

The Federal Bureau of Investigation's **National Incident-Based Reporting System (NIBRS)** is the national standard for crime reporting and provides a more complete and detailed picture of criminal activity than the previous Uniform Crime Reporting (UCR) system. Rather than counting only the most serious offense in an incident, NIBRS captures every offense and includes additional information about victims, offenders, locations, property, and other incident details.

Because the Sheriff's Office serves as the District's contracted law enforcement agency, it is responsible for collecting, validating, and submitting crime data in compliance with FBI NIBRS requirements. This ensures the District meets federal reporting standards while providing reliable crime data to support public transparency, operational planning, and informed decision-making.

The transition to NIBRS has significantly enhanced law enforcement agencies' ability to analyze crime trends with greater precision. The system supports more robust crime analysis, improved transparency in reporting, and more informed decision-making related to public safety strategies and resource allocation.

For additional information about the National Incident-Based Reporting System, visit the Federal Bureau of Investigation NIBRS information page. Detailed offense definitions used in NIBRS reporting are also available through the FBI's official NIBRS documentation.

Additional Information:

https://www.fbi.gov/how-we-can-help-you/more-fbi-services-and-information/ucr/nibrs

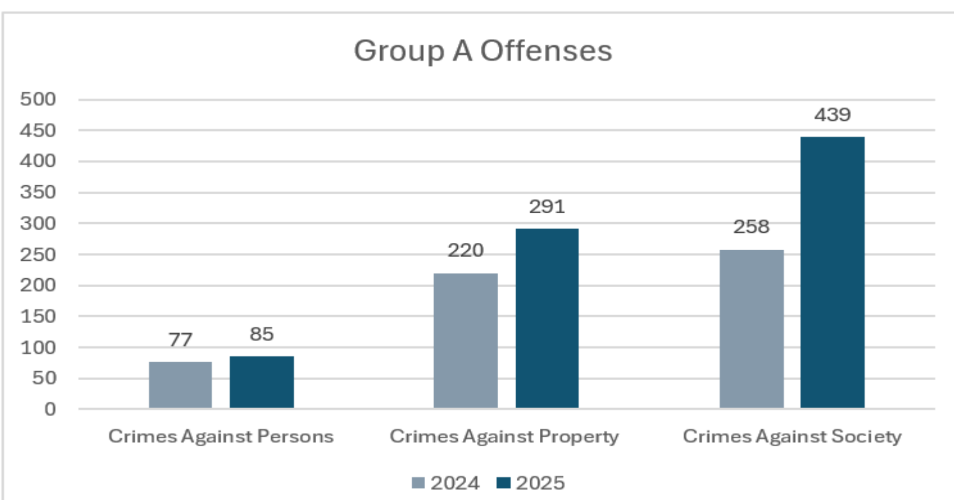
https://ucr.fbi.gov/nibrs/2018/resource-pages/nibrs_offense_definitions-2018.pdf

Group A Offenses: Crimes Against Person	2024	2025
Homicide Offense		
Murder/Non-Negligent Manslaughter	0	1
Negligent Manslaughter	0	0
Justifiable Homicide	0	0
Sexual Offenses (Non-Consensual)		
Forcible Rape	1	0
Forcible Sodomy	0	0
Sexual Assault with An Object	0	0
Forcible Fondling	7	7
Assault Offenses		
Aggravated Assault	26	11
Simple Assault	40	59
Intimidation	3	7
Kidnapping/Abduction	0	0
Sex Offense (Consensual)		
Incest	0	0
Statutory Rape	0	0
Human Trafficking		
Commercial Sex Acts	0	0
Involuntary Servitude	0	0
Crimes Against Persons Total	77	85

Group A Offenses: Crimes Against Property	2024	2025
Robbery	14	6
Burglary/Breaking & Entering	0	6
Larceny/Theft Offenses		
Pocket Picking	1	0
Purse Snatching	0	1
Shoplifting	0	6
Theft from Building	0	1
Theft from Coin-Operated Machine	0	0
Theft from Motor Vehicle	5	3
Theft of Motor Vehicle Parts or Accessories	0	2
All other Larceny	116	137
Motor Vehicle Theft	14	87
Arson	0	0
Destruction of Property	45	21

Counterfeiting/Forgery	0	0
Fraud Offense		
False Pretenses	0	6
Credit Card/ATM Fraud	2	0
Impersonation	0	3
Welfare Fraud	0	0
Wire Fraud	0	0
Embezzlement	0	1
Extortion/Blackmail	0	0
Bribery	0	0
Stolen Property Offenses	23	11
Crimes Against Property Total	220	291

Group A Offenses: Crimes Against Society	2024	2025
Drug/Narcotics Violations	106	179
Drug/Narcotic Equip. Violations	142	239
Betting/Wagering	0	0
Operating/Promoting/Assisting Gambling	0	0
Gambling Equipment Violations	0	0
Sports Tampering	0	0
Pornography/Obscene Material	0	0
Prostitution	0	0
Assisting or Promoting Prostitution	0	0
Purchasing Prostitution	0	0
Weapons Law Violation	10	21
Crimes Against Society Total	258	439



ANALYSIS:

It is important to note that crime data reported through the FBI's National Incident-Based Reporting System (NIBRS) may appear higher than under previous reporting methods. NIBRS records all crimes that occur during a single incident instead of only the most serious offense. Because of this, reported crime totals may be higher even when the number of incidents has not significantly changed. The data reflects more complete reporting, not necessarily more crime.

Overall reported **Group A offenses** increased from 555 in 2024 to 815 in 2025, representing an increase of approximately 47%. The largest increase occurred in **Crimes Against Society**, followed by **Crimes Against Property**, while **Crimes Against Persons** remained relatively stable.

Crimes Against Persons

Crimes against persons increased modestly from 77 to 85 incidents (10%). While there was one reported homicide in 2025, several more serious violent offenses decreased, including aggravated assaults (26 to 11) and robberies (14 to 6). Increases were primarily seen in simple assaults and intimidation offenses. Overall, violent crime remained a relatively small portion of all reported offenses.

Crimes Against Property

Property crimes increased from 220 to 291 incidents (32%). The most notable increase was in the "Motor Vehicles Theft" category, which rose from 14 to 87 incidents, accounting for a significant portion of the overall increase. It is important to note that, under NIBRS, this category includes thefts of motorized scooters and e-bikes in addition to automobiles. Many of the reported offenses fall into these alternative vehicle types rather than traditional passenger vehicles.

Larceny/theft offenses also increased, while robbery, destruction of property, and stolen property offenses declined.

Crimes Against Society

Crimes against society experienced the largest increase, rising from 258 to 439 incidents (70%). Much of this growth was driven by increases in drug/narcotics violations, drug equipment violations, and weapons law violations. These offenses are often influenced by proactive law enforcement activity, suggesting increased enforcement efforts in addition to changes in criminal activity. The increase in drug-related offenses should be viewed in the context of both proactive law enforcement efforts and changes in state law, including Proposition 36, which expanded enforcement options for certain repeat drug offenses. Consequently, increases in these categories may reflect enhanced enforcement activity in addition to changes in criminal behavior.

Transit-Related Enforcement Activity (Group B Offenses)

Although Group B offenses are not included in the total crime statistics for Group A, they offer important context regarding the safety of the transit system and quality-of-life enforcement. Notably, trespassing and disorderly conduct make up a significant portion of the activities of the Transit Police Bureau. These offenses can directly affect passenger safety, service reliability, and customer satisfaction.

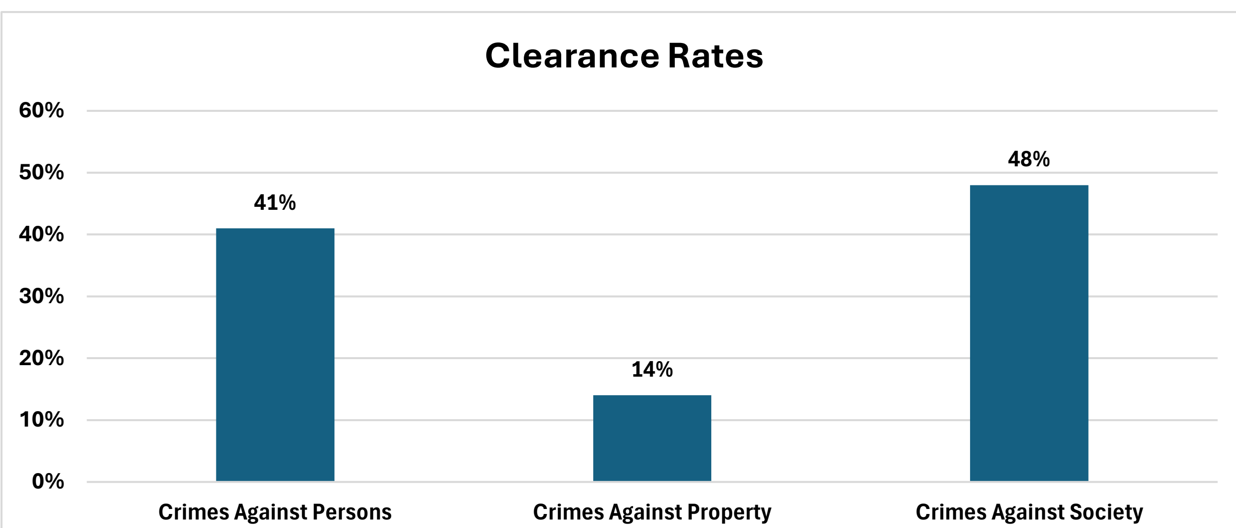
Group B offenses are only recorded under the National Incident-Based Reporting System (NIBRS) when an arrest occurs. Consequently, the statistics presented do not account for every incident of trespassing or disorderly conduct that the Transit Police Bureau encounters. Many situations are resolved through warnings, voluntary compliance, field detentions, or when individuals leave before any contact is made. Therefore, these figures reflect enforcement actions rather than the total number of incidents.

Group B Offenses	2024	2025
Disorderly Conduct	5	7
Trespassing	18	46

These offenses often require law enforcement response to maintain a safe operating environment, even though they are generally less serious than Group A offenses.

CLEARANCE RATES:

Below is a graph of the 2025 clearance rates for Group A Offenses in the Transit Police Bureau:



Clearance rates represent the proportion of reported crimes that law enforcement agencies have successfully resolved, typically through arrest or by exceptional means. However, it is important to note that clearance rates do not account for cases that remain actively under investigation, are temporarily suspended pending new information, or have already been submitted to the District Attorney's Office for charging review but have not yet resulted in an arrest.

Many complex investigations require significant time to develop sufficient evidence, identify suspects, or locate involved parties. During this period, cases may remain open or be temporarily suspended while the investigator pursues additional leads, await forensic results, conduct follow-up interviews, or coordinate with partner agencies. These cases are still actively being worked on and may ultimately be cleared at a later date once the necessary evidentiary threshold for arrest or prosecution is met.

Similarly, when a case is sent to the District Attorney's Office for review, it may stay pending while prosecutors evaluate the evidence and decide whether to file criminal charges. Because the National Incident-Based Reporting System (NIBRS) clearance methodology requires that an arrest occur or that strict exceptional clearance criteria be met, these cases are not considered cleared until that process is finished.

As a result, clearance rate statistics can underrepresent the amount of investigative work being conducted by law enforcement. A portion of reported crimes may still be progressing through investigative or prosecutorial review stages at the time that data is reported. Additional cases may ultimately be cleared after the reporting period once new evidence emerges, suspects are identified, or prosecutors authorize charges.

For this reason, clearance rates should be interpreted as a snapshot in time rather than a complete measure of investigative activity or case outcomes. Ongoing investigations, cases awaiting prosecutorial review, and suspended cases that may be reopened with new information are all part of the broader investigative process but are not reflected in clearance statistics until the required clearance criteria are satisfied.

1.Cleared by Arrest

An incident is considered cleared by arrest when law enforcement identifies and takes a suspect into custody for the commission of a reported offense. For a clearance by arrest to be recorded under NIBRS, the following conditions must be met:

a. At least one suspect is arrested in connection with the offense.
b. The arrestee is formally charged with the commission of the offense.
c. The arrestee is turned over to the court system for prosecution and adjudication.

It is important to note that only one arrest is required to clear an entire incident, even if the incident involves multiple offenses. When multiple offenses occur within a single incident, the arrest of one offender may clear all offenses within that incident if the arrest addresses the related criminal activity.

2. Cleared by Exceptional Means

An offense may be cleared by exceptional means when law enforcement has identified the offender and has sufficient evidence to make an arrest, but circumstances outside the control of law enforcement prevent the arrest or prosecution from occurring. To qualify as an exceptional clearance, all four of the following conditions must be met:

a. The identity of at least one offender has been clearly and definitively established.
b. There is sufficient probable cause to support an arrest, charge, and referral for prosecution.
c. The offender's exact location is known, enabling law enforcement to take the offender into custody.
d. Circumstances outside the control of law enforcement prevent the arrest, charge, or prosecution of the offender.

Examples of circumstances that may qualify for exceptional clearance include, but are not limited to:

- Death of the offender
- The victim refuses to cooperate with prosecution after the offender has been identified
- The offender is already incarcerated or in custody for another offense and cannot be extradited
- Prosecution is declined for reasons other than lack of probable cause
- The offender is a juvenile whose case is handled outside the traditional criminal justice process

3. Unfounded

The investigation clearly establishes that no offense actually occurred or was attempted. Any conclusion of "unfounded" must be fully supported by written facts from which the reviewer will arrive at the same conclusion as the investigating deputy.

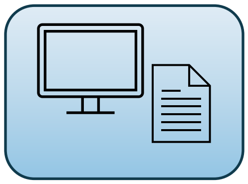
CLEARANCE RATE CALCULATIONS:

Clearance rates measure the proportion of reported crimes solved by law enforcement. The clearance rate is calculated by dividing the number of crimes cleared (by arrest or exceptional means) by the total number of crimes recorded, then multiplying the result by 100.

$$\text{Clearance Rate} = \left(\frac{\text{Number of Offenses Cleared}}{\text{Total Number of Offenses Reported}}\right) \times 100$$

Clearance rates provide insight into investigative outcomes but should be interpreted within context. Certain crimes are inherently more difficult to solve due to factors such as a lack of witnesses, delayed reporting, or limited physical evidence. As a result, clearance rates may vary across offense categories and jurisdictions.

<u>ARREST TRENDS:</u>



743

Original Reports Documented in 2025

356

Total Arrests in 2025

ARRESTS	2024	2025
January	15	55
February	15	19
March	19	43
April	18	32
May	15	37
June	16	34
July	10	20
August	12	25
September	7	17
October	30	37
November	16	27
December	58	10
TOTAL	231	356

Analysis of arrest activity during the reporting period shows a 54% increase in total arrests in 2025. This increase is consistent with a shift toward more proactive and focused enforcement efforts and may also reflect the impact of Proposition 36, which has contributed to increased arrest activity in certain offense categories.

While it is difficult to attribute the increase to a single factor, the trend likely reflects a combination of more efficient enforcement strategies, higher thresholds for custodial arrests, and a continued focus on high-impact enforcement rather than overall volume.

Top 3 Arrests in **2025**

HS 11364 (A) Possession of Drug Paraphernalia	109
Misdemeanor Warrant Arrest	51
Failure to Appear on Misdemeanor Warrant	46

PUBLIC SAFETY COMMUNICATIONS (DISPATCH):

Public Safety Communications (PSC) center serves as the primary point of contact for both 911 and non-emergency calls for service throughout the three counties, the Transit Police Bureau patrols. PSC provides critical dispatch services that ensure timely and effective emergency response. Dispatchers play a vital role in connecting with the caller, often serving as the first point of contact during emergencies and high-stress situations.

In addition to maintaining constant communication with deputies and bureau personnel in the field, dispatchers are responsible for assessing incoming calls, prioritizing incidents based on urgency, and coordinating the appropriate response. This includes dispatching law enforcement, fire, and emergency medical services, as well as providing life-saving instructions to callers when necessary.

PSC operates 24 hours a day, seven days a week, ensuring uninterrupted service to the Transit District. This is crucial during the four-hour period in which the Transit Police Bureau is not contracted to provide services. PSC ensures any calls that come in during this window, are routed to the local agency to handle.

Dispatchers utilize advanced computer-aided dispatch (CAD) systems, radio communications, and integrated law enforcement databases to support field operations, track units in real time, and maintain accurate records of calls for service.

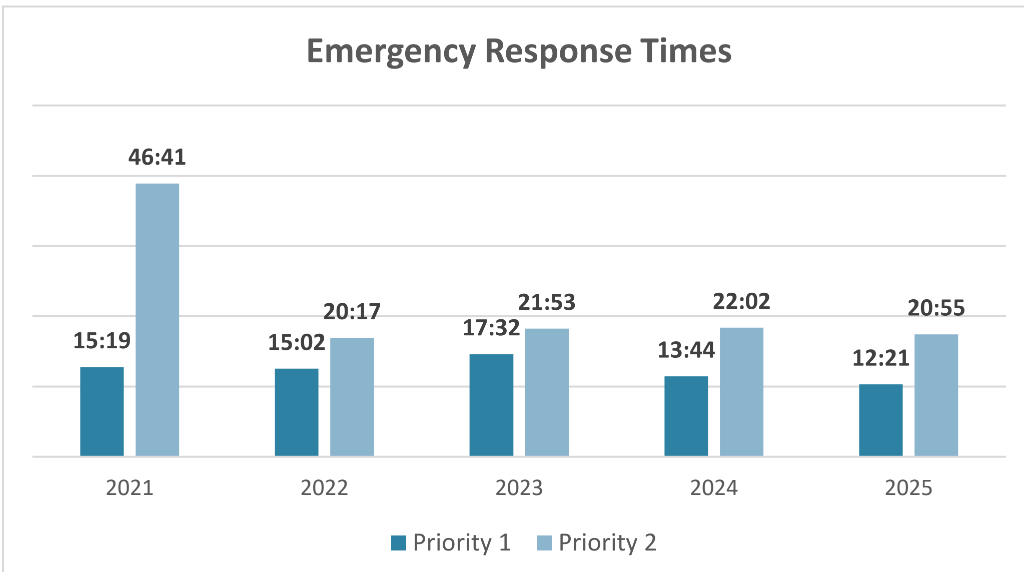
Beyond emergency response, dispatchers also handle a wide range of non-emergency requests, including public inquiries, documentation calls, and coordination with other agencies; including Central Control. Their ability to remain calm, gather critical information and make rapid decisions directly impacts response times, officer safety, and overall service delivery.

Through professionalism, efficiency, and strong communication skills, PSC plays an essential role in supporting public safety operations and maintaining the high level of service expected by customers of the Transit District.

9,657

Total 911, Emergency and Non-Emergency Calls Received by Dispatch for Transit Police Bureau 2025

RESPONSE TIMES:



Top 3 Call Types and Locations **2025**

CALL TYPE	LOCATIONS	
Dispersal	Diridon Station Sequoia Station Palo Alto Station	San Francisco Station Daly City Station
Trespasser	Diridon Station Palo Alto Station Sequoia Station	San Francisco Station
Welfare Check	Diridon Station Menlo Park Station Sequoia Station	San Francisco Station Daly City Station

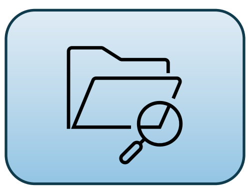
INVESTIGATIONS:

The Transit Police Bureau has one highly trained, specialized detective dedicated to conducting thorough, complex investigations into crimes affecting the Transit system.

The detective's responsibilities extend beyond case follow-up and include the investigation of serious and complex crimes such as violent offenses and property crimes. The detective works closely with patrol personnel, and allied agencies to identify suspects, develop cases, and support successful prosecution. The detective also works closely with the three county DA's Offices and Coroner's Offices, during any accident incident that resulted in a death.

In addition to traditional investigative work, the Detective conducts interviews and interrogations, prepares search warrants, analyzes evidence, and collaborates with the three District Attorney Offices to ensure cases are thoroughly documented and legally sound.

While only one Detective is assigned to the Transit Bureau, the San Mateo County Sheriff's Office Investigations Bureau is a resource available to the Detective and the Transit Bureau as needed.



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Total Number of Cases Investigated in 2025

Investigative case highlights for 2025 are as follows:

Stabbing that Resulted in Death

On 8/27/25, deputies were dispatched on the report of a possible stabbing at the Redwood City Caltrain Station. A victim was located and found to have been stabbed numerous times, at the southern end of the southbound platform. The victim was transported to a local trauma center, where he succumbed to his injuries approximately five hours later.

The incident occurred after the victim was involved in verbal altercation with a female. The suspect, later identified as Jose Gomez Bustamante, fled the scene on a bicycle through the Sequoia Shopping Center.

During the investigation, it was determined the suspect was on parole. After gathering photos and surveillance footage, two parole agents familiar with the suspect positively identified Gomez Bustamante as the subject who stabbed the victim.

On 8/28/25, Sheriff's Office SWAT members located and arrested Gomez Bustamante without incident. During an initial interview with the suspect, he identified himself in the still images and surveillance footage presented to him and expressed sorrow for stabbing the victim.

The suspect was ultimately booked into the San Mateo County Jail without the option for bail. He is currently awaiting pretrial in December of 2026.

Threatening Comments

On 5/1/25, a male suspect verbally threatened two juvenile female passengers on a SamTrans bus. The juveniles exited the bus at their designated stop and fled to their school to report the incident. Upon arrival at the school, the responding deputy contacted the juveniles and the school's Social Worker to gather more information. Both victims were able to provide a description of the suspect, which was turned over to the Transit Detective.

Video footage was collected and reviewed by the responding deputy and Detective. Using a law enforcement photo database, a deputy received a booking photo matching the subject. Due to the last known location of the suspect, deputies at the Millbrae Police Bureau were notified of the incident and a Be On the Lookout was broadcast. Approximately 10 days after the initial incident, the suspect, Richard Lee Page, was located, positively identified, and detained.

Transit Detective conducted an interview with the subject who admitted to being on the bus on 5/1/26 and recalled being asked by the bus operator to get off the bus. During the interview, the detective noted the suspect having scattered thoughts and the interview was ultimately ended at the request of the subject. The case was forwarded to the District Attorney's Office, and on 1/14/26, it was determined the subject was not fit for trial and he was ordered to be committed to a mental health facility for care and treatment.

COMMUNITY SERVICE OFFICERS:

In the Transit Police Bureau, Community Service Officers (CSOs) serve as a critical component of the Bureau's service delivery model, working in close coordination with sworn personnel to ensure operations are both efficient and responsive. As non-sworn professionals, CSOs are strategically deployed to handle calls for service that do not require an armed deputy's presence. This approach allows sworn staff to remain available for high-priority and emergency incidents, ultimately enhancing overall response capabilities and resource allocation.

The primary function of the Transit CSOs is parking enforcement. Working their way from San Jose to the most northern point of San Mateo County, including the Colma Park and Ride. CSOs also play a significant role in maintaining the Bureau's day-to-day operational effectiveness. Their responsibilities also include capturing all required National Transit Database (NTD) reporting and all Federal Railroad Administration (FRA) reporting, as well as managing traffic control at incidents, protecting grade crossings during crossing arm malfunctions, and towing and processing abandoned vehicles. CSOs also assist with evidence handling, documentation, and administrative follow-up, ensuring continuity in investigations and operational workflows.

3,487
Calls Responded to in 2025

117
Total Reports Taken in 2025

10,733
Total Parking Citations Issued in 2025

11
Abandoned Vehicles Towed in 2025

Below is a summary of the top 10 calls handled by CSOs in 2025, reflecting their ongoing commitment to responsive service, community engagement, and operational support within the Transit Police Bureau.

REQUEST TYPE	2025
Signals Out of Order	98
Theft	90
Non-Injury Accident	27
Lost Property	19
Hit & Run	12
Ticket Vending Machine Alarm	10
Found Property	9
Traffic Hazard	8
Recovered Stolen Vehicle	5

PSYCHIATRIC EMERGENCY RESPONSE TEAM (PERT):

The Psychiatric Emergency Response Team (PERT) is a partnership between the San Mateo County Sheriff's Office and San Mateo County Behavioral Health and Recovery Services that provides specialized support for individuals experiencing mental health crises. By combining law enforcement with licensed behavioral health clinicians, PERT helps connect individuals and families with appropriate services while working to reduce unnecessary arrests, psychiatric hospitalizations, and repeat law enforcement contacts.

For the Transit Police Bureau, PERT is a valuable resource when responding to incidents involving individuals in crisis aboard buses, trains, or at transit facilities. Through specialized Enhanced Crisis Intervention Training (ECIT), Transit deputies are equipped to recognize the signs of mental illness, de-escalate situations, and, when appropriate, divert individuals toward behavioral health resources rather than relying solely on enforcement.

PERT also provides guidance and follow-up for incidents involving individuals experiencing suicidal ideation or other behavioral health emergencies. This collaborative approach supports safer outcomes for those in crisis, assists families during traumatic events, and helps ensure that mental health incidents are addressed with both compassion and appropriate clinical expertise.

Case highlight from 2025:

Continuity of Care

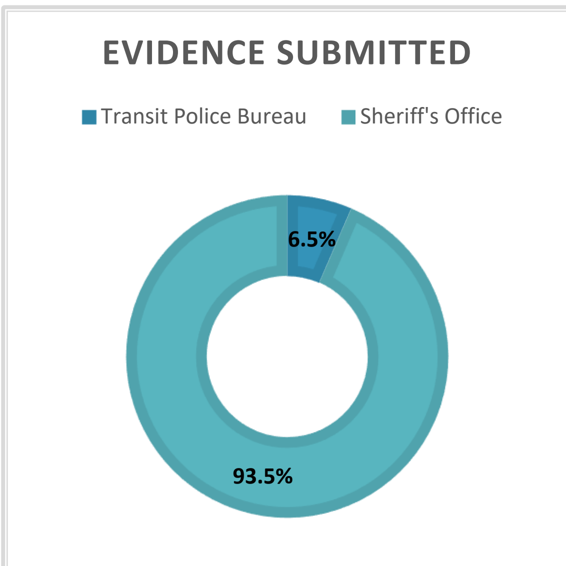
On 10/2/25, a juvenile female was contacted by Transit deputies when a call for service revealed she had run away from her home after her parents took away her social media platforms, as a punishment. The juvenile was found by her father, sitting on a train platform with her legs dangling off the platform while a train was approaching. The juvenile was ultimately placed on a W&I 5150 hold and was transported to a local hospital.

PERT conducted a follow up with the parents of the juvenile to offer resources that could help aid the family with concerns regarding the juvenile's mental health. The parents stated the juvenile was already connected to mental health services, and they would be consulting with the programs on the next steps. Resources such as the National Alliance on Mental Health (NAMI) and the Mobile Crisis Response Team (MCRT) were offered and explained to the parents. The parents expressed their gratitude for the follow up.

PROPERTY BUREAU:

The Property Bureau's primary responsibility is to document, categorize, securely store, and release property to its lawful owner for court presentation, auction, or disposal, as required by law. Transit Police Bureau submitted approximately 6.5% of the total evidence processed by the Sheriff's Office Property Bureau. Of that, **3,240** digital pieces were processed, including BWC and car videos (according to evidence.com). There were **536** physical items processed, of which 4 were firearms.

- **Evidence:** The property is typically retained until any ongoing legal proceeding are resolved. Following this, the prosecuting attorney may file a court order for its return, certifying that the property is no longer needed as evidence and can be returned to its rightful owner.
- **Found Property:** Any found or unattended property is secured and held for a minimum of 90 days while efforts are made to locate its lawful owner.



3,240
Digital Pieces Processed

536
Physical Items Processed

261
Drug Related Items

4
Firearms Received

4
Firearm-related Items
(Casings, ammo, magazines)

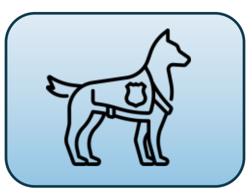
K9 UNIT:

The K9 team, serving SamTrans and Caltrain, consists of three highly trained dogs each paired with a dedicated handler. These K9 teams play a critical role in a wide range of public safety operations, including patrol support, apprehension, and search-and-rescue efforts. In addition, K9 teams are deployed to assist in conducting area and building searches, missing-person searches, and the identification or critical evidence at crime scenes that may otherwise go undetected. They also provide an added layer of protection for deputies and the community by enhancing officer safety, helping to de-escalate situations, and encouraging compliance without needing force during high-risk incidents.

The K9 teams train rigorously to maintain proficiency in obedience, detection, tracking, apprehension and undergo annual state-mandated qualification testing. K9 teams receive additional scenario-based training for deployments on buses and trains. K9 teams also work closely with San Mateo County Sheriff's Office Bomb Squad and receive additional explosive device training. This ongoing training ensures readiness for real-world situations and adherence to best practices in law enforcement.

K9 teams provide an unparalleled tactical advantage when searching bus turnarounds or train stops, primarily due to their ability to process complex olfactory environments far more efficiently than human deputies or technology. K9's can instantaneously isolate and track specific explosive odors amid the intense distractions of a public transit system.

By creating a visible and highly effective deterrent, these K9 units not only increase the speed of detection but also significantly enhance public safety by identifying threats before they can move through the transit system.



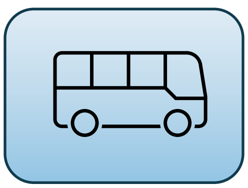
18

K9 Deployments in 2025

HIGH VISIBILITY ENFORCEMENT AND PATROL:

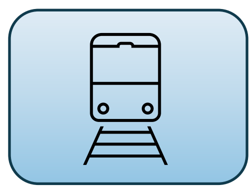
A visible law enforcement presence is one of the Transit Police Bureau's most effective tools for promoting public safety, deterring criminal activity, and fostering confidence throughout the transit system. High visibility patrols not only reassure passengers, but also provide valuable support to the bus operators, train conductors, and engineers who work throughout the systems each day. Knowing deputies are present and accessible to help reinforce a safe operating environment provides employees with confidence that assistance is readily available when needed.

High visibility patrols are conducted through voluntary overtime sign-ups, allowing deputies to provide additional proactive enforcement and engagement beyond their regularly assigned duties when staffing availability permits. These assignments allow the Bureau to enhance its visible presence throughout the transit system while continuing to meet the daily operational demands of responding to calls for service, conducting investigations, and addressing other public safety needs.



1,294.5

Hours of high visibility patrols on buses and at bus-turnarounds in 2025



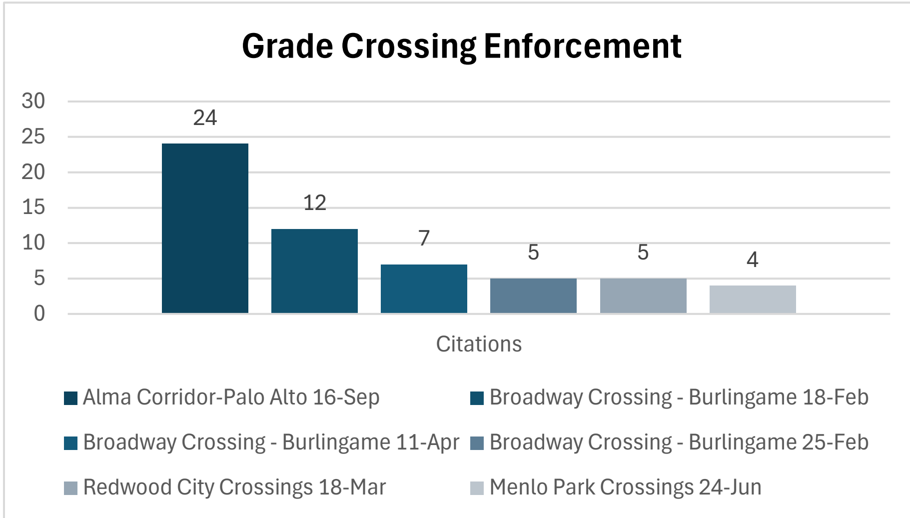
2,892

Hours of high visibility patrols aboard trains and on station platforms in 2025

4,186.5

Total Hours of high visibility patrols in 2025

In addition to routine high visibility patrols, deputies conducted multiple grade crossing enforcement operations focused on some of Caltrain's busiest crossings, including the Alma corridor in Palo Alto, the Broadway crossing in Burlingame, and several crossings throughout Redwood City and Menlo Park. These deployments were designed to improve public safety through education, increased patrol presence, and enforcement of traffic laws related to railroad crossings.



While proactive patrol remains a priority, available resources must continually be balanced with emergency response, investigations, and other operational responsibilities. The ability to dedicate more than 4,186 hours to high visibility patrols reflects the commitment of Transit Police Bureau personnel to providing a safe transit environment, supporting transit employees, and maximizing opportunities for proactive engagement with the communities served.

COLLABORATION:

The Transit Police Bureau's effectiveness extends well beyond the deputies assigned to patrol the transit system. Through strong partnerships with SamTrans, Caltrain, local law enforcement, fire agencies, emergency medical providers, and community organizations, the Bureau enhances public safety, strengthens emergency preparedness, and builds meaningful relationships throughout the region.

Because SamTrans and Caltrain operate across multiple jurisdictions throughout San Mateo, Santa Clara, and San Francisco counties, collaboration is essential. These established partnerships ensure coordinated responses during critical incidents and provide additional resources when Transit Police personnel are committed elsewhere. Regular communication and joint planning foster strong working relationships that improve operational readiness and service to the public.

TRAINING AND EMERGENCY PREPAREDNESS:

In 2025, the Transit Police Bureau participated in numerous tabletop and full-scale exercises designed to strengthen regional emergency response capabilities and prepare partner agencies for large-scale events, including Super Bowl LX and the 2026 FIFA World Cup.

The Bureau also participated in specialized training with WAYMO, providing deputies with practical guidance on autonomous vehicle operations, first responder protocols, collision response, incidents involving vehicles on rail tracks, procedures for requesting video evidence, and coordination during police-related street closures. As autonomous vehicle technology becomes more prevalent throughout the Bay Area, this training helps ensure deputies are prepared to respond safely and effectively.

Two significant full-scale exercises were conducted in partnership with SamTrans and Caltrain during the year.

The SamTrans exercise, conducted with the San Bruno Fire Department, simulated a major earthquake that caused the partial collapse of a parking structure onto a hydrogen-powered bus. Transit deputies worked alongside SamTrans personnel, local law enforcement, and fire agencies to secure the scene, assess hazards, and coordinate patient care. A structured after-action debrief identified strengths, opportunities for improvement, and reinforced interagency communication.

The Caltrain exercise, conducted with the Redwood City Fire Department, simulated an earthquake resulting in the loss of electrical power to a passenger train. Transit deputies partnered with Caltrain personnel, local police agencies, fire personnel, and emergency medical responders to assess the incident, manage passenger evacuations, and coordinate emergency operations. Following the exercise, participating agencies conducted a comprehensive after-action review to evaluate communication, coordination, and best practices for managing incidents involving electrified rail infrastructure.

These exercises strengthen regional partnerships while ensuring personnel are prepared to respond safely and effectively to complex incidents affecting the transit system.

COMMUNITY PARTNERSHIPS:

The Transit Police Bureau recognizes that public safety extends beyond emergency response. Community engagement provides valuable opportunities to strengthen relationships with riders, partner agencies, and the communities served by SamTrans and Caltrain.

One of the San Mateo County Sheriff’s Office’s most meaningful partnership continues to be Shop With A Hero, an annual program that provides children in need with a positive holiday experience alongside local first responders. Children identified through the Sheriff’s Activities League (SAL), local service organizations, and law enforcement agencies are paired with a community hero for a shopping experience before participating in gift wrapping, refreshments, and holiday activities.

Since 2023, SamTrans has served as the event's official transportation partner, providing buses that safely transport participating children and first responders to and from the event. This partnership demonstrates how transit agencies contribute beyond transportation by supporting programs that strengthen community trust and create lasting positive experiences for local families.

The Transit Police Bureau also provided highly visible security throughout the rail corridor during one of Caltrain's most well-attended community events; the Holiday Train. Planning for the Holiday Train requires months of coordination with Caltrain staff and local law enforcement agencies to ensure that each station celebration is safe for riders, families, and event participants. Deputies were assigned to each celebration stop to provide security, assist attendees, and maintain a welcoming environment throughout the evening.

EDUCATION AND OUTREACH:

The Bureau continues to expand partnerships through education and outreach opportunities. During 2025, personnel presented to the San Mateo County Office of Education, providing school administrators and educational partners with an overview of how transit-related incidents are reported and investigated, while highlighting available resources for schools whose students rely on public transportation.

The presentation fostered stronger communication between local school districts, SamTrans, and the Transit Police Bureau, creating opportunities for continued collaboration in addressing student safety and transportation-related concerns.

Whether through emergency preparedness, specialized training, community events, or educational outreach, the Transit Police Bureau remains committed to building collaborative partnerships that enhance safety, improve regional coordination, and strengthen public trust. These relationships continue to play a vital role in supporting the Bureau's mission of providing safe, reliable, and community-focused transit policing throughout the service area.

CONCLUSION:

The accomplishments highlighted through this report reflect the Transit Police Bureau's continued commitment to delivering professional, proactive, and service-oriented law enforcement to the San Mateo County Transit District.

From data-driven policing and transparent reporting to specialized investigative resources, emergency preparedness, community engagement, and regional collaboration, the Bureau remains focused on protecting the personnel who operate the buses and trains, and the people who rely on public transportation every day. The work of deputies, Community Service Officers, detectives, dispatch personnel, PERT detectives and clinicians, K9 teams, and professional staff collectively contributes to a safer transit environment while supporting the District's mission of providing safe, reliable, and accessible transportation.

As the transit system continues to evolve and the region prepares for significant events and future growth, the Transit Police Bureau remains committed to adapting to emerging challenges, strengthening partnerships, and utilizing innovative strategies to enhance public safety. By combining accountability, collaboration, and a community-focused approach, the Bureau is well positioned to meet the changing needs of the District and the communities it serves.

On behalf of Sheriff Ken Binder and the members of the Transit Police Bureau, thank you to the San Mateo County Transit District Board of Directors, District leadership, SamTrans, Caltrain, our public safety partners, and the communities we serve for your continued trust, collaboration, and support. We look forward to building upon these accomplishments and continuing our shared commitment to providing a safe, secure, and welcoming transit system for all.

SAN MATEO COUNTY
SHERIFF'S OFFICE

POLICE SERVICES ANNUAL REPORT

TRANSIT POLICE BUREAU

Presented by

Lieutenant Lou Aquino

Our Mission

The San Mateo County Sheriff's Office protects and serves our communities by delivering professional policing and correctional services while upholding our commitment to public safety, community engagement, and organizational excellence.

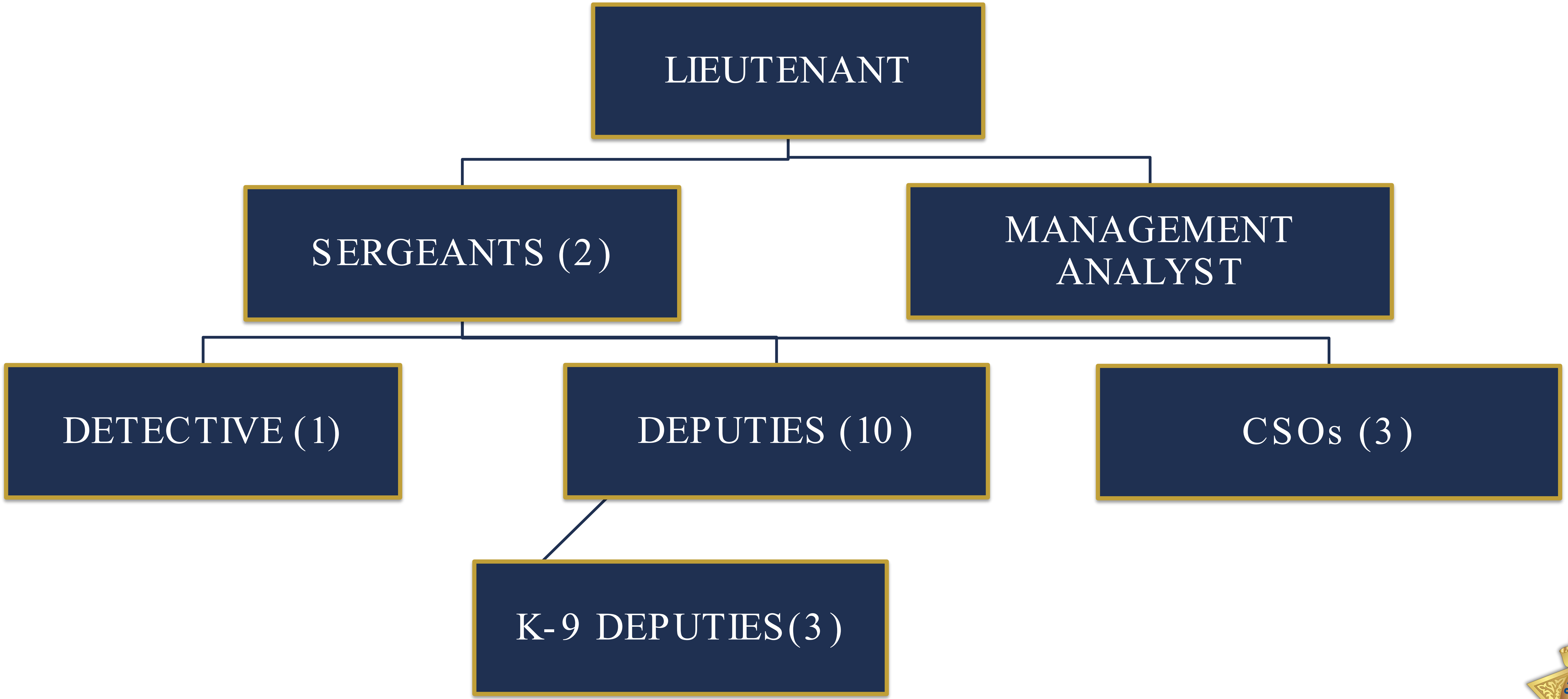
OUR THREE PILLARS

PUBLIC TRUST AND COMMUNITY ENGAGEMENT	EXCELLENCE IN SERVICE	COMMITMENT TO JUSTICE

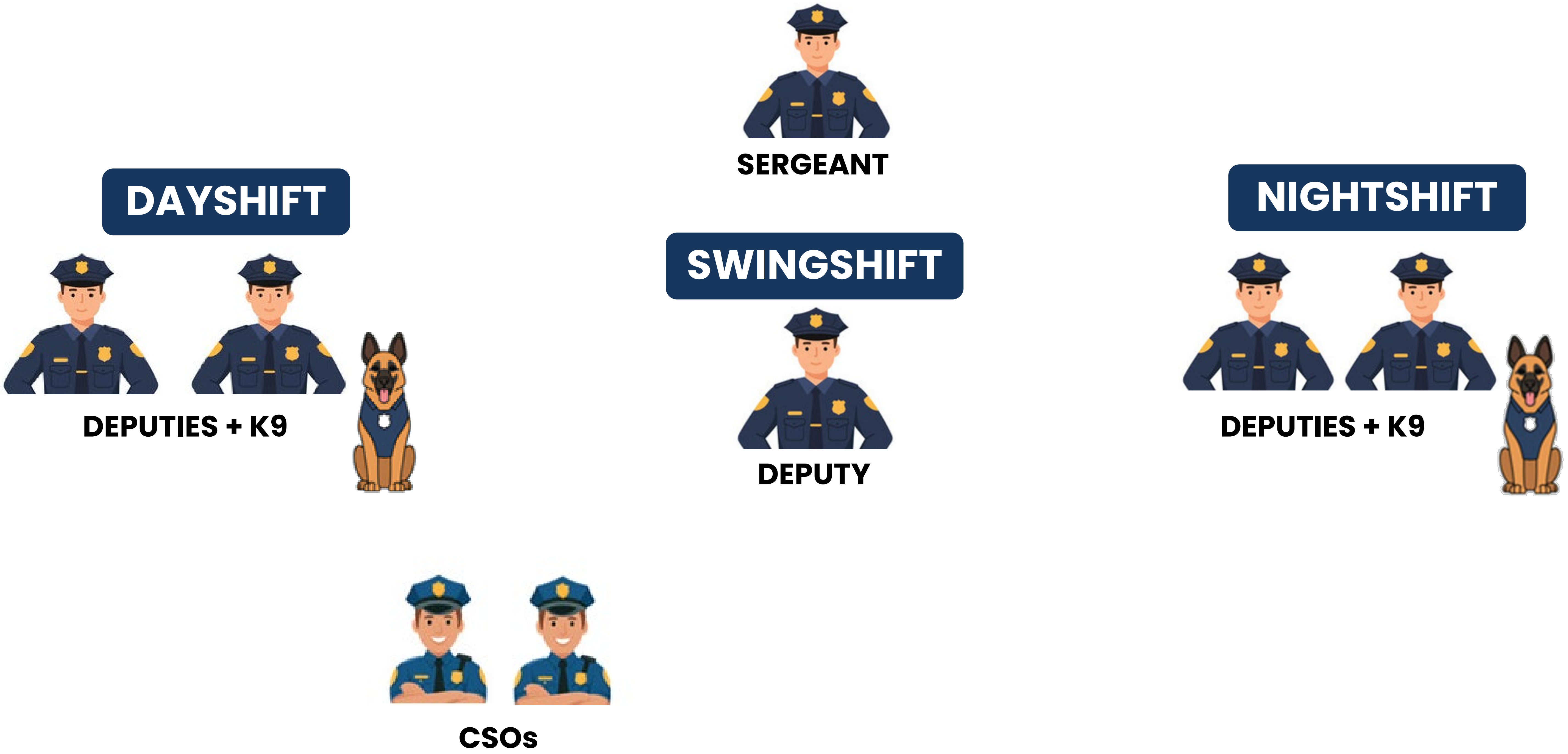
Background & Partnership Overview

- The Sheriff’s Office has partnered with the Transit District for 23 years – since 2002
- 20-hour contract
- 77 miles of track, 32 stations throughout three counties: San Francisco, San Mateo, and Santa Clara
- 76 bus routes throughout San Mateo County and into parts of San Francisco and Palo Alto
- Services: patrols, investigations, rapid response, high visibility, and special events (i.e., Giants games, Bay 2 Breakers)
- Strong collaboration with SamTrans and Caltrain, ensuring safe and reliable transit

Organizational Chart

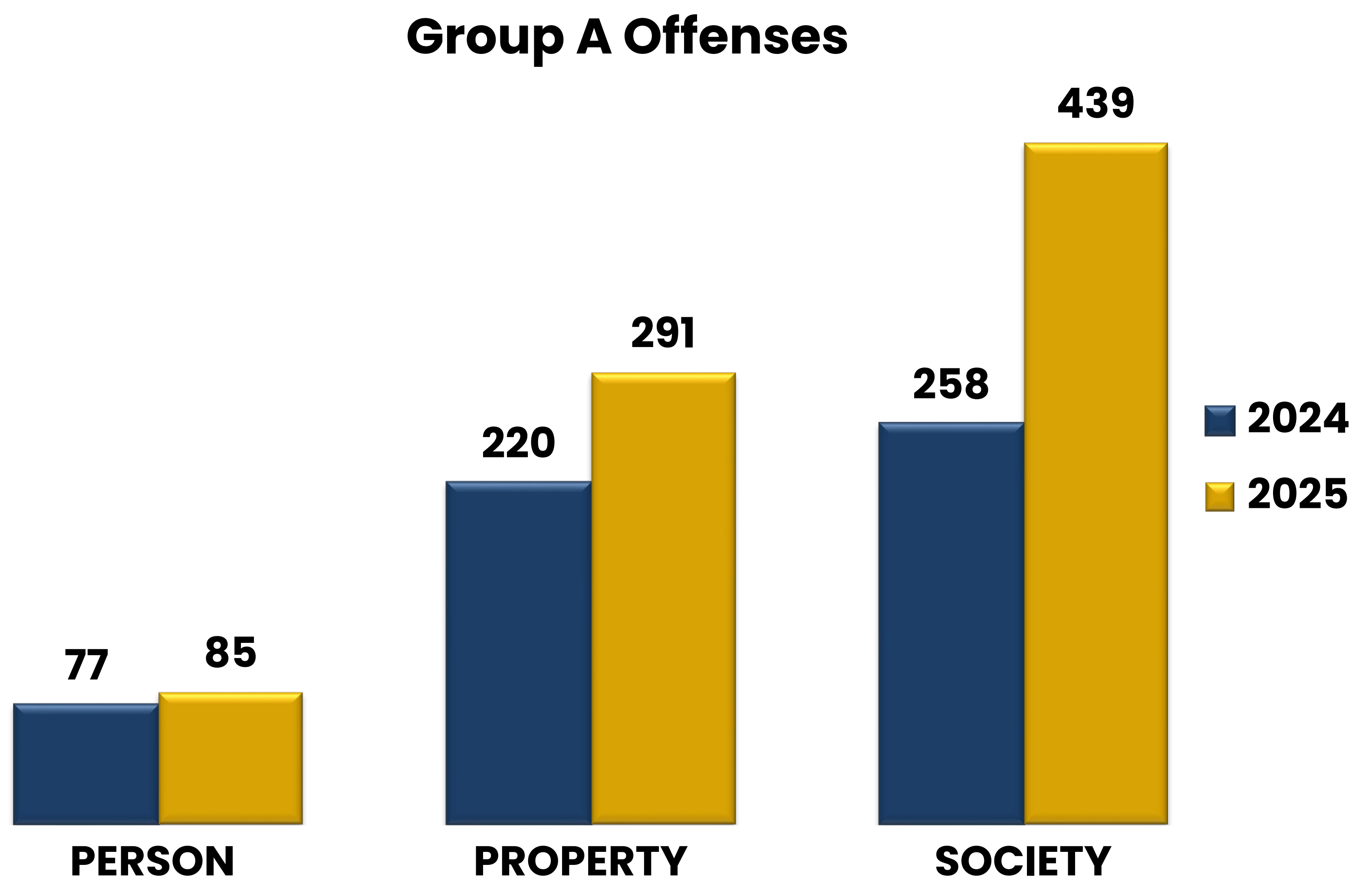


TEAM STRUCTURE



OFFENSE CATEGORIES

- **Incidents of crimes against persons increased modestly from 77 in 2024 to 85 in 2025 marking an increase of 10%.**
- **Incidents of crimes against property increased from 220 in 2024 to 291 in 2025, representing an increase of 32%.**
- **Crimes against society experienced the largest increase, rising from 258 in 2024 to 439 in 2025. An increase of 70%. Much of this was driven by a rise in drug and narcotics violations.**
- **Group B offenses highlight quality-of-life enforcement activity and are reported only when an arrest is made.**



Group B Offenses	2024	2025
Disorderly Conduct	5	7
Trespassing	18	46

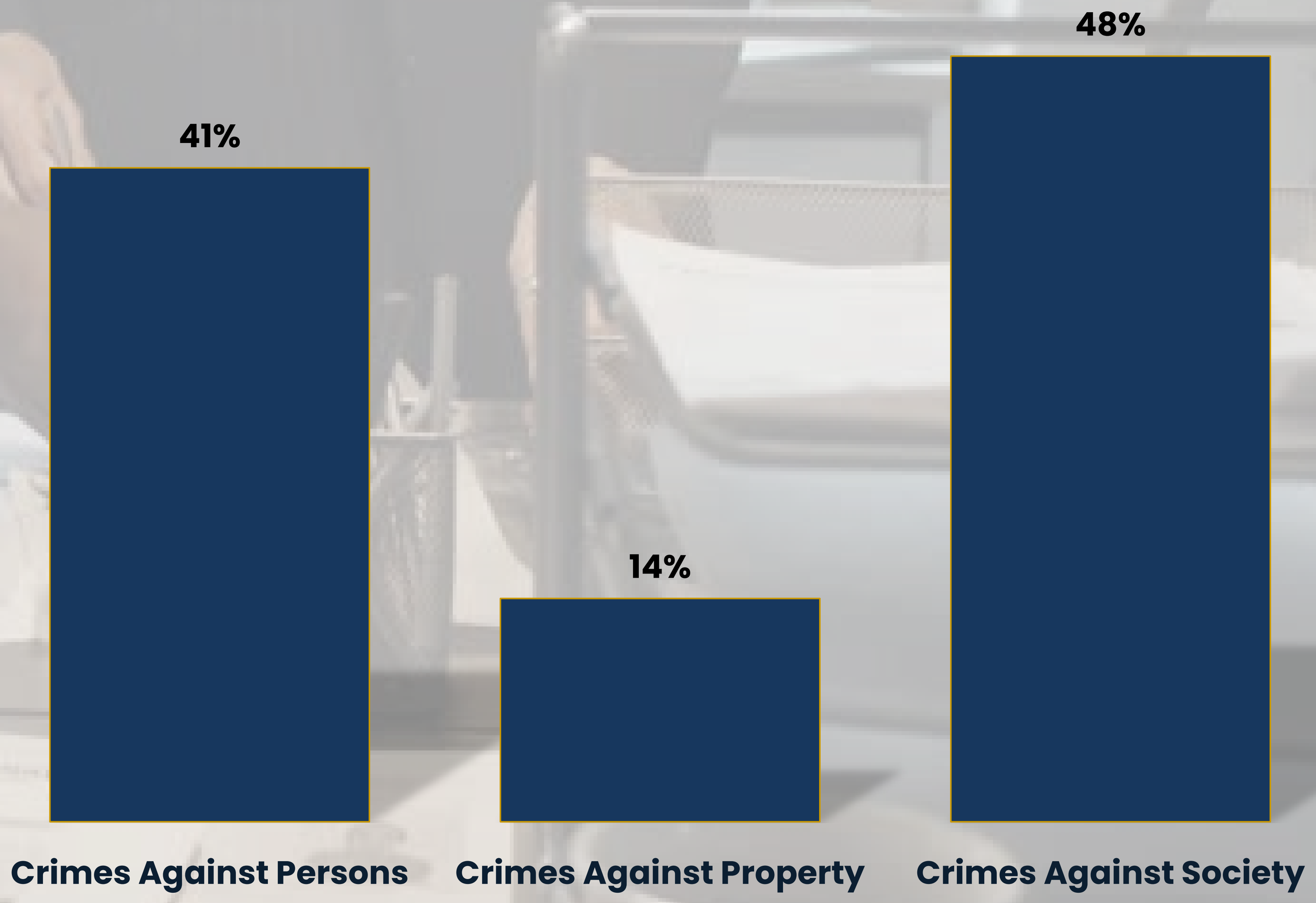
CRIME CLEARANCE RATE

- **Cleared by Arrest**
- **Cleared by Exceptional Means**
- **Unfounded**

- **Clearance rates do not include cases still under investigation, temporarily suspended, or submitted to the District Attorney's Office for review that have not yet led to an arrest.**

- **Clearance rates provide insight into investigative outcomes but should be interpreted within context.**

- **Clearance rates may vary across offense categories and jurisdictions.**



SNAPSHOT DATA

Top 3 Arrest in 2025

STATUTE	DESCRIPTION
11364 HS (A)	Possession of Drug Paraphernalia
Warrant	Misdemeanor Warrant Arrest
978.5 PC	Fail to Appear on Misdemeanor Warrant

Top 5 Locations Reports were Taken in 2025

1. Sequoia Station
2. El Camino Real*
3. Palo Alto Station
4. 4^{th} & King
5. Millbrae Transit Center

* Between San Mateo and Santa Clara counties

356
Total Arrests in 2025

743
Total Reports Taken in 2025

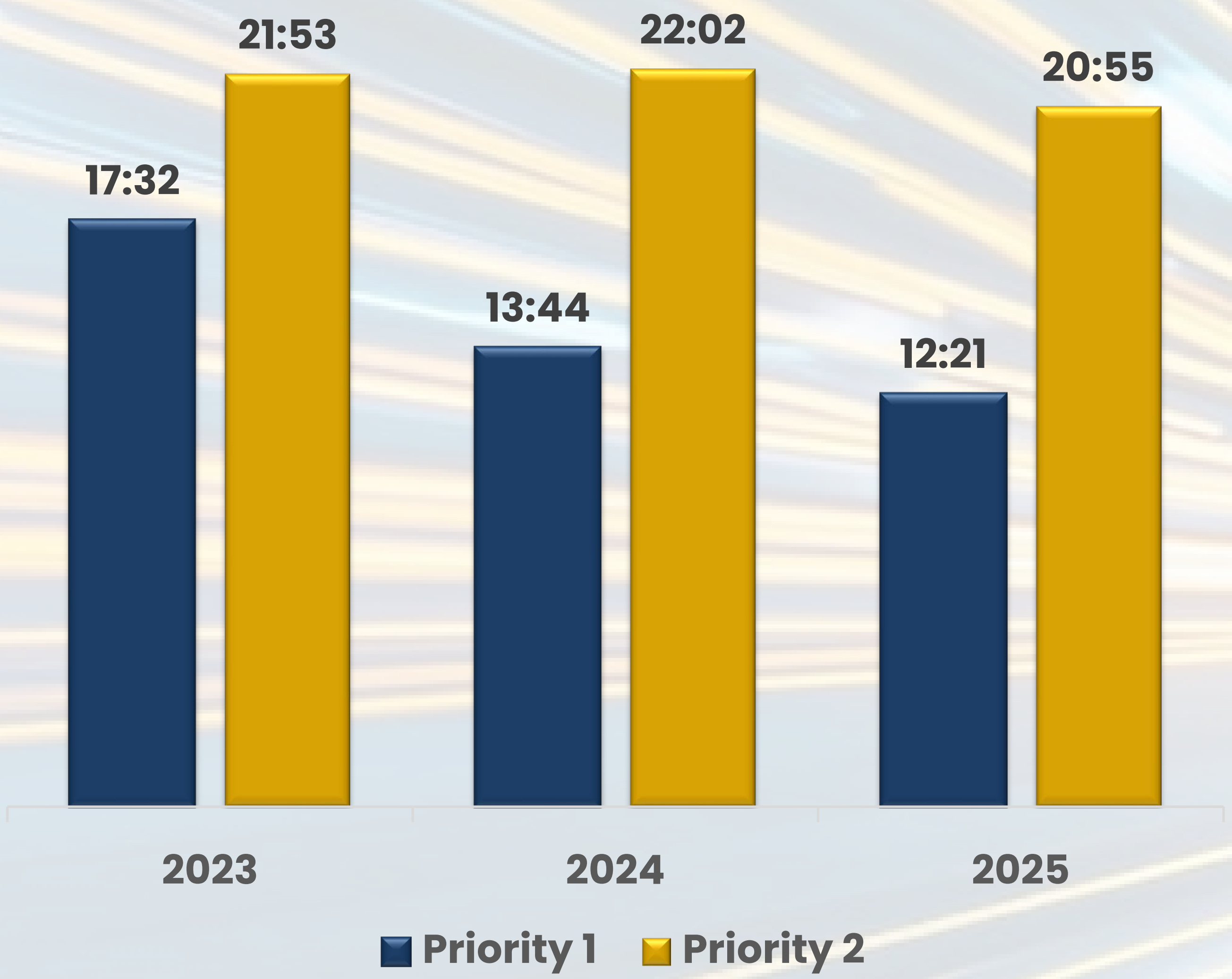
RESPONSE TIMES

Top 3 Call Types and Locations 2025

CALL TYPE	LOCATIONS
Dispersal	Diridon Station Sequoia Station Palo Alto Station San Francisco Station Daly City
Trespasser	Diridon Station Palo Alto Station Sequoia Station San Francisco Station
Welfare Check	Diridon Station Menlo Park Station Sequoia Station San Francisco Station Daly City Station

9,657

Total 911, Emergency and Non-Emergency Calls Received by Dispatch in 2025



HIGH VISIBILITY ENFORCEMENT

1,294.5

Hours of high visibility patrols on buses and at bus turnarounds in 2025

2,892

Hours of high visibility patrols aboard trains and on station platforms in 2025

4,186.5

Total hours of high visibility patrols in 2025

COMMUNITY SERVICE OFFICERS

TOP 10 CALLS HANDLED BY CSO's

SIGNALS OUT OF ORDER	98
THEFT	90
NON-INJURY ACCIDENT	27
LOST PROPERTY	19
HIT & RUN	12
TICKET VENDING MACHINE ALARM	10
FOUND PROPERTY	9
TRAFFIC HAZARD	8
RECOVER STOLEN VEHICLES	5
MINOR INJURY ACCIDENT	4

3,487
Calls Responded to in 2025

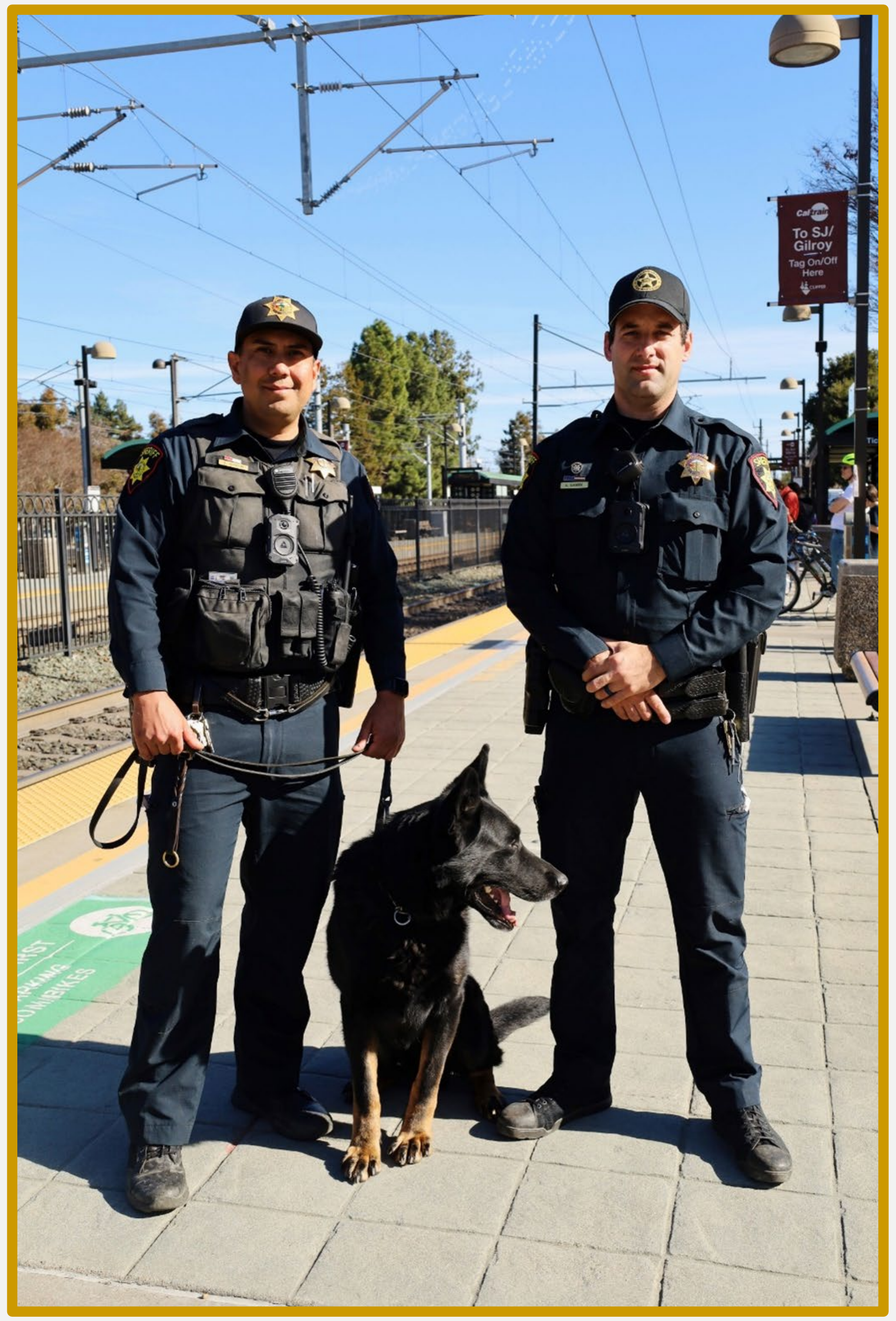
117
Total Reports Taken in 2025

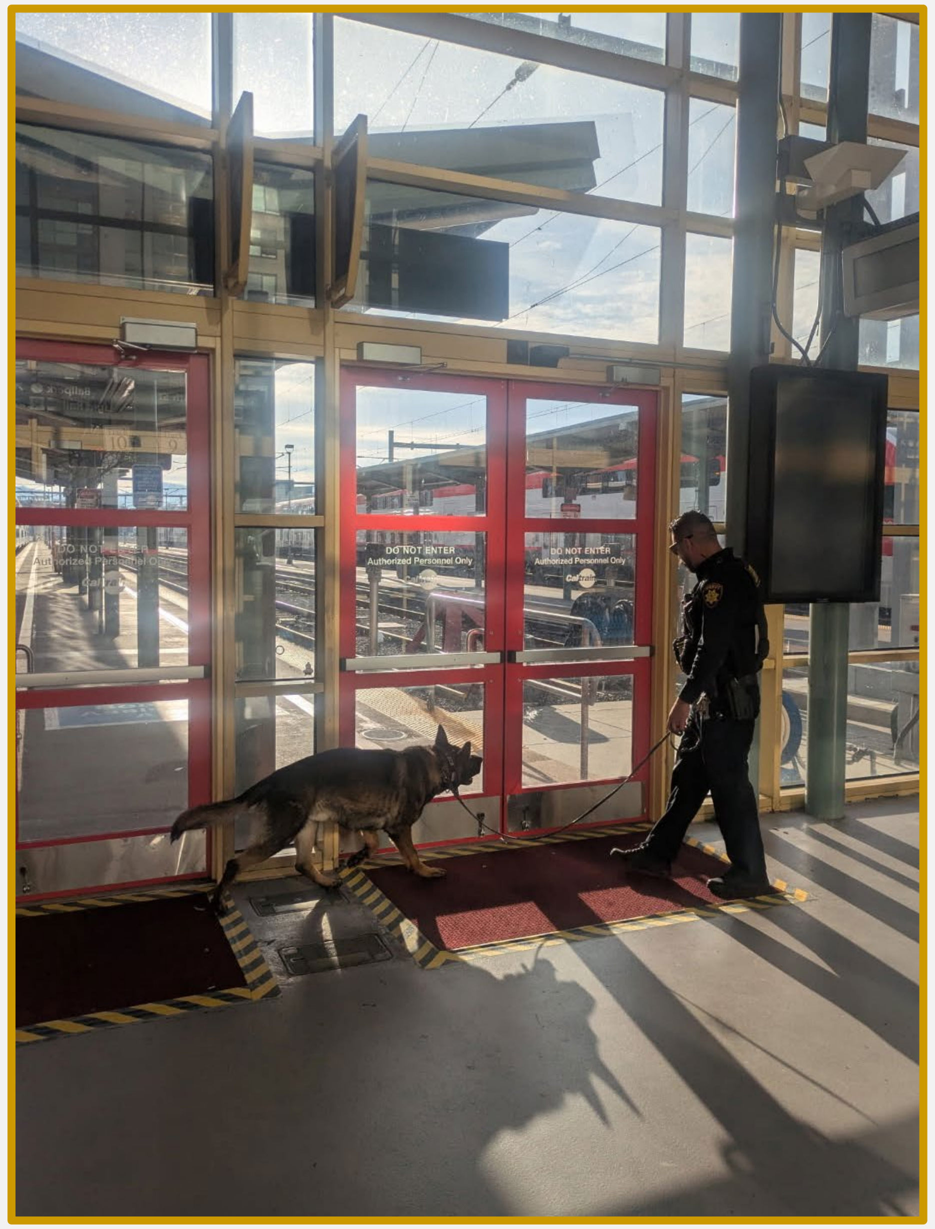
10,733
Total Parking Citations Issued in 2025

11
Abandoned Vehicles Towed in 2025

K9 UNIT

- Three highly trained dogs, each partnered with a dedicated handler.
- One handler is also a fully trained Bomb Technician.
- K9's are proficient in obedience, detection, tracking, and apprehension.
- Work closely with the San Mateo County Sheriff's Office Bomb Squad.
- 18 K9 Deployments in 2025.





PERT

- The Psychiatric Emergency Response Team (PERT) is a collaboration between the San Mateo County Sheriff's Office and San Mateo County's Behavioral Health and Recovery Services (BHRS).

- PERT is a resource available to deputies responding to calls where a person is in the midst of a mental health crisis. The team can respond in real time, if the call is within their operating hours, and within San Mateo County.

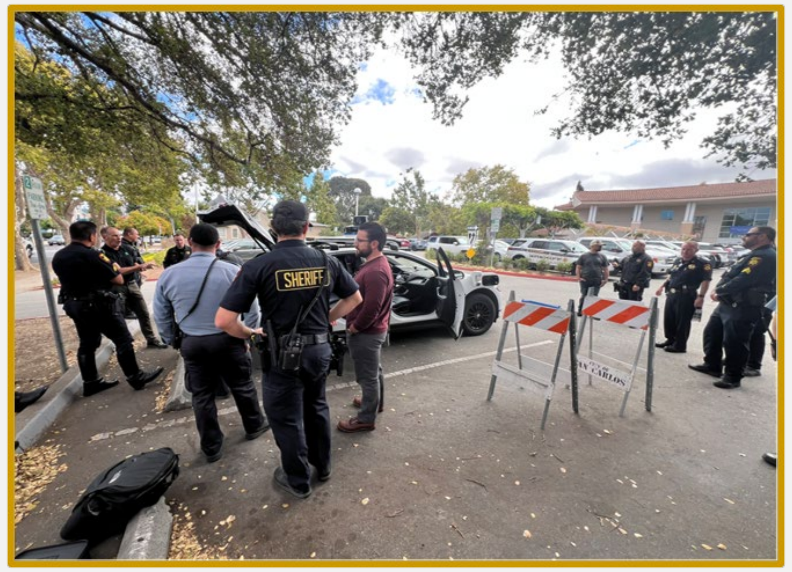
- In 2025, there were 16 PERT referrals. In addition, there were 8 post-fatality PERT referrals.

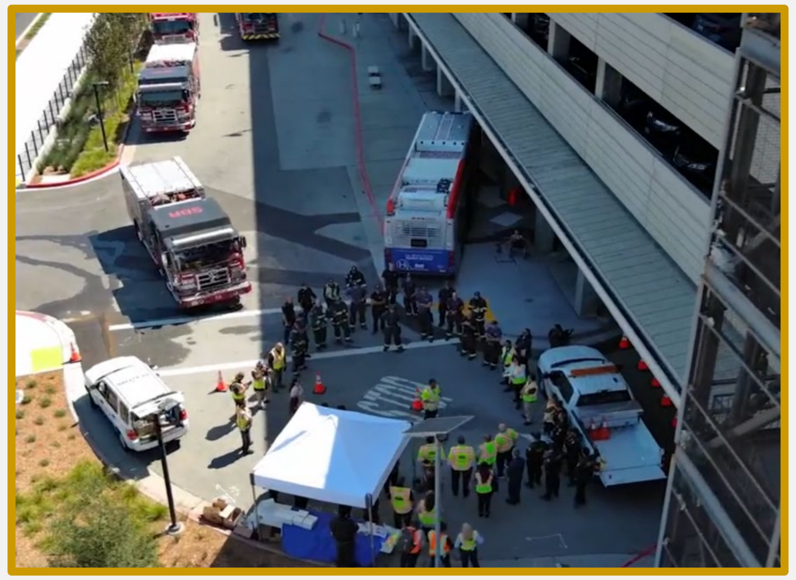
- PERT is a resource for persons with mental illness, as well as resource for the family members.

SAN MATEO COUNTY HEALTH
BEHAVIORAL HEALTH
& RECOVERY SERVICES

COLLABORATION

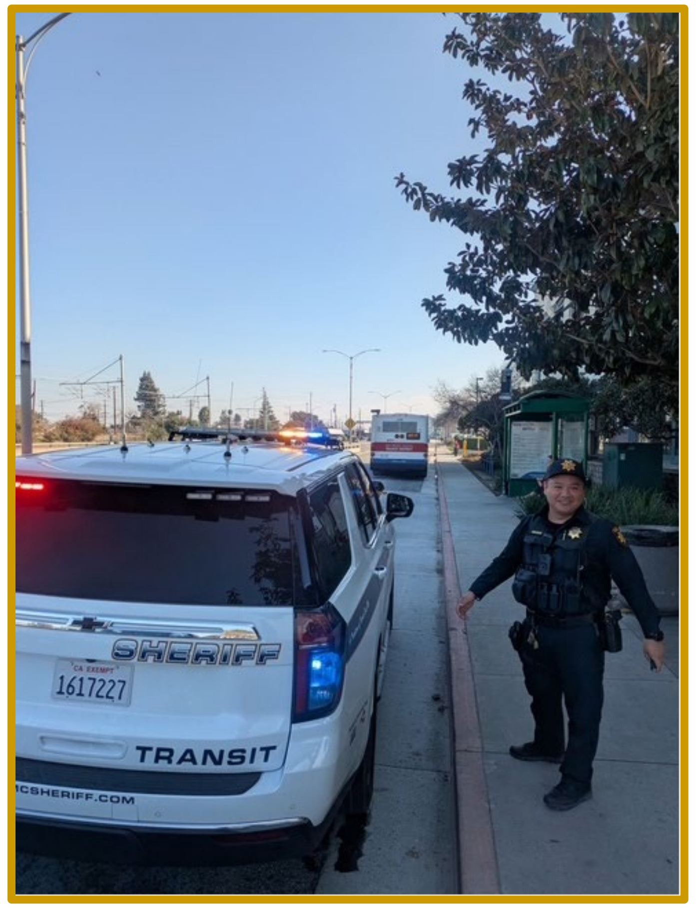
- **Joint training and emergency preparedness exercises strengthen regional response capabilities**
- **Strong partnership with SamTrans, Caltrain, local law enforcement, fire agencies, EMS**
- **Specialized training with WAYMO on autonomous vehicle response and first responder protocols**
- **Continued collaboration through community events, including:**
  - **Shop With A Hero**
  - **Holiday Train**
- **Collaboration enhances public safety, emergency preparedness, and public trust**





CURRENT TRANSIT SAFETY PRIORITIES

- Protecting frontline workers
- High visibility onboard buses and trains
- Enhance outreach efforts to help with quality of life concerns
- Explore emerging tools and best practices to enhance services
- Strengthen partnership with bus operators, conductors, and engineers
- Collaborate with the Transit District and allied agencies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SHERIFF
SAN MATEO COUNTY


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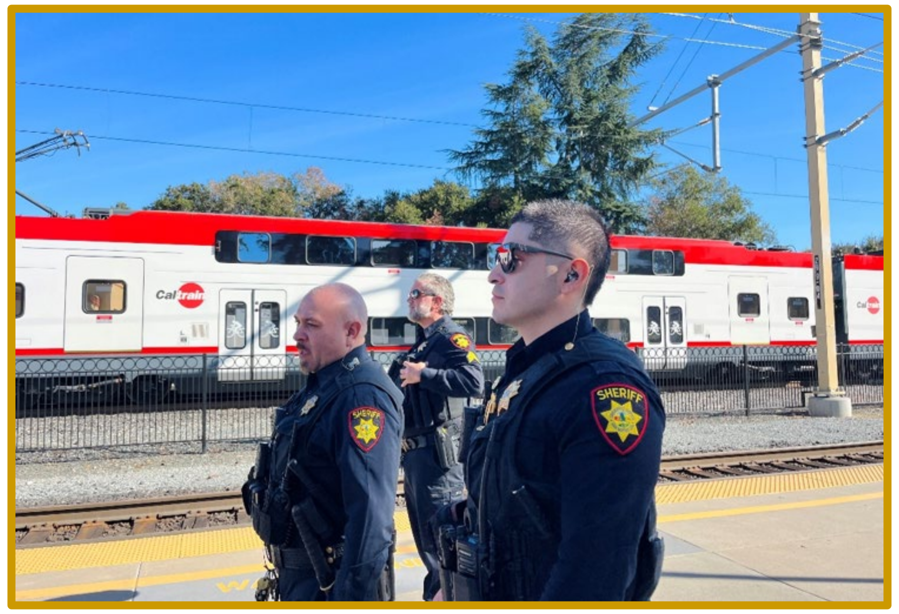
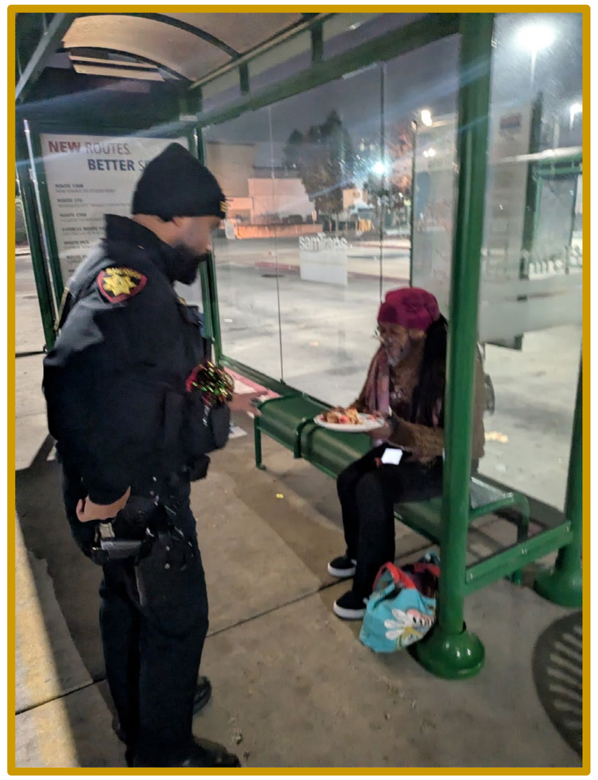



Caltrain
SHERIFF


988
SHERIFF
SHERIFF


808
samTrans




SHERIFF

On behalf of Sheriff Ken Binder and the members of the Transit Police Bureau, thank you for your continued partnership and support. We appreciate the opportunity to serve the San Mateo County Transit District and remain committed to ensuring a safe, secure, and welcoming transit system for all.

San Mateo County Transit District
Staff Report

To: Board of Directors

Through: April Chan, General Manager/CEO

From: Emily Beach, Chief Communications Officer

David Santoro, Chief Administrative Officer

Subject: **Onboard Bus Safety Update**

Action

Staff will provide an informational update on the San Mateo County Transit District's (District or SamTrans) efforts to support passenger and operator safety on SamTrans buses, including physical improvements to buses, use of incident reporting and onboard video review, implementation of the Passenger Code of Conduct and Passenger Suspension Policy, securing temporary restraining orders, and coordination with schools to address student behavioral problems on the buses.

Significance

SamTrans' Safety and Security, Operations, Legal Counsel, Civil Rights, and Government and Community Affairs (GCA) teams work together to support a safe riding environment for passengers and transit operators.

Since the implementation and enforcement of the Passenger Code of Conduct and Passenger Suspension Policy, operator incident reporting has increased, reflecting greater awareness and use of formal reporting procedures. However, passenger suspensions remain low, with two suspensions in 2025 and three suspensions in 2026 (year-to-date). Use of restraining orders related to operator assaults has also been limited, with one restraining order issued in 2024 and two issued in 2025.

The District also is focusing on the safety of riders using school-oriented routes. SamTrans school-oriented routes are public transit routes open to all passengers. Although these routes are scheduled and designed to serve student travel needs, they are not dedicated school bus service. The District utilizes onboard video footage to review reported incidents and verify information with school personnel, and coordinates with school administrators when problematic student behavior threatens operator and rider safety, including in determining appropriate follow-up actions.

For student-related incidents, the District prioritizes a restorative justice-centered approach, preferring that schools to take the lead on disciplinary matters. Staff also work with schools, parents, guardians, and students to provide training on appropriate versus unsafe behaviors, and to reinforce expectations. The District also coordinates with the County Office of Education to maximize coordination and cooperation around expectations for student behavior and consequences for unsafe activities on and around SamTrans buses. As part of SamTrans' back-to-school outreach efforts for academic year 2026-2027, staff produced the SamTrans Safety Video for Students (https://www.youtube.com/watch?v=yblhjyy2dey). This video was made in partnership with the San Mateo County Office of Education Division using in-house shared service District staff resources.

Budget Impact

No impact on the budget.

Background

The Passenger Code of Conduct, approved by the Board in April 2024, establishes clear expectations for rider behavior. The Passenger Suspension Policy, approved by this Board in October 2025, provides a process for addressing serious or repeated violations. For operator assaults, the District also uses legal remedies available under workplace violence laws.

SamTrans provides public transit service throughout San Mateo County, including on routes oriented toward student travel needs. These routes support access to schools, reduce congestion near campuses, and provide students with reliable transportation options while remaining open to the general public.

Prepared By:	Ana Vasudeo	Government and Community Affairs Manager	650-730-9917

Item #7.c.
8/5/2026

On-Board Bus Safety Update

San Mateo County Transit District Board of Director's Meeting
August 5, 2026

Agenda

- ✓ Tools to ensure safety for passengers and operators
- ✓ Bus infrastructure improvements
- ✓ SamTrans Code of Conduct: impact and implementation
- ✓ Employee feedback
- ✓ Safety on School-Oriented Routes:
  - SamTrans School-Oriented Service differs from school buses
  - Proactive approach: partnership with San Mateo County Schools
  - Working with schools to address safety issues
  - School-Oriented Route summary

SamTrans Tools for Passenger and Operator Safety

Tool	Date initiated	Comments
Operator Barriers/Shields	2025	102 barriers installed
AI Dash Cam (cameras)	MV Transportation – 2025 SamTrans – July 2026	Coaching-focused operator training
Incident Reports	Since SamTrans service began	Frequency of reports increased following the implementation and enforcement of the Code of Conduct/Passenger Suspension Policy
Video footage	Early 2000s	Recent increase school-related video reviews
Code of Conduct/Passenger Suspension Policy	April 2024/October 2025	2025 – Two suspensions 2026 – Three suspensions
Workplace Violence Law (Operator Assaults)	July 2024	2024 – One restraining order 2025 – Two restraining orders

Bus Infrastructure Improvements

- ✓ AI Dash Cam (Cameras)

- ✓ Operator Safety Barriers/Shields
  - Provide a physical barrier between passengers and the operator
  - Help reduce assaults, threats, and unwanted physical conduct
  - Improve employee confidence and sense of security

SamTrans Code of Conduct Impact

✓ Before the Code of Conduct

- Restraining orders pursued for high-level incidents only, e.g. passenger physically assaulting an operator

✓ With Code of Conduct, SamTrans can address broader incidents:

- Harassment against bus operators or passengers
- Disruptive behavior
- Discrimination against any passenger or employee
- Fighting, carrying weapons, refusing to comply with operator instructions

SamTrans Code of Conduct Impact

- ✓ Sets clear expectations for safe, respectful behavior
- ✓ Allows response to passenger misconduct
- ✓ Prevents service disruptions
- ✓ Includes roadmap for due process

Implementing the SamTrans Code of Conduct: Passenger Suspension Policy

Violation Response Process:

- ✓ Operator files incident report
- ✓ SamTrans reviews evidence
- ✓ Meet with passenger/legal guardian to discuss violation
- ✓ Repeated violations or serious violations may result in suspension
- ✓ To date:
  - Five suspensions issued
  - Enforced by the District and Transit Police

Employee Feedback

"Having the Code of Conduct and Suspension Policy in place gives our operators a clear and safe process for reporting violations and addressing concerns."

Said El-Khatib, South Base Manager

Employee Feedback

"The Code of Conduct and suspension policy show that SamTrans is listening to operators' concerns about safety. The policy provides a process to address passenger behavior and allows the District to take action when necessary, including suspending passengers from service."

Stacy Monroe, Bus Operator Mentor

Safety on School-Oriented Routes

SamTrans School Oriented-Service Differs from School Buses

Comparison	
School Buses	**SamTrans School-Oriented Routes**
Operated by school districts, counties	Operated by SamTrans
Only students, staff, and chaperones may ride	Open to all fare-paying passengers
Only serve schools, locations used for school events	Operate like all other routes, with multiple designated stops, but timed to facilitate use by students and school personnel
Student passengers must always be supervised by the bus driver while on the bus or being escorted across a street, highway, or road	Passengers may be left unattended for a short duration if operator needs to leave the bus and follows proper procedures to secure it
All student passengers must be seated	Passengers may be standing or seated as long as they remain behind the yellow standee line
May suspend student passengers	May suspend any passenger
School District/County pays full cost of service	SamTrans pays full cost of routes

Operator Rest Breaks – Scheduled or Urgent

- ✓ Operators are scheduled for official rest breaks outside of when passengers are on board
- ✓ For urgent breaks, operators:
  - Ensure bus is safely secured
  - Notify radio control
  - Notify passengers
- ✓ July 2026 Updates
  - Operators on school-oriented routes call Radio Control instead of using digital notification system
  - SamTrans will explore on-site school restrooms for operators

Proactive Approach to Safety and Ridership Growth for School-Oriented Routes

- ✓ San Mateo County Office of Education Safety Collaborative presentations
- ✓ Safety Tips for Students flyer
- ✓ *New:* SamTrans Student Safety Video
- ✓ Year-Round Tabling
- ✓ Annual meeting with school administrators
- ✓ Assemblies (upon request)

Working with Schools to Address Safety Issues

✓ Incident occurs on bus involving student – school may inform SamTrans, or SamTrans informs school:

- SamTrans reviews on board video and incident report
- SamTrans meets with the school to discuss incident and shares video
- School outlines the disciplinary action
- SamTrans prioritizes a restorative justice approach
- School and SamTrans engage parents as partners

✓ **Only if warranted:** SamTrans issues a passenger suspension

Summary of School-Oriented Routes

- ✓43 school-oriented routes throughout San Mateo County, taking pressure off schools to provide service
- ✓Routes timed to school bell schedules, primarily serving middle and high schools
- ✓Over 4,000 students ride school-oriented routes on an average weekday, many more students on regular routes
- ✓Close collaboration with schools and school districts

Thank You

Please email DistrictSafety@samTrans.com with any questions

AGENDA

San Mateo County Transit District

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

August 5, 2026 – 2:30 pm

Public Hearing Room, 5th Floor
166 North Rollins Road, Millbrae, CA 94030

Committee Members: Peter Ratto (Chair), Jeff Gee, Rico E. Medina

9.a.	Call to Order	
9.b.	Approval of Minutes of the Community Relations Committee Meeting of July 8, 2026	Motion
9.c.	Accessible Services Update	Informational
9.d.	Citizens Advisory Committee Update	Informational
9.e.	Paratransit Advisory Council Update	Informational
9.f.	Monthly State of Service Report - June 2026	Informational
9.g.	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 Committee. Staff recommendations are subject to change by the Committee.

San Mateo County Transit District
Community Relations Committee Meeting / Committee of the Whole
Regular Meeting

166 North Rollins Road, Millbrae, California 94030
17907 Holli Blue Road, Champion, Michigan 49814

DRAFT Minutes of July 8, 2026

Members Present (In Person): Rico E. Medina, Jeff Gee, Peter Ratto (Chair)

Members Absent: None

Other Board Members Present Constituting Committee of the Whole: David J. Canepa, Marie Chuang, Brooks Esser, Marina Fraser

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

Other Board Members Absent: Josh Powell

Staff Present: J. Cassman, A. Chan, T. Dubost, L. Lumina-Hsu, J. Mello, M. Tseng

9.a. Call to Order
Committee Chair Ratto called the meeting to order at 2:39 pm.

9.b. Approval of Minutes of the Community Relations Committee Meeting of June 3, 2026
Motion/Second: Medina/Esser
Ayes: Canepa, Fraser, Gee, Medina, Ratto, Speier, Esser, Chuang
Noes: None
Absent: Powell

9.c. Accessible Services Update
Tina Dubost, Manager, Accessible Transit Services, stated participating in Peninsula Jewish Community Center resource fair and sharing information about mobility resource guide and center. One-seat paratransit pilot program started for no transfer trips to parts of San Francisco outside of paratransit service area.

9.d. Citizens Advisory Committee Update
David Rabinovich, Citizens Advisory Committee (CAC) Member, stated that the CAC discussed outreach opportunities, received a 50th anniversary presentation, opposition on the proposed SamTrans Board of Directors public comment time limit reduction at Board meetings and renaming of the CAC, and requested that the Board of Directors obtain CAC input before making changes to the CAC.

9.e. Paratransit Advisory Council Update
Ms. Dubost stated the PAC discussed member recruitment and paratransit service improvements.

9.f. Monthly State of Service Report - May 2026
Joshuah Mello, Chief, Planning and Development, provided the presentation, which included the following:

- Ridership reporting paused due to Clipper transition data issues
- Youth Unlimited Pass usage decreased 9.9 percent
- 81.4 percent on-time performance (OTP)
- 0.02 percent did not operate (DNO)
- 39 service calls involved 22 District and 17 contracted; 22,193 miles between service calls
- 14 preventable accidents with 8 District and 6 contracted; 61,825 miles between preventable accidents

Staff provided further clarification in response to the Committee comments and questions, which included the following:

- Inclusion of paratransit service trends by city in future quarterly reports
- Safety reporting, accident evaluations, and implementation of drive cam technology
- Future updates on operator coaching and drive cam rollout progress

Public Comment
Aleta Dupree, Team Folds, Oakland, commented on preventable accidents, ridership data, and service calls.

9.g. Adjourn – The meeting adjourned at 2:54 pm.

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 for June 2026 are attached.

Budget Impact

There is no impact on 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 9, 2026, Meeting

Members Present: S. Capeloto, T. Dubost, M. Epstein, S. Lang (Vice Chair), B. McMullan (Chair), K. Uhl, L. Vaserman

Members Absent: R. Agarwal, D. Do, C. Santoni

Guests Present: N. Arshad (SamTrans), M. Donaldson (MV Transportation), B. Garcia (MV Transportation), C. Lun (MV Transportation), M. Ranaldson (Nelson\Nygaard, on Zoom), A. Rivas (SamTrans), T. Ponti (Commission on Disabilities), K. Porter-Brown (SamTrans), L. Spicer (SamTrans), J. Stahl (member of the public), M. Thomasmeyer (Nelson\Nygaard), M. Wright Petrik (SamTrans)

1. **Call to Order and Roll Call**
   Ben McMullan called the meeting to order at 1:30 p.m.

   PAC members and guests introduced themselves.

2. **Consent Calendar**
   a. **Approval of the May 12, 2026, Meeting Minutes**
   Motion / Second: Dubost / Lang
   Ayes: Capeloto, Dubost, Lang, McMullan, Uhl, Vaserman
   Abstention: Epstein
   Absent: Agarwal, Do, Santoni

3. **Public Comment for Items Not on the Agenda**
   Larisa Vaserman commented on Redi-Wheels reliability, scheduling and late pickups. Ms. Vaserman also requested trash bins for the transit vans.

   Tina Dubost suggested reinstating a former policy for public comment. The policy required riders to file a complaint before bringing a complaint or incident before the PAC, unless the incident happened very recently. The policy allows SamTrans and Redi-Wheels staff to investigate the incident and prepare a response.

   Ben McMullan proposed discussing the policy during an Executive Committee meeting, then bringing it back to the PAC for approval.

4. Presentation on the May Revision of the Governor's Proposed Budget for FY 2026-2027

Nicole Arshad provided a summary of recent federal budget updates and the May Revision to the Governor's Budget for FY2026-27. Ms. Arshad also provided an update on the recent California Air Resources Board (CARB) decision to adopt changes to the state's cap-and-invest program.

<u>Questions</u>

Larisa Vaserman commented on the proposed Medi-Cal limits, which could have an impact on seniors and people with disabilities who rely on paratransit services and the discounted fare program.

Sandra Lang asked a clarifying question about the CARB decision and its impact on SamTrans and Redi-Wheels.

5. PAC Committee Reports

5.a. Policy/Advocacy/Legislative (PAL) Report

<u>Legislative Issues</u>

Tina Dubost stated that the legislative update was already provided by the Government Affairs team.

Sandra Lang encouraged PAC members to track legislative issues

<u>Redi-Wheels Policy Issues</u>

Tina Dubost stated that the Redi-Wheels policy update would be part of the SamTrans update listed later on the agenda.

5.b. Education Committee Report

Tina Dubost reported that the Education Committee met in May to review the PAC outreach plan.

5.c. Executive Committee Report

Ben McMullan reported on the June Executive Committee, during which workplan progress, future presentations, and Chair/Vice Chair elections were discussed.

6. SamTrans / Redi-Wheels Reports

6.a. SamTrans Update

Ana Rivas announced that the One Seat Ride pilot program will launch on July 1 and run through June 2027. In partnership with SFTMA, the pilot will provide paratransit service to and from medical appointments in San Mateo and San Francisco counties without requiring a transfer.

Larisa Vaserman asked to clarify which agency handles the booking and provides the service for the One Seat Ride pilot.

Kathy Uhl commented that the $8 per trip cost for the One Seat Ride service may be unaffordable, especially for older adults and people with disabilities.

Tina Dubost also provided the following updates:
- Reminder that SamTrans is celebrating 50 years of service. All services will be free on July 1, and there will be an event in September.
- Reminder of the new Via Assist program, which provides accessible on-demand transportation service in the southern half of San Mateo County.

6.b. Performance Summary
Tina Dubost provided a summary of the performance reports.

Larisa Vaserman commented that the proposed Medi-Cal limits may mean a decrease in customers.

6.c. Comment Statistics Report
Tina Dubost said that the number of comment cards received was consistent and that all were compliments. Complaints came in as consumer reports and mentioned late trips and driver conduct.

6.d. Safety Report
Matthew Donaldson provided the safety update. In May, there were a total of 3 preventable incidents. MV Transportation is working with drivers to address an uptick in vehicles not coming to a complete stop. They are also working on reducing fixed strikes and securing wheelchairs.

Larisa Vaserman asked about driver retention.

Sandra Lang asked about the complete stop training and if drivers can exercise their best judgment to avoid fixed strikes.

7. Updates and Items of Interest

7.a. Agencies

No updates.

7.b. County Commissions (CoA and CoD)

Kathy Uhl announced that the new Help at Home guide will be released soon. The guides will be distributed at the San Mateo County Fair, and they will be offered in multiple languages. Ms. Uhl also mentioned that the CoA is welcoming new Commissioners.

Tim Ponti provide an update for CoD, stating that they expect new members to be appointed. CoD is also working on an emergency preparedness initiative.

7.c. Center for Independence (CID)

Tina Dubost shared that CID is looking for San Mateo County residents to serve on their board.

7.d. Coastside Transportation Committee (CTC)

No updates.

7.e. Transportation Authority Citizens Advisory Committee (TA-CAC)

Sandra Lang reported on the June 2 TA-CAC meeting, sharing that the following items were presented and accepted:

- Quarterly financial report for FY26 Quarter 3
- Capital projects status report
- US-101 Express Lanes quarterly update
- Measure A and Measure W programming
- Budget for FY27

7.f. Department of Rehabilitation (DOR)

Susan Capeloto stated that starting July 1, DOR staff will be going to the office four days a week. Ms. Capeloto mentioned that more applicants are coming in person, but staff vacancies persist. Ms. Capeloto reminded staff that DOR will be implementing an order of selection process.

7.g. ADA Policy Refresher

Tina Dubost reminded the PAC that per ADA requirements, travel time on Redi-Wheels and RediCoast should be comparable to a similar trip on a fixed route bus.

8. **Other Business**

Sandra Lang reported that Sammi Riley, a former PAC member, sends her regards to the PAC.

Tina Dubost mentioned an upcoming resource fair.

Recess for tour of the new office

Larisa Vaserman shared accessibility concerns with the new Board Room, pointing to spaces that are too narrow, chairs without arm rests, and a speaker podium that is too tall to be accessible for wheelchair users.

Sandra Lang seconded Ms. Vaserman's comments.

Tim Ponti said that the cameras and screens will help with meeting transparency and accessibility.

There was general agreement that the new office is a huge improvement.

9. **Adjournment**

The meeting was adjourned at 3:09 p.m.

San Mateo County Transit District
Staff Report

To:	Community Relations Committee
Through:	April Chan, General Manager/CEO
From:	Joshuah Mello, Chief Planning Officer
	David Olmeda, Chief Operating Officer, Bus
Subject:	**Monthly State of Service Report - June 2026**

Action

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

Significance

Fixed Route and Microtransit Ridership: Clipper data continues to be incomplete during the region's ongoing transition to Next Generation Clipper. Data for passengers using open payment (i.e. debit/credit cards) or Next Generation Clipper cards cannot be verified for accuracy as part of Clipper data reporting and thus are not available for SamTrans fixed route or microtransit ridership reporting.

As more customers transition to Next General Clipper accounts, the gap in ridership data continues to grow. Given that staff believe any decrease shown in ridership would not be accurate, staff will be pausing public ridership reporting until the issue is resolved to limit misinformation. As of this submittal, Cubic Transportation Systems (Cubic) had not provided a resolution date.

Once the issues are resolved, ridership data will be updated for December 2025 onward and incorporated into internal reporting systems and in future reports.

Youth Unlimited Pass: For June 2026, Youth Unlimited Pass usage decreased 12.5 percent compared to June 2025.

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

- **Preventable Accidents** – There were 12 preventable accidents in June 2026 (six from District and six from contracted services). The goal is to have more than 100,000 miles between preventable accidents; SamTrans did not meet its goal with 69,158 miles between preventable accidents.

- **Miles Between Service Calls (MBSC) –** There were 36 service calls in June 2026 (22 from District and 14 from contracted services). The goal is to have more than 25,000 miles between service calls. SamTrans did not meet its goal with 23,053 miles between service calls.

  For the District's service calls, the diesel bus sub-fleet had 22,090 miles between service calls, while the zero-emission bus sub-fleet had 19,598 miles between service calls.

- **On-Time-Performance (OTP) –** June 2026 systemwide OTP was 82.8 percent. The goal is to have 85 percent systemwide on-time performance. Fixed-route service did not meet this goal.

- **Did Not Operate (DNOs) –** In June 2026, there were eight total DNOs. The goal is to miss fewer than 0.1 percent of scheduled trips. SamTrans met this goal with 0.02 percent of trips missed.

KEY PERFORMANCE INDICATORS

SAMTRANS (BUS) | Operations Key Performance Indicators			
KPI	**Jun-24**	**Jun-25**	**Jun-26**
On-Time Performance	82.4%	83.9%	82.8%
Preventable Accidents	18	13	12
— District	*8*	*10*	*6*
— Contracted Services	*10*	*3*	*6*
Service Calls	29	27	36
— District	*17*	*17*	*22*
— Contracted Services	*12*	*10*	*14*
Trips Scheduled	38,772	46,342	47,498
Did Not Operate DNOs	3	8	8

SAMTRANS (BUS) | Ride Plus Key Performance Indicators			
KPI	**Jun-24**	**Jun-25**	**Jun-26**
Total Ridership	2,703	3,426	3,556
— East Palo Alto Trips	*1,927*	*2,426*	*2,435*
— Half Moon Bay Trips	*776*	*1,000*	*1,121*
Active Users	338	370	376
New Registrations	145	84	49
Total Downloads	674	537	355
— iOS Downloads	*641*	*489*	*311*
— Android Downloads	*33*	*48*	*44*
Load Factor	1.23	1.19	1.18

SAMTRANS (BUS) | Fleet Key Performance Indicators			
KPI	**Jun-24**	**Jun-25**	**Jun-26**
Revenue Hours (Scheduled)	52,675	61,097	61,156
Revenue Miles (Scheduled)	506,015	569,546	578,478
Total Fleet Miles (Actual)	739,996	816,704	829,890

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 69,158 miles between Preventable Accidents this month.

SamTrans' Miles between Service Calls goal is 25,000 miles. There were 23,053 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.

Scheduled includes in-service and layover.

PARATRANSIT | Operations Key Performance Indicators			
KPI	**Jun-24**	**Jun-25**	**Jun-26**
On-Time Performance (RW)	91.5%	90.6%	87.7%
On-Time Performance (RC)	92.9%	71.4%	96.3%
Preventable Accidents (RW)	1	5	3
Preventable Accidents (RC)	0	0	0
Service Calls (RW)	6	2	0
Service Calls (RC)	0	0	0

RW = Redi-Wheels
RC = RediCoast

PARATRANSIT | Fleet Key Performance Indicators			
KPI	**Jun-24**	**Jun-25**	**Jun-26**
Revenue Miles (RW)	158,599	160,468	152,613
Revenue Miles (RC)	23,324	23,143	13,676
Fleet Miles (RW)	177,112	180,380	173,163
Fleet Miles (RC)	27,419	25,333	24,001

CUSTOMER EXPERIENCE

SAMTRANS (BUS) | Customer Experience			
KPI	**Jun-24**	**Jun-25**	**Jun-26**
Complaints	72	103	107
Accessibility	12	3	16
Compliments	9	14	10
Service Requests	56	31	38
Reports Total	**149**	**151**	**171**

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

The total number of reports for SamTransincreased 13.2% from 151 reports in June 2025 to 171 reports in June 2026.

Prepared By: Kate Christopherson, AICP Acting Manager, Service Planning and Scheduling 650-622-7877

AGENDA

San Mateo County Transit District

Finance Committee Meeting
Committee of the Whole

August 5, 2026 – 2:45 pm

or immediately following the Community Relations Committee meeting

Public Hearing Room, 5th Floor
166 North Rollins Road, Millbrae, CA 94030

Committee Members: Rico E. Medina (Chair), Josh Powell, Jackie Speier

10.a.	Call to Order	
10.b.	Approval of Minutes of the Finance Committee Meeting of July 8, 2026	Motion
10.c.	Approving and Ratifying the Insurance Program for Fiscal Year 2027	Motion
10.d.	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 Committee. Staff recommendations are subject to change by the Committee.

San Mateo County Transit District
Finance Committee Meeting / Committee of the Whole
Regular Meeting

166 North Rollins Road, Millbrae, California 94030
17907 Holli Blue Road, Champion, Michigan 49814

DRAFT Minutes of July 8, 2026

Members Present (In Person): Rico E. Medina (Chair)

Members Present (Via Teleconference): Jackie Speier

Members Absent: Josh Powell

Other Board Members Present Constituting Committee of the Whole: David J. Canepa, Marie Chuang, Brooks Esser, Marina Fraser, Jeff Gee, Peter Ratto

Other Board Members Absent: None

Staff Present: J. Cassman, A. Chan, L. Lumina-Hsu, M. Tseng, K. Yin

10.a. Call to Order
Committee Chair Medina called the meeting to order at 2:55 pm.

10.b. Approval of Minutes of the Finance Committee Meeting of June 3, 2026
Motion/Second: Canepa/Esser
Ayes: Canepa, Fraser, Gee, Medina, Ratto, Speier, Esser, Chuang
Noes: None
Absent: Powell

10.c. Awarding a Cooperative Purchasing Contract to The Gordian Group, Inc. to Provide Job Order Contracting Program Management and Consulting Services for a Not-To-Exceed Amount of $2.5 Million for a Five-Year Term
Kevin Yin, Director, Contracts and Procurement, provided the presentation, which included the following:

- Job Order Contracting (JOC) program implementation under Senate Bill (SB) 272 for public works projects
- Streamlined procurement and delivery of small to mid-sized projects

Staff provided further clarification in response to the Board comments and questions regarding the estimated contract value and pilot program timeline.

Motion/Second: Gee/Ratto
Ayes: Canepa, Fraser, Gee, Medina, Ratto, Speier, Esser, Chuang
Noes: None
Absent: Powell

10.d. Awarding a Cooperative Purchasing Contract to Gillig, LLC, for the Purchase and Delivery of 25 Model Year 2027 40-Foot Gillig Battery Electric Buses, Including Optional Features Required for Compatibility and Integration with the District's Bus System, for a Total Not-To-Exceed Amount of $39,580,500, with an Option to Purchase and Deliver up to 37 Additional New Gillig Buses for an Estimated Not-To-Exceed Amount of $68,336,413, for an Aggregate Not-To-Exceed Amount of $107,916,913, and Authorizing Disposition of up to 25 Diesel Hybrid and Diesel Buses from Model Year 2013

Mr. Yin and David Harbour, Director, Maintenance, provided the presentation, which included the following:

- Replacement of existing diesel hybrid buses with battery electric buses (BEB)
- Evaluation of future bus technology options and additional bus purchases
- Bus disposition and transition planning

Staff provided further clarification in response to the Committee comments and questions, which included the following:

- Additional 37 BEBs purchase timeline, battery technology, BEB lifespan, purchase option expiration timeline, bus specifications, and performance expectations
- BEB range, charging infrastructure, and operational flexibility
- Contingency planning for charging disruptions and remote charging options
- Bus disposition process, fleet redundancy, and warranty coverage
- Fleet modernization and Gillig local manufacturing benefits

Public Comment

Aleta Dupree, Team Folds, Oakland, commented on technology investment, cooperative purchasing and spoke in support of the item.

Motion/Second: Chuang/Ratto
Ayes: Canepa, Fraser, Gee, Medina, Ratto, Speier, Esser, Chuang
Noes: None
Absent: Powell

10.e. Adjourn – The meeting adjourned at 3:34 pm.

San Mateo County Transit District
Staff Report

To: Finance Committee

Through: April Chan, General Manager/CEO

From: Ladi Millard-Olmeda, Interim Chief Financial Officer

Subject: **Approving and Ratifying the Insurance Program for Fiscal Year 2027**

Action

Staff proposes that the Committee recommend that the Board of Directors (Board) approve and ratify the San Mateo County Transit District (District) Insurance Program for Fiscal Year (FY) 2027, at a total premium cost of $8,774,204 inclusive of the following:

1. Excess Liability insurance with a total limit of $99 million at an annual premium of $7,180,932.

2. Combined Employment Practices Legal Liability and Public Officials' Liability coverage with aggregate limits of $5 million at an annual premium of $127,395.

3. Excess Workers' Compensation insurance with a total limit of $10 million at an annual premium of $274,576.

4. Non-liability policies, covering Bus Physical Damage, Property, Boiler and Machinery, Public Employees Blanket Bond and Excess Bond, Cyber Liability with Privacy Coverage, Fiduciary Liability, Crime, Terrorism coverage for Bus Physical Damage, and Kidnap and Ransom insurance, with annual premiums totaling $1,191,300.

Significance

With the recent hardening of liability insurance markets over the past several years affecting all transportation agencies nationwide, the District and its peer agencies in the Bay Area are experiencing significant premium increases. Several carriers have pulled out of the market, and the remaining carriers have reduced limits, making obtaining coverage at the District's previous levels more difficult than ever before. Overall, premiums for the District's insurance program will increase six percent for FY27.

The District will maintain its $3 million Self-Insured Retention (SIR), which is still low compared to many peer agencies in the region, but achievable given the District's exceptional loss history. Helpful factors include transference of liability for the first $5 million of risk to both the Contracted Urban Bus service contractor and the Redi-Wheels contractor. The District's liability limit of $99 million is in excess of the contracted operators' first $5 million of responsibility.

Below is an overview of the District's FY26 and FY27 premiums:

Program	Conditions	FY26	FY27
Liability, including Excess Liability	$99 million excess liability with $3 million SIR	$6,825,553	$7,180,932
Employment Practices and Public Official	$5 million limit with $500,000 SIR	$137,863	$127,395
Excess Workers' Compensation	$10 million excess limits with a $1 million SIR	$243,947	$274,576
Non-Liability	Various	$1,108,699	$1,191,300
Environmental Liability	$6 million	Not Applicable, second year of a 3-year policy	Not Applicable, third year of a 3-year policy
TOTALS		**$8,316,062**	**$8,774,204**

Budget Impact

Funds to pay the premiums associated with the program were included in the FY27 Operating Budget.

Background

Liability Program

As a consequence of progressively higher liability settlements in the State of California and the transit industry as a whole, fewer insurers are providing insurance capacity for public bus transit in California. With the FY27 program, the District retains its overall limit of $99 million with a $3 million SIR to cover the first $3 million of damages awarded in settlements, litigation, and attorneys' fees. The District broadened its Terrorism insurance for the first $49 million in limits (for a premium savings) and maintained coverage for the Terrorism Recovery Insurance Extension Act (TRIEA) up to the full $99 million limits. The Liability policy also provides $49 million in coverage, on top of the dedicated $5 million Public Official's Liability and Employment Practices Liability coverage.

The liability insurance program covers all District services, including District-operated revenue and non-revenue vehicles, Contracted Urban Bus service, Redi-Wheels, Ride Plus and the taxi and lift-van programs.

The San Mateo County Transportation Authority (SMCTA) is a named insured and afforded coverage under the District's insurance program that is in excess of the SMCTA's dedicated insurance policies.

Employment Practices
Combined Employment Practices legal liability and Public Officials' Liability insurance carries a $5 million limit with a $500,000 SIR and is primary to the $49 million excess coverage available in the general liability program. Coverage is consistent with that obtained by similar California transit districts having comparable claims experience. Hanson Bridgett is the carrier-approved defense counsel for the District.

Excess Workers' Compensation
The District self-insures up to $1 million per workers' compensation claim, and it purchases Excess Workers' Compensation insurance to cover potentially catastrophic claims. This Excess coverage provides a $10 million layer of protection. This insurance is written by Safety National; the premium is $274,576, which increased from $243,947, due to a 13 percent higher payroll.

Non-Liability Program
The District's Non-Liability program includes coverage for Bus Physical Damage, Property, Boiler and Machinery, Public Employees Blanket Bond and Excess Bond, Environmental, Cyber Liability with Privacy Coverage, Fiduciary Liability, Crime, Terrorism for Bus Physical Damage, and Kidnap and Ransom.

Bus Physical Damage
The Bus Physical Damage policy is written on a full-replacement-cost basis for active buses less than three years old and on an actual-cash-value basis for the District's older buses, inactive and retired buses, and non-revenue vehicles. Deductibles range from $10,000 on cut-away transit vans to $25,000 on 35-foot to 40-foot buses and $50,000 on 60-foot articulated buses. Battery electric buses (BEBs) and hydrogen fuel cell electric buses (FCEBs) carry a $100,000 deductible. The policy includes coverage for flood in high hazard zones (which includes North Base and South Base) of $2.5 million. Terrorism coverage is included for all vehicles up to a $100 million limit. Bus and auto fleet values increased 9.7 percent for FY27 (due to the addition of BEBs and FCEBs), but were offset by lower rates resulting in a one percent decrease in premiums.

Property
Property loss limits per occurrence remain at $90 million. The policy contains Boiler and Machinery coverage, business personal property, and electronic data hardware. The policy includes a $25 million annual aggregate limit for flood insurance at properties in low hazard flood zones and a $10 million annual aggregate for properties in high hazard flood zones. North Base and South Base are deemed to be in high hazard flood zones.

Property insurable values increased 10 percent for FY27, from $155,695,778 to $171,970,430, and encompasses all of the District's real property, business personal property, equipment, landscaping and paving, business income, rental income, and extra expense. Values at the San Carlos headquarters facility have been reduced from full replacement cost of $66,669,409 to actual cash value of $27,273,548. The new Millbrae District Headquarters is insured for limits of $78,944,000, of which $48,320,294 has been calculated as tenant improvements. The balance is attributable to business personal property, audio/visual security system, computer and hardware, business income/extra expense, valuable papers, and tenant rental income.

Crime Insurance
Crime coverage applies to the District, the SMCTA and the Peninsula Corridor Joint Powers Board, with a $15 million limit and a $50,000 deductible. This is the first year of a three-year program.

Environmental
This will be the third year of a renewed three-year Environmental Liability pre-paid program that carries a $6 million policy term limit and a $50,000 deductible per occurrence. Coverage will extend through FY27.

Cyber Liability
Cyber-attacks on commercial industries and public agencies across the nation and worldwide continue, however the cyber liability market has softened, causing premiums to decrease. The District currently has coverage with a $10 million limit and a $50,000 Self-Insured Retention, and the premium decreased from $170,469 in FY26 to $165,111 in FY27. This competitive renewal, in large part, is due to increased cyber security measures taken by the District, in partnership with the cyber insurance carrier.

Fiduciary Liability
The District's Fiduciary Liability coverage will continue to carry limits of $2 million for liabilities that the District could incur from the administration and management of employee benefit plans. That policy has a $10,000 deductible.

Kidnap and Ransom
The District has $1 million of Kidnap and Ransom insurance that indemnifies the District for ransom payments and expenses for actual or alleged kidnappings. This policy has no deductible.

Summary
The District's insurance coverage remains largely unchanged in FY27 with the following noteworthy highlights:

- Overall premiums increased six percent compared to FY26.
- The program will maintain $99 million general liability limits with a $3 million SIR.
- The Excess Liability program has broadened Terrorism coverage for the first $49 million in liability limits.
- Cyber liability premiums decreased three percent.

- Coverage is in place for the new Millbrae District headquarters, while coverage for the Central building in San Carlos also will be retained.

Prepared By: Marshall Rush Insurance and Claims Administrator 650-508-7742

Resolution No. 2026-

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

* * *

Approving and Ratifying the Insurance Program for Fiscal Year 2027

Whereas, the General Manager/CEO of the San Mateo County Transit District (District) has approved an insurance program for Fiscal Year (FY) 2027 with premiums totaling $8,774,204, the costs for which are included in the FY27 Operating Budget; and

Whereas, in conjunction with the expiration of the District's existing insurance program on June 30, 2026, District staff renewed its insurance program for FY27 based on the plan approved by the General Manager/CEO, with the following significant elements:

1. Excess Liability insurance with a total limit of $99 million at an annual premium of $7,180,932.
2. Employment Practices Legal Liability inclusive of a Public Officials Liability policy with aggregate limits of $5 million at an annual premium of $127,395.
3. Excess Workers' Compensation with a total limit of $10 million at an annual premium of $274,576.
4. Non-liability policies covering Bus Physical Damage, Property, Boiler and Machinery, Public Employees Blanket Bond and Excess Bond, Cyber Liability with Privacy Coverage, Fiduciary Liability, Crime, Terrorism coverage for Bus Physical Damage, and Kidnap and Ransom insurance, with annual premiums totaling $1,191,300.

Whereas, staff recommends, and the Finance Committee concurs, that the Board of Directors approve and ratify the renewal of the District's insurance program for FY27, as delineated above.

Now, Therefore, Be It Resolved, that the Board of Directors of the San Mateo County Transit District hereby approves and ratifies the renewal of the District's insurance program for Fiscal Year 2027, including the types of coverage, limits and premiums recited above.

Regularly passed and adopted this 5th day of August, 2026 by the following vote:

Ayes:

Noes:

Absent:

____
Chair, San Mateo County Transit District

Attest:

____
District Secretary

AGENDA

San Mateo County Transit District

Legislative Committee Meeting
Committee of the Whole

August 5, 2026 – 3:00 pm

or immediately following the Finance Committee meeting

Public Hearing Room, 5th Floor
166 North Rollins Road, Millbrae, CA 94030

Committee Members: Marina Fraser (Chair), Peter Ratto, David J. Canepa

11.a.	Call to Order	
11.b.	Approval of Minutes of the Legislative Committee Meeting of July 8, 2026	Motion
11.c.	Receive Legislative Update	Informational
11.d.	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 Committee. Staff recommendations are subject to change by the Committee.

San Mateo County Transit District
Legislative Committee Meeting / Committee of the Whole
Regular Meeting

166 North Rollins Road, Millbrae, California 94030
17907 Holli Blue Road, Champion, Michigan 49814

DRAFT Minutes of July 8, 2026

Members Present (In Person): David J. Canepa, Peter Ratto, Marina Fraser (Chair)

Members Absent: None

Other Board Members Present Constituting Committee of the Whole: Marie Chuang, Brooks Esser, Jeff Gee, Rico E. Medina

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

Other Board Members Absent: Josh Powell

Staff Present: J. Cassman, A. Chan, L. Lumina-Hsu, M. Petrik, M. Tseng

11.a. Call to Order
Committee Chair Fraser called the meeting to order at 3:34 pm.

11.b. Approval of Minutes of the Legislative Committee Meeting of June 3, 2026
Motion/Second: Ratto/Medina
Ayes: Canepa, Fraser, Gee, Medina, Ratto, Speier, Esser, Chuang
Noes: None
Absent: Powell

11.c. Receive Legislative Update and Recommend Support of Legislative Proposal: Senate Bill 741 (Blakespear)
Michaela Petrik, Government and Community Affairs Officer, provided the presentation, which included the following:
Federal
- House and Senate on recess until July 13
- Transit bills moving through committees
- Proposed Office of Management and Budget grant rule changes and potential impacts on federal funding; public comment period through July 13; final rule expected October 1; potential impacts to future grant opportunities and planning

State

- State Legislature on recess; reconvenes August 3
- State budget leaves Greenhouse Gas Reduction Fund (GGRF)-funded transit programs unresolved; no funding for $230 million Zero Emission Transit Capital Program
- Connect Bay Area measure qualified for November 2026 ballot; Senate Bill (SB) 830 updates Connect Bay Area ballot measure administration
- Assembly Constitutional Amendment (ACA) 22 updates local tax measure voting requirements; potential impact on future transit funding measures
- Governor's executive order to streamline transit project delivery
- SB 741 to streamline Low Carbon Transit Operations Program (LCTOP) administration and expand funding flexibility

Staff provided further clarification in response to the Board comments and questions regarding provisions to release federal interest in the Colma Park-and-Ride property.

Motion/Second: Gee/Chuang
Ayes: Canepa, Fraser, Gee, Medina, Ratto, Speier, Esser, Chuang
Noes: None
Absent: Powell

11.d. Adjourn – The meeting adjourned at 3:44 pm.

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**

Action

Staff proposes the Committee recommend the San Mateo County Transit District (District) Board of Directors (Board) receive the attached federal, state, and regional legislative updates.

Significance

The 2026 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, at the appropriate time, those bills on which staff proposes that the District take a formal position.

Prepared By:	Michaela Wright Petrik	Government and Community Affairs Officer	650-730-4951

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SamTrans
Federal Report
July 2026

Congressional Update

Surface Transportation Reauthorization Update

- The House Surface Transportation Reauthorization bill, the BUILD America 250 Act (H.R. 8870), approved by the Transportation and Infrastructure Committee on May 22, may not reach the House floor until mid-July at the earliest. The House left town on Wednesday, July 1 without having taken any visible action on the package. The Senate has yet to release its version of Surface Transportation Reauthorization text as the Senate Environment and Public Works (EPW); Commerce, Justice, and Science; Finance and Banking; and Housing and Urban Affairs Committees continue to negotiate their respective portions of the legislation.

- Several key issues remain outstanding: The House Ways and Means Committee has yet to extend the Highway Trust Fund excise taxes and spending authority for five more years. The Committee is expected to consider incorporating the bill's new electric vehicle registration fees into the Highway Trust Fund and may also consider the trucking industry's request to repeal the 12 percent excise tax on new truck sales. Additional proposals that will need to be discussed include a temporary gasoline tax holiday and an increase in private activity bond ceilings. In addition, lawmakers must contend with a contentious rail safety amendment that was added to the surface reauthorization bill in committee by a 54-11 vote. The amendment would require railroads to adopt several new safety measures.

- With surface transportation programs in the prior authorization, the Infrastructure Investment and Jobs Act (IIJA), expiring September 30, 2026, Congress must either pass a new multiyear transportation law or a short-term extension to keep federal funds flowing to states and localities. While IIJA provided $156 billion in advance appropriations, which makes funding available for future fiscal years without further congressional action, the proposed BUILD America 250 Act does not include advanced appropriations. IIJA's advanced appropriations enabled transit agencies to receive a more predictable share of federal funding than they did prior to the IIJA. Because the IIJA locked in funding levels in advance, states and localities could plan around funding allocations they knew would materialize, without having to wait for additional congressional action through the annual appropriations process.

- Left unresolved are additional measures to ensure the Highway Trust Fund remains solvent. The Build America 250 Act's EV registration fee is expected to generate billions in revenue but will not cover the expected budget shortfall. As a result, Congress may need to allocate additional funding through the

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appropriations process or an additional one-time allocation via the Treasury's General Fund.

- Included in the bill is language (H.R. 7440) that would remove all federal interests and restrictions on the Colma Park-and-Ride Lot in Daly City and transfer the property to SamTrans. Reps. Kevin Mullin (D-CA) and John Garamendi (D-CA) championed the language's eventual addition in the manager's amendment.

- On June 18, Senate Environment and Public Works (EPW) Chair Shelley Moore Capito (R-WV) expressed support for a short-term extension of the Infrastructure Investment and Jobs Act (IIJA), which expires September 30. Chair Capito and EPW Ranking Member Sheldon Whitehouse (D-RI) have yet to solidify a deal on final surface transportation text from their committee. With just two legislative weeks left in July until Congress' August recess and varying progress on the bill between both chambers, an extension is likely.

Administration Update

OMB Director Testifies Before House Appropriations Subcommittee

- On Wednesday, June 30, the House Appropriations Financial Services and General Government Subcommittee held a hearing to conduct oversight of the Office of Management and Budget (OMB). This hearing was held as the Trump Administration attempts to advance sweeping changes to federal grantmaking processes through a recently proposed rule, entitled Regulation for Federal Financial Assistance.

- Democratic lawmakers, including Full Committee Ranking Member Rosa DeLauro (D-CT), raised concerns that the OMB proposed rule would result in federal grantmaking being subject to political considerations by political appointees rather than merit-based decision-making.

- During OMB Director Russ Vought's testimony, he stated that the OMB proposed rule would not affect congressional earmarks. OMB Director Vought also repeatedly rejected the notion that the proposed rule would give OMB broad decision-making authority over grants, insisting that individual agencies would continue to make determinations on grant awards.

- SamTrans, in partnership with the San Mateo County Transportation Authority, sent a letter to its federal delegation describing the impact of OMB's proposed rule on its federal funding and related downstream effects. Additionally, the American Public Transportation Association (APTA) submitted a comment to OMB detailing its concerns with the OMB proposed rule on behalf of transit agencies.

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FTA Seeks Public Comment on its New Transportation Dashboard

- The U.S. Transportation Department's Federal Transit Administration (FTA) announced on June 8, 2026, that it is developing a new public dashboard that measures key family-friendly metrics on transit systems across America. The FTA is requesting input on five key quality performance measures: safety and security; cleanliness; universal accessibility; real-time service data availability; and system reliability.

- FTA will use this information to develop tools to help the public, transit agencies, and all levels of government assess the quality of public transportation service in their communities more directly and identify actions necessary to improve family-friendly service. Comments are due by August 3, 2026, via the Federal Register.

Shaw Yoder Antwih Schmelzer & Lange

July 16, 2026

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 2026

General Update

Upon the adjournment of session on July 2, the Legislature departed Sacramento for its month-long Summer Recess. When the Legislature returns on August 3, fiscal committees will resume and hear bills with fiscal impacts to the state. The Legislature must complete its work for the year by August 31, the last day of the 2025-26 Regular Legislative Session.

On June 29, Legislative leaders and the Governor reached an agreement to finalize the Fiscal Year 2026-27 budget before the start of new fiscal year on July 1. As expected, decisions on Greenhouse Gas Reduction Fund (GGRF) expenditures were deferred until later in the summer. We provide a more detailed budget update below.

For information about key legislative and budget deadlines for next year, please see the 2026 Legislative Calendar here.

Update on Budget Act of 2026

On June 29, the Legislature passed, and Governor Newsom signed the Budget Act of 2026, representing the agreement between Governor Newsom and the Legislature on most budget matters for Fiscal Year 2026-27. The Budget Act prioritizes building the state's budget reserves and reducing long-term liabilities while also making significant investments in education, public safety, housing, healthcare, climate resilience, and economic opportunity.

The Budget Act is comprised of SB 111 (Laird), the "Budget Bill Jr." that amends AB 109 (Gabriel), the legislative two-party budget agreement, and a series of budget trailer bills, which implement policy related to the budget, including SB 169 (Committee on Budget and Fiscal Review), the transportation trailer bill.

As anticipated, the Budget Act defers action on most Greenhouse Gas Reduction Fund expenditures, including the appropriation of $230 million for the Zero-Emission Transit Capital Program and possible changes to SB 840 (Limon) [Chapter 121, Statutes of 2025] to address expected funding losses to Tier 3 GGRF programs, including the Transit and Intercity Rail Capital Program and Low Carbon Transit Operations Program. As a reminder, these projected funding losses stem directly from the California Air Resources Board's amendments to the state's Cap-and-Invest program that were adopted in late May.

We expect Governor Newsom and the Legislature to continue to discuss GGRF expenditures throughout the summer and possibly adopt an updated GGRF expenditure plan in August.

Update on Governor's Executive Order on Public Transportation
On June 26, Governor Newsom signed Executive Order N-7-26 on public transportation. The order seeks to accelerate the delivery of local and regional transit and passenger rail projects, improve access to funding, and reduce greenhouse gas emissions in the face of federal cuts to public transportation and clean transportation programs.

Specifically, the order expands Caltrans' role in: identifying transit priority projects; providing shared technology resources; issuing design guidance, standard plans and specifications, and policy for transit infrastructure on the state highway system; and improving coordination across agencies.

The order also directs Caltrans to create a real-time funding dashboard, streamline grant administration, automate key reporting requirements, and implement several recommendations from the Transit Transformation Task Force aimed at reducing administrative burdens and accelerating access to funding.

The order further promotes transit investment by encouraging the use of flexible and discretionary transportation funds for transit projects, prioritizing projects in Pro-Housing communities, supporting transit-priority infrastructure and first- and last-mile connections, and advancing opportunities for zero-emission vehicle charging and refueling infrastructure on, or near, Caltrans facilities. We are still assessing how these changes will impact SamTrans.

Bills of Interest
SB 1187 (Durazo) Brown Act Language Requirements – WATCH
This bill was gut and amended in late June to eliminate the requirement that eligible legislative bodies subject to the Ralph M. Brown Act – including SamTrans – translate meeting materials and otherwise provide various interpretive and language access services. These provisions were initially passed into law via SB 707 (Durazo) last year. ***On the Assembly Floor.***

SB 1266 (Stern) Updating Value of Copper – WATCH
This bill would change how copper is valued in cases of copper theft. Current law requires that the value of stolen copper be calculated based on the fair market value of the scrap copper. This bill would require that the value of stolen copper also incorporate the full cost to repair and replace the stolen copper material. ***In the Assembly Appropriations Committee.***

AB 1383 (McKinnor) PEPRA Compensation Limits – WATCH
This bill makes several changes to the Public Employees' Pension Reform Act (PEPRA) of 2013, a bill passed in 2012 to reform public employee retirement systems and help local agencies better manage future pension costs. First, AB 1383 authorizes a public employer and labor organization to negotiate an increase to Defined Benefit retirement formulas for *safety* plan members. This change would impact only public safety employees (e.g. police, firefighters) and would not impact most transit agencies, unless they manage their own police force. Initially, the bill also would have required retirement systems subject to PEPRA *which are not enrolled in the social security program* to increase their pensionable compensation limit from 120% to 135% -- thus increasing those systems' pension obligations. Recent amendments to the bill have softened this provision, however. AB 1383 now caps the defined benefit at 135%; it no longer *requires* a system to increase their pensionable compensation limit. ***In the Senate Appropriations Committee.***

AB 1883 (Bryan) Limiting Workplace Surveillance Tools – WATCH
This bill would prohibit employers from using workplace surveillance tools that incorporate facial, gait, or emotion recognition AI technology. Due to concerns that this bill would severely limit existing and emerging safety tools, including driver-facing cameras, fatigue-detection systems, and more, many local government associations, including the California Transit Association, had moved to oppose the bill. Amendments made on July 2, however, significantly narrow the bill and allow for employers to use AI-supported surveillance tools to help ensure safety. ***In the Senate Appropriations Committee.***

AB 2168 (Wicks) Active Transportation Program Guidelines – WATCH
Existing law establishes the Active Transportation Program for projects that support the use of active transportation and tasks the California Transportation Commission to develop guidelines with regard to project eligibility. This bill would require the guidelines to include eligibility for *safe routes to transit* projects that encourage access to transit and investments in transit-rich and infill opportunity areas. Recent amendments now also require the guidelines to provide for consultation between transit operators and local agency ATP applicants to ensure projects are designed and constructed in a safe manner for projects adjacent to transit corridors**.** ***In the Senate Appropriations Committee.***

SamTrans Bill Matrix

as of 7/16/2026

Bill ID/Topic	Location	Summary	Position
AB 109 Gabriel D Budget Act of 2026.	This bill was signed by the Governor on June 29, 2026.	Would make appropriations for the support of state government for the 2026–27 fiscal year. This bill would declare that it is to take effect immediately as a Budget Bill.	Watch
AB 117 Committee on Budget Transit and Intercity Rail Capital Program: loans: transit operating purposes: San Francisco Bay area.	This bill was signed by the Governor on February 19, 2026.	Current law requires the Transportation Agency to evaluate applications for funding under the Transit and Intercity Rail Capital Program and to approve a multiyear program of projects, as specified, and requires the California Transportation Commission to allocate funding to applicants pursuant to the program of projects approved by the agency. 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. Current law creates various transit districts located in the San Francisco Bay area, including the San Francisco Bay Area Rapid Transit District and the Alameda-Contra Costa Transit District, with specified powers and duties relating to providing public transit services. This bill would require, on or before July 1, 2026, the Transportation Agency, subject to various requirements, to loan to the Metropolitan Transportation Commission up to $590,000,000 of funding approved under the program for projects within the San Francisco Bay area. The bill would require the Metropolitan Transportation Commission to use the proceeds of that loan to offer loans, subject to certain conditions, for public transit operating purposes to the San Francisco Bay Area Rapid Transit District, the San Francisco Municipal Transportation Agency, the Peninsula Corridor Joint Powers Board, and the Alameda-Contra Costa Transit District. By changing the purpose for which continuously appropriated funds may be expended, the bill would make an appropriation. The bill would require the California Transportation Commission, if certain conditions are met, to establish an allocation plan for the awarded projects in the San Francisco Bay area under which future allocations under the program to those projects may be adjusted or deferred during the repayment period of the loan made to the Metropolitan Transportation Commission, as specified.	Watch

Bill ID/Topic	Location	Summary	Position
AB 122 Committee on Budget Taxation.	This bill is on the Senate Floor.	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 of, 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 (SUT) defines "tangible personal property" to mean personal property that may be seen, weighed, measured, felt, or touched, or that is in any other manner perceptible to the senses. Existing law punishes various violations of the SUT as crimes. The Bradley-Burns Uniform Local Sales and Use Tax Law (Bradley-Burns) authorizes counties and cities to impose local sales and use taxes in conformity with the SUT, and existing laws authorize districts, as specified, to impose transactions and use taxes in accordance with the Transactions and Use Tax Law, which generally conforms to the SUT. Amendments to the SUT are automatically incorporated into the local tax laws. This bill would define "tangible personal property" to additionally mean a digital product and any copyright or patent interests associated therewith for the purposes of the application of the SUT, as prescribed. The bill would define "digital product" to mean, except as provided, prewritten computer software transferred on tangible storage media, transferred electronically, or accessed remotely. The bill would also make various conforming changes. By expanding the scope of violating the SUT, this bill would impose a state-mandated local program.	Watch
AB 176 Committee on Budget Taxation.	This bill is in the Senate Budget & Fiscal Review Committee.	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 of, 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 (SUT) defines "tangible personal property" to mean personal property that may be seen, weighed, measured, felt, or touched, or that is in any other manner perceptible to the senses. Existing law punishes various violations of the SUT as crimes. The Bradley-Burns Uniform Local Sales and Use Tax Law (Bradley-Burns) authorizes counties and cities to impose local sales and use taxes in conformity with the SUT, and existing laws authorize districts, as specified, to impose transactions and use taxes in accordance with the Transactions and Use Tax Law, which generally conforms to the SUT. Amendments to the SUT are automatically incorporated into the local tax laws. This bill would define "tangible personal property" to additionally mean a digital product and any copyright or patent interests associated therewith for the purposes of the application of the SUT, as prescribed. The bill would define "digital product" to mean, except as provided, prewritten computer software transferred on tangible storage media, transferred electronically, or accessed remotely. The bill would also make various conforming changes. By expanding the scope of violating the SUT, this bill would impose a state-mandated local program.	Watch
AB 467 Fong D Los Angeles Community College District: California Center for Climate Change Education.	This bill is in the Senate Appropriations Committee.	Existing law establishes community college districts throughout the state, and authorizes them to provide instruction to students at community college campuses. One of these districts is the Los Angeles Community College District. Existing law appropriates $5,000,000 to the Los Angeles Community College District for the development and initial operations of the California Center for Climate Change Education at the West Los Angeles College with the mission to promote climate change education at the California Community Colleges and establish opportunities for students to engage in hands-on internships and other learning opportunities. This bill would codify the establishment of the center. This bill would make legislative findings and declarations as to the necessity of a special statute for the Los Angeles Community College District.	Watch

Bill ID/Topic	Location	Summary	Position
AB 1198 Haney D Public works: prevailing wages.	This bill is in the Senate Appropriations Suspense File.	Current 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. Current 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 current 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 current 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, 2027, 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, 2027. 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.	Watch
AB 1337 Ward D Information Practices Act of 1977.	This bill is in the Senate Privacy, Digital Technologies, and Consumer Protection Committee.	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, beginning January 1, 2028, 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.	Watch

Bill ID/Topic	Location	Summary	Position
AB 1383 McKinnor D Public employees' retirement benefits.	This bill is in the Senate Appropriations Committee.	The Public Employees' Retirement Law (PERL) establishes the Public Employees' Retirement System (PERS) to provide a defined benefit to members of the system based on final compensation, credited service, and age at retirement, subject to certain variations. Existing law creates the Public Employees' Retirement Fund, which is continuously appropriated for purposes of PERS, including depositing employer and employee contributions. Under the California Constitution, assets of a public pension or retirement system are trust funds. The California Public Employees' Pension Reform Act of 2013 (PEPRA) establishes a variety of requirements and restrictions on public employers offering defined benefit pension plans. In this regard, PEPRA restricts the amount of compensation that may be applied for purposes of calculating a defined pension benefit for a new member, as defined, by restricting it to specified percentages of the contribution and benefit base under a specified federal law with respect to old age, survivors, and disability insurance benefits. Existing law, the Teachers' Retirement Law, establishes the State Teachers' Retirement System (STRS) and creates the Defined Benefit Program of the State Teachers' Retirement Plan, which provides a defined benefit to members of the program, based on final compensation, creditable service, and age at retirement, subject to certain variations. This bill, for service performed on and after January 1, 2027, would prohibit the pensionable compensation for calendar year 2027 used to calculate the defined benefit paid to a new member of a retirement system subject to PEPRA who retires from the system from exceeding specified percentages of the contribution and benefit base under the specified federal law with respect to old age, survivors, and disability insurance benefits.	Watch
AB 1421 Wilson D Vehicles: Road Usage Charge Technical Advisory Committee.	This bill is in the Senate Rules Committee, pending referral to policy committee.	Current 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. Current law additionally requires the Transportation Agency, in consultation with the commission, to implement the pilot program, as specified. Current law repeals these provisions on January 1, 2027. This bill would require the commission, in consultation with the Transportation Agency, to consolidate and prepare research and recommendations related to a road user charge or a mileage-based fee system. The bill would require the commission to submit a report, as specified, on the research and recommendations described above to the appropriate policy and fiscal committees of the Legislature by no later than January 1, 2027.	Watch

Bill ID/Topic	Location	Summary	Position
AB 1564 Ahrens D Employer-employee relations: confidential communications.	This bill is in the Senate Appropriations 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.	Watch
AB 1578 Jackson D State and local officials: sexual harassment training and education: anti-hate speech training.	This bill is in the Senate Appropriations Committee.	The California Fair Employment and Housing Act makes specified employment practices unlawful, including the harassment of an employee directly by the employer or indirectly by agents of the employer with the employer's knowledge. Existing law requires a specified employer with 5 or more employees to, by January 1, 2021, provide at least 2 hours of classroom or other effective interactive training and education regarding sexual harassment to all supervisory employees and at least one hour of classroom or other effective interactive training and education regarding sexual harassment to all nonsupervisory employees in California and, after that date, once every 2 years. Existing law requires an employer to include prevention of abusive conduct as a component of that training and education. This bill would additionally require, beginning on January 1, 2028, for an employer that is a state agency or local agency that the above-described training and education include, as a component of the training and education for elected officials, anti-hate speech training, as described.	Watch
AB 1599 Ahrens D Public transit: California Transit Stop Registry: transit datasets.	This bill is in the Senate Appropriations Committee.	Would require the Department of Transportation to create, on or before June 1, 2027, the California Transit Stop Registry as a centralized, statewide dataset of standardized information regarding transit stops that includes, but is not limited to, each transit stop's name, location, available amenities, and unique identifier, as specified.	Watch

Bill ID/Topic	Location	Summary	Position
AB 1624 Zbur D Public Lands Protection Act.	This bill is in the Assembly Local Government Committee.	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 of any land outside its boundaries that bears relation to its planning. Current law authorizes the legislative body of a county or city to adopt ordinances that, among other things, regulate the use of buildings, structures, and land as between industry, business, residences, open space, and other purposes, as provided. For these purposes, current law authorizes the legislative body to divide a county or city into zones, but requires that regulations adopted be uniform for each class or kind of building or use of land throughout each zone. The California Environmental Quality Act (CEQA) requires a lead agency, as defined, to prepare 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. This bill, the Public Lands Protection Act, would, upon transfer to any private or nonfederal entity of a parcel of land located within the state that is owned by the United States government on or after January 1, 2025, and that has been designated in an adopted general plan or zoning ordinance as open space, public land, resource conservation, or an equivalent conservation-oriented designation, immediately subject that parcel to the zoning designation and associated state and local restrictions. The bill would also, upon transfer of a parcel of land located within the state that is owned by the United States government on or after January 1, 2025, and that has not been designated in an adopted general plan or zoning ordinance at the time of transfer to any private or nonfederal entity, automatically subject that parcel to the most restrictive conservation-oriented zoning designation currently applied in the jurisdiction, by operation of law.	Watch
AB 1630 Caloza D Meet and confer: observation.	This bill is in the Senate Appropriations Suspense File.	Existing law provides for negotiations concerning wages, hours, and other terms and conditions of employment between a higher education employer and an exclusive representative of a recognized or certified employee organization, as these terms are defined. Existing law requires higher education employers, or such representatives as they may designate, to engage in meeting and conferring with the employee organization selected as exclusive representative of an appropriate unit on all matters within the scope of representation. Existing law requires a reasonable number of representatives of an exclusive representative to have the right to receive reasonable periods of released or reassigned time without loss of compensation when engaged in meeting and conferring and for the processing of grievances prior to the adoption of the initial memorandum of understanding. This bill would authorize an exclusive representative, in their discretion, to invite one or more members of a bargaining unit to remotely observe a session held for the purpose of a meet and confer on a memorandum of understanding. The bill would prohibit, absent an agreement of the parties, a member of a bargaining unit observing a session pursuant to these provisions from receiving released or reassigned time or compensation to observe a session.	Watch

Bill ID/Topic	Location	Summary	Position
AB 1697 Kalra D Employment contracts: stay-or-pay provisions: contract date.	This bill is in the Senate Appropriations Committee.	Existing law generally prohibits an employment contract from requiring a worker to pay certain penalties, fees, costs, or debts related to employment or education if the worker's employment or work relationship terminates, as provided. Existing law provides that a contract that is unlawful under that prohibition is void and contrary to public policy as a restraint of engaging in a lawful profession, trade, or business. Existing law authorizes a worker, among other persons, to bring a civil action for specified civil penalties and relief for a violation of these provisions. Existing law applies these prohibitions to contracts entered into on or after January 1, 2026. This bill would instead apply those provisions to contracts entered into on or after January 1, 2027.	Watch
AB 1821 Pacheco D California Public Records Act: agency response time.	This bill is in the Senate Appropriations Committee.	The California Public Records Act requires each state or local agency, upon a request for a copy of records that reasonably describes an identifiable record or records, to make the records promptly available to any person upon payment of fees covering direct costs of duplication, or a statutory fee if applicable, except with respect to public records exempt from disclosure by express provisions of law. 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, as defined. This bill would instead require each agency to determine whether the request seeks copies of disclosable public records in possession of the agency and to promptly notify the person as described above within 10 business days of a request for a copy of records.	Watch

Bill ID/Topic	Location	Summary	Position
AB 1837 González, Mark D Video imaging of parking violations.	This bill is on the Senate Floor.	Existing law authorizes a public transit operator in the state, until January 1, 2027, and authorizes the City and County of San Francisco indefinitely, to enforce parking violations in specified transit-only traffic lanes and at transit stops through the use of video imaging, and to install automated forward facing parking control devices on city-owned public transit vehicles for the purpose of video imaging parking violations occurring in transit-only traffic lanes, as specified. Existing law requires a public transit operator, prior to issuing notices of parking violations, to issue warning notices for the first 60 days and to make a public announcement of the program. Existing law requires a designated employee, or a contracted law enforcement agency, to review video image recordings for the purpose of determining whether a parking violation occurred in a transit-only traffic lane or at a transit stop and to issue a notice of violation to the registered owner of a vehicle within 15 calendar days, as specified. Existing law makes these video image records confidential and provides that these records are available only to public agencies to enforce parking violations. Existing law requires a public transit operator that implements an automated enforcement system to enforce parking violations in transit-only traffic lanes and at transit stops to submit a report to specified committees of the Legislature by no later than January 1, 2025. This bill would extend the authorization for the use of video imaging to enforce parking and stopping violations until January 1, 2034. The bill would require that a public transit operator issue warnings for 60 days prior to issuing notices of violations when it uses video imaging for enforcement of a violation that it has not previously used video imaging to enforce. The bill would require a public transit operator that uses video imaging to enforce parking violations to report to the Legislature, as specified. The bill would exempt the City and County of San Francisco from this requirement.	Support April 2026
AB 1838 Berman D Public contracts: local agencies: responsive bidders.	This bill is in the Senate Appropriations Suspense File.	Existing law governs the procurement process for contracts of specified public entities. Existing law requires a local agency that requires that contracts be awarded to the lowest responsible bidder meeting, or making a good faith effort to meet, participation goals for minority, women, or disabled veteran business enterprises to provide in the general conditions under which bids will be received that any person making a bid or offer to perform a contract shall include specified information in that bid or offer. This bill would require a contractor, as a condition of submitting a bid to a local agency for a public works contract, to fully disclose any history of wage and hour violations, as specified, and provide supporting documentation, as described. The bill would authorize a contractor that fails to provide the required disclosures and supporting materials to be disqualified from the bid. The bill would require a local agency to establish a process for a contractor to appeal their bid disqualification, as specified.	Watch

Bill ID/Topic	Location	Summary	Position
AB 1859 Ortega D Public works.	This bill is in the Senate Appropriations Committee.	Existing law requires that, except as specified, not less than the general prevailing rate of per diem wages be paid to workers employed on public works. Existing law defines “public works,” for the purposes of regulating public works contracts as, among other things, construction, alteration, demolition, installation, or repair work done under contract and paid for, in whole or in part, out of public funds. Existing law makes any officer, agent, or representative of the state or of any political subdivision who willfully violates specified provisions, including providing notice of certain public works projects, as specified, to the Department of Industrial Relations, guilty of a misdemeanor. Existing law requires the Labor Commissioner to investigate allegations that a contractor or subcontractor violated the law regulating public works projects, including the payment of prevailing wages. Existing law requires each contractor and subcontractor on a public works project to keep accurate payroll records, showing the name, address, social security number, work classification, straight time and overtime hours worked each day and week, and the actual per diem wages paid to each journeyman, apprentice, worker, or other employee employed by the contractor or subcontractor in connection with the public work. This bill would require an awarding body or owner to give reasonable access, as defined, to representatives of a joint-labor management committee in order to monitor compliance with the prevailing wage and apprenticeship requirements. The bill would authorize an awarding body, owner, contractor, or subcontractor to deny or revoke access to the committee’s representative if the representative fails or refuses to comply with job site safety requirements, as specified. The bill would authorize the committee to bring an action against an awarding body, contractor, or subcontractor that willfully denies the committee’s representative reasonable access.	Watch
AB 1883 Bryan D Workplace surveillance tools.	This bill is in the Senate Appropriations Committee.	Would, with certain exceptions, prohibit an employer from using a workplace surveillance tool that uses artificial intelligence to, among other things, collect neural data or recognize an individual’s emotional state. The bill would define an employer to include a governmental entity, including, among other entities, charter cities and the University of California. This bill would require the Labor Commissioner to enforce the bill’s provisions, would authorize an employee to bring a civil action for specified remedies for a violation of the bill’s provisions, and would authorize a public prosecutor to enforce the provisions. The bill would subject an employer who violates the bill’s provisions to a civil penalty of up to $500 for each violation. The bill would define various terms for purposes of its provisions. This bill would exempt from its provisions the use of a tool to the extent that its use is to ensure safety or is reasonably necessary to comply with, a federal statute, federal regulation, or binding federal contract relating to the development of aircraft for use in the national airspace or the development of products or services for national security, military, space, or defense purposes. The bill would include findings that changes proposed byThis bill address a matter of statewide concern rather than a municipal affair and, therefore, apply to all cities, including charter cities.	Watch

Bill ID/Topic	Location	Summary	Position
AB 1919 Pellerin D Santa Cruz Metropolitan Transit District: transactions and use tax: qualified voter initiative.	This bill is on the Senate Floor.	Current law provides for the establishment of the Santa Cruz Metropolitan Transit District, with specified powers and duties related to the operation of public transit services serving the County of Santa Cruz. Current law, among other things, authorizes the board of directors of the district to impose transactions and use taxes in accordance with the Transactions and Use Tax Law by an ordinance approved by the electors voting on the measure at a special election called by the board of directors for that purpose. This bill would also authorize those special taxes to be imposed by a qualified voter initiative. The bill would require the special election for a tax measure proposed by the board of directors or a qualified voter initiative to be consolidated with a statewide general election by the board of supervisors of the County of Santa Cruz and would require the tax measure to be submitted to the voters in accordance with specified elections provisions.	Watch
AB 1941 González, Mark D Organized metal theft.	This bill is in the Senate Appropriations Committee.	Existing law makes a person who is a dealer in or collector of junk, metals, or secondhand materials, or their agent, employee, or representative, who buys or receives any wire, cable, copper, lead, solder, mercury, iron, or brass that the person knows or reasonably should know is used by or belongs to specified entities, including a railroad, certain utility companies, or a public entity engaged in furnishing public utility service, without using due diligence to ascertain that the person selling or delivering that material has a legal right to do so, guilty of criminally receiving that property and, in addition to imprisonment, makes that act punishable by a fine of not more than $5,000. This bill would prohibit organized metal theft, described as acting in concert with one or more persons to steal metal materials from one or more of specified materials and items with the intent to sell, exchange, or return those metal materials for value, acting in concert with 2 or more persons to receive, purchase, or possess those metal materials knowing or believing it to have been stolen, acting as an agent of another to steal those metal materials as part of an organized plan to commit theft, or recruiting, coordinating, organizing, supervising, directing, managing, or financing another to undertake acts of theft of metal. The bill would make a violation of organized metal theft punishable as either a misdemeanor or a felony.	Support June 2026
AB 1944 Lee D Zero-emission transit buses: axle weight.	This bill is on the Senate Floor.	Current law prohibits the maximum gross weight on any one axle of a bus from exceeding 20,500 pounds, except the maximum limit for the curb weight on any one axle of a transit bus procured through a solicitation process pursuant to which a solicitation was issued on or after January 1, 2019, is set at 22,000 pounds. Current law sets specified higher maximum limits up to 25,000 pounds for the curb weight on any one axle of an articulated transit bus or zero-emission transit bus procured through a solicitation process pursuant to which a solicitation was issued during specified periods between January 1, 2016, and December 31, 2021, inclusive, and sets the 22,000-pound maximum limit for an articulated transit bus or zero-emission transit bus procured through a solicitation process pursuant to which a solicitation was issued on or after January 1, 2022. This bill would, until January 1, 2032, establish specified higher weight limitations up to 25,000 pounds for zero-emission transit buses procured through a solicitation process pursuant to which a solicitation was issued at various specified periods between January 1, 2027, and December 31, 2031 inclusive.	Support April 2026

Bill ID/Topic	Location	Summary	Position
AB 2051 Wicks D Public resources: Coastal Resilience Permitting Working Group.	This bill is in the Senate Appropriations Committee.	Would require the Secretary of the Natural Resources Agency, in consultation with the Secretary for Environmental Protection, to convene a Coastal Resilience Permitting Working Group for the purpose of developing a Coastal Resilience Permitting Roadmap for coastal resilience projects proposed in specified areas. The bill would require the Coastal Resilience Permitting Working Group to consist of representatives from federal, state, and local agencies, including, among others, the California Coastal Commission, the California Environmental Protection Agency, and the Department of Fish and Wildlife. The bill would, on or before January 1, 2028, require the Secretary of the Natural Resources Agency to submit the Coastal Resilience Permitting Roadmap to the Governor and the relevant fiscal and policy committees of the Legislature. The bill would require, on or before April 1, 2027, the Secretary of the Natural Resources Agency, in collaboration with the California Coastal Commission, the San Francisco Bay Conservation and Development Commission, the Department of Fish and Wildlife, and the California Regional Water Quality Boards with jurisdiction over the coast and the San Francisco Bay, to convene a Coastal Resilience Permit Advisory Group to support the deliberations of the Coastal Resilience Permitting Working Group.	Watch
AB 2074 Haney D Regional transit hub districts: downtown housing developments.	This bill is in the Senate Appropriations Committee.	The Planning and Zoning Law generally regulates local government zoning and approval of certain types of housing development projects. The law authorizes a development proponent to submit an application for a development that is subject to a prescribed ministerial approval process if the development complies with certain procedural requirements and satisfies specified objective planning standards. The law also requires a housing development project within a specified distance of a transit-oriented development stop to be an allowed use as a transit-oriented housing development on any site zoned for residential, mixed, or commercial development, if the development complies with specified requirements, as applicable. This bill would, by July 1, 2027, require major transit cities to designate one or more regional transit hub districts and prescribe requirements for those districts, including requiring that a district make a downtown housing development an allowable use, as specified. The bill would define “downtown housing development” as a housing development project within a regional hub district that meets certain conditions, including that it meets specified labor standards. The bill would prescribe requirements for the developments, including that the developments are eligible for streamlined ministerial approval, as specified. The bill would require the California Housing Finance Agency to conduct a housing construction loan and financing study that includes specified components and deliver that study to the Legislature and specified committees by December 1, 2027, as specified.	Watch

Bill ID/Topic	Location	Summary	Position
AB 2168 Wicks D Active Transportation Program: guidelines.	This bill is in the Senate Appropriations Committee.	Existing law requires the California Transportation Commission to develop guidelines and project selection criteria for the Active Transportation Program, including guidelines with regard to project eligibility that include, among other project types, safe routes to transit projects that will encourage transit by improving biking and walking routes to mass transportation facilities and schoolbus stops. This bill would, on and after January 1, 2028, instead require the guidelines with regard to project eligibility to include projects for safe routes to transit projects that encourage access to transit facilities and schoolbus stops by biking and walking, as specified, and projects that will expand access to transit in underserved or rural areas.	Watch
AB 2263 Kalra D Santa Clara Valley Transportation Authority: employee housing: transit-oriented joint development projects.	This bill is in the Senate Appropriations Committee.	Existing law establishes the Santa Clara Valley Transportation Authority (VTA) in order to meet the public transit problems of the County of Santa Clara. Existing law authorizes the VTA to purchase or otherwise acquire property for transit-oriented joint development projects, as provided. This bill would authorize the VTA to similarly purchase or acquire property for an employee housing project, as defined, for VTA employees and members of the public, as specified. The bill would authorize the VTA to construct affordable rental housing for employees and affordable for-sale housing that promotes housing opportunities for VTA employees, as specified.	Watch
AB 2323 McKinnor D Publication: newspapers of general circulation.	This bill is in the Assembly, pending Concurrence in Senate Amendments.	Existing law requires various types of notices to be provided in a “newspaper of general circulation,” as that term is defined, in accordance with certain prescribed publication periods and legal requirements. Existing law requires a newspaper of general circulation to meet certain criteria, including publication, a bona fide subscription list of paying subscribers, and printing and publishing at regular intervals in the state, county, or city where publication is to be given. This bill would require any public notice that is legally required to be published in a newspaper of general circulation to be published in the newspaper’s print publication and on the newspaper’s internet website or electronic newspaper available on the internet. This bill would prohibit a newspaper from charging a fee or surcharge to access public notices on their internet website or for posting a legally required public notice, as specified.	Watch

Bill ID/Topic	Location	Summary	Position
AB 2341 Fong D Local government: emergency response services: use of languages other than English.	This bill is on the Senate Floor.	Existing law requires, in the event of an emergency within the jurisdiction of a local agency that provides emergency response services and that serves a population within which 5% or more of the people speak English less than "very well," according to American Community Survey data, and jointly speak a language other than English, that the local agency provide information related to the emergency in English and in all languages spoken jointly by the 5% or more of the population that speaks English less than "very well," as specified. This bill would revise these provisions to instead require the local agency to provide information related to an emergency within a local agency's jurisdiction in English and translated in each language spoken by 5% or more of the population that speaks English less than "very well." The bill, to determine whether a language meets the criteria for translation, would require a local agency to calculate the total population of those within its jurisdiction that speaks English less than "very well," and, for each language included in the American Community Survey data, or data from an equally reliable source, determine whether speakers of any language who speak English less than "very well" comprise at least 5% of the total population of that jurisdiction that speaks English less than "very well."	Watch
AB 2346 Wilson D Vehicles: electric bicycles and speed limits.	This bill is in the Senate Appropriations Committee.	Existing law defines an electric bicycle as a bicycle equipped with fully operable pedals and an electric motor of less than 750 watts, and classifies electric bicycles into 3 classes with different restrictions for various purposes. This bill would require all class 2 electric bicycles manufactured, sold, or offered for sale on or after January 1, 2029, to be equipped with a speedometer. The bill would also require all electric bicycles manufactured, sold, or offered for sale on or after January 1, 2029, to be equipped with an integrated or detachable front lamp and a rear lamp, as specified. The bill would also require sellers and distributors of electric bicycles to disclose specified information at or before the point of sale.	Watch
AB 2413 Ransom D Large-format public advertisements: public expense.	This bill is in the Senate Appropriations Committee.	The Political Reform Act of 1974 provides for the comprehensive regulation of campaign financing and activities. The act defines "mass mailing" to mean over 200 substantially similar pieces of mail, and defines "mass electronic mailing" to mean sending more than 200 substantially similar pieces of electronic mail within a calendar month. The act prohibits a mass mailing from being sent at public expense if, among other things, the mailing features an elected officer affiliated with the agency that produces or sends the mailing, or includes the name, office, photograph, or other reference to the elected officer and is prepared or sent in cooperation, consultation, coordination, or concert with the elected officer. This bill would define "large-format public advertisement" as a billboard, wrap on a bus or other public transportation vehicle, advertisement affixed to a bus stop, and other public advertisements designated by the commission by regulation that are 24 inches by 36 inches or more in size. This bill would prohibit a large-format public advertisement from being published or displayed at public expense if, among other things, the advertisement includes the photograph of an elected officer affiliated with the agency that produces or purchases the large-format public advertisement.	Watch

Bill ID/Topic	Location	Summary	Position
AB 2484 Alvarez D San Diego Metropolitan Transit System: transactions and use tax: voter initiatives.	This bill is in the Senate Appropriations Committee.	The Mills-Deddeh Transit Development Act establishes the San Diego Metropolitan Transit Development Board, also known as the San Diego Metropolitan Transit System (MTS), governed by a 15-member board with specified powers and duties related to the operation of public transit services in the southern portion of the County of San Diego. The act authorizes MTS to impose a transactions and use tax of up to 0.5% for public transit purposes within its jurisdiction, or a portion of its jurisdiction, pursuant to the Transactions and Use Tax Law and subject to voter approval and various other requirements. This bill would also authorize those taxes to be imposed by a qualified voter initiative.	Watch
AB 2505 Carrillo D Electrical corporations: hydrogen refueling stations.	This bill is in the Senate Appropriations Committee.	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. Existing law requires each electrical corporation to file an advice letter for, and requires the commission to approve, a new tariff or rule that authorizes each electrical corporation to design and deploy all electrical distribution infrastructure on the utility side of the customer's meter for all customers installing separately metered infrastructure to support electric vehicle charging stations, other than those in single-family residences. This bill would require each electrical corporation, on or before April 1, 2027, to file an advice letter for, and require the commission, on or before September 1, 2027, to approve, a new or modified tariff or rule that authorizes the electrical corporation to design, construct, own, operate, and maintain all electrical distribution and service facilities located on the utility side of a customer's meter that are necessary to provide separately metered electrical service to hydrogen refueling stations, including hydrogen refueling stations located on premises that already receive electrical service for other uses. The bill would require that the tariff or rule authorize an electrical corporation to extend utility-side electrical distribution and service facilities from the existing distribution system to a dedicated revenue meter serving a heavy-duty hydrogen refueling station that serves vehicles that are 14,001 pounds or greater and authorize the installation of a dedicated revenue meter for the hydrogen refueling station load, as provided. The bill would require a facility installed pursuant to the tariff or rule to be treated, for cost allocation and customer contribution purposes, as line and service extensions, as provided.	Watch
AB 2516 Petrie-Norris D California Grid Manufacturing Initiative.	This bill is in the Senate Appropriations Committee.	Existing law creates within Governor's Office of Business and Economic Development (GO-Biz) the Energy Unit to accelerate the planning, financing, and execution of critical energy infrastructure projects, as specified. This bill would require the Energy Unit, in coordination with other specified state entities, to establish the California Grid Manufacturing Initiative. The bill would require the Energy Unit to determine and provide appropriate forms of state assistance to address identified delays with critical electricity grid components, as defined, to incentivize new or existing in-state manufacturing of critical electricity grid components, and to provide support to joint procurement initiatives.	Watch

Bill ID/Topic	Location	Summary	Position
AB 2529 Johnson R Civil claims: public entities and employees: declaration.	This bill is in the Senate Appropriations Committee.	The Government Claims Act governs the tort liability and immunity of, and claims and actions against, public entities, officers, and employees. Existing law requires that a claim against a public entity or public employee be signed by the claimant or by some person on the claimant's behalf. This bill would require a claim against a public entity or public employee to include a declaration that, upon information and belief, the contents of the claim are true and correct.	Watch
AB 2560 Schultz D Climate Action Plan for Transportation Infrastructure: goals.	This bill is in the Senate Appropriations Committee.	Existing law establishes the Transportation Agency, which has the power of general supervision over specified state entities. Existing law requires the agency to develop and report on legislative, budgetary, and administrative programs to accomplish comprehensive, long-range, coordinated planning and policy formation in the matters of public interest related to the agency. This bill would establish specified goals for the Climate Action Plan for Transportation Infrastructure (CAPTI), consistent with state law.	Watch
AB 2576 Harabedian D Transit-oriented development: exclusions: historic sites.	This bill is in the Senate Local Government Committee.	Existing law provides that a housing development project shall be an allowed use as a transit-oriented housing development if specified conditions and requirements are met. Existing law provides that these provisions do not apply to a local agency until July 1, 2026, unless the local agency adopts an ordinance or local transit-oriented development alternative plan, as defined, deemed compliant by the Department of Housing and Community Development before July 1, 2026. Existing law specifies that, beginning on January 1, 2027, a local government that denies a housing development project meeting the requirements referenced above that is located in a high-resource area is presumed to be in violation of specified law and immediately liable for specified penalties. Existing law specifies exclusions from the provisions described above, including, among other sites prior to one year following the adoption of the 7th revision of the housing element, a site with a historic resource designated as of January 1, 2025, on a local register. This bill would also exclude from the provisions described above, a contributing site within a historic district included on the State Historic Resources Inventory designated before January 1, 2025, and a parcel individually listed as a historical resource included on the State Historic Resources Inventory designated before January 1, 2025.	Watch

Bill ID/Topic	Location	Summary	Position
AB 2595 Papan D San Mateo Electric Bicycle Safety Pilot Program.	This bill is on the Senate Floor.	Existing law defines an electric bicycle and classifies electric bicycles into 3 classes with different restrictions. Under existing law, a "class 1 electric bicycle" is a bicycle equipped with a motor that provides assistance only when the rider is pedaling and ceases to provide assistance when the bicycle reaches the speed of 20 miles per hour. Under existing law, a "class 2 electric bicycle" is a bicycle equipped with a motor that may be used exclusively to propel the bicycle and is not capable of providing assistance when the bicycle reaches the speed of 20 miles per hour. Under existing law, a "class 3 electric bicycle" is a bicycle equipped with a speedometer and a motor that provides assistance only when the rider is pedaling, and that ceases to provide assistance when the bicycle reaches the speed of 28 miles per hour. Existing law prohibits a person under 16 years of age from operating a class 3 electric bicycle. This bill, the San Mateo Electric Bicycle Safety Pilot Program, would, until January 1, 2031, authorize a local authority within the County of San Mateo, or the County of San Mateo in unincorporated areas, to adopt an ordinance or resolution that would prohibit a person under 12 years of age from operating a class 1 or 2 electric bicycle. For the first 60 days following the adoption of an ordinance or resolution for this purpose, the bill would make a violation of the ordinance or resolution punishable by a warning notice. After 60 days, the bill would make a violation of the ordinance or resolution punishable by a fine of $25, except as specified. This bill would make a parent or legal guardian with control or custody of an unemancipated minor who violates the ordinance or resolution jointly and severally liable with the minor for the amount of the fine imposed.	Watch
AB 2656 Petrie-Norris D Public employees: notice: artificial intelligence performing service within scope of work.	This bill is in the Senate Appropriations Committee.	Executive Order No. N-12-23 requires specified state agencies, in collaboration with other state agencies and their workforce, to draft a report to the Governor examining the most significant, potentially beneficial use cases for deployment of generative artificial intelligence (GenAI) tools by the state. The executive order requires the report to explain the potential risks to individuals, communities, and government and state government workers, and requires the report to be regularly assessed and updated in consultation with, among others, the state government workforce or organizations that represent state government employees, as specified. Chapter 928 of the Statutes of 2024, the Generative Artificial Intelligence Accountability Act, requires specified state agencies to update the report, as needed, to respond to significant developments and to consult with specified parties, including organizations that represent state exclusive employee representatives. This bill would require certain state and local public employers to provide written notice to a recognized employee organization at least 45 days before taking an action to develop, purchase, or require the use of GenAI to perform a service that is within the scope of work of the job classification represented by the recognized employee organization.	Watch
SB 109 Laird D Budget Act of 2026.	This bill is in the Assembly Budget Committee.	Would make appropriations for the support of state government for the 2026–27 fiscal year. This bill would declare that it is to take effect immediately as a Budget Bill.	Watch

Bill ID/Topic	Location	Summary	Position
SB 111 Laird D Budget Act of 2026.	This bill was signed by the Governor on June 29, 2026.	The Budget Act of 2026 would make appropriations for the support of state government for the 2026–27 fiscal year. This bill would amend the Budget Act of 2026 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
SB 117 Committee on Budget and Fiscal Review Transit and Intercity Rail Capital Program: loans: transit operating purposes: San Francisco Bay area.	This bill is in the Assembly Budget Committee.	Current law establishes the Transit and Intercity Rail Capital Program, which is funded in part by a continuously appropriated allocation of a specified portion of the annual proceeds of the Greenhouse Gas Reduction Fund, to fund transformative capital improvements that will modernize California's intercity, commuter, and urban rail systems and bus and ferry transit systems to achieve certain policy objectives. Current law requires the Transportation Agency to evaluate applications for funding under the program and to approve a multiyear program of projects, as specified, and requires the California Transportation Commission to allocate funding to applicants pursuant to the program of projects approved by the agency. Current 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, including the San Francisco Bay Area Rapid Transit District and the Alameda-Contra Costa Transit District, with specified powers and duties relating to providing public transit services. This bill would require, on or before July 1, 2026, the Transportation Agency, subject to various requirements, to loan to the Metropolitan Transportation Commission up to $590,000,000 of funding approved under the program for projects within the San Francisco Bay area. The bill would require the Metropolitan Transportation Commission to use the proceeds of that loan to offer loans, subject to certain conditions, for public transit operating purposes to the San Francisco Bay Area Rapid Transit District, the San Francisco Municipal Transportation Agency, the Peninsula Corridor Joint Powers Board, and the Alameda-Contra Costa Transit District. By changing the purpose for which continuously appropriated funds may be expended, the bill would make an appropriation.	Watch

Bill ID/Topic	Location	Summary	Position
SB 122 Committee on Budget and Fiscal Review Taxation.	This bill was signed by the Governor on June 29, 2026.	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 of, 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 (SUT) defines "tangible personal property" to mean personal property that may be seen, weighed, measured, felt, or touched, or that is in any other manner perceptible to the senses. Existing law punishes various violations of the SUT as crimes. The Bradley-Burns Uniform Local Sales and Use Tax Law (Bradley-Burns) authorizes counties and cities to impose local sales and use taxes in conformity with the SUT, and existing laws authorize districts, as specified, to impose transactions and use taxes in accordance with the Transactions and Use Tax Law, which generally conforms to the SUT. Amendments to the SUT are automatically incorporated into the local tax laws. This bill would define "tangible personal property" to additionally mean a digital product and any copyright or patent interests associated therewith for the purposes of the application of the SUT, as prescribed. The bill would define "digital product" to mean, except as provided, prewritten computer software transferred on tangible storage media, transferred electronically, or accessed remotely. The bill would also make various conforming changes. By expanding the scope of violating the SUT, this bill would impose a state-mandated local program.	Watch
SB 169 Committee on Budget and Fiscal Review Transportation budget trailer bill.	This bill was signed by the Governor on July 13, 2026.	Existing law requires the Department of Transportation to work in partnership with the California Workforce Development Board to support California's high road construction careers program. Existing law requires the department to reserve a minimum aggregate total of $50,000,000 of federal funds from the federal Infrastructure Investment and Jobs Act to be allocated over 4 years in support of the program. This bill would instead require the department to reserve a minimum aggregate total of $30,000,000 of state transportation funds to be allocated in support of California's high road construction careers program.	Watch
SB 176 Committee on Budget and Fiscal Review Taxation.	This bill is in the Assembly Budget Committee. .	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 of, 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 (SUT) defines "tangible personal property" to mean personal property that may be seen, weighed, measured, felt, or touched, or that is in any other manner perceptible to the senses. Existing law punishes various violations of the SUT as crimes. The Bradley-Burns Uniform Local Sales and Use Tax Law (Bradley-Burns) authorizes counties and cities to impose local sales and use taxes in conformity with the SUT, and existing laws authorize districts, as specified, to impose transactions and use taxes in accordance with the Transactions and Use Tax Law, which generally conforms to the SUT. Amendments to the SUT are automatically incorporated into the local tax laws. This bill would define "tangible personal property" to additionally mean a digital product and any copyright or patent interests associated therewith for the purposes of the application of the SUT, as prescribed. The bill would define "digital product" to mean, except as provided, prewritten computer software transferred on tangible storage media, transferred electronically, or accessed remotely. The bill would also make various conforming changes. By expanding the scope of violating the SUT, this bill would impose a state-mandated local program.	Watch

Bill ID/Topic	Location	Summary	Position
SB 445 Wiener D High-speed rail: third-party agreements, permits, and approvals: regulations.	This is a two-year bill.	Current law creates the High-Speed Rail Authority Office of the Inspector General (office) and authorizes the High-Speed Rail Authority Inspector General (inspector general) to initiate an audit or review regarding oversight related to delivery of the high-speed rail project undertaken by the authority and the selection and oversight of contractors related to that project. Current law requires the inspector general to submit annual reports to the Legislature and Governor regarding its findings. This bill would require the authority, on or before July 1, 2026, to develop and adopt internal rules, as defined, setting forth standards and timelines for the authority to engage utilities to ensure coordination and cooperation in relocating utility infrastructure or otherwise resolving utility conflicts affecting the delivery of the high-speed rail project. The bill would require the authority to ensure that the internal rules, among other things, identify the circumstances under which the authority would be required seek to enter into a cooperative agreement with a utility that, where relevant, identifies who is responsible for specific utility relocations, as specified.	Watch
SB 667 Archuleta D Railroads: safety: report.	This bill is in the Assembly Appropriations Suspense File.	Existing law requires the Public Utilities Commission to annually report to the Legislature on sites on railroad lines in the state that the commission finds to be hazardous, including a list of all railroad sites in the state that it determines pose a local safety hazard. Existing law authorizes the commission to submit in the annual report the list of railroad sites submitted in the immediate prior year annual report, and to amend or revise that list from the immediate prior year as necessary. In determining which railroad sites pose a local safety hazard, existing law requires the commission to consider, among other things, whether any local safety hazards at railroad sites have been eliminated or sufficiently remediated to warrant removal of the site from the list. This bill would require the commission, on or before July 1, 2029, to review the list of railroad sites and, in the annual report, to include an evaluation of each site on the list and determine whether changes in conditions, operations, or safety data warrant the removal, modification, or addition of any site.	Watch
SB 677 Wiener D Housing financing: joint powers agreements: bond approvals:subdivisions: tentative and final maps: appeals.	This bill is in the Assembly Appropriations Committee.	The Joint Exercise of Powers Act authorizes 2 or more public agencies, by agreement, to form a joint powers authority to exercise any power common to the contracting parties, as specified. Existing law, for the purposes of that act, defines the term “public agency” to include various federal, state, local, and tribal entities. Existing law requires approval by the Department of General Services of certain joint powers agreements that include the state as a member, as provided. Existing law authorizes a joint powers authority to issue revenue bonds to pay the costs and expenses of acquiring, constructing, or conducting a program for, among other things, low-income housing projects owned or operated by a city, county, city and county, or housing authority. Existing law provides that the Treasurer and the Secretary of State are designated as elected representatives for federal tax purposes of a joint powers agency created to approve or certify the issuance of bonds, notes, or other evidence of indebtedness issued by or on behalf of the joint powers agency to the extent approval is required by federal tax law. This bill would, instead, provide that the Treasurer is designated as an applicable elected representative of a joint powers authority and may, at the discretion of the joint powers authority, approve the issuance of bonds, notes, or other evidence of indebtedness issued by or on behalf of the joint powers agency to the extent approval is required by federal tax law, as specified.	Watch

Bill ID/Topic	Location	Summary	Position
SB 739 Arreguín D Transportation network companies: California Clean Miles Standard and Incentive Program.	This bill is in the Assembly Appropriations Committee.	The Passenger Charter-party Carriers' Act provides for the regulation of charter-party carriers of passengers by the Public Utilities Commission and includes specific requirements applicable to transportation network companies, which are defined as certain organizations that, using an online-enabled application or platform, connect passengers with drivers using a personal vehicle. The act establishes the California Clean Miles Standard and Incentive Program, which requires, by January 1, 2020, that the State Air Resources Board establish a baseline for emissions of greenhouse gases for vehicles used on the online-enabled applications or platforms by transportation network companies on a per-passenger-mile basis, as provided. The act requires, by January 1, 2021, that the state board establish, and the commission implement, annual targets and goals, in accordance with specified requirements, starting in 2023 for the reduction under that baseline for emissions of greenhouse gases per passenger mile driven on behalf of a transportation network company. The act makes a violation of the act, or an order or direction of the commission pursuant to the act, a crime. This bill would require, by January 1, 2028, the state board to adopt, and the commission to implement, updated annual targets and goals starting in 2029 for the reduction under that baseline for emissions of greenhouse gases per passenger mile driven on behalf of a transportation network company in accordance with specified requirements. The bill would prohibit the commission from finding a transportation network company in violation of the program under specified circumstances.	Watch
SB 741 Blakespear D Low Carbon Transit Operations Program.	This bill is in the Assembly Appropriations Committee.	Existing law creates the Low Carbon Transit Operations Program to provide operating and capital assistance for transit agencies to reduce the emissions of greenhouse gases and improve mobility. Existing law requires the Department of Transportation to administer the program and to adopt guidelines, in coordination with the State Air Resources Board, that describe the methodologies to be used by a recipient transit agency to demonstrate that proposed expenditures will meet specified program expenditure requirements and establish the reporting requirements for documenting ongoing compliance with those expenditure requirements. This bill would repeal the requirement for the department to adopt guidelines.	Support July 2026

Bill ID/Topic	Location	Summary	Position
SB 830 Arreguín D Public Transit Revenue Measure District: revenue measure: election procedures.	This bill is in the Senate, ordered to engrossing and enrolling.	Existing law establishes the Public Transit Revenue Measure District, governed by the same board that governs the Metropolitan Transportation Commission, with jurisdiction extending throughout the boundaries of the Counties of Alameda, Contra Costa, San Mateo, and Santa Clara, and the City and County of San Francisco. Existing law authorizes 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 14 years, and in specified amounts, subject to voter approval at the November 3, 2026, statewide general election. Existing law establishes specified procedures for that election, including a requirement that the elections officials of the counties where the measure will appear on the ballot mutually agree to use the same letter designation for the measure. This bill would revise those election procedures by, among other things, instead requiring the measure to be identified on the ballot by the designation "Regional Transit Measure" in each county included in the district and by requiring each county elections official in the district to select, from among the submissions of proposed arguments in favor of, and against, the measure, the arguments to be included in the county voter information guide of that county, as specified. This bill contains other related provisions.	Watch
SB 908 Wiener D Residential windows: retrofitting: residential window replacement projects: California Building Code compliance.	This bill is in the Assembly Appropriations Committee.	The Davis-Stirling Common Interest Development Act governs the management and operation of common interest developments. Existing law places various limits and prohibitions on the governing documents, as defined, relative to an owner's separate interest within those developments. This bill would prohibit those governing documents from limiting or prohibiting the owner of a separate interest within a common interest development from completing a residential window replacement project, as defined, or from imposing any requirements on California Energy Code-compliant windows in a housing development project, as defined.	Watch
SB 922 Laird D Vehicles: local agency charges: use of streets or highways.	This bill is on the Assembly Floor.	Existing law prohibits a local agency from imposing a tax, permit fee, or other charge for the privilege of using its streets or highways, other than a permit fee for an extralegal load unless the local agency had imposed the fee prior to June 1, 1989. This bill would explicitly state that a fee, charge, surcharge, or component thereof imposed upon the provider of, or ratepayer for, public services by or for a local agency to recover the cost of street maintenance and repair and other costs associated with the use of its streets, roads, or highways to provide those public services is not a tax, permit fee, or other charge that is prohibited by the provision described above. The bill would provide that nothing in the Vehicle Code prohibits a local agency from imposing or collecting this fee, charge, or surcharge.	Watch

Bill ID/Topic	Location	Summary	Position
SB 929 Jones R State Energy Resources Conservation and Development Commission: chair: report to the Legislature.	This bill is in the Assembly Appropriations Suspense File.	Existing law requires the Governor to designate a chair of the State Energy Resources Conservation and Development Commission and requires the chair to direct the public advisor, the executive director, and other staff of the commission in the performance of their duties in conformance with the policies and guidelines established by the commission. This bill would require the chair of the commission to appear annually before the appropriate policy committees of the Legislature to report on the commission’s activities and plans as they relate to the commission’s responsibilities, as specified.	Watch
SB 935 Choi R Local agency design-build projects: authorization.	This bill is in the Senate, ordered to engrossing and enrolling.	Current law authorizes a local agency, as defined, with approval of its governing body, to procure design-build contracts for public works projects in excess of $1,000,000, awarding the contract either to the lowest bid or the best value. Current law, among other requirements for the design-build procurement process, requires specified information submitted by a design-build entity to be certified under penalty of perjury. These provisions authorizing local agencies to use the design-build procurement process are repealed on January 1, 2031. This bill would repeal the above-described January 1, 2031, repeal date, thereby extending the operation of these provisions indefinitely.	Watch

Bill ID/Topic	Location	Summary	Position
SB 939 Laird D Public employees' retirement: service credit: payments.	This bill is on the Assembly Floor.	The Public Employees' Retirement Law (PERL) creates the Public Employees' Retirement System (PERS), which provides a defined benefit to members of the system based on final compensation, credited service, and age at retirement, subject to certain variations. PERL vests management and control of PERS in the Board of Administration. Under that law, members may make certain elections, including elections to purchase service credit for various types of public service, upon payment of additional contributions. Existing law permits a member who retires before paying off the entire amount for service credit to pay the balance due by deductions from their retirement allowance equal to those authorized as payroll deductions, as specified. Under existing law, upon the death of that member, a survivor of the member, who is eligible for a monthly allowance, may elect to continue those deductions from the survivor's allowance. Existing law authorizes the member, survivor, or beneficiary, as an alternative, on or after January 1, 2020, to elect to receive an allowance that is reduced by the actuarial equivalent of any balance remaining unpaid by the member. This bill would limit that alternative option to elections made on or after January 1, 2020, with an initial effective date prior to January 1, 2028. (2)Existing law provides that all elections taking effect on or after January 1, 2020, including elections for normal contributions, arrears contributions, absences, or public service become due and payable at the time of the member's retirement or preretirement death. This bill would require, for all elections with an effective date on or after January 1, 2028, except as specified, the member's payment to be received by the system no later than 90 days after the member's retirement effective date, or the survivor or beneficiary's payment to be received by the system no later than 90 days after the date the notification of balance due is mailed. For any balance not paid, the service credit included in the election would be reduced or eliminated, as specified. This bill would also require all contributions or service credit adjustments required by law or agreement with an effective date on or after January 1, 2028, to become due and payable at the time of retirement or preretirement death.	Watch

Bill ID/Topic	Location	Summary	Position
SB 947 McNerney D Employment: automated decision systems.	This bill is in the Assembly Appropriations Committee.	Existing law requires the Department of Technology to conduct, in coordination with other interagency bodies as it deems appropriate, a comprehensive inventory of all high-risk automated decision systems (ADS) that have been proposed for use, development, or procurement by, or are being used, developed, or procured by, any state agency. Existing law establishes the Labor and Workforce Development Agency, which is composed of various departments responsible for protecting and promoting the rights and interests of workers in California, including the Division of Labor Standards Enforcement, led by the Labor Commissioner, within the Department of Industrial Relations. This bill would prohibit an employer, as defined, from using an ADS to perform certain functions and would limit the purposes for and way in which an ADS may be used. The bill would authorize a worker to request, and require an employer to provide, a copy of the most recent 12 months of the worker's own data primarily used by an ADS to make a disciplinary, termination, or deactivation decision, as specified. The bill would require an employer that primarily relied upon an ADS to make a disciplinary, termination, or deactivation decision to provide the affected worker with a written postuse notice, as specified. This bill would prohibit an employer from discharging, threatening to discharge, demoting, suspending, or in any manner discriminating or retaliating against any worker for taking certain actions asserting their rights under the bill.	Watch
SB 951 Reyes D Employment: technological displacement: notice.	This bill is in the Assembly Appropriations Committee.	Existing law establishes the Labor and Workforce Development Agency, which is composed of various departments responsible for protecting and promoting the rights and interests of workers in California, including the Division of Labor Standards Enforcement, led by the Labor Commissioner, within the Department of Industrial Relations. Existing law establishes the Employment Development Department (EDD), which is administered by the Director of Employment Development. Under existing law, the Director of Employment Development is vested with specified duties, purposes, responsibilities, and jurisdiction related to job creation activity functions, among other things. Existing law, the California Worker Adjustment and Retraining Act (Cal/WARN Act), prohibits an employer from ordering a mass layoff, relocation, or termination at a covered establishment unless, 60 days before the order takes effect, the employer gives written notice of the order to the employees affected by the order and to the EDD and certain local officials. Existing law makes an employer who fails to give specified notice regarding a mass layoff, relocation, or termination subject to a civil penalty of not more than $500 for each day of the employer's violation. This bill would revise the Cal/WARN Act to also require an employer giving notice of a mass layoff, relocation, or termination caused in whole or in substantial part by an artificial intelligence (AI) system or other automated technology replacing or automating employment positions to include certain information in the notice, including the job functions performed by workers that will be automated by AI.	Watch

Bill ID/Topic	Location	Summary	Position
SB 994 Cabaldon D Local agencies: nondisclosure agreements.	This bill is in the Assembly Appropriations Committee.	Existing law, the legislative code of ethics, prohibits Members of the Legislature from entering into, or requesting that another party enter into, a nondisclosure agreement relating to the drafting, negotiation, or discussion of proposed legislation. Existing law also makes any nondisclosure agreement relating to the drafting, negotiation, or discussion of proposed legislation entered into after January 1, 2026, void and unenforceable. Existing law provides an exception for nondisclosure agreements, or portions thereof, that prevent only the disclosure of trade secrets, financial information, or proprietary information, as specified. This bill would prohibit a local agency official, as defined, acting in their official capacity from entering into, or requesting that another individual enter into, a nondisclosure agreement relating to public business that precludes their ability to share information with fellow local agency officials serving on the same council, board, commission, district, or agency. The bill would require a local agency official in violation of that provision to, among other things, disclose the existence of the nondisclosure agreement, as specified, and would provide that these requirements imposed on a local agency official also apply to a local agency official acting in their official capacity who entered into, or requested that another individual enter into, a nondisclosure agreement described above before January 1, 2027.	Watch
SB 1087 Cabaldon D Transportation planning: sustainable communities strategies: transportation funding programs.	This bill is in the Assembly Appropriations Committee.	Existing law requires certain transportation planning agencies to prepare and adopt regional transportation plans directed at achieving a coordinated and balanced regional transportation system. Existing law requires a regional transportation plan to include a policy element, a sustainable communities strategy prepared by a metropolitan planning organization, an action element, and a financial element, as provided. Existing law requires those transportation planning agencies to adopt and submit every 4 years, except as provided, an updated regional transportation plan to the California Transportation Commission and the Department of Transportation. Existing law requires a sustainable communities strategy to achieve regional targets set by the State Air Resources Board for the reduction of greenhouse gas emissions from the automobile and light truck sector in the region for 2020 and 2035, respectively, and requires the state board to update those targets every 8 years, consistent with each metropolitan planning organization’s timeframe for updating its regional transportation plan, as specified. Existing law establishes certain procedural requirements for setting and updating those targets and authorizes the state board to revise the targets every 4 years based on changes in specified factors. This bill would instead require, commencing with the first or 2nd regional transportation plan prepared on or after January 1, 2027, as determined by the applicable metropolitan planning organization, the regional transportation plan to include an 8-year sustainable communities strategy prepared by the metropolitan planning organization.	Watch

Bill ID/Topic	Location	Summary	Position
SB 1159 Cabaldon D Artificial intelligence: transparency and governance.	This bill is on the Assembly Floor.	The California Constitution provides that people have the right of access to information concerning the conduct of the people's business. Various provisions of existing law, including the California Public Records Act, the Legislative Open Records Act, the Bagley-Keene Open Meeting Act, and the Ralph M. Brown Act, provide, with some exceptions, for public access to government records and meetings of government bodies. Among those acts, the California Public Records Act defines "person" to include any natural person, corporation, partnership, limited liability company, firm, or association. his bill would specify that, for purposes of the California Public Records Act, the Bagley-Keene Open Meeting Act, the Ralph M. Brown Act, the Legislative Open Records Act, the Administrative Procedure Act, the California Coastal Act of 1976, and CEQA, "person," "interested person," "participant," "member of the public," as applicable, and any other similar terms under each act referring to those who may engage with governmental agencies, do not include artificial intelligence, as defined, systems, autonomous agents, or robots, whether physical or digital.	Watch
SB 1187 Durazo D Open meetings.	This bill is on the Assembly Floor.	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. Existing law, beginning July 1, 2026, requires eligible legislative bodies, as defined, to have in place a system for electronically accepting and fulfilling requests for meeting agendas and documents. Existing law additionally requires these legislative bodies to translate the agenda for each meeting of that body and to reasonably assist members of the public who wish to translate a public meeting or receive interpretation, as specified. This bill would instead delete the above-described requirements on eligible legislative bodies.	Watch
SB 1216 Laird D Budget Act of 2026.	This bill is in the Senate Budget & Fiscal Review Committee.	The Budget Act of 2026 would make appropriations for the support of state government for the 2026–27 fiscal year. This bill would amend the Budget Act of 2026 by amending a section relating to appropriations. This bill would declare that it is to take effect immediately as a Budget Bill.	Watch
SB 1266 Stern D Crimes: theft.	This bill is in the Assembly Appropriations Committee.	The Safe Neighborhoods and Schools Act, enacted by Proposition 47, as approved by the voters at the November 4, 2014, statewide general election, requires the theft of property that does not exceed $950 to be punished as a misdemeanor, except as specified. Proposition 47 authorizes amendment of its provisions by a 2/3 vote of the Members of each house of the Legislature so long as the amendments are consistent with and further the intent of the act. Under existing law, it is grand theft to steal, take, or carry away copper materials of another valued at more than $950. This bill would amend Proposition 47 to require, for the purposes of this provision, value to be calculated as the cost to the victim to repair and replace the stolen materials, including equipment that was damaged or destroyed by the stealing, taking, or carrying away, as specified.	Watch

Bill ID/Topic	Location	Summary	Position
SB 1275 McNerney D Sales and use tax exemption: vehicle license fee imposition: motor vehicles.	This bill is in the Assembly 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. This bill would, on and after July 1, 2027, and before July 1, 2032, exempt from those taxes the gross receipts from the sale of, and the storage, use, or other consumption of a used motor vehicle sold by specified dealers or their affiliates or a new motor vehicle.	Watch
SB 1361 Durazo D Transit-oriented housing developments: local governments: transit agencies and projects.	This bill is in the Assembly Local Government Committee.	Existing law requires a housing development project to be an allowed use as a transit-oriented housing development if certain requirements are met. Existing law provides that these provisions do not apply to a local agency until July 1, 2026, unless the local agency takes specified actions. Existing law prohibits a local government from adopting any requirement that applies to a project solely or partially on the basis that the project is seeking approval as a transit-oriented housing development, as specified. This bill would additionally prohibit a local government with an existing or planned transit-oriented development stop from taking specified actions with respect to transit agencies and transit projects.	Watch
SB 1375 Cortese D California Environmental Quality Act: exemption: urban intermodal rail station project.	This bill is in the Assembly Appropriations Committee.	Existing law exempts from the California Environmental Quality Act (CEQA) a public project for the improvement, institution, or increase of passenger rail service, including the maintenance, construction, or rehabilitation of stations, terminals, or existing operations facilities that will be exclusively used by zero-emission trains or specified rolling stock or locomotives, as provided. This bill would exempt from CEQA, except as specified, a public urban, intermodal rail station project within a long-urbanized area within the statewide passenger rail network, at which high-capacity light, commuter, and intercity rail services converge that meets specified conditions, including, among other requirements, a requirement for compliance with various environmental laws and for the adoption of a plan for how any displacement from the project will be fully addressed, as provided. The bill would require a lead agency, if it determines that a project is not subject to CEQA pursuant to this exemption, and it determines to carry out the project, to file a notice of exemption with the Office of Land Use and Climate Innovation and the county clerk of the county in which the project is located, as provided. The bill would permit exemption only for projects for which a notice of exemption is filed before January 1, 2032. Because a lead agency would be required to determine the applicability of this exemption, the bill would impose a state-mandated local program.	Watch

AGENDA

San Mateo County Transit District

Strategic Planning, Development, and Sustainability Committee Meeting
Committee of the Whole

August 5, 2026 – 3:15 pm

or immediately following the Legislative Committee meeting

Public Hearing Room, 5th Floor
166 North Rollins Road, Millbrae, CA 94030

Committee Members: Josh Powell (Chair), David J. Canepa, Brooks Esser

12.a.	Call to Order	
12.b.	Approval of Minutes of the Strategic Planning, Development, and Sustainability Committee Meeting of July 8, 2026	Motion
12.c.	Reimagine Dumbarton Feasibility Study Project Update	Informational
12.d.	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 Committee. Staff recommendations are subject to change by the Committee.

San Mateo County Transit District
Strategic Planning, Development, and Sustainability Committee Meeting /
Committee of the Whole
Regular Meeting

166 North Rollins Road, Millbrae, California 94030
17907 Holli Blue Road, Champion, Michigan 49814

DRAFT Minutes of July 8, 2026

Members Present (In Person): David J. Canepa, Brooks Esser

Members Absent: Josh Powell (Chair)

Other Board Members Present Constituting Committee of the Whole: Marie Chuang, Marina Fraser, Jeff Gee, Rico E. Medina, Peter Ratto

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

Other Board Members Absent: None

Staff Present: J. Cassman, A. Chan, L. Lumina-Hsu, M. Tseng

12.a. Call to Order

Committee Vice Chair Canepa called the meeting to order at 3:45 pm.

12.b. Approval of Minutes of the Strategic Planning, Development, and Sustainability Committee Meeting of April 1, 2026

Motion/Second: Medina/Esser
Ayes: Canepa, Fraser, Gee, Medina, Ratto, Speier, Esser, Chuang
Noes: None
Absent: Powell

12.c. Transit-Oriented Development Feasibility Study and Development Opportunities for San Carlos Headquarters Site

Joshuah Mello, Chief, Planning and Development, and Charla Gomez, Manager, Transit Oriented Development, provided the presentation, which included the following:

- San Carlos Inclusionary House and Surplus Land Act - affordable housing requirements and income levels
- Market study and feasibility analysis identify 75 to 120 dwelling units per acre as a feasible density range

- Request for Proposals (RFP) development incorporating Board and Transit Oriented Development (TOD) Ad Hoc Committee feedback, development flexibility, housing options, and potential daycare center preference
- TOD development timeline and next steps

Staff provided further clarification in response to the Committee comments and questions, which included the following:

- San Carlos location coordination, housing focus, and ground-floor retail requirements
- Senate Bill 79 analysis, density considerations, and project feasibility
- TOD affordable housing goals, RFP direction, and ground lease approach
- Collaboration with housing experts and community engagement opportunities
- Density increases, zoning considerations, and RFP flexibility for additional density

12.d. **Adjourn** – The meeting adjourned at 4:06 pm.