BOARD OF DIRECTORS 2026

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

APRIL CHAN
GENERAL MANAGER/CEO

AGENDA

San Mateo County Transit District

Board of Directors Meeting

December 2, 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 one minute 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, December 2, 2026 2:00 pm

1. Call to Order / Pledge of Allegiance

2. Roll Call

3. Safety Message

4. Public Comment for Items Not on the Agenda

   Comments by each individual speaker shall be limited to one (1) minute. Items raised that require a response will be deferred for staff reply.

5. Consent Calendar

5.a.	Approval of Minutes of the Board of Directors Meeting of November 4, 2026	Motion
5.b.	Accept Quarterly Fuel Hedge Update	Motion
5.c.	Authorizing the Filing of an Application with the Metropolitan Transportation Commission for Transportation Development Act, State Transit Assistance, and Regional Measure 2 Funds for Fiscal Year 2027	Resolution
5.d.	Ratifying the Agreement with Voice Intelligence Labs, Inc. to Sublease 3,632 Square Feet of Office Space at 166 North Rollins Road in Millbrae, California, for 51 Months for Total Base Rents of $1,120,180.80, and the Associated Agreement with SFIII Millbrae, LLC for Consent of the Same	Resolution

6. Report of the Chair

6.a.	Resolution of Appreciation David J. Canepa	Resolution
6.b.	Resolution of Appreciation Marie Chuang	Resolution
6.c.	Report of the Nominating Committee and Appointment for Board of Director Public Member Seat Representing Coastside for a Term Beginning January 1, 2027, and Ending December 31, 2030	Motion
6.d.	Announce 2027 Chair and Vice Chair Nominating Committee	Informational

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

6.e.	Appointment of Representative to the San Mateo County Transportation Authority Board of Directors for a Term Beginning January 1, 2027, and Ending December 31, 2028	Motion

7. Report of the General Manager/CEO

7.a.	Report of the General Manager/CEO | November 23, 2026	Informational
7.b.	District Headquarters Transportation Demand Management, Parking, and Bay Pass Program 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	Informational
9.b.	Approval of Minutes of the Community Relations Committee Meeting of November 4, 2026	Motion
9.c.	Accessible Services Update	Informational
9.d.	Community Advisory Committee Update	Informational
9.e.	Paratransit Advisory Council Update	Informational
9.f.	Monthly State of Service Report - October 2026	Informational
9.g.	Quarterly State of Service Report - Fiscal Year 2027 Quarter 1	Informational
9.h.	Adjournment	

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

10.a.	Call to Order	Informational
10.b.	Approval of Minutes of the Finance Committee Meeting of November 4, 2026	Motion

10.c.	Awarding a Contract to Lamar Transit, LLC for Bus and Bus Shelter Advertising Services for a Five-Year Base Term for Minimum Annual Guarantee Revenue of $5.35 Million, with Two One-Year Option Terms for an Additional Minimum Annual Guarantee Revenue of $2.325 Million	Motion
10.d.	Receive Quarterly Financial Report Fiscal Year 2027 Quarter 1 Results and Financial Outlook	Informational
10.e.	Adjournment	

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

11.a.	Call to Order	Informational
11.b.	Approval of Minutes of the Strategic Planning, Development, and Sustainability Committee Meeting of November 4, 2026	Motion
11.c.	District Strategic Plan Fiscal Year 2026 Annual Progress Report	Informational
11.d.	Adjournment	

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

12.a.	Call to Order	Informational
12.b.	Approval of Minutes of the Legislative Committee Meeting of November 4, 2026	Motion
12.c.	Legislative Update	Informational
12.d.	Draft 2027 Legislative Program	Informational
12.e.	Adjournment	

13. Reconvene Board of Directors Meeting

14. Matters for Board Consideration: Finance Committee

    14.a. Awarding a Contract to Lamar Transit, LLC for Bus and Bus Shelter Advertising Services for a Five-Year Term for a Minimum Annual Guarantee (MAG) Revenue of $5.35 Million, with Two One-Year Option Terms for Additional MAG Revenue of $2.325 Million — Resolution

15. Matters for Board Consideration: Audit Committee

    15.a. Acceptance of the San Mateo County Transit District's Annual Comprehensive Financial Report for the Fiscal Year Ended June 30, 2026 — Motion

16. Written Communications to the Board of Directors

17. Board Members Requests

18. Date / Time of Next Regular Meeting: Wednesday, January 6, 2027, 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.

19. Report of the General Counsel

    19.a. Closed Session Pursuant to Government Code Section 54957(a): Threat to Public Services/Facilities – Consultation with Mehul Kumar, Chief Information and Technology Officer, and Steve Thomas, Director for Infrastructure and Cybersecurity

    19.b. Closed Session: Conference with Legal Counsel – Existing Litigation Pursuant to Government Code Section 54956.9(d)(1): San Mateo County Transit District v. SFIII Millbrae, LLC, et al., Superior Court of California, County of San Mateo, Case No. 26-CIV-06530

    19.c. Closed Session: Conference with Legal Counsel – Existing Litigation Pursuant to Government Code Section 54956.9(d)(1): Heather Diane Feliciano Sotomayor v. Juanito Enriquez Paulino, San Mateo County Transit District, et al., Superior Court of California, County of San Mateo, Case No. 24-CIV-07532

20. Adjournment

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 Community Advisory Committee Meetings
San Mateo County Transit District (SamTrans) Board and Committees: First Wednesday of the month, 2:00 pm; SamTrans Community 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. **Accessible parking** is available to the right upon entering the parking structure at 166 North Rollins Road, Millbrae, CA 94030.

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

DRAFT Minutes of November 4, 2026

Members Present: David J. Canepa, Marina Fraser, Jeff Gee, Rico E. Medina (arrived at 3:54 pm), Josh Powell, Peter Ratto, Jackie Speier (arrived at 2:06 pm), Brooks Esser (Vice Chair), Marie Chuang (Chair)

Members Absent: None

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

1. **Call to Order / Pledge of Allegiance**
   Chair Marie Chuang called the meeting to order at 2:01 pm.

2. **Roll Call**
   Margaret Tseng, District Secretary, called the roll and confirmed a quorum was present.

3. **Safety Message**

4. **Report Out from Closed Session at October 7, 2026 Board of Directors Meeting**

   4.a. Closed Session: Conference with Legal Counsel - Existing Litigation Pursuant to Government Code Section 54956.9(d)(1): Love, Lowel v. San Mateo County Transit District, Workers Compensation Appeals Board Case No. ADJ975710
   Joan Cassman, General Counsel, stated the Board of Directors (Board) unanimously approved a settlement in the amount of $126,129.41.

   4.b. Closed Session: Conference with Legal Counsel – Existing Litigation Pursuant to Government Code Section 54956.9(d)(1): Lino Garcia Diaz v. San Mateo County Transit District et. al., Superior Court of California, County of San Francisco, Case No. CGC-23-609955
   Ms. Cassman stated the Board unanimously approved a settlement in the amount of $185,000.

   4.c. Closed Session: Conference with Legal Counsel – Existing Litigation Pursuant to Government Code Section 54956.9(d)(1): Julio Cesar Moran v. San Mateo County Transit District et. al., Superior Court of California, County of San Mateo, Case No. 24-CIV-07001
   Ms. Cassman stated there was no reportable action.

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5. Recess to Closed Session

5.a. Closed Session: Conference with Legal Counsel – Existing Litigation Pursuant to Government Code Section 54956.9(d)(1): San Mateo County Transit District v. SFIII Millbrae, LLC, et al., Superior Court of California, County of San Mateo, Case No. 26-CIV-06530

5.b. Closed Session: Conference with Labor Negotiators Pursuant to Government Code Section 52957.6
Agency-designated Representatives: Pat Glenn and Nathaniel Kramer
Employee Organization: International Brotherhood of Teamsters, Local 856 (All Units)

Ms. Cassman announced the closed sessions items.

The Board recessed to closed session at 2:06 pm.

6. Reconvene Open Session

The Board reconvened open session at 2:48 pm.

7. Report Out from Closed Session (Items 5.a. and 5.b.)

7.a. The Board may consider approving one-year extensions of labor agreements with International Brotherhood of Teamsters, Local 856 (all units). – *Approved by Resolution No. 2026-53*

For Closed Session Item 5.a., Ms. Cassman stated there was no reportable action.

For Closed Session Item 5.b., Ms. Cassman stated the Board will take action to extend the collective bargain agreement the District has with International Brotherhood of Teamster units for a fourth year. The Teamster employees will be eligible for 4 percent annual increase that is also granted under the Amalgamated Transit Union (ATU) collective bargaining agreements.

Motion to approve one-year extensions for International Brotherhood of Teamsters, Local 856 (all units) labor agreements/Second: Gee/Esser
Ayes: Canepa, Fraser, Gee, Powell, Ratto, Speier, Esser, Chuang
Noes: None
Abstain: None
Absent: Medina

8. Public Comment for Items Not on the Agenda

Aleta Dupree, Team Folds, commented on 60-foot hydrogen buses and renewable energy.

Max Mautner, New San Mateo, commented on Regional Transit Measure (Measure RTM), Hillsdale Mall redevelopment effect on Route 294, potential end Route 294 at a Caltrain station, and coastside services.

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9. Consent Calendar

9.a. Approval of Minutes of the Board of Directors Meeting of October 7, 2026

9.b. Approve the 2027 San Mateo County Transit District (SamTrans) Board of Directors and Board Committees Calendar

9.c. Accept Quarterly Report for On-Call Contracts for Fiscal Year 2027 Quarter 1

9.d. Accepting Contracts and Procurement Quarterly Report on Technology Purchases for Fiscal Year 2027 Quarter 1

9.e. Accept Quarterly Investment Report

9.f. Accept San Mateo County Transit District (SamTrans) Capital Program Quarterly Progress Report for Fiscal Year 2027 Quarter 1

9.g. Updating the Public Transportation Agency Safety Plan (PTASP) – *Approved by Resolution No. 2026-54*

9.h. Adopting the Amended Conflict of Interest Code – *Approved by Resolution No. 2026-55*

9.i. Authorizing an Amendment to Contract No. 21-S-CO-069 with Western States Oil Company for Fuel and Fueling Services to Increase the Not-to-Exceed Amount by $8 Million and Extend the Term for One Year – *Approved by Resolution No. 2026-56*

9.j. Awarding a Contract to Midwest Motor Supply Co., Inc. dba Kimball-Midwest to Provide Bus Maintenance Shop Supplies for a Five-Year Term for a Not-To-Exceed Amount of $484,000 – *Approved by Resolution No. 2026-57*

9.k. Adopting a Drug-Free Workplace Policy Applicable to Non-Safety Sensitive Personnel – *Approved by Resolution No. 2026-58*

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

10. Report of the Chair

10.a. American Public Transportation Association (APTA) TRANSForm and Expo

Vice Chair Esser and Director Ratto reported the following information from their attendance at the 2026 APTA TRANSForm Conference:

- Learned about transit performance benchmarking and data-driven service improvements
- Attended sessions regarding transit funding challenges and regional funding strategies
- New York City's Metropolitan Transportation Authority's (MTA's) congestion pricing program and its impact on bus speeds and ridership
- Federal transit funding outlook and delays in project funding
- Visited various vendor booths regarding emerging transit equipment and technologies

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11. Report of the General Manager/CEO | October 28, 2026

Public Comment

Aleta Dupree, Team Folds, commented on transit funding and congestion pricing, capital plan programs, and reduced fares.

12. Recess to Committee Meetings

The Board meeting recessed to Committee Meetings at 3:09 pm.

13. Community Relations Committee / Committee of the Whole

The Community Relations Committee meeting was held.

14. Finance Committee / Committee of the Whole

The Finance Committee meeting was held.

Director Medina joined the meeting at 3:54 pm.

15. Strategic Planning, Development, and Sustainability Committee / Committee of the Whole

The Strategic Planning, Development, and Sustainability Committee meeting was held.

16. Legislative Committee / Committee of the Whole

The Legislative Committee meeting was held.

17. Reconvene Board of Directors Meeting

Chair Chuang reconvened the Board meeting at 5:12 pm.

18. Matters for Board Consideration: Finance Committee

18.a. Awarding Contracts to AECOM Technical Services, Inc. and WSP USA, Inc. for On-Call Environmental Planning, Permitting and Support Services for an Aggregate Not-To-Exceed Amount of $11.1 Million for a Five-Year Base Term, with up to Two One-Year Option Terms for an Additional Not-to-Exceed Amount of $877,500 per Option Year, for an Aggregate Not-To-Exceed Amount of $12.9 Million – *Approved by Resolution No. 2026-59*

18.b. Awarding a Contract to Stronger Building Services for the North Base Electric Vehicle Charging Project for a Total Amount of $1,248,000, with a Contract Option for an Additional $84,000 – *Approved by Resolution No. 2026-60*

18.c. Amending to Increase the Fiscal Year 2027 Operating Budget by $13,923,818 for a Revised Budget of $357,271,877 – *Approved by Resolution No. 2026-61*

18.d. **Awarding a Contract to Carahsoft Technology Corp. for Salesforce Customer Relationship Management System Software Licenses for a Not-To-Exceed Amount of $270,000 for a One-Year Base Term, with up to Two One-Year Option Terms for an Additional Not-To-Exceed Amount of $300,000 per Option Year, for an Aggregate Not-To-Exceed Amount of $870,000** – *Approved by Resolution No. 2026-62*

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18.e. Awarding a Contract to Infosys Public Services, Inc. for Salesforce Customer Relationship Management System Implementation Services for a Not-To-Exceed Amount of $800,000, and an Additional Not-To-Exceed Amount of $300,000 for As-Needed Professional Services, for an Aggregate Not-To-Exceed Amount of $1.1 Million – *Approved by Resolution No. 2026-63*

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

19. Written Communications to the Board of Directors

20. Board Members Requests
There were none.

21. Date / Time of Next Regular Meeting: Wednesday, December 2, 2026, at 2:00 pm

22. Report of the General Counsel

22.a. Closed Session Performance Evaluation Pursuant to Government Code Section 54957(b)(1) and Conference with Labor Negotiator under Government Code Section 54957.6
Title / Unrepresented Officer: General Manager/Chief Executive Officer
Designated Agency Representative: Board Chair Marie Chuang

Ms. Cassman announced the closed sessions items.

The Board recess to closed session at 5:15 pm.

Director Canepa left the meeting at 5:15 pm.

Directors Powell and Ratto left the meeting at 6:25 pm.

23. Reconvene Open Session
The Board reconvened to open session at 6:26 pm.

24. Report Out from Closed Session

24.a. Amending Contract with General Manager/CEO or Declaring Uncertainty of Compensation for the General Manager/CEO as of November 1, 2026 – *Approved by Resolution No. 2026-64*

Ms. Cassman stated the Board is considering an amendment to the contract with General Manager/CEO to extend the contract through December 31, 2029; to include an equity

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adjustment to the base salary in the amount of $5,000; to remove the vehicle benefit provision, which the General Manager/CEO has not utilized; and there may be other considerations in the future, however none are to be considered at this time.

Motion to approve contract amendment as stated by the General Counsel/Second: Gee/Esser
Ayes: Fraser, Gee, Medina, Speier, Esser, Chuang
Noes: None
Abstain: None
Absent: Canepa, Powell, Ratto

25. Adjournment

The meeting adjourned at 6:28 pm in memory of John Ward.

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San Mateo County Transit District
Staff Report

To: Board of Directors

Through: April Chan, General Manager/CEO

From: Chris Andrichak, Chief Financial Officer

Subject: **Accept Quarterly Fuel Hedge Update**

Action

Staff recommends the San Mateo County Transit District (SamTrans) Board of Directors (Board) accept the quarterly fuel hedge update report for Fiscal Year 2027 Quarter 1 (FY27Q1).

Background

The Diesel Fuel Hedging Program was implemented in May 2020 for SamTrans and is designed to minimize large budget variances resulting from the volatility of diesel fuel prices. An effective hedging strategy can increase budget certainty and facilitate a more effective utilization of budgetary resources. The purpose of the Program is not to speculate on the price of fuel but to manage risk, particularly as it relates to SamTrans' annual budget.

Significance

The purpose of this report is to provide an update on the implementation and performance status of the Fuel Hedging Program (Program) established for SamTrans. Staff are exploring options to shift part of the diesel fuel hedge toward hydrogen and electricity as SamTrans transitions to a zero-emission fleet.

Under this Program, staff will continue to work with Linwood Capital, LLC, to:

- Secure new diesel fuel hedge contracts as market conditions permit.
- Evaluate timing and feasibility of implementing alternative hedge programs related to zero-emission vehicles.
- Modify the diesel hedge size to safeguard SamTrans' fuel budget from market volatility, while accounting for reduced diesel usage during the transition to a zero-emission fleet.

Under the current Innovative Clean Transit (ICT) transition plan, diesel fuel consumption is expected to decline steadily in accordance with the diesel bus replacement schedule. As additional zero-emission buses (ZEBs) are delivered and placed into service in the upcoming fiscal years, our reliance on diesel fuel will continue to diminish.

FY27Q1 Fuel Hedge Performance

- In FY27Q1, the fuel hedging program realized a net gain of $779,243. This is approximately $2.19 per gallon of realized gain on 355,681 consumed gallons for the quarter. The gain reflects the difference between the hedged price and the actual market price of fuel during the period, which can fluctuate based on market conditions. During the quarter, the approximate cost of fuel before taxes and fees and after the effect of the hedge was $2.95 (Hedged Rate $/Gallon).

- For FY26Q4, there was a realized net gain of $423,785 or $1.11 per gallon on 381,956 gallons of consumption with a cost before taxes and fees and after hedging of $3.69 (Hedged Rate $/Gallon).

The FY27Q1 results reflect realized gains, which are in line with expectations as SamTrans anticipate incurring gains approximately half of the time, with losses anticipated in other periods. The primary purpose of the hedge is to manage financial risk, not speculate or make investment gains. Any loss or gain from the hedge offsets fluctuations in the fuel prices and helps SamTrans to smooth the impact of market volatility.

FY27Q1 Hedge Program Asset Information

- The futures account value of $5,788,767 as of September 30, 2026, consists of:
    - $200,000 in net cash contributions by SamTrans since inception in May 2020,
    - $291,919 in cumulative net interest income since inception ($14,656 of which was earned in FY27Q1),
    - $3,255,563 in realized net gains (decreased fuel cost) since inception, and
    - $2,041,284 in unrealized gain (contingent future decreased fuel cost), up by $869,707 from $1,171,577 on June 30, 2026.
- As of September 30, 2026, the future account value was $5,788,767. The value increased by $1,663,606 during FY27Q1.

FY27 Prospective

- For the balance of FY27, there is an unrealized gain of $1,728,199 which is $1.93/gallon on all projected consumption. This assumes projected consumption of 895,766 gallons for the balance of FY27 at an average price of $2.93 per gallon, net of fuel hedge before taxes and fees.

- For the balance of FY27, approximately 86 percent of the remaining anticipated fuel usage of 895,766 gallons is hedged on a tax adjusted basis.

Key Takeaways

- **Q1 Performance:** The program achieved a net gain of **$779,243** ($2.19/gallon) on 355,681 consumed gallons. This brought our net fuel cost down to **$2.95/gallon** (before taxes/fees).

- **Account Portfolio:** As of September 30, 2026, the total account value grew to **$5,788,767**. This includes $3.25 million in cumulative realized gains and $2.04 million in unrealized gains since inception.

- **FY27 Outlook:** We are highly protected for the remainder of FY27, with **86 percent of projected fuel usage hedged** at an expected net average of $2.93/gallon.

Budget Impact

There is no impact on the budget.

Prepared By:	Daniel Yap	Senior Financial Analyst, Debt, Investment and Cash Management	650-508-6405
	Ray Galindo	Interim Manager, Treasury	650-508-7757

San Mateo County Transit District
Staff Report

To: Board of Directors

Through: April Chan, General Manager/CEO

From: Chris Andrichak, Chief Financial Officer

Subject: **Authorizing the Filing of an Application with the Metropolitan Transportation Commission for Transportation Development Act, State Transit Assistance, and Regional Measure 2 Funds for Fiscal Year 2027**

Action

Staff recommends that the Board of Directors (Board) authorize filing a claim to receive Transportation Development Act (TDA) Article 4.0 and 4.5 funds, State Transit Assistance (STA), and Regional Measure 2 (RM2) funds for Fiscal Year 2027 (FY27). The total amount to be claimed and received by the San Mateo County Transit District (District) is $68,494,095. The District is also claiming $16,054,140 in STA operating funds on behalf of, and to be passed through to, the Peninsula Corridor Joint Powers Board (JPB).

Based on the Metropolitan Transportation Commission's (MTC) latest estimates, the District may claim the following amounts for FY27:

Funding Source	FY27 Adopted Budget	FY27 MTC Claim	Increase / (Decrease)
Transportation Development Act (TDA)			
TDA Article 4.0 (SamTrans bus)	$51,792,728	$54,454,446	$ 2,661,718
TDA Article 4.5 (Paratransit)	2,725,933	2,866,023	140,090
TDA Total	**$54,518,661**	**$57,320,469**	**$ 2,801,808**
State Transit Assistance (STA)			
Revenue Based	$ 9,330,152	$ 9,902,938	$ 572,786
Population Based	1,011,412	1,011,412	0
Total District Operating TDA & STA	**$64,860,225**	**$68,234,819**	**$ 3,374,594**
STA Population Lifeline (SamCoast/Route 117)	500,000	0	(500,000)
RM2 (SamTrans Owl Service)	250,000	259,276	9,276
Total District TDA, STA, and RM2 Funding	**$65,610,225**	**$68,494,095**	**$ 2,883,870**

Peninsula Corridor Joint Powers Board (JPB)			
STA Based Revenue	$10,624,575	$16,054,140	$5,429,565
Total JPB STA Pass-Through Funding	**$10,624,575**	**$16,054,140**	**$5,429,565**

Significance

TDA and STA funding allocated by the MTC supports the District's fixed-route bus and paratransit services for San Mateo County residents. In addition, the District claims STA funds on behalf of the JPB, which funds will be used to support the JPB's operating budget to cover ongoing costs and ensure continuation of current service levels.

Furthermore, the District usually claims STA funds to be passed through to eligible local jurisdictions in support of locally operated shuttle and transportation programs. Although these entities are independently eligible to receive funding, the District facilitates the process by acting as the claimant and distributing the appropriate share of funds. This approach promotes regional collaboration and strengthens partnerships by providing administrative support. For this specific claim, we are not including these funds because the next cycle of the Lifeline Program has not yet been awarded. Once those funds are awarded, staff will bring another resolution to the Board to claim these pass-through funds in addition to operations funds provided to SamTrans for Route 117 and SamCoast Service.

In addition to TDA, STA, and Senate Bill 125 funds, the MTC allocates Regional Measure 2 (RM2) and RM3 bridge toll revenues. The District's RM2 claim will offset operating costs for Route 397, a late-night Owl Service which services Palo Alto Caltrain Station, San Francisco International Airport, and the Transbay Terminal in San Francisco. The District does not currently receive operational funding from RM3.

The District must submit an application to MTC each year to receive the allocations outlined above.

Budget Impact

The District's FY27 Operating budgeting includes TDA funding in the amount of $51,792,728, STA funding in the amount of $9,330,152, STA Population Lifeline funding for SamCoast and Route 117 in the amount of $500,000, and RM2 funding in the amount of $250,000. The TDA, STA, and RM2 claims are higher than the adopted budget due to updated allocations released after the budget was finalized and inclusion of prior-year unclaimed funds into the FY26 claim. The STA Population Lifeline funding is not being claimed yet due to a delay in the Lifeline Cycle 8 Call for Projects, which is expected in December 2026 and will be claimed early next year.

The JPB's FY27 Operating budget includes STA funding in the amount of $10,624,575. The claims filed on behalf of the JPB are higher than the adopted budget based on the latest funding estimates. These amounts are claimed by the District on behalf of the JPB and do not impact the District's budget.

Usually, the District's FY27 Operating budget includes some amount in STA funding to be passed through to other agencies. SamTrans will file the STA claim on behalf of these agencies once the next cycle of Lifeline Program awards are released. Since these funds are fully passed through, there is no net impact on the District.

Background

TDA funding provides a significant share of the District's operating revenues. TDA and STA dollar amounts cited are estimates from the MTC and are subject to adjustment if actual receipts differ from projections over the course of the year.

Prepared By:	Heather Salem	Director, Grants, Billing, and Project Controls	650-730-8099
	Perry Chavez	Program Manager, Grants	650-730-7716

Resolution No. 2026-

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

*** * ***

Authorizing the Filing of an Application with the Metropolitan Transportation Commission for Transportation Development Act, State Transit Assistance, and Regional Measure 2 Funds for Fiscal Year 2027

Whereas, the Metropolitan Transportation Commission (MTC) is the transportation planning agency for the nine-county San Francisco Bay Area and, as such, distributes assorted federal and state transit and transportation planning funds to cities, counties, and other entities to spend, including but not limited to funds authorized by the Transportation Development Act of 1971 (TDA), and Regional Measure 2 (RM2), as set forth below; and

Whereas, the TDA (Public Utilities Code §§ 99200 et seq.) provides for the disbursement of TDA Article 4.0 and 4.5 Funds, and State Transit Assistance (STA) Funds (Public Utilities Code §§ 99310 et seq.); and

Whereas, RM2 (Streets and Highway Code §§ 30921, 30914, and 30914.5) was adopted by the voters of seven Bay Area counties in 2004 to provide funding for new transit options in the Bay Area's toll bridge corridors, to relieve traffic congestion and bottlenecks, and to build secondary transit connections, with funds available to specific recipients subject to application to the MTC; and

Whereas, the San Mateo County Transit District (District) acts as managing agency for the Peninsula Corridor Joint Powers Board (JPB); and

Whereas, for technical reasons, the JPB is not eligible to apply for funds under these four sources, but the District can apply for funds on behalf of the JPB; and

Whereas, the District is an eligible claimant for funds under the sources described above to support transit operations and planning, and to pass through funds to other entities including the JPB, San Mateo County, the City/County Association of Governments of San Mateo County, cities in San Mateo County, and the entity responsible for administering the Paratransit Advisory Council (PAC) (Public Utilities Code §§ 99260(a), 99260.2, 99260.6, and 99275; Resolution Nos. 2012-26 and 2012-28, dated June 13, 2012, and District's Opinion of Counsel dated May 9, 2013); and

Whereas, the MTC has provided the District with estimates of its share of TDA and STA funds and the JPB's share of STA funds for Fiscal Year 2027 (FY27), subject to adjustment if actual receipts differ from projections over the course of the fiscal year; and

Whereas, the General Manager/CEO recommends, and the Finance Committee concurs, that the Board of Directors (Board) authorize the General Manager/CEO, or designee, to apply to the MTC for funds for FY27 from the specified sources and for the purposes set forth below, to:

1. TDA Article 4.0 (SamTrans Bus): $54,454,446
2. TDA Article 4.5 (Paratransit): $2,866,023
3. STA Revenue Based (SamTrans Bus General Operating Expense): $9,902,938
4. STA Population Based (American Rescue Plan): $1,011,412
5. RM2 (SamTrans Owl Service): $259,276
6. JPB STA Revenue Based (JPB Operating): $16,054,140

Now, Therefore, Be It Resolved by the Board of Directors of the San Mateo County Transit District that the General Manager/CEO, or designee, hereby is authorized and directed to file appropriate claims for Transportation Development Act Article 4.0 and 4.5 Funds, State Transit Assistance Funds, and Regional Measure 2 Funds, together with all necessary supporting document, with the Metropolitan Transportation Commission for FY27 as listed above; and

Be It Further Resolved, that the General Manager/CEO, or designee, is authorized and directed to file appropriate amendments to these claims, together with all necessary supporting documents, with the MTC to carry out the policies of the Board and attendant funding requirements during FY27, as may be adopted from time to time by the Board; and

Be It Further Resolved, that the District indemnifies and holds harmless the MTC, its Commissioners, representatives, agents, and employees from and against all claims, injury, suits, demands, liability, losses, damages, and expenses, whether direct or indirect (including any and all costs and expenses in connection therewith), incurred by reason of any act or failure to act of the District, its officers, employees or agents, or subcontractors or any of them in connection with its performance of services under the allocation of RM2 funds. In addition to any other remedy authorized by law, the MTC may retain as much of the funding due under the allocation of RM2 funds as shall reasonably be considered necessary by the MTC until disposition has been made of any claim for damages; and

Be It Further Resolved, that the General Manager/CEO, or designee, is authorized and directed to transit an executed copy of this Resolution to the MTC in conjunction with the filing of the claims authorized pursuant to this Resolution, and to request that the MTC concur in these findings and grant the allocation of funds as specified.

Regularly passed and adopted this 2nd day of December, 2026 by the following vote:

Ayes:

Noes:

Absent:

_____
Chair, San Mateo County Transit District

Attest:

_____
District Secretary

San Mateo County Transit District
Staff Report

To: Board of Directors

Through: April Chan, General Manager/CEO

From: Joshuah Mello, Chief Planning Officer

Subject: **Ratifying the Agreement with Voice Intelligence Labs, Inc. to Sublease 3,632 Square Feet of Office Space at 166 North Rollins Road in Millbrae, California, for 51 Months for Total Base Rents of $1,120,180.80, and the Associated Agreement with SFIII Millbrae, LLC for Consent of the Same**

Action

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

1. A sublease agreement with Voice Intelligence Labs, Inc. (VIL) to sublease Suite #405, totaling 3,632 square feet, at the District Headquarters (DHQ), located at 166 North Rollins Road, Millbrae, in San Mateo County, California, for 51 months for total base rents of $1,120,180.80 (Sublease Agreement)

2. An agreement with SFIII Millbrae, LLC (referred to herein as "Swift") documenting the DHQ building owner's consent of the sublease (Consent Agreement).

Significance

Staff is requesting Board ratification of the Sublease Agreement and Consent Agreement permitting VIL to occupy Suite #405 (also referred to as Suite C), consisting of approximately 3,632 rentable square feet on the fourth floor of DHQ, with occupancy anticipated as soon as practicable. As the District is currently a tenant of DHQ, the Sublease Agreement is beginning as a sublease and will convert to a lease when the District becomes the building owner. The proposed action is a ratification because the General Manager/CEO has already executed the Sublease Agreement and Consent Agreement based on guidance previously provided by the Board related to negotiation of the price and terms of payment of the Sublease Agreement.

Under the Sublease Agreement, VIL will receive access to the subject premises 30 days before commencement of the 51-month term to install furniture, fixtures, and voice and data communications equipment necessary for occupancy. Additionally, VIL will receive a three-month rental abatement following the Sublease Agreement commencement date, a common concession in the current commercial office market. The District will not provide tenant improvement allowances to VIL.

As a DHQ subtenant (and then tenant), VIL will have nonexclusive access to the building's common areas and shared facilities, along with other building occupants. These areas include five parking spaces in the District garage; the exterior plaza and surrounding land and improvements; the fourth-floor gym, showers, and locker room; and the boardroom and meeting spaces. Use of the boardroom and meeting spaces will be subject to availability, advance reservation, and payment of reasonable charges established by the District.

The Sublease Agreement will generate approximately **$1,120,108.80** in rental revenue over the 51-month term, as shown in the table below.

Period	Monthly Base Rent per Square Foot of Rentable Floor Area (3,632 SF)	Monthly Base Rent	Total Base Rent
Year 1: Months 1-3	$0	$0	$0
Year 1: Months 4-12	$6.10	$22,155.20	$199,396.80
Year 2: Months 13-24	$6.28	$22,808.96	$273,707.52
Year 3: Months 25-36	$6.47	$23,499.04	$281,988.48
Year 4: Months 37-48	$6.66	$24,189.12	$290,269.44
Year 5: Months 49-51	$6.86	$24,915.52	$74,746.56
Total Base Rent			**$1,120,180.80**

In addition, VIL will pay 2.32 percent pro rata shares of Direct Expenses, which encompass various direct landlord costs including, but not limited to, operating expenses, property taxes and insurance expenses.

The District will be required to pay the following brokerage commissions over the term of the Agreement, as follows:

$1.50/sf/yr (District's Broker)	$21,792
$3/sf/yr (VIL's Broker)	$43,584
Total per year	**$65,376**

In addition, for as long as the DHQ is being leased by the District, the building owner will be entitled to 50 percent of the difference between the rents paid by VIL (net of certain District leasing costs including brokerage commissions) and the rents paid by the District for the portion of the DHQ being sublet to VIL.

District staff, in consultation with the District's real estate broker, reviewed and negotiated the proposed business terms and conditions of the Sublease Agreement, with the various and profit shares described above, and determined that the Sublease Agreement is consistent with the District's objectives and requirements as the master tenant for the DHQ property. Legal Counsel to the District drafted the Sublease Agreement.

Finally, the District requested and obtained consent to the sublease from Swift, the current DHQ building owner/landlord. Negotiations were successfully completed and the General Manager/CEO executed the Consent Agreement with Swift.

Budget Impact

After accounting for brokerage commissions, the Sublease Agreement is expected to generate approximately $1.1 million in rental income over its 51-month term. VIL's contribution of 2.32 percent of the District's Direct Expenses, including the Common Area Maintenance (CAM) charges, will reduce the District's costs of leasing and then ownership of DHQ.

Budget for the brokerage commissions was included in the Fiscal Year 2027 Revised Operating Budget that the Board approved at its November 2026 meeting. Funds for future years' brokerage commissions will be requested in future operating budgets and covered by rental income from the leased space.

The District paid $12,000 in legal and administrative review fees incurred by Swift to obtain consent and approve the Sublease Agreement under a condition of the lease agreement.

Background

On August 2, 2023, the Board authorized the General Manager/CEO to pursue acquisition of a new District headquarters.

In December 2023, the Board authorized the General Manager/CEO to execute a lease agreement for the District's new headquarters at 166 North Rollins Road in Millbrae, California, with the option to purchase the building for $126 million after paying at least eight months of rent. The rent payment precondition was met on October 1, 2026, and, pursuant to Resolution No. 2026-51, the District has exercised its option to purchase DHQ. Staff is proceeding with all steps required to close the transaction in early 2027.

Built in 2023, the DHQ is an approximately 180,000-square foot, six-story building with approximately 157,000 square feet of office space, about 23,000 square feet of first-floor retail space, and both public and tenant/owner parking. After accounting for office space occupied by the District, the San Mateo County Transportation Authority, and the Peninsula Corridor Joint Powers Board, there remains approximately 17,458 square feet of rentable vacant office space on the fourth floor.

To activate the vacant office suites and generate rental revenue, staff issued a work directive to CBRE to market the available space and assist the District in securing subtenants/tenants. VIL will be the District's first commercial subtenant/tenant at DHQ.

VIL is a newly incorporated next-generation voice artificial intelligence (AI) startup. According to VIL, it is building AI models that enable more natural and real-time voice interactions between people and AI systems. VIL's client base will primarily consist of technology companies that want to integrate advanced AI voice capabilities into their products.

Staff performed financial due diligence on VIL, including review of a Dun and Bradstreet report, recent bank statements, and documentation of venture capital funding deposits. Due to VIL being a newly established company with limited long-term financial performance data, staff determined it would be in the District's best interest to mitigate potential financial risk to the District by requiring a $193,077.12 security deposit, representing six months of combined base rent and VIL's anticipated share of operating expenses (estimated at $2/square foot).

Prepared By:	Megan LaRocque	Lease Administrator	650-508-7978
	Charla Gomez	Transit-Oriented Development Manager	650-730-9507

Resolution No. 2026-

Board of Directors, San Mateo County Transit District

State of California

*** * ***

Ratifying the Agreement with Voice Intelligence Labs, Inc. to Sublease 3,632 Square Feet of Office Space at 166 North Rollins Road in Millbrae, California, for 51 Months for Total Base Rents of $1,120,180.80, and the Associated Agreement with SFIII Millbrae, LLC for Consent of the Same

Whereas, pursuant to Resolution No. 2023-59, the Board of Directors (Board) authorized the San Mateo County Transit District (District) to enter into a lease-to-purchase agreement for the Gateway at Millbrae Station, located at 166 North Rollins Road, Millbrae, California 94030 (now referred to as the "District Headquarters" or "DHQ"); and

Whereas, the lease-to-purchase agreement provides for a lease term of up to 146 months, with an option to purchase the building for $126 million within 30 months of moving in or substantial completion of build-out, and after paying at least eight months of rent; and

Whereas, on October 8, 2026, pursuant to Resolution No. 2026-51, the District informed SFIII Millbrae, LLC, the current owner of DHQ (referred to herein as "Swift"), that the District is exercising its option to purchase the building; and

Whereas, during the lease period, the District may sublease vacant office premises on the Fourth Floor at DHQ, with the consent of Swift and the understanding that any sublease will become a lease once the District acquires the building; and

Whereas, following consultation with the Board on the price and terms of payment, staff and the District's representatives have negotiated, and the General Manager/CEO has

executed, an agreement for Voice Intelligent Labs, Inc. (VIL) to sublease, and then lease, 3,632 square feet on the Fourth Floor of DHQ ("Suite #405" or "Suite C") for 51 months, subject to the following key terms:

- Security Deposit: $193,077.12
- Monthly Base Rents per square foot:

  Year 1 (Months 1-3): $0 (Rent abated)

  Year 1 (Months 4-12): $6.10

  Year 2 (Months 13-24: $6.28

  Year 3 (Months 25-36): $6.47

  Year 4 (Months 37-48): $6.44

  Partial Year 5 (Months 49-51): $6.86
- Direct Expenses: 2.32 percent pro rata share of direct landlord costs, including but not limited to operating expenses, property taxes, and insurance expenses
- Tenant Improvement Allowance: $0
- Non-exclusive access to common areas, including but not limited to: fourth floor shared gym and locker room; first floor lobby; fifth floor public hearing and other meeting rooms (subject to availability, payment of reasonable charges and advanced reservations required)
- Parking: five spaces in the DHQ garage; and

Whereas, staff and the District's representatives also have negotiated and the General Manager/CEO has executed an agreement with Swift to document its consent to the VIL sublease; and

Whereas, the Board desires to ratify (1) the agreement with VIL, and (2) the agreement documenting Swift's approval of the VIL agreement.

Now, Therefore, Be It Resolved that the Board of Directors of the San Mateo County Transit District hereby ratifies (1) the agreement to sublease, and then lease, Suite #405 (Suite C) at 166 North Rollins Road, Millbrae, California, to Voice Intelligence Labs, Inc., consistent with the terms set forth above, for total base rents of $1,120,180.80, and (2) the agreement documenting SFIII Millbrae, LLC's consent to the sublease.

Regularly passed and adopted this 2nd day of December, 2026 by the following vote:

Ayes:

Noes:

Absent:

_____

Chair, San Mateo County Transit District

Attest:

_____

District Secretary

Resolution No. 2026-

Board of Directors, San Mateo County Transit District

State of California

Resolution of Appreciation for

David J. Canepa

Whereas, David J. Canepa was appointed to the San Mateo County Transit District Board of Directors on January 1, 2023, representing the San Mateo County Board of Supervisors, and has served with distinction throughout his four-year term; and

Whereas, during his tenure**, Director Canepa** provided thoughtful leadership, strategic direction and a strong commitment to advancing public transportation, improving mobility, promoting sustainability and enhancing the quality of life for residents throughout San Mateo County; and

Whereas, Director Canepa demonstrated his leadership through his service as Chair of the Strategic Planning, Development and Sustainability Committee in 2023 and 2024, helping guide important discussions and policy decisions involving the District's long-term vision, development priorities and sustainability initiatives; and

Whereas, in 2023**, Director Canepa** also served as a member of the Transit-Oriented Development (TOD) Housing Ad Hoc Committee and the Innovative Clean Transit (ICT) / Sustainability Ad Hoc Committee, contributing to the District's efforts to advance housing opportunities near transit and support the transition to cleaner, more sustainable transportation; and

Whereas, in 2024**, Director Canepa** continued his leadership as Chair of the Strategic Planning, Development and Sustainability Committee while serving on the Finance Committee, TOD Housing Ad Hoc Committee and Innovative Clean Transit (ICT) / Sustainability Ad Hoc Committee, helping advance the District's financial stewardship, strategic planning and environmental priorities; and

Whereas, in 2025**, Director Canepa** served as Chair of the Community Relations Committee and as a member of the Finance Committee, supporting the District's commitment to meaningful community engagement, public accountability and responsible financial management; and

Whereas, in 2026, Director Canepa continued his service as a member of the Strategic Planning, Development and Sustainability Committee, Legislative Committee, TOD Housing Ad Hoc Committee and Capital Improvement Projects (CIP) Ad Hoc Committee, contributing to discussions and decisions that will help shape the District's future investments, infrastructure and transportation priorities; and

Whereas, during **Director Canepa's** tenure, SamTrans achieved significant milestones that strengthened the agency's ability to serve San Mateo County, including:

- Receiving the American Public Transportation Association's Outstanding Public Transportation System Award in 2024, recognizing SamTrans as the nation's top public transportation system;
- Adopting *Moving San Mateo County*, the District's 10-year strategic plan, in 2024 to establish a long-term vision and priorities for transportation, mobility and community investment;

- Celebrating SamTrans' 50th anniversary in 2026, marking five decades of connecting people and communities throughout San Mateo County and beyond, while surpassing 750 million passenger trips since the agency began service in 1976; and

Whereas, Director Canepa's service reflected a commitment to the important role public transportation plays in connecting people to jobs, education, health care, housing and essential services, while supporting economic opportunity, environmental sustainability and vibrant communities; and

Now, Therefore, Be It Resolved that the San Mateo County Transit District (SamTrans) Board of Directors hereby commends and expresses its sincere appreciation to **David J. Canepa** for his dedicated service, leadership and contributions to the District and the residents of San Mateo County.

Regularly passed and adopted this 2nd day of December 2026.

samTrans

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Chair, San Mateo County Transit District

Resolution No. 2026-

Board of Directors, San Mateo County Transit District

State of California

Resolution of Appreciation for

Marie Chuang

Whereas, Marie Chuang was sworn in on Jan. 4, 2023, as a member of the San Mateo County Transit District Board of Directors, representing the Central Judicial Cities; and

Whereas, in 2026**, Chair Chuang** assumed the role of Board Chair, providing leadership and guidance to the District while also serving on the Governance Ad Hoc Committee and Senate Bill 63 Return-to-Source Effort Ad Hoc Committee; and

Whereas, in 2025**, Chair Chuang** served as Board Vice Chair and contributed her leadership and expertise as a member of the Strategic Planning, Development and Sustainability Committee; Audit Committee; Citizens Advisory Committee Nominating Committee; Transit-Oriented Development Housing Ad Hoc Committee; General Manager / Chief Executive Officer Evaluation Committee; and Capital Improvement Program Ad Hoc Committee; and

Whereas, in 2024, **Chair Chuang** continued her leadership as Chair of the Finance Committee and served on the Transit-Oriented Development Housing Ad Hoc Committee and General Manager / Chief Executive Officer Evaluation Committee; and

Whereas, in 2023, **Chair Chuang** served as Chair of the Community Relations Committee and as a member of the Finance Committee and Transit-Oriented Development Housing Ad Hoc Committee; and

Whereas, Chair Chuang demonstrated a strong commitment to public service through her dedicated leadership and advocacy on behalf of the residents, transit riders, employees and communities served by SamTrans; and

Whereas, Chair Chuang provided leadership during the development and advancement of the Regional Transit Measure, supporting regional efforts to pursue a coordinated, sustainable funding approach for public transportation service throughout the Bay Area; and

Whereas, Chair Chuang helped commemorate SamTrans' 50th anniversary, celebrating five decades of public transportation service and the agency's longstanding role in connecting San Mateo County communities; and

Whereas, Chair Chuang supported the District's successful transition to its new headquarters in Millbrae, establishing a modern, centrally located home for SamTrans and supporting continued collaboration among employees and regional transportation partners; and

Whereas, Chair Chuang helped guide the adoption of *Moving San Mateo County*, the District's strategic plan establishing a vision and direction for SamTrans over the next decade; and

Whereas, throughout her tenure, **Chair Chuang** has consistently demonstrated an unwavering commitment to sound financial stewardship, transparent governance, meaningful community engagement, strategic planning, sustainable transportation, transit-oriented development and the continued advancement of reliable public transportation in San Mateo County; and

Now, Therefore, Be It Resolved that the San Mateo County Transit District (SamTrans) Board of Directors hereby commends and expresses its sincere appreciation to Marie Chuang for her outstanding service to the District, her strong and collaborative leadership, and many accomplishments on behalf of SamTrans customers.

Regularly passed and adopted this 2nd day of December 2026.

samTrans

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Chair, San Mateo County Transit District

BOARD OF DIRECTORS 2026

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

APRIL CHAN
GENERAL MANAGER/CEO

Memorandum

Date: November 24, 2026

To: SamTrans Board of Directors

From: April Chan, General Manager/CEO

Subject: Report of the General Manager/CEO

SamTrans fixed-route bus trips for the first three months of Fiscal Year 2027(FY27), ending September 30, 2026 were 102.2 percent of the total bus trips for the same three months in FY19 (pre-pandemic).

Ridership	3-months September 2018	3-months September 2026	Recovery Rate
SamTrans	2,715,720	2,774,506	**102.2%**
AC Transit	13,374,020	10,065,419	75.3%
SFMTA	54,521,618	45,173,746	82.3%
VTA	6,915,136	6,407,459	92.7%
Dallas	7,522,928	6,896,546	91.7%
Seattle - King	30,399,445	23,004,589	75.7%
Chicago	60,673,156	53,237,246	87.8%
Atlanta	12,008,609	8,665,783	72.2%
New York MTA	176,630,228	174,762,330	99.1%
National Bus	1,145,393,505	977,590,710	85.3%
Caltrain	4,889,911	4,745,838	97.1%
BART Extension	3,580,962	2,063,307	57.6%
BART System	33,153,468	19,061,142	57.5%
National Rail	1,182,749,188	1,008,930,645	85.3%
Total NTD Trips	2,452,239,010	2,093,087,654	85.6%

Free Fares New Year's Eve 2026

SamTrans will provide free fares on New Year's Eve for SamTrans motor bus, RidePlus microtransit, Redi-Wheels, and RediCoast paratransit systems.

Bus Operator Staffing

	Approved FTEs	Trainees	No. Bus Operators*
Bus Operators	350	8	352

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

Miles Between Preventable Accidents

For the month of October 2026, South Base District operated buses exceeded their 100,000 miles between preventable accidents goal. However North Base and Community Urban Bus (CUB) services fell short of the 100,000 miles goal.

The table below provides the miles between accidents by mode and location for the month of September 2026. While accidents are defined as any event that involves any of the following: fatality, serious injury, collision of a San Mateo County Transit District (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 reasonable to prevent it. Most of the District's preventable accidents are negligible in severity.

	October 2026		
	Total Miles	Preventable Accidents	Miles Between Preventable Accidents
North Base	358,437	6	59,740
South Base	255,265	1	255,265
Trainee In-service	7,945	0	nm
CUB + Coastside Fixed	255,337	6	42,556
Fixed Route Total	876,984	13	67,460
ADA	198,538	3	66,179
Microtransit	20,217	0	nm

Severity Classifications

The table below provides the severity classifications for Preventable Accidents for the month of October 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

October 2026	Preventable Accidents - Severity			
	Negligible	Marginal	Critical	Catastrophic
North Base	2	4	0	-
South Base	0	1	-	-
Trainee In-service	-	-	-	-
CUB + Coastside Fixed	3	2	1	-
Fixed Route Total	5	7	1	-
ADA	2	1	-	-
Microtransit	-	-	-	-

Safety Updates

Safety Campaign: Over the past two months, Safety and Transportation departments have launched six safety campaigns based on data collected through the DashCam system. Although the DashCams are in their initial phase of implementation, data obtained informed campaign topics to focus on railroad crossings, traffic lights, following distance, rolling stops, speed, and road conditions. Staff will continue to monitor the data to identify trends, improve driver awareness, and promote safer bus operations.

Emergency Management: The district is preparing for El Niño in collaboration with the San Mateo County Emergency Management and representatives from key internal departments. The initial meeting was held on November 13, 2026. An El Niño Emergency Action Plan was developed by reviewing emergency procedures, identifying flood-prone areas, potential service impacts, identifying departmental responsibilities, establishing emergency contacts, creating evacuation plans, and identifying mutual aid opportunities. The goal is to ensure all departments are ready and know what to do in the event of major flooding, king tides, heavy rain, and other severe weather events.

Next Generation Clipper Status: Metropolitan Transportation Commission (MTC) and Cubic Corporation (Cubic) continue working to stabilize the Next Generation Clipper system while advancing the transition from the legacy platform. MTC's revised phased migration strategy is temporarily paused due to back-office performance issues affecting customers' ability to view recent transactions. Once resolved, phased migration is expected to resume and continue through the end of 2026. The broader bulk migration remains on hold pending resolution of outstanding system issues. As of November 16, approximately 4.89 million of 15 million or about 32.6 percent of Clipper cards had been migrated to the Next Generation system.

Current efforts remain focused on improving system reliability, financial processing, and customer account functionality. While recent software releases have resolved several defects, intermittent performance issues persist and continue to require corrective action.

SamTrans staff continue coordinating with MTC and Cubic to obtain clear documentation of financial reconciliation procedures, resolve outstanding operational issues, and support a stable transition to the Next Generation Clipper system.

Employee of the Month (EOM) Recognitions, October 2026

Bus Operator EOM for North Base is **Austin Yu**. This is Austin's first EOM Award during his three years of service with the District.

Bus Operator EOM for South Base is **Mario Bravo**. This is Mario's first EOM Award during his two years of service with the District.

Bus Maintenance EOM for North Base is Mechanic A **Alan Fang.** This is Alan's fourth EOM Award in his eight years of service with the District.

Bus Maintenance EOM for South Base is Mechanic B **Sandro Moncada**. This is Sandro's eighth EOM Award during his sixteen years of service with the District.

Communications and Marketing Update - October 2026

SamTrans Monthly Press Releases and Earned Media

Press Releases/Blogs/Podcasts:

- SamTrans seeks Coastside public member for Board of Directors
- SamTrans to provide Ride Plus service update at October 14 public meeting
- SamTrans seeks seven volunteers for Measure W Citizens Oversight Committee
- SamTrans seeks members for Paratransit Advisory Council
- Sustainability moves SamTrans and San Mateo County forward

Article Mentions:

- Regional Transit Measure
    - The Fresno Bee, The Press Democrat, KRON 4, San Jose Spotlight, NewsBreak, San Mateo Daily Journal, Substack - Darrel Owens, Modesto Bee,

- Valkyries championship
    - ABC 7
- SamTrans R.I.D.E survey
    - The Almanac
- Millbrae Headquarters lease deal
    - Hoodline
- Redwood City bus boarding project
    - Newsbreak
- SamTrans 50th
    - The Almanac
- Crash in East Palo Alto (EPA)
    - KTVU

Social Media Activities

Digital Marketing Report

- A fare survey went out to riders, parents, and schools in October to gather feedback on youth fare products.
- Phase 2 of Reimagine Dumbarton—which explores a zero-emission busway, walking and biking trail, and community amenities between Redwood City and EPA —continued community outreach.
- SamTrans continued to heavily push the 50th Anniversary Campaign with throwback posts and the start of the SamTrans 50th Spotlight of the South Base.
    - The Transit Training Department's spotlight concluded this month.

Organic Digital Marketing Highlights

- Half Moon Bay Pumpkin Festival Promotion

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

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

OCTOBER 2026	OCTOBER 2025
Impressions: 289,077	Impressions: 1,102,224
Engagements: 9,962	Engagements: 5,384
Post Link Clicks: 2,825	Post Link Clicks: 961

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

Marketing Activity Highlights

SamTrans Digital Performance — October 2026 Summary

The Always On display campaign (Underused Routes banners) delivered 654,572 impressions and 421 clicks in October, a 0.064 percent Click-through Rate (CTR).

Metric	October	September	Change
Impressions	654,572	798,407	−18%
Clicks	421	308	+37%
CTR	0.064%	0.039%	+0.025 pts
Conversions	0	0	—

Millbrae DHQ – TDM & Parking Update



SamTrans Board Meeting
December 2, 2026

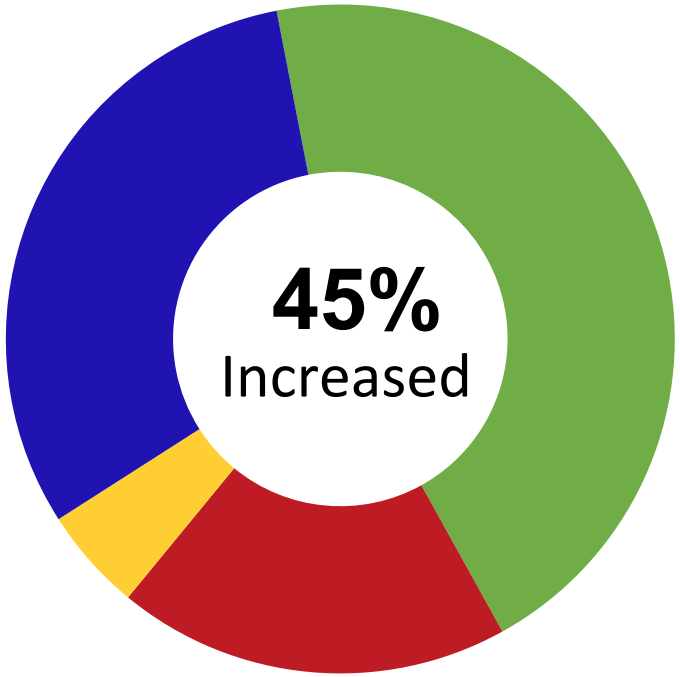
TDM – BayPass Pilot Program

- Known demand for 202 employee parking spaces at San Carlos Central Office
- Only 198 office parking spaces available at new Millbrae DHQ
- Need to reduce parking demand and move more employees to public transit
- Millbrae DHQ offers access to BART, Caltrain express/limited trains, SamTrans buses, and Commute.org shuttles
- BayPass Pilot Program rolled out on May 15, 2026 (move to Millbrae DHQ)
- Program needs to be extended on January 1, 2027

TDM – Employee Survey

Post-Move Employee Survey Results

September 2026 Survey following the move to the Millbrae DHQ



Changes in Transit Commuting

- Increased Transit use – 45%
- Transit use stayed the same – 19%
- Decreased Transit use – 5%
- No Transit use before or after the move – 31%

Commute changes (n=210)

Factors contributing to increased transit use

81% Baypass as a contributing factor

53% More convenient Caltrain/BART access transit option

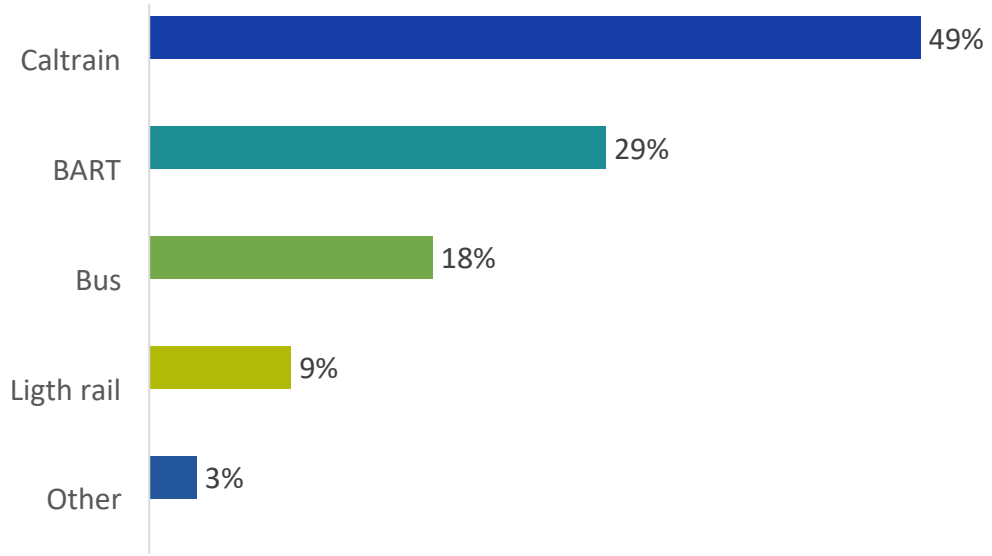
Barriers to transit use

57% Long Transit Commute

45% No convenient

TDM – Employee Survey

Transit Modes Used for Commuting



Survey respondents (n=208); multiple selections allowed

Key Findings

- **Transit options:** Caltrain (49%) and BART (29%) were the leading transit selections, followed by bus and light rail.
- **BayPass coverage:** Includes Caltrain, BART, Muni, VTA, and other participating bus operators
- **Regular benefit use:** 73% selected BayPass as a commuter benefit used at least weekly (n=197).

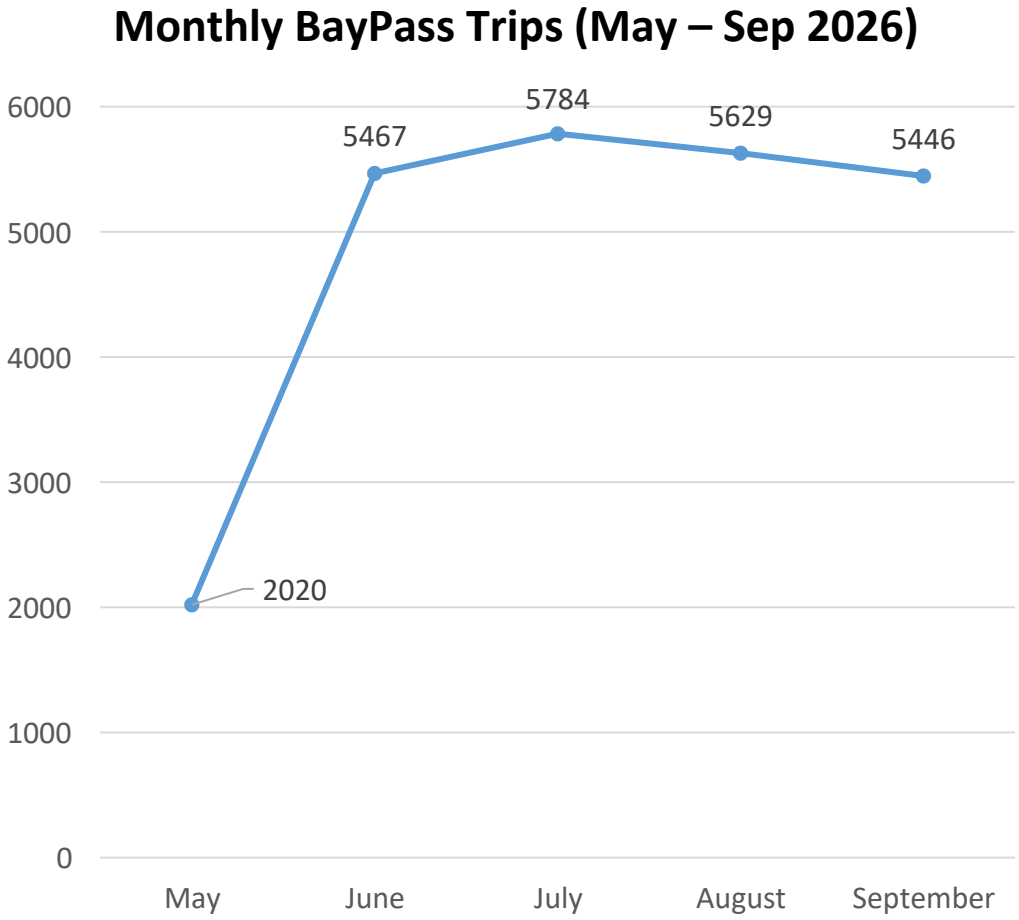
Employee Feedback

"Having multiple transit options to DHQ has been so helpful, especially coupled with the BayPass"; *"Love the BayPass Benefit"*; *Keep BayPass going – it's what keeping everyone commuting via transit!";*
BayPass described as *"an affirmation of our values."*

TDM – BayPass Pilot Program Data

Highlights

- **Pre-move transit interest:** 61% of surveyed employees planned to use transit at the new DHQ, either primarily (34%) or combined with driving (27%)
- **Post-rollout BayPass Participation:** 62% of eligible employees actively used BayPass as of September 2026
- **Employee uptake:** Active BayPass users ↑33% from 206 in May to 273 in September



TDM – BayPass Pilot Program Costs

Program	Cost/CY	Passes Issued	Cost/Issued Pass/CY
San Carlos Central Office			
SamTrans Way2Go Pass CY2025	N/A	253	N/A
Caltrain GoPass CY2025	$120,450	438	$275
ECC Transit Reimbursement CY2025	$9,320	7	$1,130†
Total CY2025	**$129,770**	**438**	**$275**
Millbrae DHQ			
Bay Pass Pilot Program CY2026*	$81,840*	440	$186*
Caltrain GoPass CY2026	$121,000	440	$275
Total CY2026	**$202,840**		**$461**
Bay Pass Pilot Program CY2027	$170,880	445	$384
Caltrain GoPass CY2027	$122,375	445	$275
Total CY2027	**$293,255**		**$659**

* Partial year (May 15 - December 31, 2026)

† Average annual cost of transit reimbursement per participant

Parking – Existing Conditions

Pre-survey Work

- Examined electronic gate-entry records
- Determined that entries subside at 10:30AM

September 27 - October 3, 2026

- Surveyed three times each weekday, beginning at 10:30AM
- Saturday night survey beginning at 10:00PM
- Sunday morning survey beginning at 11:30AM
- Did not include ungated spaces, however observations of those spaces were made

Parking – Existing Conditions

Category	Maximum Demand by Location		Notes
	San Carlos Central Office (All Areas)	Millbrae DHQ (Gated Only)	
Handicapped	2	0	Maximum 4 occupied in ungated area
Non-revenue Vehicles	6	2	Another 19 non-revenue vehicles at BART garage
EV Charging	6	9	San Carlos EV count anywhere; Millbrae EV spaces only
Registered Carpool	4	2	EV spaces are also carpool eligible
Transit Police	6	3	Additional vehicles still parked at San Carlos Central Office
Other Reserved	30	7	SamTrans reduced designated spaces in Millbrae
Unrestricted	165	148	Remainder of vehicles
Total	**219**	**171**	Millbrae total is greater than survey as this is maximum demand by category
Total with San Carlos Adjusted	**211**	**171**	Adjusted total for demand outside of gate

TDM – Next Steps CY2027

- **Extend Bay Pass: Continue BayPass Pilot Program until December 31, 2027**
- **Promote Other Options: Promote bicycle commuting (bike parking room), carpooling, GoNavia parking subsidy, Spin bike share, and Zipcar (explore employee group discount for Spin and Zipcar)**
- **Spread Demand: Work with District Chiefs to encourage additional employees that drive to work to move in-office days to Monday, Thursday, and/or Friday**
- **Adapt: Continue to monitor use of transit, bicycling, and carpooling and adjust/promote programs as needed**

Parking – Next Steps CY2027

- **Reallocate Spaces: Reduce number of reserved carpool, chief, and expectant mother spaces; add more unrestricted and Transit Police spaces to better meet demand (eliminate off-site Transit Police parking)**

- **Motorcycle Parking: Create new motorcycle parking spaces in gated area to free-up full-size spaces**

- **Fix Signage: Correct signage for ADA spaces on 1st floor and office visitor spaces on 2nd floor to increase usage; improve access to existing ADA spaces**

- **Adapt: Continue to monitor use of parking and adjust/promote programs as needed; consider paid parking for CY2028 if needed (could fund BayPass)**

Thank You



Please email melloj@samtrans.com with any questions.

BOARD OF DIRECTORS 2026

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APRIL CHAN
GENERAL MANAGER/CEO

AGENDA

San Mateo County Transit District

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

December 2, 2026 – 2:15 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	Informational
9.b.	Approval of Minutes of the Community Relations Committee Meeting of November 4, 2026	Motion
9.c.	Accessible Services Update	Informational
9.d.	Community Advisory Committee Update	Informational
9.e.	Paratransit Advisory Council Update	Informational
9.f.	Monthly State of Service Report - October 2026	Informational
9.g.	Quarterly State of Service Report - Fiscal Year 2027 Quarter 1	Informational
9.h.	Adjournment	

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

DRAFT Minutes of November 4, 2026

Members Present (In Person): Jeff Gee, Peter Ratto (Chair)

Members Absent: Rico E. Medina

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

Other Board Members Absent: None

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

13.a. Call to Order
Committee Chair Ratto called the meeting to order at 3:09 pm.

13.b. Approval of Minutes of the Community Relations Committee Meeting of October 7, 2026
Motion/Second: Esser/Gee
Ayes: Canepa, Fraser, Gee, Powell, Ratto, Speier, Esser, Chuang
Noes: None
Abstain: None
Absent: Medina

13.c. Accessible Services Update

13.d. Community Advisory Committee Update

13.e. Paratransit Advisory Council Update

13.f. Monthly State of Service Report | September 2026

13.g. Adjournment
The meeting adjourned at 3:17 pm.

DRAFT

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 PAC minutes from the October meeting 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 Transit District
166 N. Rollins Rd, Millbrae, CA 94030
Paratransit Advisory Council (PAC)
Minutes of October 13, 2026

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

Members Absent: D. Do, S. Capeloto

Guests Present: M. Donaldson (MV Transportation), B. Garcia (MV Transportation), P. McCarroll (SamTrans), K. Porter-Brown (SamTrans), M. Ranaldson (Nelson\Nygaard), K. Shanks (SamTrans), M. Thomasmeyer (Nelson\Nygaard), L. Weiner (Commission on Disabilities)

1. **Call to Order and Roll Call**
   Ben McMullan called the meeting to order at 1:39 p.m.

   PAC members and guests introduced themselves.

2. **Consent Calendar**
   a. **Approval of the September 8, 2026, Meeting Minutes**
   Motion / Second: Dubost / Lang
   The meeting minutes were approved by acclamation.

3. **Public Comment for Items Not on the Agenda**
   Larisa Vaserman commented on the ongoing on-time performance issues and called for SamTrans and MV Transportation to maintain their commitment to people with disabilities.

   Raj Agarwal commented on how one of his recent trips was re-routed after he was picked up, which almost caused him to be late for his appointment. Mr. Agarwal also requested trash bins in all new vehicles and a Redi-Wheels app for tracking rides.

   Kathy Uhl expressed concerns about ongoing issues and stated a need to hear from more paratransit riders. Ms. Uhl asked if there is a way to do a focus group with Redi-Wheels riders.

   Ms. Vaserman stated that it is hard to get riders to commit to attending meetings, even a one-time meeting.

   Sandra Lang seconded Ms. Uhl's recommendation.

   Tina Dubost stated that they are aware of the on-time performance issues, but paratransit is a shared-ride service and changes to the trip are possible. Ms. Dubost directed riders to contact Customer Service to file a complaint and share an experience.

4. Update on Same-Day Paratransit Service

Tina Dubost provided an update on same-day paratransit service, including the following highlights:

- Service has been offered since December 2023
- Service is a result of long-standing feedback from riders wanting a same-day option
- Redi-Wheels averages around 10 trips per weekday
- Medical trips are 39% of trips and social trips are 20%.
- The percentage of riders using fare assistance for same-day service is similar to the percentage of riders using fare assistance for regular paratransit service
- Riders report being satisfied with the program

Questions and Comments

Sandra Lang asked if there are differences in the percentage of medical trips completed on regular versus same-day service. Ms. Lang also asked clarifying questions about the difference between the two services and if there are more requests for same-day service.

Kathy Uhl asked if medical trips go beyond the county line.

5. PAC Committee Reports

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

Legislative Issues

Tina Dubost encouraged PAC members to vote in November.

Redi-Wheels Policy Issues

Tina Dubost thanked those who attended the 50th anniversary celebration, especially Ben McMullen and Kathy Uhl for staffing the PAC table.

Ms. Dubost shared information about the Dumbarton Corridor project, stating that there is a survey to collect feedback on the project.

- Sandra Lang asked for more details about the project and whether it will impact service to the East Bay.

Ms. Dubost also reminded PAC members about the One Seat Ride pilot, Via Assist program, and Onward program.

5.b. Education Committee Report

Tina Dubost stated that the next Education Committee meeting will be in November.

5.c. Executive Committee Report

Ben McMullen reported that the Executive Committee discussed more PAC outreach, member recruitment, and inviting more people to the PAC retreat. Mr. McMullen highlighted upcoming presentations to the PAC.

6. SamTrans / Redi-Wheels Reports

6.a. SamTrans Update

Tina Dubost referred to the updates provided during the Committee reports.

6.b. Performance Summary

Tina Dubost provided an overview of ridership, including the following highlights:

- Ridership is consistent and stable
- Distribution of rides is consistent
- On-time performance continues not to meet the standard

6.c. Comment Statistics Report

Tina Dubost reported that there is no data for August due to the new complaints tracking module but that the most frequent complaint is about on-time performance.

There was a discussion about software.

- Larisa Vaserman stated that the software the drivers use has her home address on the wrong side of the street.
- Sandra Lang asked to clarify the different software Redi-Wheels uses.

6.d. Safety Report

Matthew Donaldson provided the safety report, highlighting that there were zero incidents in September. Mr. Donaldson stated that the Bus Contracts team was invited to attend monthly safety meetings and that MV continues to reinforce safety and defensive driving techniques to deliver accident-free service.

7. Updates and Items of Interest

7.a. Agencies

No report.

7.b. County Commissions (COA and COD)

Kathy Uhl reported that the COA staff person is retiring and that COA may be restructuring.

No COD report.

7.c. Center for Independence (CID)

No updates.

7.d. Coastside Transportation Committee (CTC)

No updates.

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

Sandra Lang provided the report for September 29, highlighting that the TA-CAC approved a resolution to be presented to the Transportation Authority that programs and allocates highway funds as a special circumstances request. This would provide additional funding for projects in Colma, Redwood City, and East Palo Alto.

The next TA-CAC meeting is on November 3.

7.f. Department of Rehabilitation (DOR)
No report.

7.g. ADA Policy Refresher
Tina Dubost reminded PAC members about the late cancel and no-show policy. Riders are asked to give as much notice as possible, with at least 2 hours' notice so the seat can be reallocated.

8. Other Business
Larisa Vaserman asked for more information on the Onward program.

9. Adjournment
The meeting was adjourned at 2:49 pm. The next PAC meeting will be on November 10.

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 | October 2026**

Action

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

Significance

SamTrans: Average weekday ridership across all four modes (Bus, Paratransit, Shuttles, and Microtransit) increased by 1.8 percent in October 2026 compared to October 2025. The total monthly ridership increased by 0.8 percent in October 2026 compared to October 2025[1]. October 2025 did have one additional weekday and one less weekend then October 2026, for context a typical weekday has around 20,000 more riders boarding SamTrans services than a typical weekend.

Shuttles: Average weekday ridership on shuttles increased by 7.7 percent in October 2026 compared to October 2025. The total monthly ridership on shuttles decreased by 4.2 percent in October 2026 compared to October 2025.

Microtransit: Average weekday ridership on all microtransit services decreased 7.6 percent compared to October 2025, and the total ridership decreased 9.3 percent compared to October 2025. In the East Palo Alto/Belle Haven zone, the contractor noted challenges with vehicle availability, street closures, and passengers booking and then cancelling. In the Half Moon Bay zone, the contractor noted challenges with increased traffic and high on-demand requests between 2:00pm-4:00pm that the system was unable to meet.

Youth Unlimited Pass: For October 2026, Youth Unlimited Pass usage decreased 3.8 percent compared to October 2025.

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[1] Note that for Bus, the year-over-year comparison between October 2025 and October 2026 use different sources because farebox data was the official ridership source prior to the APC certification. Data comparison may be skewed slightly due to the variance in data collection methodology for each source, including manual nature of farebox data collection. When comparing APC data to APC data, total ridership decreased 1.0% percent in October 2026 compared to October 2025.

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

- **Preventable Accidents** – There were 13 preventable accidents in October 2026 (seven 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 67,460 miles between preventable accidents.

- **Miles Between Service Calls (MBSC) –** There were 47 service calls in October 2026 (28 from District and 19 from contracted services). The goal is to have more than 25,000 miles between service calls. SamTrans did not meet its goal with 18,659 miles between service calls. For the District's service calls, the diesel bus sub-fleet had 24,553 miles between service calls, while the zero-emission bus (ZEB) sub-fleet had 15,149 miles between service calls.

- **On-Time-Performance (OTP) –** October 2026 systemwide OTP was 81.4 percent. The goal is to have 85 percent systemwide on-time performance. Fixed-route Bus service did not meet this goal.

- **Did Not Operate (DNO) –** In October 2026, there were 15 DNOs, or missed trips. The goal is to miss fewer than 0.1 percent of scheduled trips. SamTrans met this goal.

RIDERSHIP (ALL MODES)

SAMTRANS | Average Weekday Ridership								
Mode	**Oct-24**	**Oct-25**	**Oct-26**	**%Δ[1]**	**YTD FY25**	**YTD FY26**	**YTD FY27**	**%Δ[2]**
Bus	38,156	38,655	39,259	1.6%	34,452	35,450	36,635	3.3%
Paratransit	784	779	769	-1.3%	771	776	783	0.9%
Shuttles	2,027	1,939	2,088	7.7%	1,858	1,911	1,965	2.8%
Microtransit	139	168	155	-7.6%	133	164	169	3.3%
Total	**41,106**	**41,541**	**42,271**	**1.8%**	**37,214**	**38,300**	**39,551**	**3.3%**
SAMTRANS | Total Ridership								
Mode	**Oct-24**	**Oct-25**	**Oct-26**	**%Δ[1]**	**YTD FY25**	**YTD FY26**	**YTD FY27**	**%Δ[2]**
Bus	1,043,540	1,048,755	1,056,396	0.7%	3,697,484	3,785,846	3,918,603	3.5%
Paratransit	20,965	20,974	20,463	-2.4%	80,172	80,787	82,037	1.5%
Shuttles	46,541	44,043	45,878	4.2%	160,474	164,915	167,858	1.8%
Microtransit	3,865	4,378	3,971	-9.3%	14,257	17,708	17,864	0.9%
Total	**1,114,911**	**1,118,150**	**1,126,708**	**0.8%**	**3,952,387**	**4,049,256**	**4,186,362**	**3.4%**

CALTRAIN | Average Weekday Ridership								
Mode	**Oct-24**	**Oct-25**	**Oct-26**	**%Δ[1]**	**YTD FY25**	**YTD FY26**	**YTD FY27**	**%Δ[2]**
Caltrain	27,583	39,900	49,486	24.0%	25,414	40,241	48,928	21.6%
CALTRAIN | Total Ridership								
Mode	**Oct-24**	**Oct-25**	**Oct-26**	**%Δ[1]**	**YTD FY25**	**YTD FY26**	**YTD FY27**	**%Δ[2]**
Caltrain	753,391	1,047,362	1,322,736	26.3%	2,686,618	4,247,713	5,219,259	22.9%

OTHER MODES in San Mateo County | Average Weekday Ridership								
Mode	**Oct-24**	**Oct-25**	**Oct-26**	**%Δ[1]**	**YTD FY25**	**YTD FY26**	**YTD FY27**	**%Δ[2]**
Dumbarton	99	92	104	13.0%	101	95	102	7.3%
BART (San Mateo County)	20,198	22,426	26,238	17.0%	19,685	21,495	25,318	17.8%
OTHER MODES in San Mateo County | Total Ridership								
Mode	**Oct-24**	**Oct-25**	**Oct-26**	**%Δ[1]**	**YTD FY25**	**YTD FY26**	**YTD FY27**	**%Δ[2]**
Dumbarton	2,274	2,115	2,294	8.5%	8,767	8,303	8,816	6.2%
BART (San Mateo County)	565,130	626,126	734,193	17.3%	2,156,591	2,364,979	2,797,500	18.3%

IMPORTANT NOTES:

Total row may not add up due to rounding.

SamTrans (Bus) ridership includes Fixed-Route service.

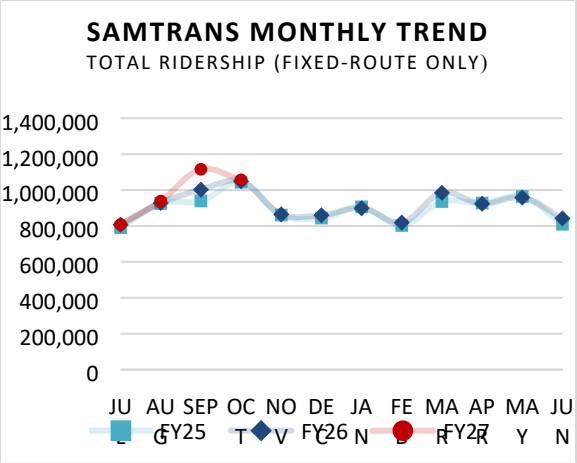
Microtransit ridership includes Ride Plus and SamCoast.

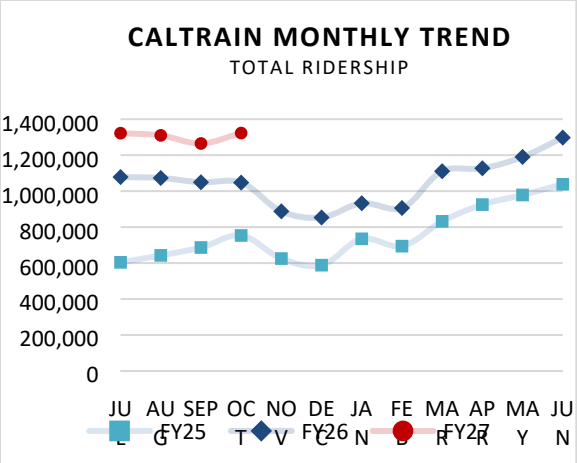
Shuttle ridership includes SamTrans, JPB Caltrain, and other Transportation Authority funded shuttles. Ridership counts are done manually by operators.

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

%Δ[1] indicates the percentage change for the month, current year to previous year.

%Δ[2] indicates the percentage change current year to previous, Year to Date.





FARES

SAMTRANS (BUS) | Fare Usage			
Fare Type	**Oct-24**	**Oct-25**	**Oct-26**
Adult	642,582	657,279	630,915
Eligible Discount	207,923	210,960	217,740
Youth	193,035	180,516	164,202
--- Youth Unlimited Pass	*108,253*	*105,283*	*101,156*
Total	**1,043,540**	**1,048,755**	**1,012,857**

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

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

KEY PERFORMANCE INDICATORS

SAMTRANS (BUS) | Operations Key Performance Indicators			
KPI	**Oct-24**	**Oct-25**	**Oct-26**
On-Time Performance	79.4%	80.7%	81.4%
Preventable Accidents	18	22	13
— District	*12*	*15*	*7*
— Contracted Services	*6*	*7*	*6*
Service Calls	39	29	47
— District	*23*	*20*	*28*
— Contracted Services	*16*	*9*	*19*
Trips Scheduled	50,454	50,778	50,078
Did Not Operate DNOs	24	31	15

SAMTRANS (BUS) | Fleet Key Performance Indicators			
KPI	**Oct-24**	**Oct-25**	**Oct-26**
Revenue Hours (Scheduled)	61,914	60,816	62,341
Revenue Miles (Scheduled)	610,778	609,007	602,242
Total Fleet Miles (Actual)	877,170	870,069	876,984

MICROTRANSIT | Ride Plus Key Performance Indicators			
KPI	**Oct-24**	**Oct-25**	**Oct-26**
Total Ridership	3,355	4,378	3,971
— East Palo Alto Trips	*2,401*	*3,169*	*2,847*
— Half Moon Bay Trips	*954*	*1,209*	*1,124*
Active Users	382	432	405
New Registrations	176	86	55
Total Downloads	432	320	210
— iOS Downloads	*371*	*250*	*110*
— Android Downloads	*61*	*70*	*100*
Load Factor	1.34	1.16	1.15

PARATRANSIT | Operations Key Performance Indicators			
KPI	**Oct-24**	**Oct-25**	**Oct-26**
On-Time Performance (RW)	87.4%	84.9%	83.4%
On-Time Performance (RC)	94.0%	69.9%	95.8%
Preventable Accidents (RW)	0	1	3
Preventable Accidents (RC)	0	1	0
Service Calls (RW)	3	5	1
Service Calls (RC)	0	0	0

PARATRANSIT | Fleet Key Performance Indicators			
KPI	**Oct-24**	**Oct-25**	**Oct-26**
Revenue Miles (RW)	170,084	174,328	156,597
Revenue Miles (RC)	26,158	12,285	13,548
Fleet Miles (RW)	189,739	195,285	175,077
Fleet Miles (RC)	33,620	21,338	23,462

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

SamTrans' Miles between Preventable Accidents goal is 100,000 miles. There were 67,460 miles between Preventable Accidents this month.

SamTrans' Miles between Service Calls goal is 25,000 miles. There were 18,659 miles between Service Calls this month.

Scheduled includes in-service and layover.

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.

RW = Redi-Wheels
RC = RediCoast

CUSTOMER EXPERIENCE

SAMTRANS (BUS) | Customer Experience			
KPI	**Oct-24**	**Oct-25**	**Oct-26**
Comment	0	0	3
Complaint	114	144	163
Compliment	13	15	16
Request	59	34	49
Other	7	10	0
Reports Total	**193**	**203**	**231**

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

The total number of reports for SamTrans increased 13.8% from 203 reports in October 2025 to 231 reports in October 2026.

Prepared By: Emily Chen Senior Transportation Planner, Service Planning and Scheduling 650-551-6127

San Mateo County Transit District
Staff Report

To: Board of Directors

Through: April Chan, General Manager/CEO

From: Josh Mello, Chief Planning Officer

Subject: **Quarterly State of Service Report - Fiscal Year 2027 Quarter 1**

Action

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

Significance

The quarterly report provides an overview of key performance indicators, including ridership, on-time performance, fares, workforce composition, safety, fleet, and customer experience for the period of July through September 2026 (Fiscal Year 2027 Quarter 1).

This quarter reflects service plans implemented on June 14, 2026 (Runbook 154) and on August 2, 2026 (Runbook 155). Runbook 154 suspended all School-Oriented routes for the summer break, modified timepoints on two routes, removed two bus stops due to unsafe pedestrian conditions, and implemented a detour on routes El Camino Real (ECR) and 397 in response to California State Department of Transportations' (Caltrans') long-term construction project on El Camino Real in Burlingame.

Runbook 155 returned all School-Oriented routes with schedule adjustments to address new school bell schedules, adjusted routing on routes 30, 50, 81, 250, College of San Mateo (CSM), and East Palo Alto (EPX), discontinued weekend service on Route CSM, and adjusted span to provide later morning service and earlier afternoon service to Route FCX. The Ride Plus East Palo Alto service area expanded to include the Palo Alto Transit Center and reduced the number of weekend vehicles from three vehicles to two. The Ride Plus Half Moon Bay service area expanded to include Moss Beach and Montara and implemented an earlier service start time at 7:00 am daily.

A summary of systemwide performance in Quarter 1 is provided in **Table 1**. A summary of productivity by service category is provided in **Table 2**.

Table 1. Systemwide Key Performance Indicators Summary

Metric	Goal	FY26Q1	FY27Q1	Improved since FY25?	Goal Met?
Boardings per revenue hour	15 or more	15.0	16.1	Yes	Yes
Cost per passenger	$15 or less	$17.20	$18.02	No	No
Farebox recovery	8.5% or more	6.2%	4.9%	No	No
On-time performance	85%	82.4%	82.0%	No	No
Complaints per 10,000 boardings	<1	1.4	1.7	No	No
Missed trips	<0.1%	0.015%	0.005%	Yes	Yes
Mean distance between service call	>25,000 miles	29,096 miles	20,353 miles	No	No
Mean distance between accident	>100,000 miles	89,368 miles	90,861 miles	Yes	No

Note: Key performance indicators that improved from the previous year but did not meet the goal are highlighted in blue. Key performance indicators that did not improve and did not meet the goal are highlighted in orange.

Table 2. Productivity Summary: Boardings Per Revenue Hour

Service Category	Number of Routes Meeting Standard	Total Number of Routes	% of Routes Meeting Standard
Frequent	3	4	75%
Local	7	9	78%
School-Oriented	33	43	77%
Community	7	9	78%
Express and Limited Stop	0	5	0%
Owl	3	3	100%

Note: Frequent routes have 15 minutes or better frequency seven days a week. Routes include 120, 130, 296, and ECR.
Local routes have 30 minutes or better frequency seven days a week. Routes include 110, 121, 122, 141, 250, 276, 278, 281, and 292.
School-Oriented routes operate with very few trips a day and are scheduled to align with school schedules and bell times. All two-digit routes are School-Oriented routes.
Community routes have 60 minutes or better frequency five days a week. Routes include 112, 117, 142, 251, 260, 270, 280, 294, and 295.
Express and Limited Stop routes provide limited-stop service to or from major destinations and are typically longer in length. Routes include CSM, EPX, FCX, PCX, and SKY.
Owl routes operate overnight after regular transit service has ended. Routes include 296 Owl, 397, and ECR Owl.

Ridership[1]

Average weekday ridership on SamTrans was 37,710 in Fiscal Year 2027 Quarter 1 (FY27Q1), which is an increase of 9.9 percent compared to FY26Q1. Total SamTrans ridership was 2,997,631, which is an increase of 9.2 percent compared to FY26Q1. Ridership details are included in **Table 3**.

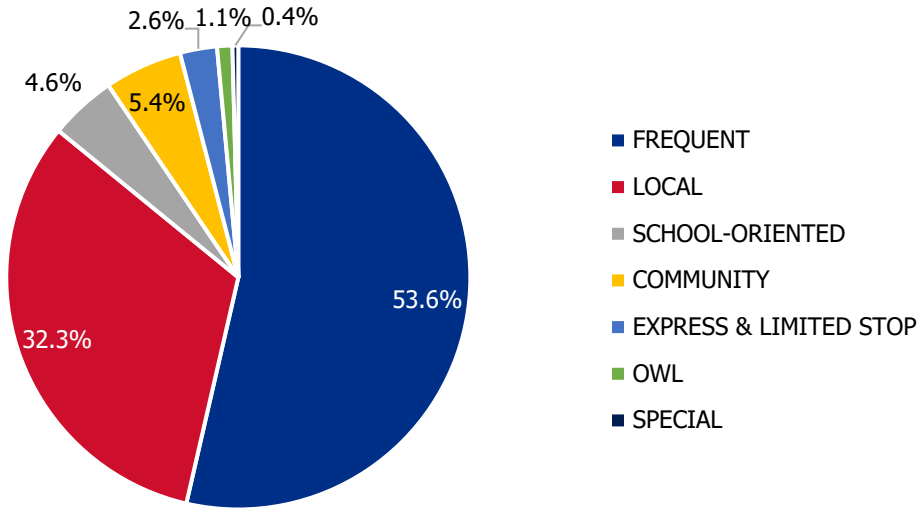
Table 3. Average Weekday Ridership and Total Ridership

Ridership Type	FY26Q1	FY27Q1	%Δ
Average Weekday Ridership	34,325	37,710	9.9%
Total Ridership	2,744,392	2,997,631	9.2%

Note: Does not include Route 713 or Dumbarton Express.

By service category, 53.6 percent of total ridership was on Frequent routes, 32.3 percent was on Local routes, 5.4 percent was on Community routes, 4.6 percent was on School-Oriented routes, 2.6 percent was on Express and Limited routes, 1.1 percent was on Owl routes, and 0.4 percent was on Special routes (see **Figure 1**).

Figure 1. Total Ridership Share By Service Category



Note: Does not include Route 713 or Dumbarton Express.

1 Update on ridership data: SamTrans' Automatic Passenger Counter (APC) data received certification from the Federal Transit Administration (FTA) in September 2026 for fixed-route services operated by SamTrans. Prior to APC certification, farebox data was used to report SamTrans fixed-route ridership. Starting with this report, fixed-route ridership will be derived from APC passenger count data; the prior quarter used for comparison purposes still reflect farebox data as that was the official source at that time.

All service categories except School-Oriented and Special saw an increase in total ridership compared to last year. Ridership details by service category are included in **Table 4**.

Table 4. Total Ridership By Service Category

Service Category	FY26Q1	FY27Q1	%Δ
Frequent	1,561,801	1,606,738	2.9%
Local	816,287	968,040	18.6%
School-Oriented	149,059	139,191	-6.6%
Community	144,871	162,338	12.1%
Express and Limited Stop[1]	37,960	77,344	103.8%
Owl	22,026	31,864	44.7%
Special	12,388	12,116	-2.2%

Note: Does not include Route 713 or Dumbarton Express.

[1]The FY26Q1 ridership for Express and Limited Stop service is the ridership that was reported in FY26Q1. Ridership data for Express and Limited Stop in the FY26Q1 report was incomplete at the time of reporting and reflected only about half of the total collected ridership data available now. Since the completion of the FY26Q1 report, additional ridership was recovered. The missing ridership may have been caused by a number of factors that could include vehicle issues in data uploading and database processing. With the change to APC data, these events of missing data will be significantly reduced because the APC software will also use FTA approved sampling methods to fill in trips that did operate but for whatever reason did not have ridership information. For example, with farebox data, which was subject to human error and delays in manual data uploads. If a bus was out of commission before farebox data was uploaded, then the data would not have been added to the database in a timely manner for the typical reporting period. FY27Q1 ridership increased 7.7 percent on Express and Limited Stop routes compared to the currently available farebox data FY26Q1.

The systemwide ridership productivity goal is to have a minimum of 15 boardings per vehicle revenue hour[2], with a goal for each service category, shown in **Table 5**. The fixed route bus network met the goal with 16.1 boardings per vehicle revenue hour in Quarter 1, a 7.4 percent increase over the previous year. All service categories met their goal and all service categories either increased or remained constant except School-Oriented service which decreased by 16.9 percent from FY26Q1. Route level productivity is provided in the Appendix.

Table 5. Ridership Productivity Measure

Boardings per Vehicle Revenue Hour	Goal	FY26Q1	FY27Q1	%Δ
Systemwide	**15**	**15.0**	**16.1**	**7.4%**
Frequent	15	21.0	21.0	0.3%
Local	10	11.8	13.6	15.6%
School-Oriented	25	54.1	45.0	-16.9%
Community	7	7.3	8.1	11.4%
Express and Limited Stop	16	3.2	7.1	125.7%
Owl	5	6.7	9.1	35.9%

[2] Boardings by vehicle revenue hour normalizes ridership to the amount of service being provided by calculating the number of customers that board the service per the revenue hours operated.

Note: Does not include Route 713 or Dumbarton Express.

Compared to the previous year, Ride Plus service in Quarter 1 increased boardings per revenue hour by 3.3 percent to 2.2 boardings per revenue hour (**Table 6**).[3]

Table 6. Ride Plus Productivity Measures

Productivity Measure	Goal	FY26Q1	FY27Q1	%Δ
Boardings per Vehicle Revenue Hour	**2**	**2.1**	**2.2**	**3.3%**
East Palo Alto	2	2.1	2.2	3.6%
Half Moon Bay	2	2.0	2.1	3.0%
Percent Pooled Trips	**TBD**	**44.5%**	**46.4%**	**4.3%**
East Palo Alto	TBD	43.5%	45.4%	4.4%
Half Moon Bay	TBD	45.4%	47.4%	4.2%
Percent Wait Time <15 Minutes	**99%**	**99.2%**	**98.2%**	**-1.0%**
East Palo Alto	99%	98.7%	97.8%	-0.9%
Half Moon Bay	99%	99.7%	98.5%	-1.1%
Percent Requested Trips Completed	**99%**	**99.7%**	**99.8%**	**0.1%**
East Palo Alto	99%	99.6%	99.8%	0.2%
Half Moon Bay	99%	99.9%	99.7%	-0.2%

Total ridership on Equity Priority Routes[4] was 2,179,788 in FY27Q1, accounting for 73 percent of total ridership (see **Table 7**). Equity Priority Routes are defined as routes where more than one-third of a route's alignment is operated in an Equity Priority Area. Equity Priority Areas are neighborhoods where residents are more likely to not have access to a car, be part of a low-income household, and/or identify as people of racial or ethnic minority populations. Ridership on Equity Priority Routes increased from FY26Q1 by 6.3 percent; however, total ridership on non-Equity Priority Routes also increased causing the percent of total ridership on Equity Priority Routes to decrease by 2.8 percent to 73 percent. Still, these figures demonstrate that a large share of SamTrans ridership is generated within Equity Priority Areas.

Table 7. Ridership In Equity Priority Areas

Service Category	FY26Q1	FY27Q1	%Δ
Boardings on Equity Priority Routes	2,051,437	2,179,788	6.3%
% of Total Boardings	75.1%	73.0%	-2.8%

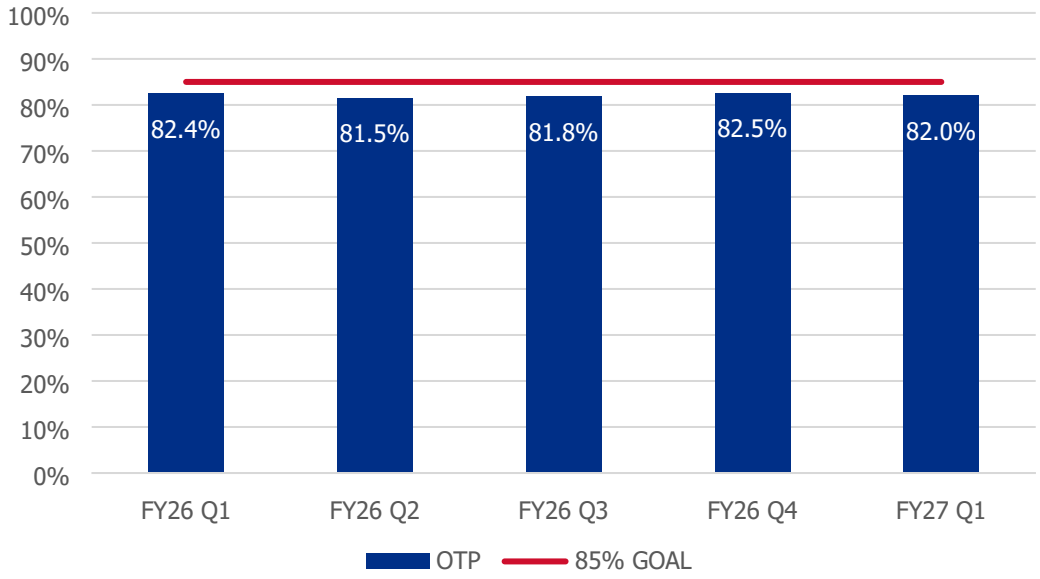
[3] For Ride Plus on-demand service, similar productivity measures are provided; however, the definitions used are different from fixed-route bus service. For boardings per revenue hour, revenue hour is defined as any time passengers have an opportunity to use the service (total hours minus time to/from the depot and time that the vehicle is out of service for breaks, etc.). Percent pooled trips is the share of total trips where multiple trips were taken simultaneously in the same vehicle.

[4] Equity Priority Routes include 24, 25, 29, 30, 35, 37, 41, 46, 49, 62, 68, 79, 81, 120, 121, 122, 130, 138, 141, 142, 260, 270, 276, 280, 281, 294, 296, 296 Owl, ECR, ECR Owl, and SKY.

On-Time-Performance

Average systemwide on-time performance (OTP) for FY27Q1 was below SamTrans' OTP goal of 85 percent at 82 percent (**Figure 2**). This represents a 0.5 percent decrease from the same quarter in the previous year. OTP for the average weekday, Saturday, and Sunday was below the goal at 82.1 percent, 78.6 percent, and 84.3 percent, respectively. The average scheduled speed was 12.7 miles per hour, which is a 1.1 percent decrease compared to the previous year.

Figure 2. On-Time Performance By Quarter

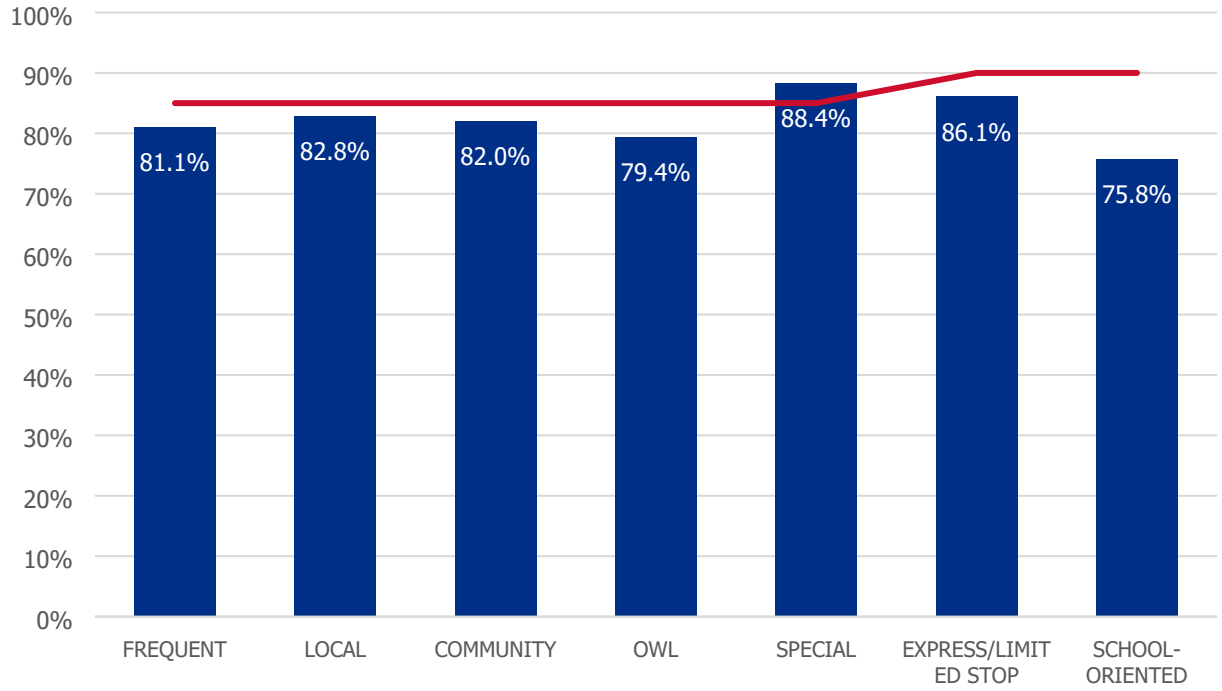


Broken down by fixed-route service category, only the Special service category met its OTP goal. Frequent, Owl, and School-Oriented service categories have all improved from FY26Q1, but all are below their OTP goals. The School-Oriented service category had the lowest average OTP of 75.8 percent. Details are included in **Table 8** and **Figure 3**.

Table 8. On-Time Performance By Service Category

Service Category	Goal	FY26Q1	FY27Q1	%Δ
Frequent	85%	80.9%	81.1%	0.2%
Local	85%	83.6%	82.8%	-1.0%
Community	85%	82.5%	82.0%	-0.6%
Owl	85%	75.6%	79.4%	5.0%
Special	85%	91.5%	88.4%	-3.4%
Express and Limited	90%	87.8%	86.1%	-1.9%
School-Oriented	90%	73.6%	75.8%	3.0%

Figure 3. On-Time Performance By Service Category



Note: Express and Limited and School-Oriented routes have a 90 percent OTP goal. The goal for all other categories is 85 percent.

Fares

Of the fares collected, 64.4 percent were Adult fares, 23.1 percent were Eligible Discount fares, and 12.5 percent were Youth fares. As for how passengers paid, 7.7 percent used one-way tickets (e.g., cash, free rides), 51.7 percent used Clipper, and 40.6 percent used a pass (e.g., day, month, Youth Unlimited). Fares and payment method details are included in **Table 9** and **Table 10**.

Table 9. Total Trips by Fares Type

Fare Type	FY26Q1	FY27Q1	%Δ
Adult	1,775,786	1,770,164	-0.3%
Eligible Discount	595,316	634,419	6.6%
Youth	378,281	344,671	-8.9%

Table 10. Total Trips by Payment Method

Payment Method	FY26Q1	FY27Q1	%Δ
	241,105	210,857	-12.5%
Clipper	1,372,841	1,421,193	3.5%
Clipper START	*50,918*	*69,894*	*37.3%*
Pass	1,135,437	1,117,204	-1.6%

Notes: Fares on Ride Plus were not integrated into the reporting system and therefore not included in this data.

The cost per passenger was $18.02, a 4.8 percent increase from the previous year. SamTrans did not meet its goal of $15.00 or less per passenger. Farebox recovery was 4.9 percent of operating costs, a 21.8 percent decrease compared to the previous year. SamTrans did not meet its goal of 8.5 percent farebox recovery rate. Details are included in **Table 11**.

Table 11. Operating Costs and Farebox Recovery Metrics

Metric	Goal	FY26Q1	FY27Q1	%Δ
Farebox Revenue	N/A	$3,129,866	$2,762,245	-11.7%
Operational Costs	N/A	$50,332,333	$56,786,626	12.8%
Cost per Passenger	<$15	$17.20	$18.02	4.8%
Farebox Recovery Rate	8.5%	6.2%	4.9%	-21.8%

Notes: Cost figures use both accrual and cash-based accounting methods depending on expenditure.

Operator Count

During FY27Q1, the District and Contracted Services[5] employed a combined total of 518 full-time fixed route operators, a 7.7 percent increase compared to the previous year. The number of District operators increased by 3.2 percent. Of the total full-time fixed route operators, 68 percent were District operators, 25.5 percent were Contracted Urban Bus Service (CUBS) operators, and 6.5 percent were Coastside operators. For details, see **Table 12**.

Table 12. Average Total Operators

Operators	FY26 Q1	FY27 Q1	%Δ
Total	**481**	**518**	**7.7%**
District	341	352	3.2%
CUBS	111	132	18.9%
Coastside	29	34	17.2%

Note: Quarterly employment statistics were provided by the District's People and Culture team and MV Transportation for CUBS and Coastside services from the last week of the quarter.

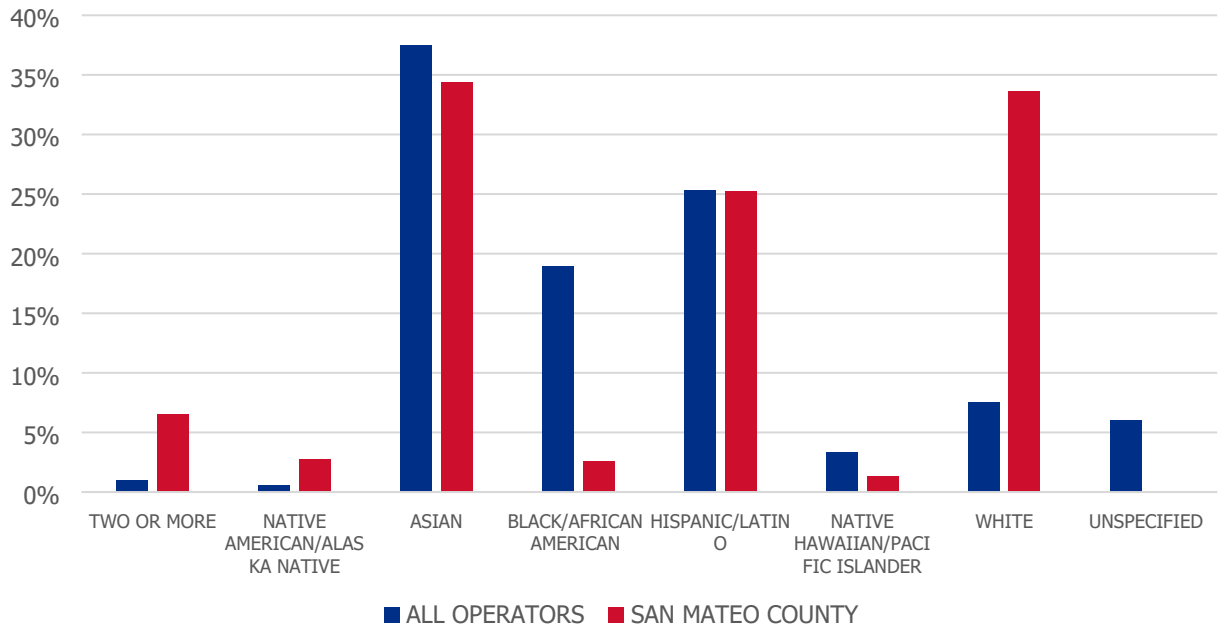
Of the District and Contracted Services operators, 14.1 percent identified as women and 85.9 percent identified as men. There was a 19.7 percent increase in the number of women working as full-time operators year over year, and a six percent increase in the number of men.

For race and ethnicity, 86.5 percent of operators identify as persons of color and/or Hispanic/Latino. Broken down, 37.5 percent identify as Asian, 25.3 percent identify as Hispanic/Latino, 18.9 percent identify as Black/African American, one percent identify as Two or More Races, 3.3 percent identify as Native Hawaiian/Pacific Islander, 0.6 percent identify as American Indian/Alaska Native. There were 7.5 percent of operators that identified as White, and six percent preferred not to specify. See **Figure 4** for details on operator race and ethnicity.

[5] Contracted Urban Bus Service (CUBS) and Coastside

The District monitors this data to see how closely the SamTrans operators' demographics reflect the demographics of San Mateo County. Compared to San Mateo County Census demographics, operators identifying as Asian, Black/African American, or Native Hawaiian/Pacific Islander are overrepresented, while those identifying as White, Two or More Races, or Native American/Alaska Native are underrepresented. Operators identifying as Hispanic/Latino are at similar proportions of San Mateo County demographics.

Figure 4. Operators By Race and Ethnicity



Note: Demographic statistics may add up to more than 100 percent because people may identify as one race and one ethnicity (e.g., Black/ African American and Hispanic).

Preventable Accidents

In FY27Q1, there were 28 preventable accidents, the same number of total preventable accidents as the previous year. The goal is to have 100,000 miles or more between preventable accidents. This quarter, SamTrans increased the miles between preventable accidents by 1.7 percent when compared to the previous year but did not meet its overall goal with 90,861 miles between preventable accidents, however District had 113,104 mean miles between preventable accidents. Details are included in **Table 13**.

Table 13. Preventable Accidents

	Goal	FY26Q1	FY27Q1	%Δ
Preventable Accidents	**N/A**	**28**	**28**	**0.0%**
District	N/A	21	16	-23.8%
Contracted Services	N/A	7	12	71.4%
Mean Miles between Preventable Accident	**>100,000**	**89,368**	**90,861**	**1.7%**
District	>100,000	85,813	113,104	31.8%
Contracted Services	>100,000	100,031	61,204	-38.8%

Note: Of total revenue miles, the District operates approximately 70 percent and MV Transportation provides 30 percent.

Service Calls

SamTrans had 125 service calls in FY27Q1, a 45.3 percent increase from the previous year. The goal is to have 25,000 miles or more between service calls. SamTrans did not meet its goal with 20,353 miles between service calls. For details, see **Table 14**. For the District's service calls, the diesel bus sub-fleet had 22,887 miles between service calls, while the zero-emission bus sub-fleet had 14,575 miles between service calls.

Table 14. Service Calls

	Goal	FY26Q1	FY27Q1	%Δ
Service Calls	**N/A**	**86**	**125**	**45.3%**
District	N/A	57	87	52.6%
Contracted Services	N/A	29	38	31.0%
Mean Miles between Service Call	**>25,000**	**29,096**	**20,353**	**-30.1%**
District	>25,000	31,615	20,801	-34.2%
Contracted Services	>25,000	24,146	19,328	-20.0%

Fleet in Operation

In FY27Q1, 321 buses were in operation, a 0.3 percent decline year over year. Approximately 77.3 percent were diesel, 7.8 percent were diesel-hybrid, 11.5 percent were battery electric, and 3.4 percent were hydrogen. For details, see **Table 15**. For mileage operated by District buses, 74 percent were operated by diesel, 8.2 percent were operated by diesel-hybrid, 13 percent were operated by battery electric, and 4.8 percent were operated by hydrogen.

Table 15. Fleet In Operation

	FY26Q1	FY27Q1	%Δ
Total	**322**	**321**	**-0.3%**
Diesel	252	248	-1.6%
Diesel-Hybrid	25	25	0.0%
Battery Electric	35	37	5.7%
Hydrogen Fuel Cell	10	11	10.0%

Trips That Did Not Operate

In FY27Q1 there were seven trips that did not operate (DNO), which is a 66.7 percent decrease when compared to the previous year. This quarter, SamTrans met its goal of fewer than 0.1 percent of trips missed. For details, see **Table 16**.

Table 16. Trips That Did Not Operate

	Goal	FY26Q1	FY27Q1	%Δ
DNOs	**N/A**	**21**	**7**	**-66.7%**
District	N/A	3	1	-66.7%
Contracted Services	N/A	18	6	-66.7%
Missed Trips Percentage	**<0.1%**	**0.015%**	**0.005%**	**-66.7%**
District	<0.1%	0.003%	0.001%	-66.4%
Contracted Services	<0.1%	0.064%	0.021%	-67.7%

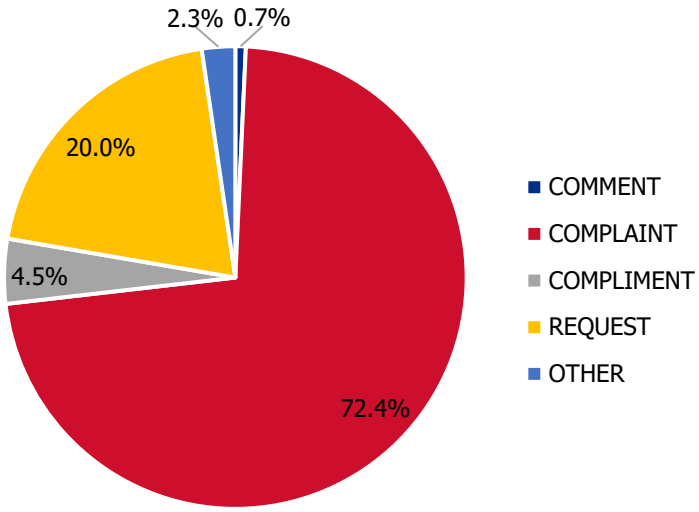
Customer Experience

In FY27Q1, SamTrans Customer Service received 686 public comments. This is a 16.7 percent increase from the same period in the previous year. Of the public comments, 72.4 percent were complaints, 0.7 percent were general comments, 4.5 percent were compliments, 20 percent were service requests, and 2.3 percent were other comments. The goal is to have less than one complaint per 10,000 boardings. SamTrans did not meet this goal with 1.7 complaints per 10,000 boardings in Q1. Details can be seen in **Table 17** and **Figure 5**.

Table 17. Customer Feedback Details

	FY26 Q1	FY27 Q1	%Δ
Total	**581**	**686**	**18.1%**
Comment	0	5	100.0%
Complaint	390	497	27.4%
Compliment	52	31	-40.4%
Request	139	137	-1.4%
Other	30	16	-46.7%
Complaints per 10,000 Boardings	**1.4**	**1.7**	**16.7%**

Figure 5. Customer Feedback By Type



Overall, the most common feedback themes were about operators (34.7 percent), no show (16.2 percent), and route changes (no percent). See **Table 18** for a comparison to the previous year.

Table 18. Most Common Public Comment Themes

FY26Q1		FY27Q1	
Category	**% of Total Comments**	**Category**	**% of Total Comments**
Operators	42.5%	Operators	34.7%
Late	14.6%	No Show	16.2%
Other Maintenance	8.4%	Route Changes	9.0%

SamTrans fully transitioned to a new customer feedback platform in September 2026, making it easier for customers to submit feedback. There was a brief social media campaign for customer awareness. Customers can now submit feedback on the new platform by clicking a link on the SamTrans web page or scanning a quick response (QR) code on SamTrans buses. Most people used the website feedback form to leave comments. 33.4 percent of comments were received on the website feedback form, 18.1 percent by phone, 2.5 by walk-in, one percent by email, 0.3 percent by comment card, and 0.7 percent by other methods. Details are included in **Table 19**.

Table 19. Reporting Method

Method	FY26 Q1	FY27 Q1
Comment Card	1	2
Email	331	7
Phone	274	124
Walk-in	2	17
Website Feedback Form	0	229
Other	3	5

Data shown in this report is current as of November 16, 2026.

Prepared By: Emily Chen Senior Transportation Planner, Service Planning and Scheduling 650-551-6127

APPENDIX A: ROUTE-LEVEL BOARDINGS PER VEHICLE REVENUE HOUR

Service Category/Route	Goal	FY27 Q1	Performance Tier[6]
Frequent	**15**	**21.0**	**Meets Standard**
120 - Colma BART - Brunswick/Templeton	15	26.8	Meets Standard
130 - Daly City BART - Airport and Linden	15	16.8	Meets Standard
296 - Redwood City Transit Center - Bayshore/Donohoe	15	11.9	Monitoring
ECR - Daly City BART - Palo Alto Transit Center	15	24.4	Meets Standard
Local	**10**	**13.6**	**Meets Standard**
110 - Daly City BART - Linda Mar Park and Ride	10	12.6	Meets Standard
121 - Pope/Bellevue - Skyline College	10	17.4	Meets Standard
122 - South San Francisco (SF) BART - Stonestown/SF	10	13.8	Meets Standard
141 - Airport/Linden - Skyline College	10	11.0	Meets Standard
250 - San Mateo Caltrain - College of San Mateo	10	11.0	Meets Standard
276 - Redwood City Transit Center - Bohannon/Campbell	10	5.7	Not Meeting Standard
278 - Redwood City Caltrain - Canada College	10	12.5	Meets Standard
281 - Belle Haven Community Campus - Stanford	10	9.6	Monitoring
292 - San Francisco – San Francisco International Airport (SFO) - Hillsdale Mall	10	16.6	Meets Standard
School-Oriented	**25**	**45.0**	**Meets Standard**
10 - Terra Nova High School (HS)	25	40.3	Meets Standard
12 - Pacifica School	25	98.4	Meets Standard
14 - Linda Mar Circulator	25	22.9	Monitoring
15 - HMBHS - Moonridge Apartments	25	16.3	Not Meeting Standard
18 - Main/7th – Half Moon Bay High School	25	19.7	Not Meeting Standard
19 - Lacy School	25	65.9	Meets Standard
24 - Shasta High	25	39.6	Meets Standard
25 - Ben Franklin Intermediate School (IS)	25	116.7	Meets Standard
28 - South San Francisco HS	25	43.0	Meets Standard
29 - Lipman Middle School (MS)	25	31.3	Meets Standard
30 - John F Kennedy Elementary School (ES)	25	41.0	Meets Standard

[6] Based on the Service Policy Framework, route-level productivity will fall into three performance tiers and related actions: (1) meets standard – no action required; (2) monitor – track performance closely and receive targeted marketing and outreach; and (3) not meeting standard – develop and action plan to improve or adjust service as necessary and could be discontinued if there are no improvements to productivity or viable alternative provided. Routes and service categories identified as "monitoring" are highlighted in blue. Routes and service categories identified as "not meeting standard" are highlighted in orange.

APPENDIX A: ROUTE-LEVEL BOARDINGS PER VEHICLE REVENUE HOUR

Service Category/Route	Goal	FY27 Q1	Performance Tier[6]
35 - El Camino HS	25	41.7	Meets Standard
37 - Romney-Alta Loma MS	25	44.4	Meets Standard
40 – Ingrid B. Lacy MS	25	20.6	Monitoring
41 - Parkside IS	25	57.0	Meets Standard
42 - Parkside MS	25	15.9	Not Meeting Standard
46 - Burlingame School	25	64.2	Meets Standard
49 - Terra Nova HS	25	39.2	Meets Standard
50 - Bayside Science, Technology, Engineering, and Mathematics (STEM) Academy	25	50.9	Meets Standard
51 - Hillsdale HS	25	27.1	Meets Standard
53 - Borel MS	25	72.2	Meets Standard
53P - Borel MS	25	47.2	Meets Standard
54 - Bowditch School	25	97.7	Meets Standard
56 - Aragon HS	25	38.0	Meets Standard
57 - Hillsdale HS	25	56.9	Meets Standard
58 - Borel MS	25	48.1	Meets Standard
59 - Aragon HS	25	58.7	Meets Standard
60 - Ralston MS	25	45.9	Meets Standard
61 - Carlmont HS	25	44.2	Meets Standard
62 - Carlmont HS	25	46.4	Meets Standard
67 - Ralston MS	25	52.8	Meets Standard
68 - Ralston MS	25	70.3	Meets Standard
72 - Selby Lane School	25	109.8	Meets Standard
73 - Clifford School	25	80.0	Meets Standard
78 - Woodside HS	25	10.9	Not Meeting Standard
79 - Kennedy MS	25	33.9	Meets Standard
81 - Menlo-Atherton HS	25	26.9	Meets Standard
82 - Hillview MS	25	59.8	Meets Standard
83 - Hillview MS	25	17.2	Not Meeting Standard
85 - Ormondale ES	25	22.1	Monitoring
86 - Menlo-Atherton HS	25	75.0	Meets Standard
87 - Woodside HS	25	9.6	Not Meeting Standard
88 - Encinal ES	25	12.6	Not Meeting Standard

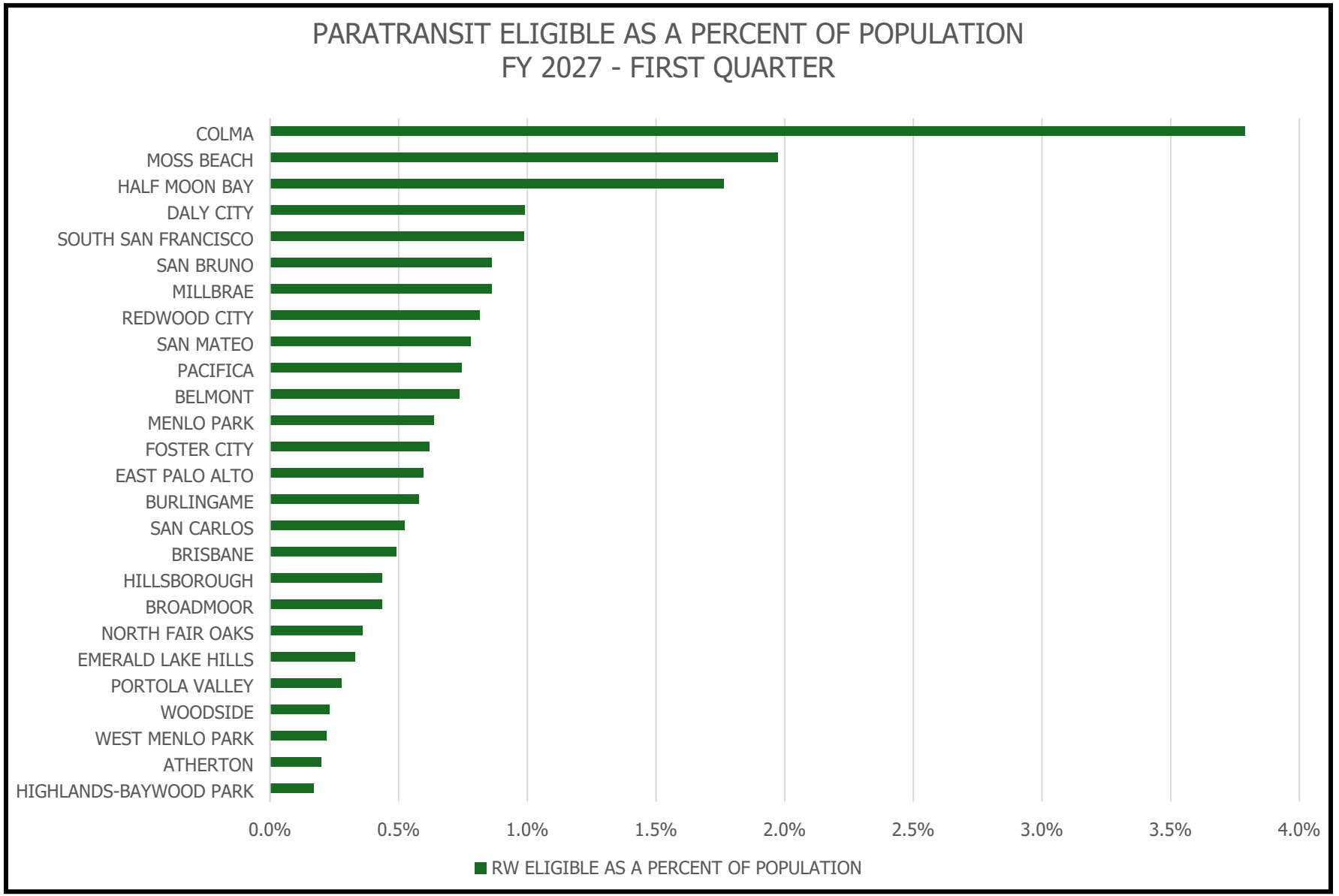
APPENDIX A: ROUTE-LEVEL BOARDINGS PER VEHICLE REVENUE HOUR

Service Category/Route	Goal	FY27 Q1	Performance Tier[6]
Community	**7**	**8.1**	**Meets Standard**
112 - Sharp Park - Colma BART	7	7.7	Meets Standard
117 - Linda Mar Park and Ride - Moonridge Apartments	7	8.4	Meets Standard
142 - SFO - Shelter Creek	7	8.36	Meets Standard
251 - Foster City - Hillsdale Mall	7	15.1	Meets Standard
260 - San Carlos Caltrain - Carlmont Village	7	8.3	Meets Standard
270 - Redwood City Caltrain - Florence/17th	7	9.4	Meets Standard
280 - Purdue/Fordham - Palo Alto Transit Center	7	7.3	Meets Standard
294 - Hillsdale - Half Moon Bay	7	5.4	Monitoring
295 - Hillsdale Mall - Redwood City	7	6.7	Monitoring
Express and Limited	**16**	**7.1**	**Not Meeting Standard**
FCX - Foster City - San Francisco	16	13.7	Monitoring
CSM - College of San Mateo - Downtown San Mateo	16	5.3	Not Meeting Standard
EPX - East Palo Alto - San Bruno BART	16	3.0	Not Meeting Standard
PCX - Linda Mar Park and Ride - Daly City BART	16	4.4	Not Meeting Standard
SKY - Daly City BART - Skyline College	16	13.3	Monitoring
Owl	**5**	**9.1**	**Meets Standard**
397 - San Francisco - Palo Alto Transit Center	5	11.2	Meets Standard
296O - Redwood City Transit Center - Palo Alto Transit Center	5	5.0	Meets Standard
ECRO - Daly City - SFO	5	9.0	Meets Standard

Note: Does not include Special service category, Route 713, or Dumbarton Express.

APPENDIX B: PARATRANSIT

This chart shows the number of paratransit riders as a percentage of the population of each city. Colma, Moss Beach and Half Moon Bay have a higher percentage of eligible riders. All are relatively small cities.



(Data as of September 30, 2026)

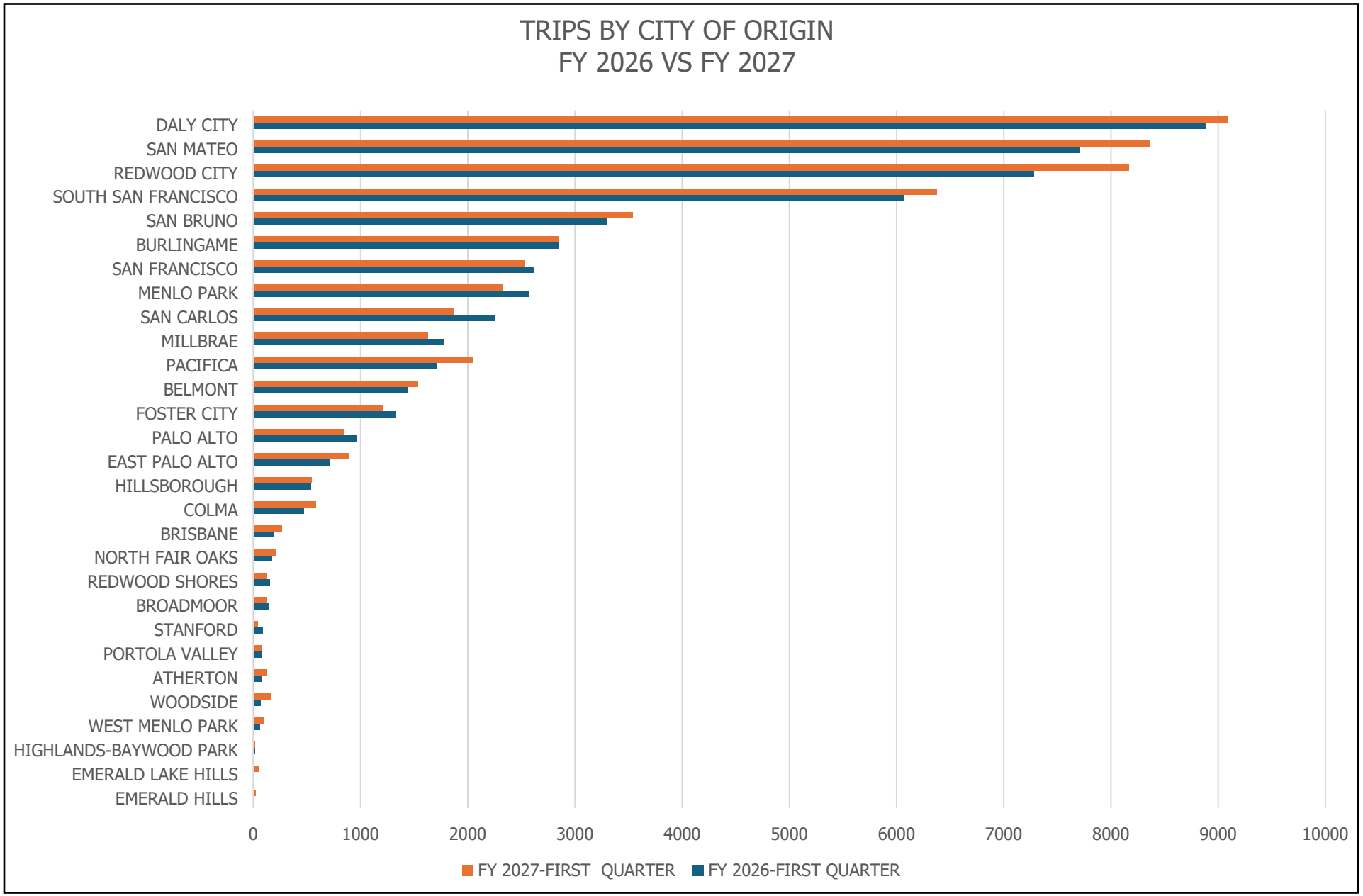
APPENDIX B: PARATRANSIT

This chart shows percentage of active riders (the number of individuals registered for Redi-Wheels in each City in San Mateo County compared with the number of individuals who rode during the first quarter of FY 2027. Cities with a small number of eligible riders have a higher percentage of active riders.

City	Paratransit Eligible Riders	Individuals who rode in 1st Quarter FY 2027	% Active Riders
ATHERTON	15	7	47%
BELMONT	218	70	32%
BRISBANE	23	8	35%
BROADMOOR	23	6	26%
BURLINGAME	196	63	32%
COLMA	61	13	21%
DALY CITY	1029	311	30%
EAST PALO ALTO	183	45	25%
EMERALD LAKE HILLS	14	2	14%
FOSTER CITY	204	62	30%
HALF MOON BAY	199	NA	NA
HIGHLANDS-BAYWOOD PARK	14	4	29%
HILLSBOROUGH	48	14	29%
MENLO PARK	213	44	21%
MILLBRAE	200	57	29%
MOSS BEACH	53	3	6%
NORTH FAIR OAKS	48	13	27%
PACIFICA	289	81	28%
PORTOLA VALLEY	12	2	17%
REDWOOD CITY	691	220	32%
SAN BRUNO	375	109	29%
SAN CARLOS	154	42	27%
SAN MATEO	827	249	30%
SOUTH SAN FRANCISCO	658	214	33%
WEST MENLO PARK	8	4	50%
WOODSIDE	12	2	17%

APPENDIX B: PARATRANSIT

This chart shows the distribution of trips by city in the first quarter of FY 2026 and FY 2027. While there is some variation, the trip patterns are similar. The largest cities (Daly City, San Mateo, Redwood City and South San Francisco) have the greatest number of trips. Popular destinations include dialysis centers, medical facilities, shopping and groceries.



FY27 Quarter 1 (Jul-Sep 2026) Dashboard



December 2, 2026

samTrans

QUARTERLY DASHBOARD

July - September 2026 (FY27 Q1)



RIDERSHIP, SERVICE & ON-TIME PERFORMANCE

Systemwide Overview

2,997,631
Boardings (+9.2%[1])

74 Routes

1.8M Revenue Miles

Service Categories What types of service are available?	Revenue Hours How much service is available?	Avg Weekday Ridership How many people ride?	On-Time Performance[2] How often is the bus on time?
15 min **Frequent** 15-minute or better frequency, 7 days/week	41%	52%	81%
30 min **Local** 30-minute or better frequency, 7 days/week	38%	32%	83%
60 min **Community** 60-minute or better frequency, 5–7 days/week	11%	5%	82%
School-Oriented Routes aligned with school bell times, 5 days/week	2%	6%	76%
Express & Limited Stop Peak-only routes with few stops, 5 days/week	6%	3%	86%
Night **Owl** Overnight routes, 7 days/week	2%	1%	79%
Special **Special Routes** Unique purpose routes, 7 days/week	<1%	<1%	88%
	185.2K Total Revenue Hours	**34.3K** Systemwide Average	**82.0%** Systemwide Average

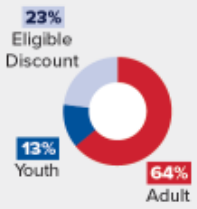
85% Target

FARES

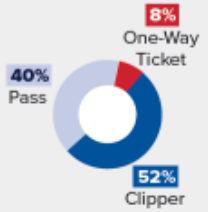
$2.76M Fare Revenue

$18.02 Cost Per Passenger

Fare Type



Payment Method

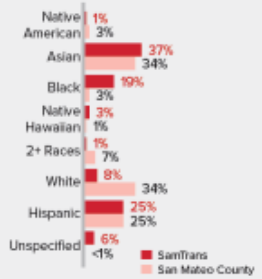


OPERATORS

518 Average Number of Operators

352 SamTrans | **132** CUB | **34** Coastside

Race & Ethnicity



Gender



ENVIRONMENT & SAFETY

Service Calls



1.2 Per 25,000 Miles (+43.0%[1])

Preventable Accidents



1.1 Per 100,000 Miles (-1.6%[1])

Fleet in Operation



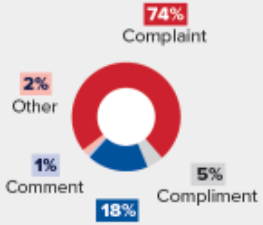
8% Hybrid | **3%** Hydrogen | **12%** Electric | **77%** Diesel

RIDER EXPERIENCE

4.8 Trips Not Operated Per 100,000 Trips (-66.7%[1])

1.7 Complaints Per 10,000 Boardings (+16.7%[1])

Comment Type



Trending Themes

35% Operators

16% No Show

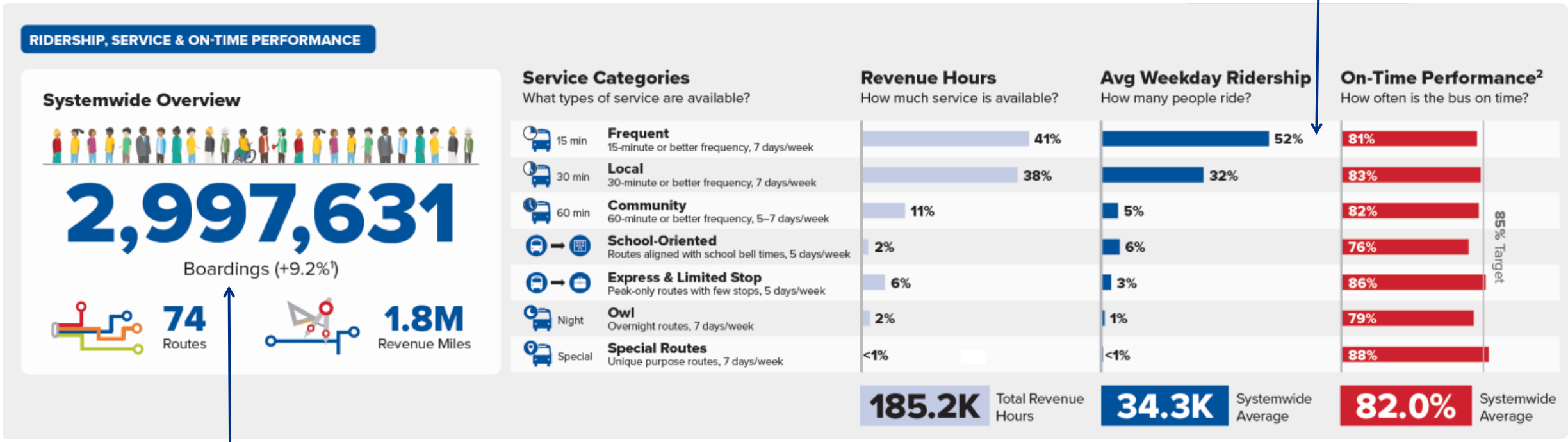
9% Route Changes

Top 3 in FY26 Q1 Operators, Late and Other Maintenance

[1] Percent change from the previous year (FY26 Q1).

[2] Buses are on-time if they depart a timepoint within 59 seconds before schedule or 4 minutes and 59 seconds after schedule.

Frequent Routes carry over 50% of all SamTrans customers



Ridership is up 9.2% YoY

[1] Percent change from the previous year (FY26 Q1)
[2] Buses are on-time if they depart a timepoints within 59 seconds before schedule or 4 minutes and 59 seconds after schedule.

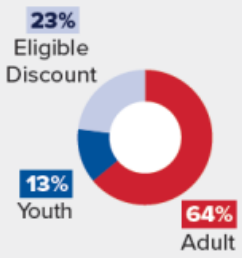
DNO rate decreased by 66.7% YoY

FARES

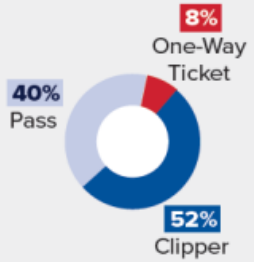
$2.76M Fare Revenue

$18.02 Cost Per Passenger

Fare Type



Payment Method

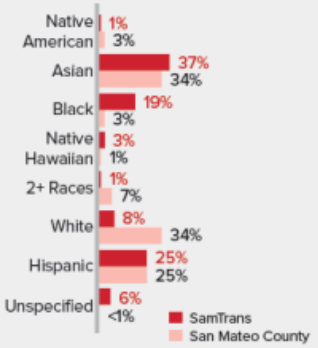


OPERATORS

518 Average Number of Operators

352	132	34
SamTrans	CUB	Coastside

Race & Ethnicity



Gender



ENVIRONMENT & SAFETY

Service Calls



1.2 Per 25,000 Miles (+43.0%[1])

Preventable Accidents



1.1 Per 100,000 Miles (-1.6%[1])

Fleet in Operation



8%	3%	12%	77%
Hybrid	Hydrogen	Electric	Diesel

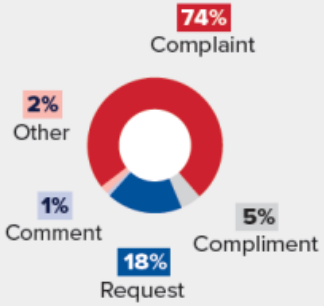
Preventable accidents rate decreased by 1.6% YoY

RIDER EXPERIENCE

4.8 Trips Not Operated Per 100,000 Trips (-66.7%[1])

1.7 Complaints Per 10,000 Boardings (+16.7%[1])

Comment Type



Trending Themes

35% Operators

16% No Show

9% Route Changes

Top 3 in FY26 Q1 Operators, Late and Other Maintenance

[1] Percent change from the previous year (FY26 Q1)

Questions?



Thank You!

BOARD OF DIRECTORS 2026

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

APRIL CHAN
GENERAL MANAGER/CEO

AGENDA

San Mateo County Transit District

Finance Committee Meeting
Committee of the Whole

December 2, 2026 – 2:20 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	Informational
10.b.	Approval of Minutes of the Finance Committee Meeting of November 4, 2026	Motion
10.c.	Awarding a Contract to Lamar Transit, LLC for Bus and Bus Shelter Advertising Services for a Five-Year Base Term for Minimum Annual Guarantee Revenue of $5.35 Million, with Two One-Year Option Terms for an Additional Minimum Annual Guarantee Revenue of $2.325 Million	Motion
10.d.	Receive Quarterly Financial Report Fiscal Year 2027 Quarter 1 Results and Financial Outlook	Informational
10.e.	Adjournment	

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

DRAFT Minutes of November 4, 2026

Members Present (In Person): Josh Powell, Jackie Speier (Acting Chair), Rico E. Medina (Chair) (arrived at 3:54 pm)

Members Absent: None

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: C. Andrichak, B. Baney, J. Cassman, A. Chan, Z. Fan, T. Huckaby, M. Kumar, L. Lumina-Hsu, L. Mai, M. Tseng, K. Yin

14.a. Call to Order
Acting Committee Chair Speier called the meeting to order at 3:17 pm.

14.b. Approval of Minutes of the Finance Committee Meeting of October 7, 2026
Motion/Second: Ratto/Powell
Ayes: Canepa, Fraser, Gee, Powell, Ratto, Speier, Esser, Chuang
Noes: None
Abstain: None
Absent: Medina

14.c. Awarding Contracts to AECOM Technical Services, Inc. and WSP USA, Inc. for On-Call Environmental Planning, Permitting and Support Services for an Aggregate Not-To-Exceed Amount of $11.1 Million for a Five-Year Base Term, with up to Two One-Year Option Terms for an Additional Not-to-Exceed Amount of $877,500 per Option Year, for an Aggregate Not-To-Exceed Amount of $12.9 Million
Motion/Second: Chuang/Fraser
Ayes: Canepa, Fraser, Gee, Powell, Ratto, Speier, Esser, Chuang
Noes: None
Abstain: None
Absent: Medina

DRAFT

14.d. Awarding a Contract to Stronger Building Services for the North Base Electric Vehicle Charging Project for a Total Amount of $1,248,000, with a Contract Option for an Additional $84,000

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

14.e. Amending to Increase the Fiscal Year 2027 Operating Budget by $13,923,818 for a Revised Budget of $357,271,877

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

14.f. Awarding a Contract to Carahsoft Technology Corp. for Salesforce Customer Relationship Management System Software Licenses for a Not-To-Exceed Amount of $270,000 for a One-Year Base Term, with up to Two One-Year Option Terms for an Additional Not-To-Exceed Amount of $300,000 per Option Year, for an Aggregate Not-To-Exceed Amount of $870,000

Director Medina joined the meeting at 3:54 pm.

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

14.g. Awarding a Contract to Infosys Public Services, Inc. for Salesforce Customer Relationship Management System Implementation Services for a Not-To-Exceed Amount of $800,000, and an Additional Not-To-Exceed Amount of $300,000 for As-Needed Professional Services, for an Aggregate Not-To-Exceed Amount of $1.1 Million

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

14.h. Adjournment

The meeting adjourned at 4:08 pm.

DRAFT

San Mateo County Transit District
Staff Report

To: Finance Committee

Through: April Chan, General Manager/CEO

From: David Santoro, Chief Administrative Officer

Emily Beach, Chief Communications Officer

Subject: **Awarding a Contract to Lamar Transit, LLC for Bus and Bus Shelter Advertising Services for a Five-Year Base Term for Minimum Annual Guarantee Revenue of $5.35 Million, with Two One-Year Option Terms for an Additional Minimum Annual Guarantee Revenue of $2.325 Million**

Action

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

1. Award a contract to Lamar Transit, LLC of Frisco, Texas (Lamar) for Bus and Bus Shelter Advertising Services (Services) for the District to receive the greater of (a) minimum annual guarantee (MAG) revenue of $5.35 million for a five-year base term, and an additional MAG revenue of $2.325 million for two one-year option terms, or (b) 65 percent of net advertising revenue per year.

2. Authorize the General Manager/CEO or designee to execute a contract with Lamar in full conformity with the terms and conditions set forth in the solicitation documents and negotiated agreement, and in a form approved by legal counsel.

3. Authorize the General Manager/CEO or designee to exercise up to two one-year option terms, if in the best interest of the District.

Significance

Award of the proposed contract will provide the District with a qualified, experienced advertising services provider to manage, market, sell, and administer the District's advertising program. The Services will provide an important stream of non-fare revenue while maximizing the value of the District's existing advertising assets, such as bus shelters, bus exteriors, and bus interiors. Advertising revenues help support the District's overall financial sustainability and provide an opportunity to generate additional resources without increasing fares.

The contract will also expand the District's ability to offer advertisers with access to a broad and diverse audience throughout San Mateo County and the greater Bay Area. Bus advertising provides high-visibility mobile inventory across the District's service area, while bus shelter

advertising provides a complementary, location-based platform with exposure to riders, pedestrians and surrounding communities.

The contract is expected to strengthen the District's advertising program through professional sales and management of the inventory, maximize utilization of available advertising space, and position the District to respond to changing market demand, including new and emerging technologies. A portion of the available advertising inventory will also be reserved for the District's external communications, public information, community messaging, and initiatives, allowing the District to maintain flexibility in communicating important information and promote programs and services.

In addition, the District's advertising program permits it to maintain appropriate oversight of advertising activities and ensure advertising is consistent with District policies and operational requirements.

Budget Impact

Advertising revenue is included in the Fiscal Year 2027 Revised Operating Budget based on estimates from the existing bus exterior advertising contract. The proposed contract, which includes bus interior, exterior, and bus shelter advertising, is expected to generate higher advertising revenue. The anticipated revenue over the term of the proposed contract will be incorporated into future operating budgets.

The proposed contract will generate significant revenue for the District. Lamar will pay the District the greater of (a) the applicable MAG each year (set forth in the table below), or (b) 65 percent of net advertising revenue collected that year. As a reference, MAG has increased approximately 30 percent from previous contract.

Under the proposed contract, Lamar will be responsible for the production, installation, maintenance, and removal of advertising materials, as well as coordinating with SamTrans staff to ensure all advertising activities comply with operational, safety, and accessibility requirements.

Year	Per Calendar Year (January 1 – December 31)	Minimum Annual Guarantee (MAG)
1	2027	$1,000,000
2	2028	$1,050,000
3	2029	$1,075,000
4	2030	$1,100,000
5	2031	$1,125,000
Option Year 1	2032	$1,150,000

Option Year 2	2033	$1,175,000
	Total MAG	**$7,675,000**

Background

On July 2, 2026, the District issued Request for Proposals (RFP) 26-S-S-087 for the Services. The RFP was advertised on the District's e-Procurement website. Eighteen potential proposers downloaded the RFP, and the District received one proposal, which was submitted by Lamar. Staff and legal counsel reviewed Lamar's proposal and determined it is responsive to the RFP requirements.

The procurement was conducted through a full competitive process to identify a contractor with the qualifications, experience, sales capabilities, and strategic approach necessary to maximize advertising revenue while maintaining high-quality customer experience and protecting the appearance and integrity of District facilities and equipment.

To better understand the limited submittals, staff conducted a survey of firms that did not submit proposals. Three firms responded, citing the following reasons: the scope of work was too small for their firms, the scope was outside their areas of expertise, and they intended to provide the solicitation information to a subcontractor.

A Selection Committee (Committee), composed of District staff, reviewed, evaluated, scored, and ranked the proposal in accordance with the following weighted criteria:

Evaluation Criteria	Maximum Points
Compensation Proposal	**35**
Company Qualifications, Experience and References	**25**
Approach to Providing Services	**40**
Small Business Enterprise (SBE) Preference	**5**
Total	**105**

After the initial scoring, the Committee found that Lamar possesses the requisite experience and qualifications required for successful performance of the Services as defined in the solicitation documents. Lamar also qualified for the SBE preference points.

Staff successfully negotiated contract terms, including compensation, with Lamar. Staff conducted a price analysis and determined the negotiated compensation proposal to be fair, reasonable, and consistent with similar services in the Bay Area.

Prepared By:	Manny Caluya	Procurement Administrator III	650-647-3492
	Ravi Sreekakula	Manager, Sales and Marketing	650-730-9077

Resolution No. 2026-

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

*** * ***

Awarding a Contract to Lamar Transit, LLC for Bus and Bus Shelter Advertising Services for a Five-Year Base Term for Minimum Annual Guarantee Revenue of $5.35 Million, with Two One-Year Option Terms for an Additional Minimum Annual Guarantee Revenue of $2.325 Million

Whereas, the San Mateo County Transit District (District) desires to maximize non-fare revenue opportunities across the District's advertising assets such as bus shelters, bus exteriors and bus interiors; and

Whereas, on July 2, 2026, the District issued Request for Proposals (RFP) 26-S-S-087 for Bus and Bus Shelter Advertising Services (Services) to obtain a qualified, experienced advertising services provider to manage, market, sell, and administer the District's advertising program; and

Whereas, the District conducted outreach through direct emails and posted the RFP on the District's e-procurement website; and

Whereas, in response to the RFP, the District received one proposal submitted by Lamar Transit, LLC of Frisco, Texas (Lamar); and

Whereas, a Selection Committee (Committee), composed of District staff, reviewed, evaluated, and scored the proposal in accordance with the evaluation criteria set forth in the RFP; and

Whereas, after the initial scoring, the Committee found that Lamar possesses the requisite experience and qualifications required for successful performance of the Services as defined in the solicitation documents; and

Whereas, following negotiation of the compensation terms, staff conducted a price analysis and determined the negotiated compensation to be fair, reasonable, and consistent with similar services in the Bay Area; and

Whereas, staff and legal counsel have reviewed Lamar's proposal and determined it is responsive to the RFP requirements; and

Whereas, staff recommends that the Board of Directors (Board) award a contract to Lamar to provide the Services for the District to receive the greater of (1) minimum annual guarantee (MAG) revenue of $5.35 million for a five-year base term, and an additional MAG revenue of $2.325 million for two one-year option terms, or (2) 65 percent of net advertising revenue per year.

Now, Therefore, Be It Resolved that the Board of Directors of the San Mateo County Transit District hereby awards a contract to Lamar Transit, LLC for Bus and Bus Shelter Advertising Services for the District to receive the greater of (1) minimum annual guarantee revenue of $5.35 million for the five-year base term, and an additional MAG revenue of $2.325 million for two one-year option terms, or (2) 65 percent of net advertising revenue per year; 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 Lamar in full conformity with the terms and

conditions set forth in the solicitation documents and negotiated agreement, and in a form approved by legal counsel; and

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

Regularly passed and adopted this 2nd day of December, 2026, by the following vote:

Ayes:

Noes:

Absent:

_____
Chair, San Mateo County Transit District

Attest:

_____
District Secretary

Bus & Bus Shelter Advertising Services



December 2, 2026

Proposed Consideration

1. **Award a contract to Lamar Transit, LLC** for **Bus and Bus Shelter Advertising Services** for a five-year base term for a minimum annual guarantee (MAG) **revenue of $5.35 million**, with two one-year option terms for additional MAG revenue of **$2.325 million**

2. **Authorize the General Manager**/CEO or designee to **execute a contract** with Lamar in full conformity with the terms and conditions set forth in the solicitation documents and negotiated agreement, and in a form approved by legal counsel

3. **Authorize the General Manager**/CEO or designee to **exercise** up to two one-year **option terms**, if in the best interest of the District

Ad Sales Overview

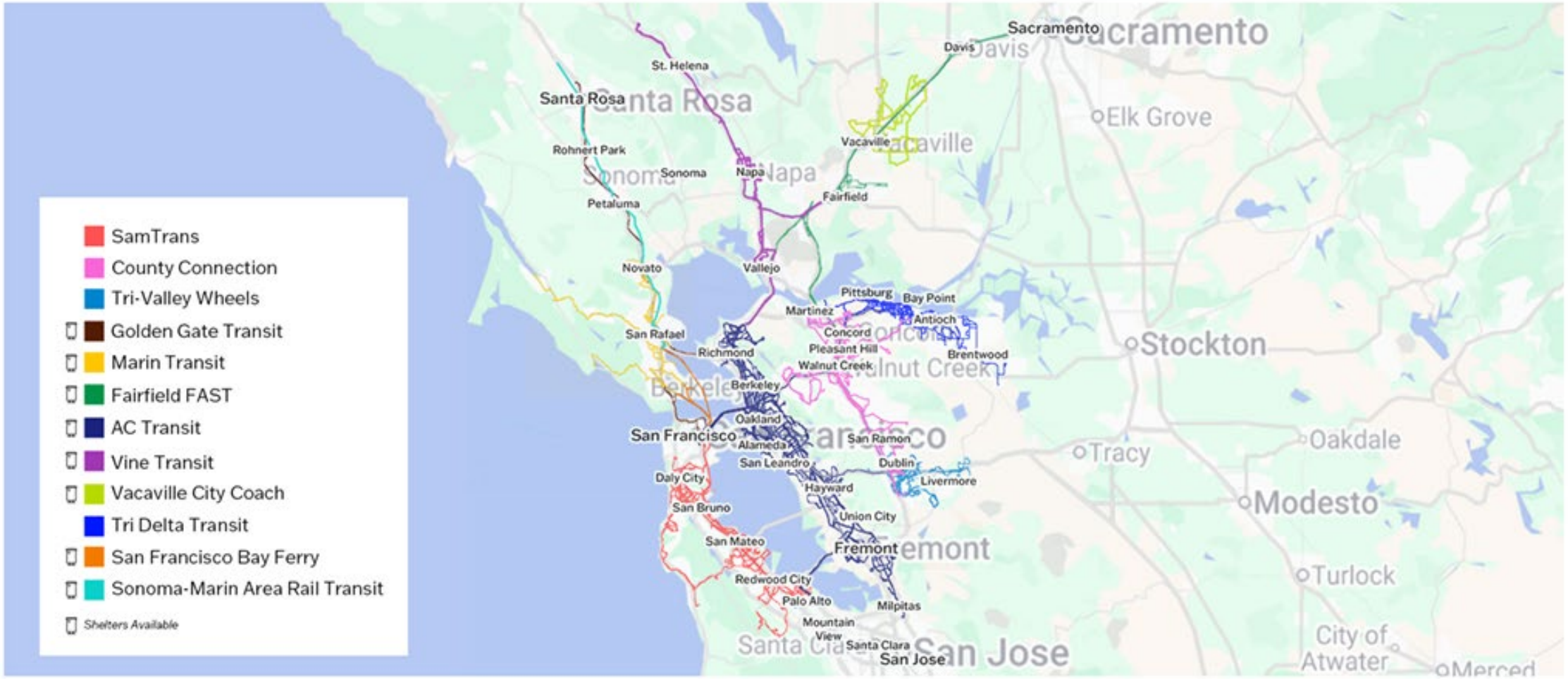
- Calendar year (CY) 2026 advertising revenues forecasted $903K net revenue

- This is above MAG of $775K and the highest net revenues achieved in a calendar year by SamTrans

- Growth Drivers:
  - Strong Ridership
  - Favorable Bay Area advertising environment
  - Geographic diversity



Lamar SF Bay Area coverage



New Opportunities

- Bus Shelters
- Digital Display Unit at District Headquarters
- $15K Production Credit for bus wraps







Contract Goal

- Provide the District with qualified and experienced firm to manage, market, sell, and administer District's advertising program
- Generate sustainable and growing non-fare revenue
- Negotiate a favorable minimum annual guarantee (MAG) amount to ensure revenue stability



Solicitation Process

- July 2, 2026, the District issued an RFP for the Services
- RFP advertised on District's eProcurement website
- 18 potential proposers downloaded the RFP
- District received one responsive proposal, from the incumbent
- Selection Committee reviewed and scored the proposal and determined Lamar Transit has the experience and qualifications to successfully perform the Services under this contract

Budget Impact

- Revenue-generating contract, with minimum annual guarantee (MAG)
  - $1.00M MAG first year (30% higher than current contract); gradually increases each following year
  - $5.35M MAG revenue over five-year base term
  - Two one-year options terms additional MAG $2.325M
  - Provides 65% revenue share

- Staff conducted a price analysis and determined the compensation schedule is fair and reasonable

Proposed Consideration

1. **Award a contract to Lamar Transit, LLC** for **Bus and Bus Shelter Advertising Services** for a five-year base term for a minimum annual guarantee (MAG) **revenue of $5.35 million**, with two one-year option terms for additional MAG revenue of **$2.325 million**

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3. **Authorize the General Manager**/CEO or designee to **exercise** up to two one-year **option terms**, if in the best interest of the District

Thank You



San Mateo County Transit District
Staff Report

To: Board of Directors

Through: April Chan, General Manager/CEO

From: Chris Andrichak, Chief Financial Officer

Subject: **Receive Quarterly Financial Report Fiscal Year 2027 Quarter 1 Results and Financial Outlook**

Action
This is an informational item.

Discussion
The San Mateo County Transit District (District) ended Fiscal Year 2027 Quarter 1 (FY27Q1) with a deficit of $13.9 million, which is $4.2 million favorable compared to the adopted budget deficit for the quarter of $18.1 million. This favorable variance was primarily driven by higher-than-budgeted investment income and sales tax revenue, along with timing-related expenditure savings and lower-than-anticipated claims activity.

Sources:
As of September 30, 2026, total sources were $66.1 million, compared to the adopted budget of $67.6 million, resulting in an unfavorable variance of $1.5 million or 2.3 percent.

- **Operating Revenue** reflected an unfavorable variance of $2.2 million or 11.5 percent, primarily due to:

  - **Passenger Fares** were $0.6 million or 16.6 percent unfavorable, primarily due to increased discounted and free fares, regional transfer discounts, lower-than-anticipated BayPass payments for prior-year, and the timing of regional transfer program reimbursements. In response to previous Board of Directors (Board) feedback, Passenger Fares now includes both direct fare collections and associated regional program reimbursements and grant funding to provide a more comprehensive view of fare-related revenue.

  - **Investment Interest Income** was $1.1 million or 25.1 percent favorable due to higher-than-expected interest rates and balances. Staff expect this favorability to continue through fiscal year-end.

  - **Agency Indirect Administrative (AIA) Recovery** was $3.5 million or 32.9 percent unfavorable due to timing of cost recovery for managing agency services and lower-than-projected Caltrain capital project expenditures.

- **Operating Assistance** reflected a favorable variance of $1.3 million or 2.8 percent to the adopted budget, driven by higher-than-anticipated Proposition A and Measure W Sales Tax receipts, reflecting higher-than-anticipated economic activity and consumer spending, including Fédération Internationale de Football Association (FIFA) World Cup activity and continued investments in the biotechnology and Artificial Intelligence (AI) sectors.

- **Multi-Modal Transit Program Operating Assistance** reflected an unfavorable variance of $0.5 million or 23.8 percent to the adopted budget, primarily due to lower shuttle cost recovery resulting from adjusted Commute.org service levels in response to lower-than-anticipated funding and demand from partner agencies.

Uses:
As of September 30, 2026, total use was $79.9 million, compared to the adopted budget of $85.7 million, reflecting a favorable variance of $5.8 million or 6.7 percent.

- **Purchased Transportation** reflected a favorable variance of $1.5 million or 8.8 percent, driven by:

  - **Contracted Americans with Disabilities Act (ADA) Programs** was $0.9 million or 17.9 percent favorable, driven by negotiated lower than budgeted hourly rates.

  - **Contracted Multi-Modal Transit Programs** was $0.6 million or 24.7 percent favorable due to adjusted Commute.org service levels in response to lower-than-anticipated funding and demand, resulting in lower operating expenditures.

- **Contracted Services** reflected a favorable variance of $1.1 million or 11.9 percent, driven primarily by timing of payment during the quarter and as-needed services that have not yet been utilized.

- **Other Non-Labor** reflected a favorable variance of $2.3 million of 20.6 percent, primarily driven by lower-than-anticipated claims activity and lower non-labor AIA due to the timing of expenditures in the reporting period.

Fiscal Year 2027 Outlook:
The FY27 first quarter results reflect a $13.9 million deficit, primarily due to timing differences in the recognition of sources and uses. As the fiscal year progresses, these timing differences are expected to normalize. Staff will continue to monitor financial performance and maintain sound financial management practices, with additional insights from the forthcoming annual forecast to help assess the full-year outlook. In addition, the FY27 Operating Budget Amendment adopted by the Board in November 2026 reduced the annual budgeted deficit from $4.4 million to $3.6 million. These adjustments will be reflected in the next quarterly financial performance report, providing an updated basis for evaluating budget-to-actual variances.

Budget Impact

This is an informational item. There is no budget impact.

Prepared By:	Cleo Liao	Manager, Budgets	650-508-7756
	Jerry Vuong	Budget Analyst III	650-622-7804
	Michael Marasigan	Budget Analyst III	650-508-6367

Quarterly Financial Report
Fiscal Year 2027 Quarter 1 Result



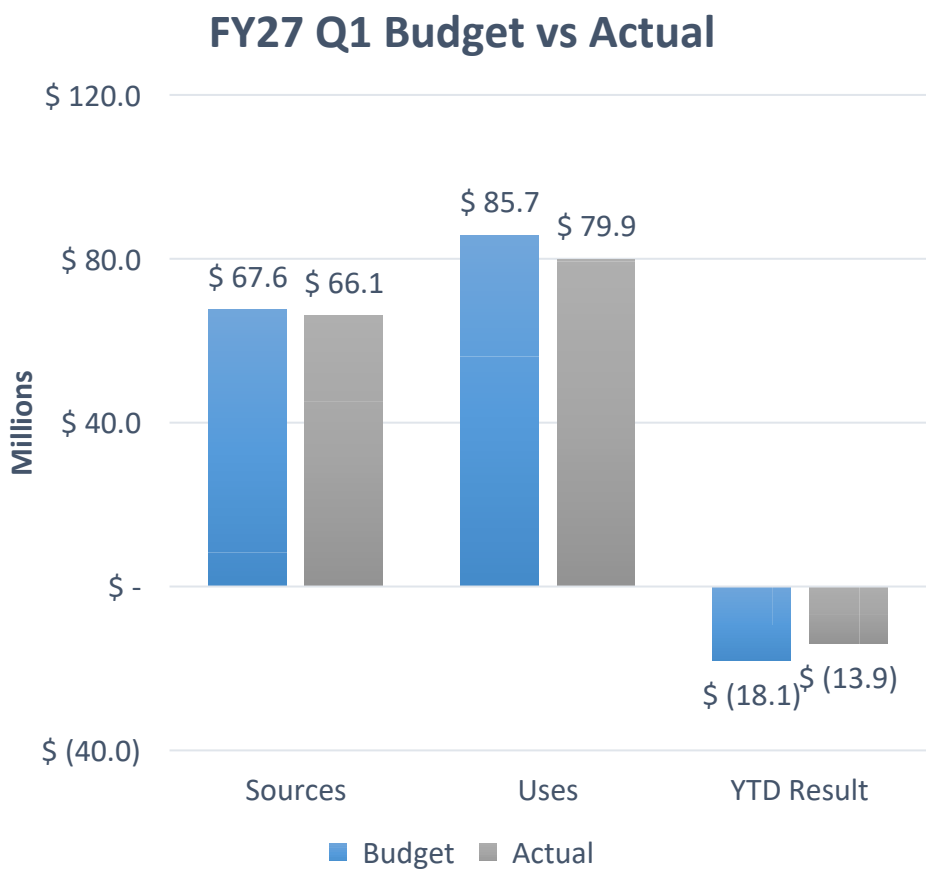
Board of Directors | December 2, 2026

Agenda

I. FY27 Quarter 1 Financial Performance
II. Sources
III. Uses
IV. Next Steps

FY27 Quarter 1 Financial Performance

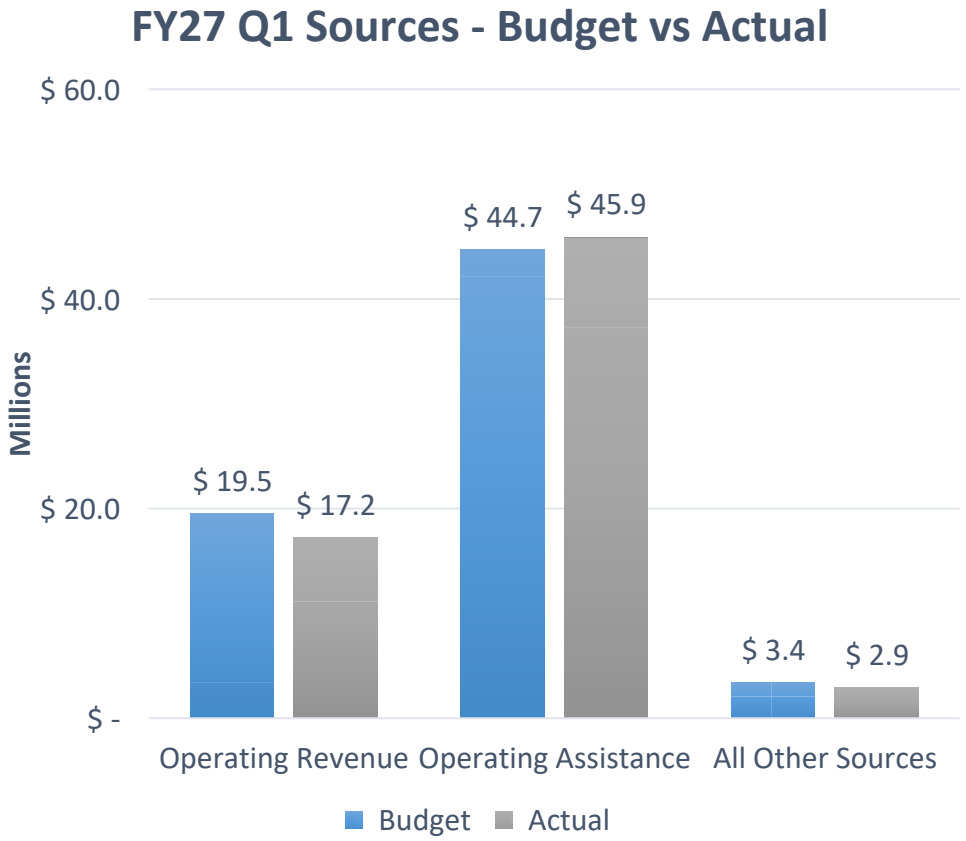
- **Sources:** $66.1M, unfavorable ($1.5M)
- **Uses:** $79.9M, favorable $5.8M
- **Q1 Result:** ($13.9M) deficit, favorable $4.2M



Sources – Budget vs. Actual

Sources: ($1.5M) unfavorable

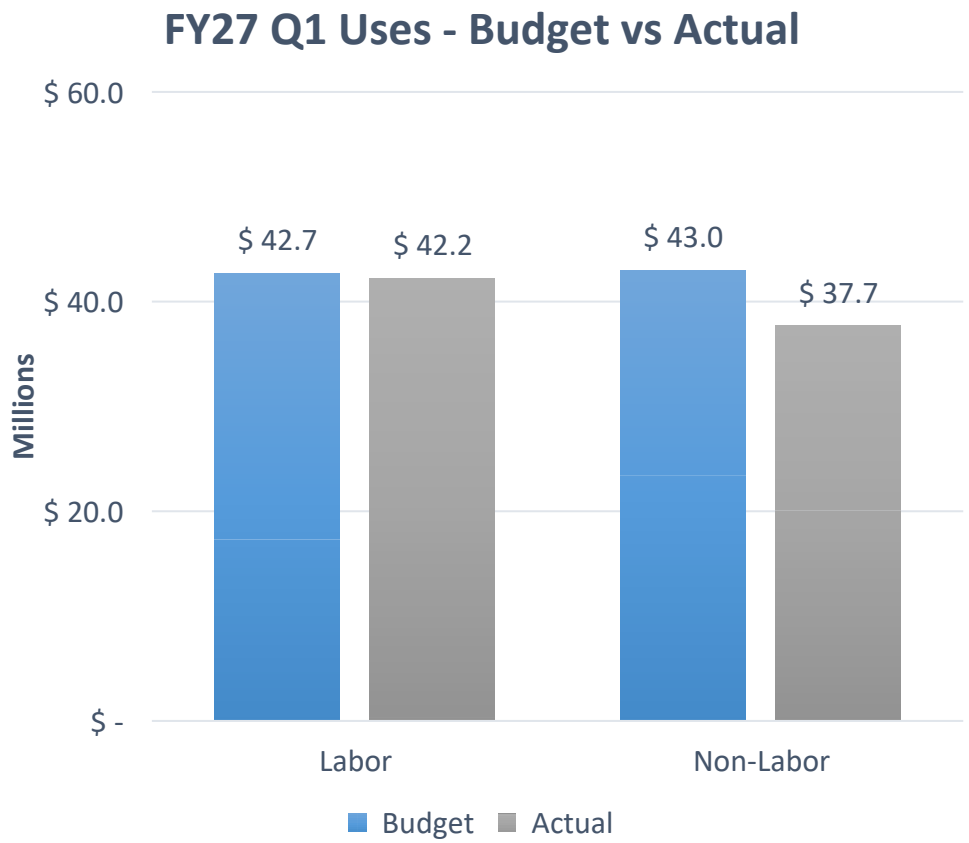
- **Operating Revenue: ($2.2M) Unfavorable**
  - ▲ Investment Income offset by
  - ▼ Managing Agency Cost Recovery
- **Operating Assistance: $1.3M Favorable**
  - ▲ Sales Tax Receipts
- **All Other Sources: ($0.5M) Unfavorable**
  - ▲ Employer Shuttle Cost Recovery



Uses - Budget vs. Actual

Uses: $5.8M favorable

- **Labor: $0.5M Favorable**
  - Salaries and Benefits
  - Managing Agency Cost
- **Non-Labor: $5.3M Favorable**
  - Purchased Transportation
  - Contracted Services
  - Other Non-Labor



Next Steps

December

- Board Workshop

Early Spring

- FY27 Forecast
- FY27 Quarter 2 Financial Report

Thank You



samTrans

SAN MATEO COUNTY TRANSIT DISTRICT
STATEMENT OF SOURCES AND USES
FISCAL YEAR 2027
AS OF SEPTEMBER 30, 2026

(In thousands)

	YEAR-TO-DATE SEPTEMBER				ANNUAL
	BUDGET	ACTUAL	$ VARIANCE	% VARIANCE	BUDGET
SOURCES					
Passenger Fares	$ 3,507	$ 2,925	$ (581)	(16.6%)	$ 13,570
Rental Income	766	871	105	13.7%	4,078
Investment Interest Income	4,256	5,324	1,068	25.1%	17,211
Advertising Income	172	194	22	12.7%	688
Other Income	99	753	654	663.3%	445
Agency Indirect Administration Recovery	10,672	7,164	(3,508)	(32.9%)	38,999
Subtotal: Operating Revenue	**19,472**	**17,231**	**(2,241)**	**(11.5%)**	**74,989**
Prop A Sales Tax	29,811	30,648	837	2.8%	118,889
Measure W Sales Tax	14,886	15,286	400	2.7%	59,445
Transportation Development Act (TDA) Transit Fund	-	-	-	0.0%	51,793
State Transit Assistance (STA)	-	-	-	0.0%	9,330
Operating Grants	-	-	-	0.0%	1,997
Subtotal: Operating Assistance	**44,697**	**45,934**	**1,237**	**2.8%**	**241,453**
Transportation Development Act (TDA) 4.5 Redi-Wheels	-	-	-	0.0%	2,726
State Transit Assistance (STA) - Paratransit	-	-	-	0.0%	1,011
SMCTA Measure A Redi-Wheels	1,192	1,192	-	0.0%	4,756
Measure M Paratransit	-	-	-	0.0%	1,200
Operating Grants - American Disabilities Act	-	-	-	0.0%	3,909
Subtotal: Americans with Disabilities Act Operating Assistance	**1,192**	**1,192**	**-**	**0.0%**	**13,602**
Employer SamTrans Shuttle Funds	2,229	1,699	(530)	(23.8%)	8,916
Subtotal: Multi-Modal Transit Program Operating Assistance	**2,229**	**1,699**	**(530)**	**(23.8%)**	**8,916**
TOTAL - SOURCES	**$ 67,590**	**$ 66,057**	**$ (1,534)**	**(2.3%)**	**$ 338,960**
USES					
Wages & Benefits	39,765	39,590	176	0.4%	136,373
Indirect Admin and Overhead Costs - Labor	2,954	2,620	335	11.3%	11,488
Subtotal: Labor	**42,719**	**42,209**	**510**	**1.2%**	**147,860**
Contracted Urban Bus Service	9,885	9,843	42	0.4%	39,539
Contracted Americans with Disabilities Act Programs	5,099	4,188	911	17.9%	20,397
Contracted Multi-Modal Transit Programs	2,302	1,734	568	24.7%	9,206
Non-Labor Subtotal - Purchased Transportation	**17,286**	**15,765**	**1,521**	**8.8%**	**69,142**
Vehicle Maintenance (Contracted)	218	83	135	62.0%	871
Property Maintenance	1,036	554	482	46.5%	4,616
Professional Services	1,713	1,669	44	2.6%	10,213
Technical Services	3,334	3,275	59	1.8%	7,788
Security and Law Enforcement	1,657	1,478	179	10.8%	7,962
Ticketing and Fare Collection	348	284	65	18.6%	1,394
Other Services	1,080	926	155	14.3%	4,237

samTrans

SAN MATEO COUNTY TRANSIT DISTRICT
STATEMENT OF SOURCES AND USES
FISCAL YEAR 2027
AS OF SEPTEMBER 30, 2026

(In thousands)

	YEAR-TO-DATE SEPTEMBER				ANNUAL
	BUDGET	ACTUAL	$ VARIANCE	% VARIANCE	BUDGET
Non-Labor Subtotal: Contracted Services	**9,387**	**8,269**	**1,118**	**11.9%**	**37,082**
Bus Fuel and Energy	2,302	2,269	33	1.4%	9,207
Bus Parts and Materials	1,199	1,135	65	5.4%	4,798
Uniforms and Bus Operator Expense	188	45	144	76.2%	641
Office Supplies / Printing	218	51	166	76.4%	826
Non-Labor Subtotal: Materials & Supplies	**3,907**	**3,500**	**408**	**10.4%**	**15,472**
Telecommunication	230	141	89	38.7%	921
Other Utilities	568	804	(236)	(41.6%)	2,272
Non-Labor Subtotal: Utilities	**798**	**945**	**(147)**	**(18.4%)**	**3,193**
Workers Compensation	1,294	1,064	229	17.7%	5,174
Insurance	1,167	1,189	(22)	(1.9%)	4,668
Contracted Urban Bus (CUB) Insurance	527	553	(25)	(4.8%)	2,110
Americans with Disabilities Act Insurance	465	463	2	0.4%	1,860
Claims Reserves and Payments	1,156	92	1,065	92.1%	4,625
Contracted Urban Bus (CUB) Claims Reserves and Payments	-	12	(12)	(100.0%)	-
Promotional Advertising and Events	184	72	112	61.0%	728
Banking and Transaction Fees	130	48	83	63.5%	522
Leases and Rentals	2,744	3,008	(265)	(9.6%)	4,726
Employee Programs	369	85	284	76.9%	1,509
Training and Business Travel	190	89	101	53.2%	1,040
Dues and Membership	96	88	09	9.1%	300
Other Expenses	45	32	14	30.2%	178
Indirect Admin and Overhead Costs - Non-Labor	2,949	2,194	755	25.6%	13,052
Non-Labor Subtotal: Other	**11,317**	**8,988**	**2,329**	**20.6%**	**40,493**
Debt Service	-	-	-	0.0%	26,008
TOTAL - OPERATING USES	**85,414**	**79,676**	**5,738**	**6.7%**	**339,249**
Operating Reserve	-	-	-	0.0%	2,369
Unapplied Dumbarton Rental Income for Future Dumbarton Maintenance of Way	270	241	(29)	(10.6%)	730
Subtotal - Allocations & Contributions	**270**	**241**	**(29)**	**(10.6%)**	**4,099**
TOTAL - USES	**$ 85,684**	**$ 79,917**	**$ 5,767**	**6.7%**	**$ 343,348**
SURPLUS/(DEFICIT)	**$ (18,094)**	**$ (13,861)**	**$ 4,233**	**23.4%**	**$ (4,388)**
Draw from Prior Year's Measure W	**-**	**-**	**-**	**0.0%**	**$ 2,000**
Draw from Prior Years' Surpluses	**-**	**-**	**-**	**0.0%**	**2,388**
ADJUSTED SURPLUS/(DEFICIT)	**$ (18,094)**	**$ (13,861)**	**$ 4,233**	**23.4%**	**-**

BOARD OF DIRECTORS 2026

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

APRIL CHAN
GENERAL MANAGER/CEO

AGENDA

San Mateo County Transit District

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

December 2, 2026 – 2:25 pm

or immediately following the Finance Committee meeting

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

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

11.a.	Call to Order	Informational
11.b.	Approval of Minutes of the Strategic Planning, Development, and Sustainability Committee Meeting of November 4, 2026	Motion
11.c.	District Strategic Plan Fiscal Year 2026 Annual Progress Report	Informational
11.d.	Adjournment	

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

DRAFT Minutes of November 4, 2026

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

Members Absent: None

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

Other Board Members Absent: None

Staff Present: J. Cassman, A. Chan, C. Espiritu, L. Lumina-Hsu, D. Shockley, M. Tolleson, M. Tseng

15.a. Call to Order
Committee Chair Powell called the meeting to order at 4:08 pm.

15.b. Approval of Minutes of the Strategic Planning, Development, and Sustainability Committee Meeting of October 7, 2026
Motion/Second: Medina/Esser
Ayes: Canepa, Fraser, Gee, Medina, Powell, Ratto, Speier, Esser, Chuang
Noes: None
Absent: None

15.c. Introduction to the 2026 SamTrans Fare Study
The Directors directed staff to explore free fares for seniors and youth riders; stepped fare increases, reduced fares, and ridership elasticity to fare changes; Regional Transit Measure (Measure RTM) return-to-source funds allocation to support or pilot various transit programs; Clipper START promotion; and how to increase ridership for various county demographics.

Public Comment
Aleta Dupree, Team Folds, commented on Clipper usage.

Max Mautner commented on ridership growth goals and local partnership opportunities to increase ridership.

15.d. Adjournment

The meeting adjourned at 5:03 pm.

DRAFT

San Mateo County Transit District
Staff Report

To: Board of Directors

Through: April Chan, General Manager/CEO

From: Joshuah Mello, Chief Planning Officer

Subject: **District Strategic Plan Fiscal Year 2026 Annual Progress Report**

Action

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

Significance

Moving San Mateo County (the "Plan"), adopted by the Board in November 2024, is the San Mateo County Transit District's (District or SamTrans) strategic plan for Fiscal Years 2026 to 2035 (FY26-35). The Plan provides policy guidance and strategic direction for the District as a workplace and managing agency, and for SamTrans service and investments. Following adoption of the Plan, Staff developed an implementation framework to systematically track and measure progress toward advancing the Plan's vision and strategic goals. This effort included convening of a Strategic Plan Committee, development of key performance indicators (KPIs), and creation of an internal management tool to track the status of the Plan's 70+ initiatives.

The District is committed to reporting on the Plan's progress each year. The FY26 progress report, which is appended to this staff report, summarizes key accomplishments, KPI performance and progress on strategic initiatives. The key accomplishments section highlights the District's achievements this past fiscal year that are moving us toward our strategic goals and vision. Examples of key accomplishments include:

- Implementation of a One-Seat Ride paratransit pilot;
- Creation of SamTrans and Caltrain rider research panels to receive ongoing rider feedback;
- Launching the Reimagine Dumbarton study;
- Adoption of new bus shelter designs;
- Move to Millbrae Headquarters;
- Introduction of new supervisory and leadership trainings; and

- Continued investment in zero-emission bus fleet and infrastructure.

The KPIs measure the District's progress toward achieving the Plan's six goals. Rather than capturing every aspect of District performance, the KPIs are intended to provide a high-level view of whether the organization is moving in the direction envisioned by the strategic plan. KPIs will be reported each year to assess both annual performance for the past fiscal year and cumulative performance over time, to ensure that KPIs are trending in the right direction.

The Plan includes 32 KPIs. For FY26, 11 KPIs are meeting or exceeding target, five are near target (within 20 percent of target), and four are below target (more than 20 percent below target). Five KPIs are tracking only, and do not have a specific target. Seven KPIs will begin collecting data in FY27. Table 1 summarizes KPI performance and initiative status for FY26 by goal.

Table 1: Strategic Plan KPI FY26 Performance

Goal	Description	Meets or Exceeds Target	Near Target	Below Target	Tracking Only	No Data for FY26
1	Deliver Better Mobility Services	3	0	0	2	0
2	Provide Outstanding Customer Experience	2	1	2	0	2
3	Become an Employer of Choice	1	2	1	0	2
4	Lead Responsibly	5	1	0	0	3
5	Ensure Effective Management	TBD	TBD	TBD	TBD	TBD
6	Exercise Collective Efforts	0	1	1	3	0
	Totals:	**11**	**5**	**4**	**5**	**7**

The strategic initiatives are concrete and specific actions the District will take to implement the Plan and achieve the objectives, goals, and vision. These are separate and distinct from the goal-level KPIs shown in Table 1. For FY26, there were a total of 73 initiatives; 82 percent were in progress or completed, 14 percent were scheduled to start, and four percent were yet to start or paused. Table 2 summarizes initiative status for FY26.

Table 2: Strategic Plan Initiative Status for FY26

Goal	Description	In Progress or Ongoing	Scheduled	Not Yet Started or Paused	Completed
1	Deliver Better Mobility Services	8	2	0	0
2	Provide Outstanding Customer Experience	13	2	0	0
3	Become an Employer of Choice	11	1	2	1
4	Lead Responsibly	13	4	1	0
5	Ensure Effective Management	4	1	0	0
6	Exercise Collective Efforts	9	0	0	1
	Totals:	**58**	**10**	**3**	**2**

Budget Impact

There is no budget impact associated with this informational item. Initiatives in the Strategic Plan are implemented based on available funding, as approved by the Board via the operating and capital budgets.

Background

Strategic Plan Initiative 4B.3 commits the District to reporting on progress of achieving Strategic Plan goals. Staff will provide an annual progress report to the Board after the close of each fiscal year. The progress report will include a summary of the past year's accomplishments, KPI performance and initiative status. The Plan was adopted by the Board on November 6, 2024. It is guided by the following vision, mission, core values, and goals. Table 3 summarizes the components of the Plan.

Table 3: Components of the Strategic Plan

Strategic Plan Component	**Description**
Vision	The District provides an exceptional mobility experience for the people and communities in San Mateo County.
Mission	Working together to revolutionize mobility and create a more equitable and sustainable region.

Strategic Plan Component	**Description**
Core Values	Equity: Delivering equitable access to opportunities for our communities and our employees to live and thrive. Excellence: Delivering high-quality service for our customers, investing in our employees, and securing our financial future. Innovation: Demonstrating eagerness and support to try new things, take calculated risks, and adapt to changing conditions. Partnership: Building trust, exercising empathy, working as a team, and collaborating with external partners. Safety: Cultivating a culture of safety and well-being of our people and customers. Sustainability: Creating a sustainable and resilient environmental future for the agency and people in the region.
*Goals**	Goal 1: Deliver Better Mobility Services: Expand and invest in sustainable transportation options to better meet mobility needs, reduce emissions, and improve equity. Goal 2: Provide Outstanding Customer Experience: Deliver a superior transit experience that captivates riders, fosters loyalty, and nurtures trust. Goal 3: Become an Employer of Choice: Create an employee experience that is meaningful, inclusive, attracts talent, and is built on trust. Goal 4: Lead Responsibly: Build a fiscally responsible, accountable, and highly effective organization. Goal 5: Ensure Effective Management: Provide sufficient flexibility, resources, and staffing to support the effective delivery of all transportation services for agencies under the District umbrella. Goal 6: Exercise Collective Effort:. Collaborate across the region to improve transit and land use in service of greater mobility.

** Please see Appendix A in the Strategic Plan for specific objectives and initiatives under each goal*

Prepared By:	Nicholas Yee	Senior Transportation Planner	650-551-6174
	Chelsea Schultz	Senior Manager, Strategic and Environmental Planning	650-508-6483

Moving San Mateo County: Annual Progress Report for FY 2026

Presented to the Board of Directors on December 2, 2026



Executive Summary

Fiscal Year 2026 marked the first full year of implementation of *Moving San Mateo County*, the San Mateo County Transit District's (District) 10-Year Strategic Plan (Plan). Adopted by the Board of Directors in November 2024, the Plan establishes six goals to guide the District's policy, investment, and service decisions through FY2035. This first Annual Progress Report provides a transparent assessment of the District's progress in putting the Plan into action and establishes a foundation for measuring performance for the coming years.

Overall, the District made substantial progress in translating *Moving San Mateo County* into an active framework for decision-making and implementation. During FY26, the District integrated the Plan into capital and operating investment decisions, established Strategic Key Performance Indicators (KPIs), and developed an Initiative Management Tool to consistently track implementation, identify risks and resource needs, and inform future budget cycles and work plans.

By the end of FY26, 58 of the 73 initiatives were in progress or ongoing, and 2 of the 73 initiatives were complete, meeting the District's first-year target for implementation (82%).

As expected in the first year of a 10-year plan, progress across the six goals centered on launching new programs and projects, advancing work already underway, and establishing the systems, processes, and partnerships needed to support ongoing implementation:

- Under **Goal 1 Deliver Better Mobility Services**, the District improved and expanded existing services while undertaking planning and engineering studies to meet future mobility needs. We refined SamTrans bus and Ride Plus services in response to customer feedback and travel patterns, launched a new one-seat paratransit pilot, and initiated the *Reimagine Dumbarton* study. We also strengthened the assets and systems that support reliable service.
- Under **Goal 2 Provide Outstanding Customer Experience**, the District laid groundwork for significant improvements to how customers experience and interact with the system. The Board approved new bus shelter and amenity designs, and over 200 bus stops have been identified for improvements to be delivered over four phases. SamTrans is also making strides to advance its transit priority program. As part of *TSP-NOW* (Transit Signal Priority Network Optimization Working Group), a systemwide transit signal priority assessment, the District established a Technical Working Group with Caltrans and local partners and began coordination to improve bus reliability and reduce delays at traffic signals. SamTrans also expanded opportunities for

riders to help shape service through recruitment of a volunteer customer advisory panel, RIDE (Riders Influencing Decisions and Experiences.)

- Under **Goal 3 Become an Employer of Choice**, the District worked to become a more competitive employer by strengthening compensation, benefits, employee development, workplace inclusion, and facilities. A new three-tiered supervisor development program launched, and 75 supervisors have completed the program. We have expanded Employee Resource Groups and launched a new DEIB (Diversity, Equity, Inclusion, and Belonging) Ambassador Program. We have added six new restrooms at operator layover locations and relocated our headquarters to a new transit-accessible location in Millbrae.
- Under **Goal 4 Lead Responsibly**, the District strengthened the organizational and financial systems needed to deliver the Plan over the long term. The District adopted a 4-year Capital Improvement Plan to align capital investment priorities with the District's six strategic goals, recommending up to $479 million in priority capital projects for FY26-29. SamTrans remains on track for a 100 percent zero-emission bus fleet by 2034 and has begun receiving delivery of 108 new hydrogen fuel cell electric buses and 62 battery electric buses.
- Under **Goal 5 Ensure Effective Management**, the District and Caltrain established an annual Shared Services workplan development process and is currently undertaking an externally facilitated process to stand up a Shared Services Agreement. This next phase of work will establish mutually agreed upon KPIs to measure Shared Services performance and effectiveness for the District, Caltrain, the San Mateo County Transportation Authority and the San Mateo County Express Lanes Joint Powers Authority (Express Lanes JPA).
- Finally, under **Goal 6 Exercise Collective Efforts**, the District played an active regional role by voting to participate in the regional transit funding measure authorized by Senate Bill 63 and adopting a Local Investment Plan. We accelerated corridor-wide collaboration by reinvigorating the Grand Boulevard Initiative and leading a coordinated Caltrans project development process for El Camino Real; we invested in local partnerships by distributing 22,900 Youth Unlimited passes to school districts; and we supported transit-oriented communities by adopting our first Transit-Oriented Development (TOD) policy.

An important part of the District's first year of implementation was to establish a set of **Strategic KPIs** that collectively measure the District's progress toward the Plan's goals. These KPIs highlight areas where performance is meeting or exceeding targets, approaching expectations, or where additional focus is needed. A summary of FY26 Strategic KPI Performance is provided in **Table 1** below.

TABLE 1: FY26 STRATEGIC KPI PERFORMANCE

FY26 Strategic KPI Performance		
Met or Exceeded Target	**Approached Target (Within 20%)**	**Below Target**
• Zero-emission share of fixed route fleet • Boardings per revenue hour • Service to Equity Priority Areas • Customer satisfaction rating • Bus stops with improved amenities • Employee recruitment • Operating forecast performance for (1) sources, (2) uses • IT system performance • Strategic Plan initiatives • GHG emissions	• On-time performance • Workplace safety incident rate • Employee retention rate • IT internal customer experience • Grand Boulevard Initiative	• Number of preventable accidents • Customer complaints per 10,000 boardings • Employee vacancy rate • Clipper START usage

SamTrans met or exceeded 11 targets, came close to meeting five targets, and fell short of four targets. Performance for five KPIs will be evaluated based on tracking only, and do not have a numeric target set. Seven KPIs will not have sufficient data and/or established targets to identify and report on until FY27.

As the first year of a 10-year plan, the Annual Progress Report provides evidence of how the District has integrated the Plan into an active framework for decision-making and implementation. Many of the initiatives now underway will require several years to fully implement and longer to produce measurable changes in Strategic KPI performance. Future annual reports will build on this foundation, using internal tracking and monitoring tools, and Strategic KPIs to assess whether progress is being sustained, to identify areas requiring adjustment, and to maintain accountability for delivering the vision established in *Moving San Mateo County*.

District Strategic Plan Framework

The following two pages summarize the core values guiding the District's Strategic Plan and the Strategic Plan goals.

San Mateo County

TRANSIT DISTRICT

Mission: Working together to revolutionize mobility and create a more equitable and sustainable region.

Vision: The District provides an exceptional mobility experience for the people and communities in San Mateo County.

Core Values



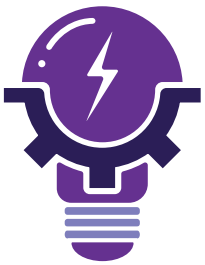
Equity

Deliver equitable access to opportunities so our communities and employees thrive.



Excellence

Deliver high-quality service to customers, invest in our employees, and secure our financial future.



Innovation

Demonstrate eagerness to try new things, take calculated risks, and adapt to changing conditions.



Partnership

Build trust, exercise empathy, work as a team, and collaborate with external partners.



Safety

Cultivate a culture of safety and well-being for our people and customers.



Sustainability

Create a sustainable and resilient environmental future for the agency and people in the region.

Our Goals

1 **Deliver Better Mobility Services**

Expand and invest in sustainable transportation options to better meet mobility needs, reduce emissions, and improve equity.

2 **Provide Outstanding Customer Experience**

Deliver a superior transit experience that captivates riders, fosters loyalty, and nurtures trust.

3 **Become an Employer of Choice**

Create an employee experience that is meaningful, inclusive, attracts talent, and is built on trust.

4 **Lead Responsibly**

Build a fiscally responsible, accountable, and highly effective organization.

5 **Ensure Effective Management**

Provide sufficient flexibility, resources, and staffing to support the effective delivery of all transportation services for agencies under the District umbrella.

6 **Exercise Collective Efforts**

Collaborate across the region to improve transit and land use in service of greater mobility.

Background

In November 2024, *Moving San Mateo County: San Mateo County Transit District's 10-Year Strategic Plan ("Moving San Mateo County"* or the "Plan"*)* was adopted by the Board of Directors. The Plan guides all policy, investment, and service decisions for the San Mateo County Transit District (District) through fiscal year (FY) 2035. It offers strategic direction to address the District's multi-faceted and unique role as the operator of bus transportation for the county (SamTrans); managing agency for Caltrain and the San Mateo County Transportation Authority (TA); provider of staff support for the San Mateo County Express Lanes Joint Powers Authority (Express Lanes JPA);[1] and provider of Shared Services.

Progress Report Purpose

In *Moving San Mateo County,* the District committed to establishing a system for implementing strategic initiatives, as well as measuring, monitoring, evaluating, and reporting progress toward achieving the six strategic goals. This progress report is intended to fulfill that requirement and provide transparency into how the District is advancing and delivering on the initiatives in the Plan. A progress report will be presented to the Board of Directors after the end of each fiscal year.

Strategic Plan Implementation Framework

Since the Plan's adoption, the District has systematically integrated it into everyday processes, including aligning capital and operational spending with strategic goals, socializing the Plan across the organization, and engaging a new internal Strategic Plan Committee (StPC) to build technical capacity and expertise districtwide around the Plan. Over the past year, the StPC worked with District leadership to refine initiatives, establish Strategic Key Performance Indicators (KPIs) with consistent definitions, data sources, and calculation methods, and develop an internal Initiative Management Tool (IMT). The IMT is a critical component of the implementation framework, providing a consistent structure for both assessing progress to date and planning for the work ahead. It goes beyond tracking the status of each initiative by serving as a diagnostic and planning tool that helps staff identify and address issues related to scope, sequencing, risks, and resource needs as they plan for upcoming budget cycles.

[1] The Plan does not address Caltrain's service vision, delivery, and investments, nor the strategic vision for the TA or Express Lanes JPA.

How to Read This Report

This report summarizes the District's progress toward implementing *Moving San Mateo County* in FY2026. It is organized into three sections:

- **Spotlight on Key FY26 Accomplishments** highlights significant accomplishments and milestones achieved under each of the six strategic goals during the past fiscal year. The progress highlighted in this section is illustrative rather than exhaustive and demonstrates how individual initiatives are advancing the broader goals of the Plan. Where appropriate, upcoming milestones are also identified to provide a look ahead of work already underway for FY2027.
- **Strategic Key Performance Indicators (KPIs)** presents a focused set of indicators that collectively help the District assess progress towards the six goals of *Moving San Mateo County*. Rather than capturing every aspect of District performance, the Strategic KPIs are intended to provide a high-level view of whether the organization is moving in the direction envisioned by the strategic plan.
- **Progress on Strategic Initiatives** provides a comprehensive table showing the implementation status of all 73 initiatives included in *Moving San Mateo County*.

Spotlight on Key FY26 Accomplishments

Goal 1 Deliver Better Mobility Services

The District's intent for Goal 1 is to expand and invest in sustainable transportation options to better meet mobility needs, reduce emissions, and improve equity. In *Moving San Mateo County*, the District committed to improving and expanding existing SamTrans services and experimenting and responding to the changing transportation landscape.

In FY26, we made progress towards this goal by adapting and expanding SamTrans bus and microtransit service to changing mobility needs, piloting improvements to paratransit service, supporting reliable bus service behind the scenes, and planning for the next generation of mobility.

Adapting and expanding SamTrans service to changing mobility needs:

We evaluated *Reimagine SamTrans,* our 2024 comprehensive bus network redesign, to refine existing services based on customer feedback and travel patterns. 82% of respondents to our 2025 Customer Satisfaction Survey were satisfied or very satisfied with SamTrans, and nearly half (47%) said their SamTrans experience has gotten better in the past year. When asked in what way, respondents pointed to increased reliability (15%) and cleaner buses and/or bus stops (10%). Changes implemented at the beginning of FY27 (August 2026) to Express and Limited Stop routes and schedules provide faster, more reliable trips.

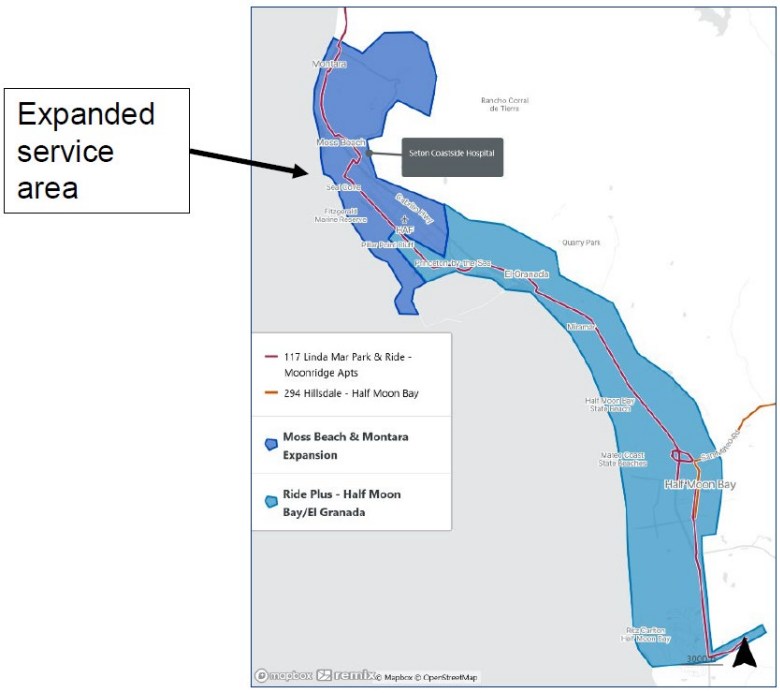


FIGURE 1: EXPANDED RIDE PLUS SERVICE AREA TO MOSS BEACH & MONTARA

The District completed an evaluation of our SamTrans Ride Plus on-demand transit service. 88% of riders are satisfied with the service and experience. Expansions to the Half Moon Bay area are responsive to customer feedback requesting expanded service areas and hours, and extension of East Palo Alto service to the Palo Alto Transit Center will

strengthen connections to regional transit service. These changes went into effect in August 2026.

Piloting improvements to paratransit service:

In partnership with the San Francisco Municipal Transportation Agency (SFMTA), we developed One Seat, a pilot program to provide no-transfer trips for eligible paratransit riders traveling between San Mateo and San Francisco counties for medical appointments. The pilot began on July 1, 2026.

Supporting reliable service behind the scenes:

Behind the scenes, the District maintained the infrastructure needed to deliver reliable service, achieving a 95% on-time completion rate for scheduled bus maintenance. We completed the North and South Base Conditions and Needs Assessment to identify assets that are nearing, at, or have exceeded their useful life.[2] We are implementing a new Enterprise Asset Management system that will help us track asset conditions and lifecycle systematically and develop projects for inclusion in the Capital Improvement Plan, a comprehensive list of anticipated capital needs for the next ten years. We also completed a study to determine the feasibility of protecting North Base from flooding and sea level rise impacts and are implementing a phased mitigation approach focused on the most vulnerable areas, as we work to advance a longer-term solution. Protecting SamTrans' fleet and operations from sea level rise is critical to ensuring service reliability.



FIGURE 2: NORTH BASE FLOOD PROTECTION ALTERNATIVES

[2] North Base is SamTrans' primary hub for vehicle maintenance, operations and dispatch, and plays a central role in the agency's daily transportation services. The 27-acre property houses two-thirds of the SamTrans bus fleet, an operator training facility, and rest areas for bus operators and other essential staff. It is also the planned site of a hydrogen refueling station for SamTrans' new zero-emissions fleet. South Base is the operations and maintenance facility for the remaining one-third of the SamTrans bus fleet.

Planning for the next generation of mobility:

We initiated the *Reimagine Dumbarton* study to explore how we can transform the unused Dumbarton freight railroad corridor to bring fast, reliable, zero-emission bus service to the community and connect residents with local destinations, regional employment centers, and the regional transportation network. This past year, we engaged community members through 11 pop-up events, two community meetings, a Stakeholder Working Group meeting, an online survey, and more than 15 roadshow presentations to help develop different options for the corridor.

In parallel, we completed baseline and existing conditions work, advanced preliminary concept designs for the corridor, and initiated technical evaluation of the alternatives, including ridership and traffic modeling, environmental analysis, operational analysis, and planning-level cost estimates. We also continued coordination with Union Pacific Railroad on existing railroad rights and future use of the corridor. Staff plan to identify a preferred alternative in FY27, informed by a second round of community outreach and the results of this technical evaluation.



FIGURE 3: *REIMAGINE DUMBARTON* COMMUNITY MEETING AT THE BELLE HAVEN COMMUNITY CAMPUS

Goal 2 Provide Outstanding Customer Experience

The District's intent for Goal 2 is to deliver a superior transit experience that captivates riders, fosters loyalty, and nurtures trust. In *Moving San Mateo County*, the District committed to improving communication with riders, investing in the customer experience, listening and responding to rider feedback, and strengthening

the culture of safety across the organization. This year, much of our work focused on laying the foundation for modernizing customer communications, improving the transit environment, expanding opportunities for rider feedback, and strengthening the systems and culture that support safe, reliable service.

Modernizing how customers receive information and connect with us:

SamTrans has been advancing a multifaceted approach to make it easier for customers to access timely, real-time service information. We are working to provide customers with information in multiple ways, including online, through personalized email and text notifications, and directly at bus stops. Several projects are underway, including a new customer communications platform, e-paper displays at bus stops, and a redesigned interactive live map, with improvements rolling out over the next year.

Investing in a better rider experience:

This past year, the Board of Directors approved new designs for SamTrans bus shelters, seating and other bus stop features. This milestone advances the Bus Stop Improvement Program, which aims to install shelters, seating, lighting, signage, and other customer amenities at high-priority bus stops throughout the county. We have identified over 200 bus stops for improvements to be delivered over four phases, with construction of the first phase beginning next year.

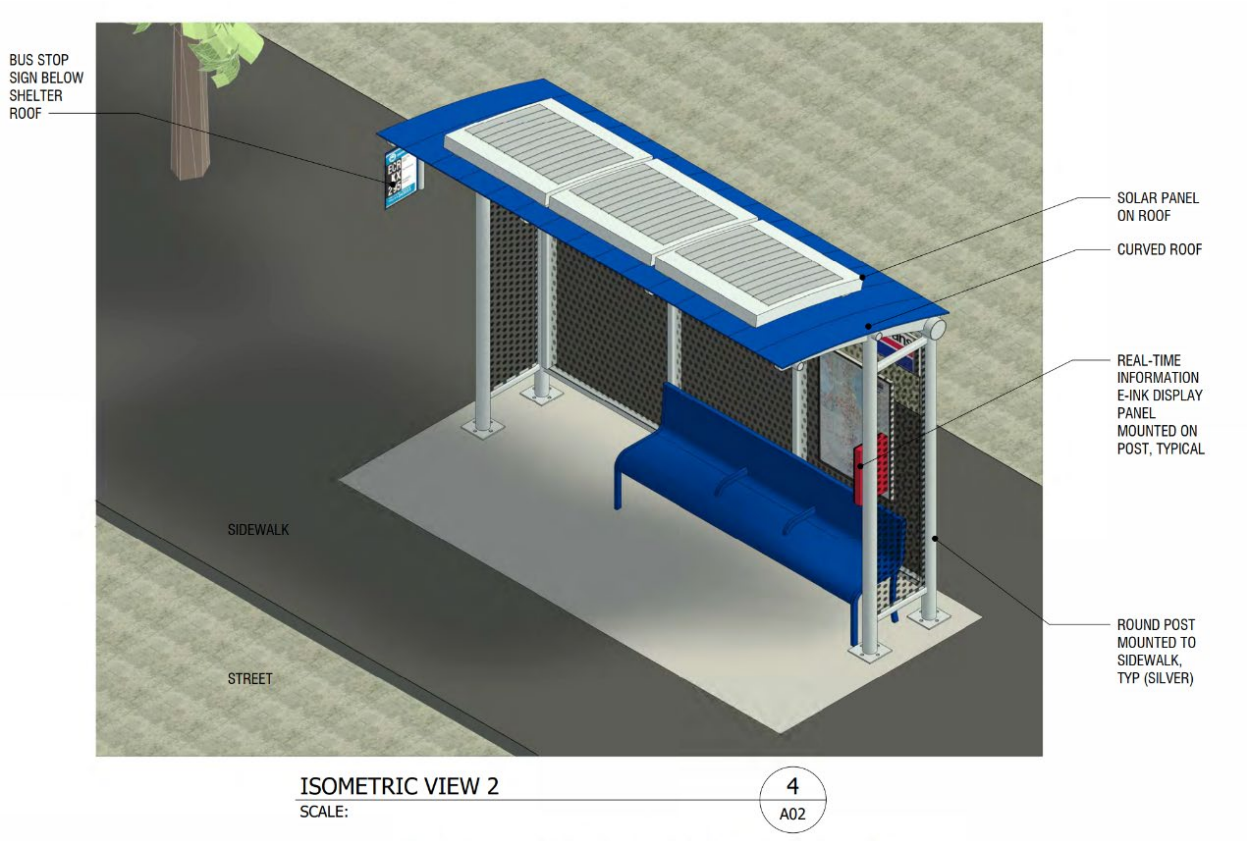


Figure 4: New SamTrans Bus Shelter Design

We also launched our long-term planning effort to expand transit signal priority (TSP) in San Mateo County through our Transit Signal Priority Network Optimization Working Group (*TSP-NOW)* initiative. As part of this initiative, we established a Technical Working Group with Caltrans and local partners, and began coordination to improve bus reliability and reduce delays at traffic signals. *TSP-NOW* will create TSP standards for the County, work with Caltrans to optimize the existing El Camino Real TSP system, provide an opportunity to upgrade to more efficient cloud-based TSP systems, and continue to pursue grants to kick-start recommendations identified in this program.

Listening to riders to improve our services:

We completed a comprehensive user experience study to better understand how customers interact with our website and digital tools, with findings that will directly inform a future website redesign.

We also launched recruitment for SamTrans and Caltrain RIDE (Riders Influencing Decisions and Experiences), a standing panel of riders who will provide ongoing feedback through surveys, interviews, and focus groups to help shape future service, customer programs, and communications. We aim to finalize the panel by end of calendar year 2026 and utilize this panel for future studies.

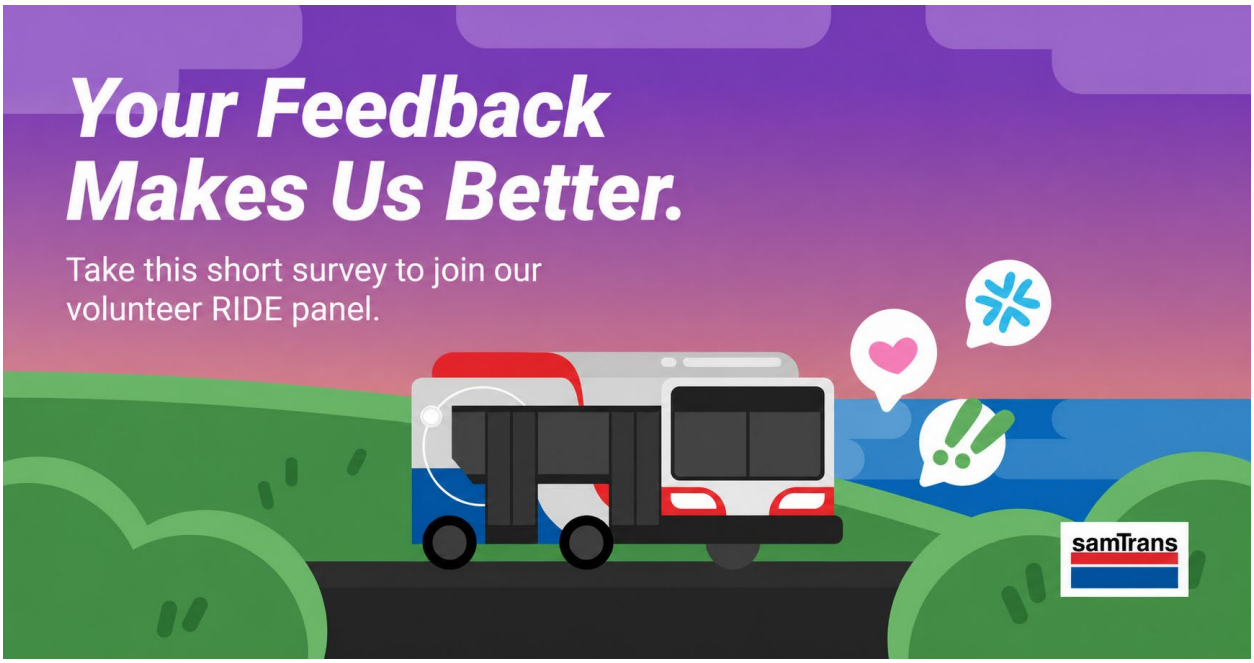


FIGURE 5: RECRUITMENT POSTER FOR RIDE PANEL

Strengthening the culture of safety:

The District continued building a proactive, technology-enabled safety culture by updating operating procedures, holding Safety Stand Down events that encouraged frontline employees to raise concerns and share feedback, and modernizing safety reporting systems to improve how incidents are tracked and analyzed.

As part of our efforts to reduce collisions and improve safety for passengers, operators, and the public, we also expanded operator training through new technology-based instructional tools, completed deployment of operator barriers across the bus fleet, installed additional pedestrian safety improvements and LED lighting upgrades at our operating bases, and finalized procurement of new AI-powered dash cameras that help identify unsafe driving behaviors, increase operator awareness of pedestrians, and support incident review and training.

Goal 3 Become an Employer of Choice

The District understands that becoming an employer of choice goes hand-in-hand with being able to deliver outstanding customer experience and improve and expand our existing services. In *Moving San Mateo County*, we committed to attracting and retaining talented employees, creating opportunities for professional growth, fostering an inclusive workplace, and providing the tools, facilities, and resources employees need to do their best work. This year, the District made progress by becoming a more competitive employer, investing in employee development, fostering an inclusive workplace, and giving our employees the tools and workplace to do their best work.

Becoming a more competitive employer:

The District implemented key findings from the 2024 Classification and Compensation Study through the adoption of Salary Ordinance 111, which adjusted salary scales to be more competitive within the Bay Area market; established multiple salary checkpoints for employees in good standing to reward long-term commitment and ensure internal equity and pay parity between current staff and new hires; and introduced flex positions to improve recruitment, retention, and career advancement opportunities for entry- to mid-level Individual Contributor positions. Work is also underway to establish policies and procedures to guide future classification and compensation administration.

In response to employee feedback, we enhanced employee benefits by adding pet insurance and expanded deferred compensation plan options to include loans and Roth contributions. We became the first transit agency to participate in MTC's Clipper BayPass pilot, providing employees based at District Headquarters in Millbrae with unlimited access to all Bay Area bus, rail, and ferry services on the Clipper system.

Investing in employee development:

The District continued strengthening its support for employees throughout their careers through standardization of introductory period performance metrics, updates to the employee performance management system, and a new approach to supervisor training. We launched a new three-tier approach to supervisor training designed to support leaders at various stages in their career. This includes onboarding for any employee with supervisory responsibilities, one-day leadership and managerial classes, and future succession planning. During the first year of implementation, 75 supervisors completed the new onboarding program,

strengthening the District's ability to coach, mentor, and support employees across the organization.

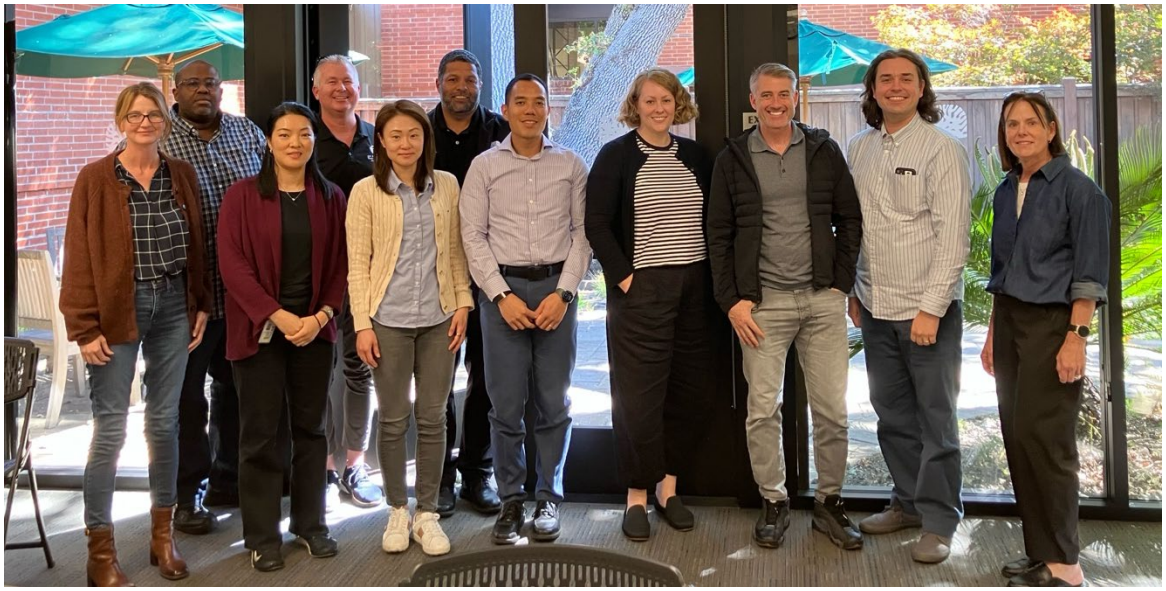


FIGURE 6: DISTRICT PARTICIPANTS IN THE *STEP UP TO LEADERSHIP* TRAINING PROGRAM

Fostering an inclusive workplace:

We modernized and standardized the District's exit interview process to better understand employee experiences related to inclusion, belonging and workplace culture. Employee-led engagement grew with the addition of the Parents and Caregivers Employee Resource Group (ERG), joining five existing ERGs. We also launched the District's first DEIB Ambassador Program, graduating representatives from every division who will help integrate diversity, equity, inclusion, and belonging into day-to-day work across the organization. In addition, DiSC personality profile assessments, a workplace-oriented behavioral assessment designed to help people understand how they tend to communicate, interact with others, respond to challenges, and approach work, are now available to all departments across the District.

Improving the employee workplace:

The District continued investing in facilities and tools that support employees in their daily work. Four new restroom service agreements expanded restroom access at six operator layover locations, while a new restroom finder mobile application helps operators quickly locate approved facilities, access entry information, and report maintenance issues in real time. The District is working with BART to provide District employees access to a future permanent operator restroom facility at the BART Daly City Station, which is currently in the final approval phase.

In May 2026, the District, Caltrain, TA, and the Customer Service Center relocated to new headquarters at 166 N. Rollins Road in Millbrae. The new District Headquarters (DHQ) provides modern workspaces, expanded collaboration areas, and a more transit-accessible location for employees and visitors, with connections to Caltrain,

SamTrans and BART. SamTrans also hosted Transit Employee Appreciation Day events at North and South Bases and the new District Headquarters to celebrate our 50th Anniversary.



FIGURE 7: NEW DISTRICT HEADQUARTERS IN MILLBRAE

Goal 4 Lead Responsibly

Under Goal 4 the District aims to build a fiscally responsible, accountable, and highly effective organization. In *Moving San Mateo County*, the District committed to strengthening internal processes, improving financial stewardship, and embedding sustainability into day-to-day operations. This year, the District made progress toward this goal by improving organizational effectiveness, strengthening project oversight, and advancing environmental sustainability across the organization.

Improving organizational effectiveness:

The District worked to improve our internal business processes to better support service delivery. A comprehensive procurement study is underway to identify opportunities to streamline the procurement process and reduce the time required to release Requests for Proposals and deliver contracts. The study is expected to be complete in FY27 and will include key performance indicators to measure successful outcomes.

We are also working to modernize employee recruitment practices to improve access to qualified candidates and create a more consistent hiring experience across the District. Improved automation was introduced through the District's applicant tracking system and recruitment outreach also increased through new LinkedIn engagement.

Strengthening financial stewardship:

This past year, the District focused on strengthening its project controls process and aligning its capital and operational investment plans with the strategic plan goals and initiatives. This included adoption of the Capital Improvement Plan (CIP) which covers the same 10-year planning horizon as *Moving San Mateo County*, FY26-35.

The CIP recommends funding up to $479 million in priority capital projects in FY26-29 and identifies nearly $2 billion in capital needs through FY35. Work has already begun to update the CIP for FY28-37. The CIP's key investment areas and project evaluation criteria are directly aligned with the District's six strategic goals, and the prioritization process specifically elevates projects that advance strategic plan initiatives.

Also in FY26, the District created and filled a new Principal Project Controls Analyst position. This role is leading development of a standardized project controls framework that will improve financial planning, project monitoring, reporting, and accountability across the District's capital and operating programs, helping ensure strategic investments are delivered with strong fiscal oversight.

Leading environmental sustainability:

The District continued making significant progress toward achieving its long-term environmental goals. SamTrans remains on track to transition to a 100 percent zero-emission bus fleet by 2034—six years ahead of California's statewide requirement. This past year, delivery began on 108 new hydrogen fuel cell electric buses and 62 battery electric buses. Projects to construct a permanent hydrogen fueling station at North Base and charging infrastructure at South Base are continuing to advance.



FIGURE 8: PHOTO OF A NEW HYDROGEN FUEL CELL BUS

The District also continued integrating sustainability into its daily operations. A new Sustainability Dashboard was developed for both SamTrans and Caltrain to provide the Board and public with more timely and accessible information about environmental performance and progress toward sustainability goals across the organization. We completed the replacement of gas water heaters with electric systems at District facilities, implemented environmentally friendly storm drain protection measures that achieved "Baseline" status with the State Water Resources Control Board, and advanced water line replacement projects at both North and South Bases. All storm water samples collected in the last fiscal year at both bases showed little to no pollutants.

Goal 5 Ensure Effective Management

The District's intent for Goal 5 is to provide sufficient flexibility, resources, and staffing to support the effective delivery of all transportation services for agencies under the District umbrella. A 2022 Governance Memorandum of Understanding reaffirmed the District's role as managing agency for Caltrain while establishing a separate Caltrain Executive Director who reports solely to the Caltrain Joint Powers Board. The Shared Services model supports SamTrans, Caltrain, TA, and the Express Lanes JPA.

Sharing services requires collaboration and alignment on goals and priorities. The result can yield significant cost savings and operational efficiencies for all agencies. *Moving San Mateo County* commits us to continually evaluating and improving the model's outcomes for both internal customers and shared-services staff. Since the Plan adoption, the District and Caltrain have established an annual workplan development process to identify Shared Services priorities for the year. The workplan is developed collaboratively between Caltrain, Shared Services Chiefs and the District, and is revisited quarterly.

Early in FY27, the District will engage in an externally facilitated partnership process between Caltrain and SamTrans Shared Services. This multi-stage process will establish mutual goals and performance metrics for Shared Services, improve existing processes (including workplan development), and support successful implementation of a Shared Services Agreement.

It is expected that some of the KPIs developed during the partnering process will be applicable to the Shared Services Model as a whole. These KPIs will be brought forward into the strategic plan to ensure the Shared Services Model is effective across the entire District organization, for SamTrans, Caltrain, the SMCTA and Express Lanes JPA.

Goal 6 Exercise Collective Efforts

Delivering on our vision of providing an exceptional mobility experience requires collaboration and coordination beyond our own services and facilities. In *Moving San*

Mateo County, we committed to strengthening partnerships with other transit agencies, local governments, schools, and community organizations to improve regional mobility, expand access to transit, and support more sustainable, transit-oriented communities. This year, the District advanced these commitments by playing a more active regional role, accelerating corridor-wide collaboration, investing in partnerships to expand access, and establishing a policy framework for transit-oriented development.

Advancing regional mobility:

The District took a more active role in regional efforts to improve how transit systems work across the Bay Area. In August 2025, the Board of Directors voted to join the regional transit funding measure laid out in California Senate Bill 63. Next, we adopted the Local Investment Plan, which establishes a community-informed roadmap for how SamTrans will administer future return-to-source funding should a regional transportation measure be approved by voters in November 2026. The Local Investment Plan reflects extensive outreach, including presentations and meetings with over 30 city councils and other groups, three meetings each with senior city, county, and agency staff convened as an Agency Advisory Group (AAG) and with other community leaders in a Stakeholder Advisory Group (SAG), and a multilingual survey that generated over 1,800 responses.

Accelerating corridor-wide collaboration:

The District has reinvigorated the Grand Boulevard Initiative (GBI), bringing renewed momentum to a long-standing regional effort to transform El Camino Real into a safer and more connected complete street. SamTrans is coordinating local transportation planning efforts through the GBI Task Force, which is bringing together cities, countywide agencies, Caltrans, advocates, and business groups to establish a coordinated vision and strategy for improving safety, walking, biking, and transit along the corridor. In January 2026, the SamTrans and TA Boards adopted the GBI Action Plan, and SamTrans is now leading a coordinated Caltrans project development process by developing a Project Initiation Document (PID) for all of El Camino Real in San Mateo County. As the first step of the Caltrans project development process, the PID will define the purpose and need for transportation improvements to the corridor as well as establish potential design alternatives.



FIGURE 9: GRAND BOULEVARD INITIATIVE MEETING AND WALKING TOUR

Investing in partnerships to expand access:

This past year, we continued efforts to grow youth ridership through youth-focused programming, specialized fare programming, and other targeted initiatives. SamTrans conducted outreach at school and community events to promote our Youth Unlimited passes, Way2Go free passes for community college students, Go Card, school-oriented routes, and free passes for field trips. School districts received 22,900 Youth Unlimited passes to distribute countywide for students. SamTrans provided free rides to 1,863 students and 401 chaperones on 45 field trips. We partnered with Ravenswood Middle School in East Palo Alto and San Mateo County Office of Education's Safe Routes to School Program and hosted a Meet the Bus event during its back-to-school night, where many families explored a SamTrans bus and Ride Plus microtransit van for the first time.

Supporting transit-oriented communities:

In February 2026, the Board adopted the District's first Transit-Oriented Development (TOD) Policy, establishing a long-term vision for developing mixed-use, transit-oriented communities on District-owned properties, with an emphasis on affordable housing, equitable access, and increased transit ridership. The District is now working on a Request for Proposals to attract developer interest in its former headquarters building in San Carlos. Work is underway to declare the Brewster site as *Exempt Surplus Land*, which will give SamTrans more flexibility for redevelopment.



FIGURE 10: MEET THE BUS EVENT AT RAVENSWOOD MIDDLE SCHOOL

Strategic Key Performance Indicators (KPIs)

Strategic Key Performance Indicators (KPIs) are a focused set of metrics that collectively help the District assess progress towards the six goals of *Moving San Mateo County*. Rather than capture every aspect of District performance, the Strategic KPIs were intentionally selected to measure different aspects of the District's operations and business functions that, taken together, provide a high-level view of progress towards the strategic plan's vision.

Approach

Over the past year, the StPC and District leadership have worked to identify the Strategic KPIs and establish consistent definitions, data sources, and calculation methods. While many of these assess changes in District performance, others track whether the projects, initiatives, and activities needed to advance the strategic plan are moving forward. This combination provides a complete picture of progress, particularly in the early years of a 10-year strategic plan.

The majority of KPIs are reported against an established target to provide context for interpreting results. Depending on the indicator, this may be a target established through Board-adopted policy, industry standards, or a project or implementation milestone. For the first year, performance is assessed based on whether we met or exceeded the target, were close to meeting the target, or were below target. Being within 20 percent is considered meeting the target. As we move through the ten year plan, we will be able to report and evaluate how performance has changed year by year.

A small subset of KPIs are not reported against a target, because progress on these KPIs is strongly influenced by factors outside of the District's control. For example, some initiatives, such as transit priority improvements or transit-oriented development, may require local actions to advance. For these KPIs, the progress report provides an annual status update on activities completed in the last fiscal year in place of a target. The KPIs that do not have an established target are listed below:

- Service expansion and pilot programs
- Transit priority treatments implemented
- Collaboration in regional transit initiatives
- Coordinated transfers to other transit agencies
- TOD opportunities advanced on District-owned land

Two KPIs (zero-emission share of fixed route fleet and bus stops with improved amenities) have both a long-term and annual target. This is because for both of these KPIs, year over year progress is necessary to meet the long-term target, necessitating tracking across multiple time scales. The operating forecast performance KPI is counted as two trackable KPIs because sources and uses will hit targets independently of one another.

For this first year of reporting, seven KPIs (plus future KPIs under Goal 5) do not yet have sufficient data and/or established targets to identify and report on. SamTrans will be working on establishing, collecting, and reporting on this data in FY27.

The Strategic KPIs are intended to complement, not replace, the District's more detailed performance reporting. For example, regular State of Service reports will continue to provide a more comprehensive view of operational performance, and other issue-specific reporting will continue to provide deeper analysis of individual programs and areas of District activity.

Finally, this report represents the first year of implementation of a 10-year plan. In general, the District is on track towards meeting many of our benchmarks. However, many of the initiatives necessary to achieve the strategic goals will take several years to implement, and in some cases, even longer to produce measurable changes in outcomes. Significant year-over-year movement should not be expected across every KPI at this stage. As additional years of data become available, the Strategic KPIs will become increasingly useful for assessing whether the District is making sustained progress and whether adjustments are needed.

FY26 Strategic KPI Performance at a Glance

Overall, FY26 results provide a positive starting point for tracking progress towards the Strategic Plan's goals. In FY26, the District met or exceeded 11 targets, came close to meeting five targets, and fell short of four targets, as shown in **Table 2 and Figure 11**. Performance was particularly strong under Goal 1: Deliver Better Mobility Services, where the District met or exceeded both established annual performance targets for boardings per revenue hour and coverage for Equity Priority areas, while remaining on track towards its longer-term zero-emission fleet transition. Under Goal 4, the District demonstrated strong financial management, IT system reliability, progress toward advancing the strategic plan, and reducing greenhouse gas emissions.

Results under Goal 2 Provide Outstanding Customer Experience were more mixed: customer satisfaction met its target, and bus stops with improved amenities remained on track, but on-time performance, preventable accidents, and customer complaints below target. Similarly, under Goal 3 Become an Employer of Choice, the District met its recruitment success target, but did not meet targets for employee retention, workplace safety or employee vacancy. Under Goal 6 Exercise Collective Efforts, the District continued advancing regional collaboration and transit-oriented development, although Clipper START usage and Grand Boulevard Initiative project were below target.

TABLE 2: FY26 STRATEGIC KPI PERFORMANCE

FY26 Strategic KPI Performance		
Met or Exceeded Target	**Approached Target (Within 20%)**	**Below Target**
• Zero-emission share of fixed route fleet • Boardings per revenue hour • Service to Equity Priority Areas • Customer satisfaction rating • Bus stops with improved amenities • Employee recruitment • Operating forecast performance for (1) sources, (2) uses • IT system performance • Strategic Plan initiatives • GHG emissions	• On-time performance • Workplace safety incident rate • Employee retention rate • IT internal customer experience • Grand Boulevard Initiative	• Number of preventable accidents • Customer complaints per 10,000 boardings • Employee vacancy rate • Clipper START usage

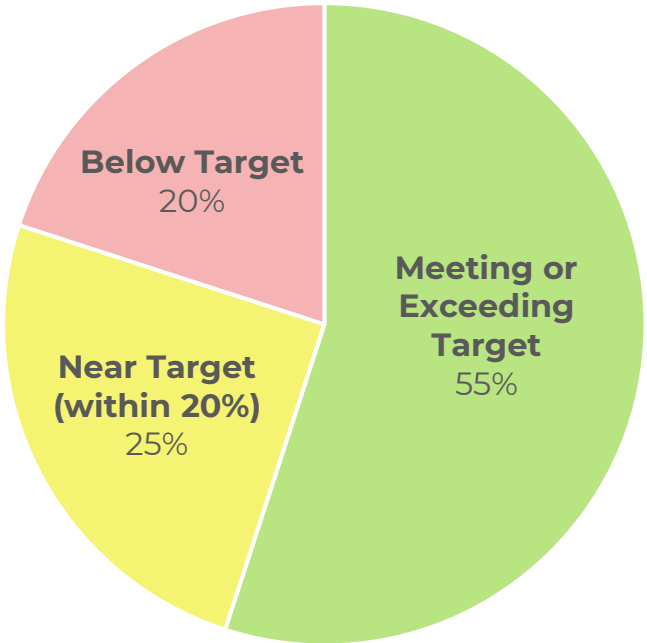


FIGURE 11: DISTRICT-WIDE PERFORMANCE AGAINST STRATEGIC KPIS

FY26 Strategic KPI Performance Table

KPI	KPI Description	Target	FY26 Performance	Performance vs. Target
Goal 1: Deliver Better Mobility Services				
Zero-emission share of fixed route fleet	Percentage of fixed-route fleet comprised of zero emission buses	100% by 2034	14.6% of fleet are ZEBs	*2026 Performance (on track)* *2034 Target (on track but not met yet)*
Service expansion and pilot programs	Number of service expansion or innovative pilot opportunities under development or implemented	*Tracking only; No numeric target*	6 projects/programs under development or implemented	*Tracking only; No numeric target*
Transit priority treatments implemented	Number of transit priority improvements implemented to create systemwide travel time savings	*Tracking only; No numeric target*	0 transit priority treatments implemented	*Tracking only; No numeric target*
Boardings per revenue hour	Number of total boardings divided by total revenue hours for the previous fiscal year	15 boardings per revenue hour	15.3 boardings per revenue hour	

= Meeting or Exceeding Target, = Near Target (within 20%), = Below Target

KPI	KPI Description	Target	FY26 Performance	Performance vs. Target
Service to Equity Priority Areas	Share of Equity Priority Areas served by all day services	85% or more of EPAs within ¼ mile of a SamTrans bus stop or microtransit zone	92.4% or more of EPAs within ¼ mile of a SamTrans bus stop or microtransit zone	
Goal 2: Provide Outstanding Customer Experience				
Number of preventable accidents	SamTrans Accidents in which the employee failed to do everything reasonable to prevent the accident, as determined by the Accident Review Committee	One preventable accident per 100,000 in-service miles	1.53 preventable accidents per 100,000 in-service miles	
Number of major preventable accidents	Number of major preventable accidents (i.e., critical or catastrophic) per 100,000 in-service miles	*Target to be established in FY27*	0.07 major preventable accidents per 100,000 in-service miles	--
Assets in a state of good repair	Assets in the Transit Asset Management Plan with average asset condition rating of 3 or higher by category	*Target to be established in FY27*	Facilities: 3.5 Systems: 2.9 Non-Revenue Vehicles: 2.7 Revenue Vehicles: 3.3	--

= Meeting or Exceeding Target, = Near Target (within 20%), = Below Target

KPI	KPI Description	Target	FY26 Performance	Performance vs. Target
Customer satisfaction rating	Share of Annual Customer Satisfaction Survey respondents noting they are satisfied or very satisfied with SamTrans services	82% satisfied or very satisfied	82% satisfied or very satisfied	*2026 Performance (on track)*
Bus stops with improved amenities	Percent of SamTrans bus stops that have required amenities as defined in the adopted Bus Stop Design Guidelines *Excluding real-time information as this has yet to be broadly implemented*	100% of near-term priority bus stops completed by 2030	10% of near-term priority bus stops complete	*2030 Target (not met yet but on track)*
On-time performance	Share of buses arriving no later than 5 minutes behind schedule and departing no more than 59 seconds ahead of schedule	85% systemwide	82.1% systemwide	
Customer complaints per 10,000 boardings	Public comments received that are categorized as complaints	One complaint per 10,000 boardings	1.3 complaints per 10,000 boardings	

= Meeting or Exceeding Target, = Near Target (within 20%), = Below Target

KPI	KPI Description	Target	FY26 Performance	Performance vs. Target
Goal 3 Become an Employer of Choice				
Workplace safety incident rate	Number of OSHA-recordable employee safety lost-time incidents per 100 full-time employees	3.5 lost-time incidents per 100 full-time employees	4.05 lost-time incidents per 100 full-time employees	
Staff sentiment of the District as a great place to work	The percentage of employees who "Agree" or "Strongly Agree" to the statement: "I recommend the District as a great place to work" in annual employee survey	66% of employees	*N/A, survey to be conducted in FY27*	--
Employee retention rate	Percentage of District employees retained year-over-year	93% of employees	91% of employees	
Employee attrition related to inclusion, belonging, and work culture	Percentage of employees who identify inclusion, belonging, and/or work culture in exit interviews as contributing to their decision to leave District employment	*To be established in FY27*	*N/A, data collection to begin in FY27*	--

= Meeting or Exceeding Target, = Near Target (within 20%), = Below Target

KPI	KPI Description	Target	FY26 Performance	Performance vs. Target
Employee vacancy rate	Percentage of budgeted and planned positions unfulfilled across the District[3]	7% of budgeted positions	10% of budgeted positions	
Recruitment success rate	Percent of District recruitments that result in a hire	95% of recruitments	95% of recruitments	
Goal 4 Lead Responsibly				
Capital budget variance	*To be established*	*To be established in FY27*	*N/A, data collection to begin in FY27*	--
Procurement cycle time	Median number of working days from requisition approval to contract execution	*To be established in FY27*	*N/A, data collection to begin in FY27*	--

[3] This does not include frozen positions but does include positions filled by seconded staff

= Meeting or Exceeding Target, = Near Target (within 20%), = Below Target

KPI	KPI Description	Target	FY26 Performance	Performance vs. Target
Operating forecast performance	Percent difference between operating forecast and year-end actuals for sources and uses	Sources: actuals are at least 95% of forecast Uses: actuals are at no greater than 103% of forecast	Sources: 103% Uses: 96%	*Sources* *Uses*
Fiscal prudence	*To be established*	*To be established in FY27*	*N/A, data collection to begin in FY27*	--
IT system performance	Percent of IT applications and infrastructure that meet internal Service Level Agreement (SLA) standard for systems application up-time	99.9% Up Time	99.94% Up Time	
IT internal customer experience	Percent of IT service requests that meet internal SLA standard for resolution	100% of tickets resolved within 72 hours from ticket submission with initial response in 24 hours	91% of tickets resolved within 72 hours from ticket submission with initial response in 24 hours	

= Meeting or Exceeding Target, = Near Target (within 20%), = Below Target

KPI	KPI Description	Target	FY26 Performance	Performance vs. Target
Strategic Plan initiatives	Percent of Strategic Plan initiatives that are in progress or complete	82% of Strategic Plan initiatives in progress or complete	82% of Strategic Plan initiatives in progress or complete	
GHG emissions per vehicle miles traveled	Total agency-generated greenhouse gas emissions (CO_2e) from transit operations divided by total vehicle miles operated during the same reporting period	4.45 lbs of CO_2e per year	4.45 lbs of CO_2e per year	
Goal 5 Ensure Effective Management				
To Be Determined in FY27	--	--	--	--
Goal 6 Exercise Collective Efforts				
Grand Boulevard Initiative	Variance against the Grand Boulevard Initiative's Caltrans project development milestones	No variance from annual milestone schedule	Three-month delay in beginning the Caltrans Project Initiation Document	

= Meeting or Exceeding Target, = Near Target (within 20%), = Below Target

KPI	KPI Description	Target	FY26 Performance	Performance vs. Target
Collaboration in regional transit initiatives	SamTrans participation in collaborative projects or initiatives that advance regional transit	*Tracking only; No numeric target*	Participated in 14 initiatives	*Tracking only; No numeric target*
Coordinated transfers to other agencies	The number of coordinated transfers between SamTrans and other operators (Caltrain, SFMTA, VTA, BART)	*Tracking only; No numeric target*	*N/A, data collection to begin in FY27*	*Tracking only; No numeric target*
TOD opportunities advanced on District owned land	Number of District-owned sites being advanced for TOD, including sites under exploration, in development, and completed/generating revenue	*Tracking only; No numeric target*	Five TOD sites: San Carlos: RFP development is underway Colma Park & Ride: Land disposition options are being explored Brewster: Land disposition options are being explored Trestle (San Carlos): operating and generating revenue La Terrazza (Colma): operating and generating revenue	*Tracking only; No numeric target*

= Meeting or Exceeding Target, = Near Target (within 20%), = Below Target

Clipper START usage	The percent of SamTrans riders who pay for their fare using Clipper START	10% of riders	2% of riders	

= Meeting or Exceeding Target, = Near Target (within 20%), = Below Target

Progress on Strategic Initiatives

The below table shows the implementation status of all 73 initiatives included in *Moving San Mateo County*. 60 of the 73 initiatives (82%) are In Progress/Ongoing or Completed, 3 have Not Started, and 10 are Scheduled Future Work.

Status	Symbol
In Progress/Ongoing	◑
Scheduled Future Work *(Work scheduled to start in future fiscal years)*	◌
Not Started *(Work scheduled to start this fiscal year that did not begin)*	◯
Paused	⏸
Completed	●
Cancelled	✕

#	Initiative	Status
Goal 1 Deliver Better Mobility Services		
1A.1	Invest in new or existing service in key transit corridors	◑ In Progress / Ongoing
1A.2	Adapt service to new travel patterns and increase service for key markets	◑ In Progress / Ongoing
1A.3	Evaluate and refine on-demand services	◑ In Progress / Ongoing
1A.4.1	Maintain existing bus assets in a state of good repair to support safe and reliable bus operations	◑ In Progress / Ongoing
1A.4.2	Maintain existing infrastructure in a state of good repair to support safe and reliable bus operations	◑ In Progress / Ongoing
1A.4.3	Enhance the resilience of SamTrans facilities and infrastructure to climate change through targeted capital investments	◑ In Progress / Ongoing
1B.1	Conduct a fare policy study and continually refine fare programs to meet customer needs	◑ In Progress / Ongoing
1B.2	Undertake a systemwide service analysis/comprehensive operational analysis (COA)	◌ Scheduled Future Work
1B.3	Continue to pilot improvements to SamTrans paratransit services	◑ In Progress / Ongoing
1B.4	Pilot a mobility wallet concept that provides Universal Basic Mobility	◌ Scheduled Future Work
Goal 2 Provide Outstanding Customer Experience		
2A.1	Improve real-time communication to and from riders	◑ In Progress / Ongoing
2A.2	Provide high-quality real-time vehicle arrival information	◑ In Progress / Ongoing

#	Initiative	Status
2A.3	Improve digital and physical customer communication tools	◑ In Progress / Ongoing
2A.4.1	Implement transit-supportive infrastructure projects: Transit Priority and Bus Stop Improvement Plan	◑ In Progress / Ongoing
2A.4.2	Implement transit-supportive infrastructure projects: Grand Boulevard Initiative	◑ In Progress / Ongoing
2A.4.3	Implement transit-supportive infrastructure projects: Reimagine Dumbarton	◑ In Progress / Ongoing
2B.1	Create a rider rewards program	◌ Scheduled Future Work
2B.2	Regularly collect and utilize rider input	◑ In Progress / Ongoing
2B.3.1	Strengthen Districtwide safety culture through clear protocols and transparent reporting	◑ In Progress / Ongoing
2B.3.2	Develop and implement safety training that prepares employees for new technologies	◑ In Progress / Ongoing
2B.3.3	Develop and implement a Safety Management System tool to reduce and track workplace accidents and injuries.	◑ In Progress / Ongoing
2B.3.4	Increase emergency safety training and exercises that better prepare the District to respond to major incidents and disasters	◑ In Progress / Ongoing
2B.3.5	Reduce the accident frequency rate of revenue vehicles through implementation of Drive Cam technology	◑ In Progress / Ongoing
2B.3.6	Implement base hardening initiatives for North and South Bases	◑ In Progress / Ongoing
2B.4	Support riders in navigating climate change impacts	◌ Scheduled Future Work

#	Initiative	Status
Goal 3 Become an Employer of Choice		
3A.1	Implement recommendations from the 2024 Classification and Compensation Study	◑ In Progress / Ongoing
3A.2	Study and adapt employee benefit programs to attract talent and improve retention	◑ In Progress / Ongoing
3B.1	Standardize and widely communicate employee performance metrics and career pathways	◑ In Progress / Ongoing
3B.2	Conduct an employee survey at regular intervals with meaningful and actionable follow-up to employees	○ Not Started
3B.3	Improve transparency between executive leadership and staff	◑ In Progress / Ongoing
3B.4	Provide enhanced management training for District employees who supervise others	◑ In Progress / Ongoing
3B.5	Foster in-person relationship-building with events and team cross-pollination opportunities	◑ In Progress / Ongoing
3B.6	Create a recurring innovation challenge for employees paired with rewards	◌ Scheduled Future Work
3C.1	Develop and adopt annual DEIB workforce goals	◑ In Progress / Ongoing
3C.2	Increase employee knowledge and understanding of DEIB by providing training and learning events	◑ In Progress / Ongoing
3C.3	Evaluate and enhance the District's management and collaboration tools, training programs, and leadership development to foster an inclusive workplace	◑ In Progress / Ongoing

#	Initiative	Status
3D.1	Provide operator restroom access at all SamTrans end-of-line and/or layover locations	◑ In Progress / Ongoing
3D.2	Replace existing transportation building at North Base (Building 200)	◑ In Progress / Ongoing
3D.3	Relocate District Headquarters to 166 Rollins Road in Millbrae	● Completed
3D.4	Develop and implement an operating facilities masterplan for District and SamTrans facilities	○ Not Started
Goal 4 Lead Responsibly		
4A.1	Improve work efficiency of departments critical to the achievement of the goals of this Plan	◑ In Progress / Ongoing
4A.2	Streamline the employee recruitment process and improve access to qualified labor pool	◑ In Progress / Ongoing
4A.3.1	Develop and administer capital budgets to maximize District ability to fund capital projects and infrastructure included in the Strategic Plan	◑ In Progress / Ongoing
4A.3.2	Develop and administer operating budgets, including FTE, to support Operating projects included in the Strategic Plan	◑ In Progress / Ongoing
4B.1	Establish and integrate data standards and data sharing expectations across all District services and entities	◑ In Progress / Ongoing
4B.2.1	Develop a public facing webpage or dashboard to share how the District establishes budgets and spends funds	◌ Scheduled Future Work
4B.2.2	Implement and Operationalize the Enterprise Performance Management (EPM) System	◑ In Progress / Ongoing

#	Initiative	Status
4B.3	Report on progress of achieving Strategic Plan goals	◑ In Progress / Ongoing
4B.4.1	Incentivize employees and board members to ride and better understand the system	◌ Scheduled Future Work
4B.4.2	Encourage employees and board members to provide suggestions for system improvement with an emphasis on customer experience	◌ Scheduled Future Work
4C.1	Implement recommendations from the IT Strategic Plan	◑ In Progress / Ongoing
4C.2	Develop strategy for better internal coordination of operations between North and South Bases and HQ	○ Not Started
4C.3	Improve internal communication and collaboration tools to increase organizational effectiveness	◑ In Progress / Ongoing
4D.1.1	Deliver the zero-emission bus transition program: Deploy ZEB fleet and infrastructure	◑ In Progress / Ongoing
4D.1.2	Deliver the zero-emission bus transition program: Develop Funding Roadmap	◑ In Progress / Ongoing
4D.2	Design and implement an Environmental Management System (EMS)	◌ Scheduled Future Work
4D.3	Measure, reduce and communicate the environmental impacts of agency activities	◑ In Progress / Ongoing
4D.4	Monitor and exceed environmental compliance on all programs and projects	◑ In Progress / Ongoing

#	Initiative	Status
Goal 5 Ensure Effective Management		
5A.1	Develop mutually agreed-upon Shared Services Agreement to improve service delivery and clarify expectations, roles, and responsibilities	◑ In Progress / Ongoing
5A.2	Develop metrics and work plans for tracking improvements to Shared Services outcomes	◑ In Progress / Ongoing
5A.3	Analyze and adjust staffing and resource needs for Shared Services based on work plans	◑ In Progress / Ongoing
5B.1	Establish process and escalation path to resolve Shared Services issues	◑ In Progress / Ongoing
5B.2	Re-evaluate Shared Services Agreement implementation and analyze potential long-term changes to Shared Services	◌ Scheduled Future Work
Goal 6 Exercise Collective Efforts		
6A.1	Participate in and dedicate resources toward regional transit coordination initiatives	◑ In Progress / Ongoing
6A.2	Collaborate with partner transportation agencies to improve service coordination and customer experience	◑ In Progress / Ongoing
6A.3.1	Partner with school districts to improve the coordination of school-oriented bus service	◑ In Progress / Ongoing
6A.3.2	Grow youth ridership through youth-focused programming, fare programs, and other targeted initiatives	◑ In Progress / Ongoing
6A.4	Increase participation in and dedicate resources towards regional climate adaptation efforts to protect lifeline assets	◑ In Progress / Ongoing

#	Initiative	Status
6B.1	Develop and implement SamTrans Transit-Oriented Development (TOD) Policy	● Completed
6B.2.1	Advance transit-oriented development opportunities at Colma	◑ In Progress / Ongoing
6B.2.2	Explore opportunities for the redevelopment of former headquarters site in San Carlos	◑ In Progress / Ongoing
6B.2.3	Advance transit-oriented development opportunities at other District-owned properties	◑ In Progress / Ongoing
6B.3	Work with municipal partners, Caltrans, and C/CAG to improve pedestrian and bicycle access to bus stops and along major corridors	◑ In Progress / Ongoing

San Mateo County
TRANSIT DISTRICT

STRATEGIC
PLAN

Strategic Plan
FY 26 Annual Progress Report

December 2, 2026 Board of Directors Meeting

Informational Item



Agenda

1. The District's 10-year Strategic Plan
2. Reflecting on FY26
   - Accomplishments
   - Key Performance Indicators
   - Strategic Initiatives
3. Looking ahead to FY27

STRATEGIC PLAN



The District's 10-Year Strategic Plan

The District's 10-Year Strategic Plan

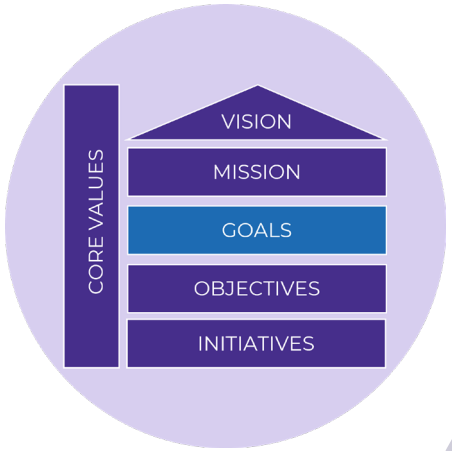
- Guiding policy document that provides strategic direction for the District for the next 10 years (FY 2026-2035)
- Aligns the work we do every day around a common vision and shared priorities
- Adopted by the Board of Directors in Nov 2024



Scope of Plan

Not Included

Service vision or investments for Caltrain, Transportation Authority, Express Lanes Joint Powers Authority



Goals

1. **Deliver Better Mobility Services**
2. **Provide Outstanding Customer Experience**
3. **Become an Employer of Choice**
4. **Lead Responsibly**

   4.B.3 *Establish and track metrics, implementation timelines, and regularly report on their progress.*
5. **Ensure Effective Management**
6. **Exercise Collective Efforts**

The District Will Regularly Monitor Progress Toward Implementing the Strategic Plan

2024

The District adopts the 10-Year Strategic Plan

2025-2026

The District convenes Strategic Plan Committee and develops first annual progress report

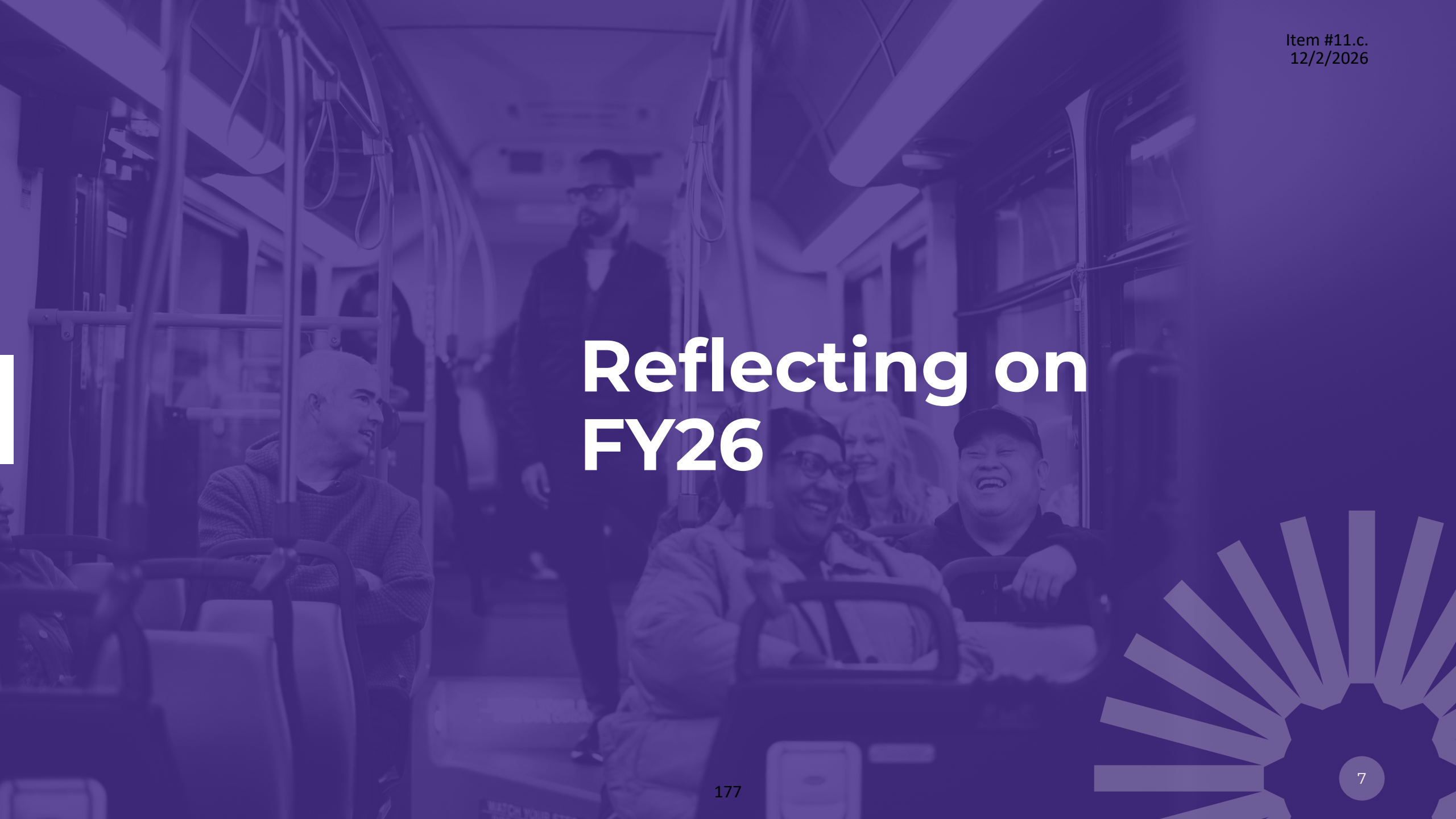
2027 Onward

The District will update the progress report annually

2029 (5-year mark)

The District will comprehensively evaluate progress against Strategic Plan Initiatives and Goals and revise as needed

STRATEGIC PLAN



Reflecting on FY26

Highlights of FY26 Accomplishments

- Implemented One-Seat Ride paratransit pilot
- Created RIDE Panel to receive ongoing rider feedback
- Launched Reimagine Dumbarton study
- Adopted new bus shelter designs
- Moved to new Millbrae HQ
- Introduced new supervisory and leadership trainings
- Invested in zero-emission bus fleet and infrastructure





Strategic Plan Key Performance Indicators (KPIs)

KPIs	Target	FY 26 Performance	Performance vs Target
Zero Emission Share of fixed route fleet	100% by 2034	14.6% of fleet are ZEBs	*2026 Performance (on track)* *2034 Target (not met yet)*
Service expansion and pilot programs	*Tracking only; No numeric target*	6 Projects/Programs in development or implemented	*Tracking only; No numeric target*
Transit priority treatments implemented	*Tracking only; No numeric target*	0 transit priority treatments implemented	*Tracking only; No numeric target*
Boardings per revenue hour	15 boardings per revenue hour	15.3 boardings per revenue hour	
Service to Equity Priority Areas	85% or more of EPAs within ¼ mile of a SamTrans bus stop or microtransit zone	92.4% or more of EPAs within ¼ mile of a SamTrans bus stop or microtransit zone	

KPIs are reported against an **established target** to provide context for interpreting results

A small set of KPIs are strongly **influenced by factors outside** of the district's control and are tracking only

Performance on a KPI is **color coded** as green for meeting/exceeding goal, yellow for near target (within 20%), or red for more than 20% below target

STRATEGIC PLAN

FY26 KPI Summary

Goal	Meeting or Exceeding Target	Near Target	Below Target	Tracking Only	No Data for FY26
Goal 1	3	0	0	2	0
Goal 2	2	1	2	0	2
Goal 3	1	2	1	0	2
Goal 4	5	1	0	0	3
Goal 5	TBD	TBD	TBD	TBD	TBD
Goal 6	0	1	1	3	0
Total	**11**	**5**	**4**	**5**	**7**

STRATEGIC PLAN

Goal 1: Deliver Better Mobility Services

KPIs	Target	FY 26 Performance	Performance vs Target
Zero Emission Share of fixed route fleet	100% by 2034	14.6% of fleet are ZEBs	*2026 Performance (on track)* *2034 Target (not met yet)*
Transit priority treatments implemented	*Tracking only; No numeric target*	0 transit priority treatments implemented	*Tracking only*
Boardings per revenue hour	15 boardings per revenue hour	15.3 boardings per revenue hour	

Meeting or exceeding target

Near Target (within 20% of target)

Below Target (more than 20% below target)



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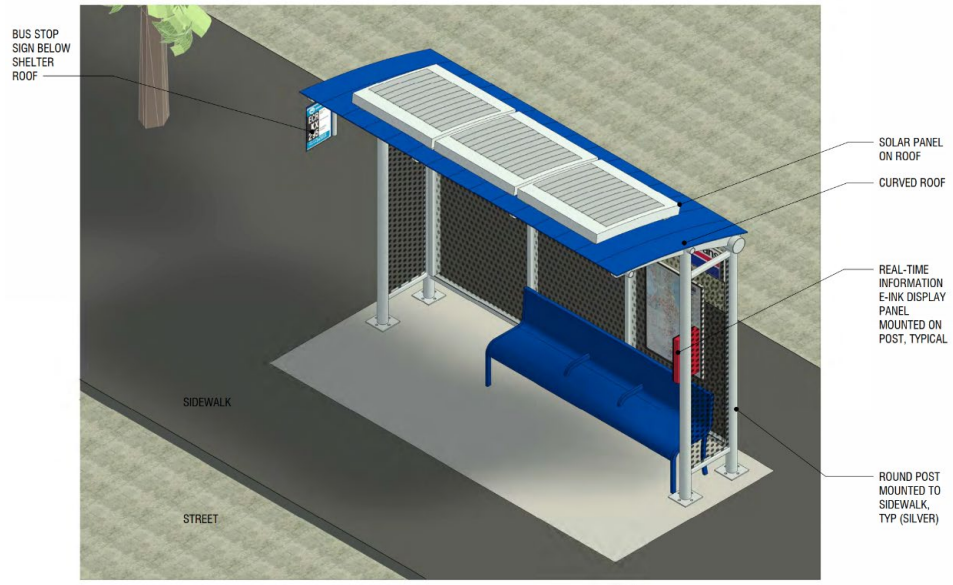
Goal 2: Provide Outstanding Customer Experience

KPIs	Target	FY 26 Performance	Performance vs Target
Major preventable accidents	*To be established in FY27*	0.07 major preventable accidents per 100,000 in-service miles	--
Assets in state of good repair	*To be established in FY27*	Facilities: 3.5 Systems: 2.9 Non-Revenue Vehicles: 2.7 Revenue Vehicles: 3.3	--
Bus stops with improved amenities	100% of near-term priority bus stops by 2030	10% of near-term priority bus stops	*2026 Performance (on track)* *2030 Target (not met yet)*

Meeting or exceeding target

Near Target (within 20% of target)

Below Target (more than 20% below target)



STRATEGIC PLAN

Goal 3: Become an Employer of Choice

KPIs	Target	FY 26 Performance	Performance vs Target
Employee retention rate	93% of employees	91% of employees	
Recruitment success rate	95% of recruitments	95% of recruitments	



Meeting or exceeding target

Near Target (within 20% of target)

Below Target (more than 20% below target)

STRATEGIC PLAN

Goal 4: Lead Responsibly

KPIs	Target	FY 26 Performance	Performance vs Target
Operating forecast performance	Sources: actuals are at least 95% of forecast Uses: actuals are at no greater than 103% of forecast	Sources: 103% Uses: 96%	*Sources* *Uses*
Greenhouse gas emissions per vehicle miles traveled	4.45 lbs of CO_2e per year	4.45 lbs of CO_2e per year	

Meeting or exceeding target

Near Target (within 20% of target)

Below Target (more than 20% below target)



STRATEGIC PLAN

Goal 5: Ensure Effective Management

Meeting or exceeding target
Near Target (within 20% of target)
Below Target (more than 20% below target)

In FY27 KPIs will be developed for Districtwide shared services and will be informed by the upcoming Caltrain Shared Service Agreement partnering process

STRATEGIC PLAN

Goal 6: Exercise Collective Efforts

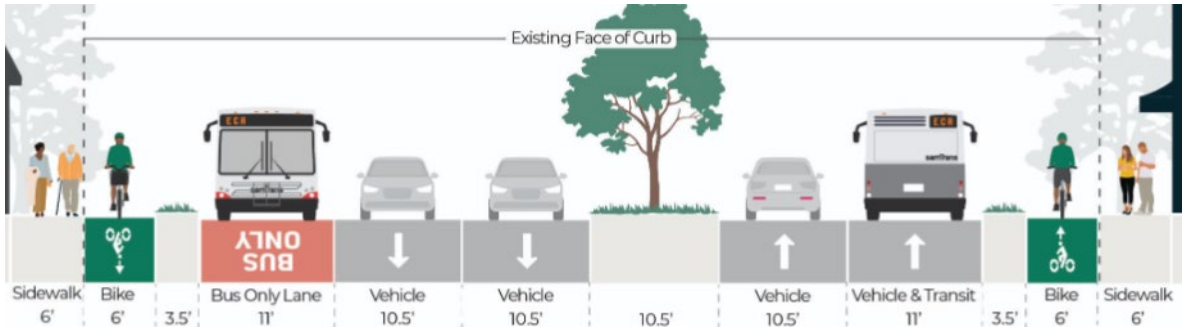
KPIs	Target	FY 26 Performance	Performance vs Target
Grand Boulevard Initiative	No variance from annual milestone schedule	Three-month delay in beginning the Caltrans Project Initiation Document	
TOD Opportunities advanced on District owned land	*Tracking only; No numeric target*	Five TOD sites: Three under development Two complete (operating and generating revenue)	*Tracking only*
Clipper START usage	10% of riders	2% of riders	

Meeting or exceeding target

Near Target (within 20% of target)

Below Target (more than 20% below target)





Status of Strategic Plan Initiatives

Goal	Description	Initiative Status			
		In Progress or Ongoing	Scheduled	Not Yet Started or Paused	Completed
1	Deliver Better Mobility Services	8	2	0	0
2	Provide Outstanding Customer Service	13	2	0	0
3	Become an Employer of Choice	11	1	2	1
4	Lead Responsibly	13	4	1	0
5	Ensure Effective Management	4	1	0	0
6	Exercise Collective Efforts	9	0	0	1
	Total	**58**	**10**	**3**	**2**

STRATEGIC PLAN

Looking Ahead to FY27

Upcoming FY27 Milestones

- Upcoming milestones for FY27
  - Deploy new bus stop amenities
  - Expand real-time signage pilot
  - Conduct annual employee survey
  - Complete shared services agreement partnering progress
- Develop remaining KPIs through continued Board engagement
- Collect FY27 data on KPIs
- Continue to advance strategic initiatives
- FY27 progress report in late 2027



STRATEGIC PLAN



Questions?

San Mateo County
TRANSIT DISTRICT

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Thank you!

Chelsea Schultz – schultzc@samtrans.com

Nicholas Yee – yeen@samtrans.com



BOARD OF DIRECTORS 2026

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PETER RATTO
JACKIE SPEIER

APRIL CHAN
GENERAL MANAGER/CEO

AGENDA

San Mateo County Transit District

Legislative Committee Meeting
Committee of the Whole

December 2, 2026 – 2:30 pm

or immediately following the Strategic Planning, Development, and Sustainability Committee meeting

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

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

12.a.	Call to Order	Informational
12.b.	Approval of Minutes of the Legislative Committee Meeting of November 4, 2026	Motion
12.c.	Legislative Update	Informational
12.d.	Draft 2027 Legislative Program	Informational
12.e.	Adjournment	

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

DRAFT Minutes of November 4, 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, Josh Powell, Jackie Speier

Other Board Members Absent: None

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

16.a. Call to Order
Committee Chair Fraser called the meeting to order at 5:03 pm.

16.b. Approval of Minutes of the Legislative Committee Meeting of October 7, 2026
Motion/Second: Esser/Chuang
Ayes: Canepa, Fraser, Gee, Medina, Powell, Ratto, Speier, Esser, Chuang
Noes: None
Abstain: None
Absent: None

16.c. Legislative Update
Public Comment
Aleta Dupree, Team Folds, commented on newly elected leadership, and spoke in support of transit funding.

16.d. Adjournment
The meeting adjourned at 5:12 pm.

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San Mateo County Transit District
Staff Report

To: Legislative Committee

Through: April Chan, General Manager/CEO

From: Emily Beach, Chief Communications Officer

Subject: **Legislative Update**

Action

Staff proposes the Legislative Committee recommend the 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 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 San Mateo County Transit 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
November 2026

Congressional Update

2026 Midterm Elections: Democrats Win Senate and House Majorities

- On November 3, 2026, Democrats achieved a sweeping victory in federal and gubernatorial races as voters cast ballots in elections for all 435 seats in the House, 35 Senate seats, and 36 governorships. Democrats won control of the Senate and will take a majority of at least 54 seats; Democrats also won control of the House with their new majority expected to fall between 255 – 263 seats, giving them a 37 – 45 seat majority in the 120th Congress.

- Democratic majorities in both chambers are expected to impact surface transportation reauthorization negotiations. In the 120th Congress, Democrats are likely to push for increased investment in public transit and the inclusion of climate transportation priorities.

Government Funding Update

- The current continuing resolution (CR) extends current government funding through December 11, 2026, giving Congress additional time to negotiate FY27 appropriations bills. In addition to extending current government funding, the CR also delays the White House Office of Management and Budget (OMB) proposed rule that governs how agencies award and manage grants, and provides a clean extension of surface transportation reauthorization provisions in the Infrastructure Investment and Jobs Act (IIJA) through December 11, 2026.

- Republican and Democratic leaders of the House and Senate Appropriations Committees met the week of November 9 to determine a path forward on FY27 funding. With Democratic majorities in both chambers in the 120th Congress, congressional Democrats have a strong incentive to pass another short-term CR rather than complete full-year appropriations during the lame-duck session, which would allow the incoming Democratic majorities to reshape the final bill.

Rep. Larsen (D-WA) Officially Launches Bid for T&I Chair

- On November 4, Rep. Rick Larsen (D-WA), the current Ranking Member of the House Transportation and Infrastructure (T&I) Committee, sent a Dear Colleague letter announcing his bid for T&I Chair. In the letter, he stated that, as Chair, he would lead efforts to invest in surface transportation and improve rail safety, reauthorize the Federal Aviation Administration, conduct rigorous oversight of the

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administration's politicization of grants, and work to develop next-generation policies to advance transportation safety, resilience, and innovation.

- The T&I Committee is expected to hold two reauthorization hearings early in the 120th Congress to solicit input from new and returning members, followed by a markup, with a goal of House floor consideration of surface transportation reauthorization by June 2027. The Senate may wait for the House to advance its bill before moving its own legislation, potentially pushing final enactment to later in 2027.

- Sen. Elizabeth Warren (D-MA) is expected to chair the Senate Banking, Housing, and Urban Affairs Committee, which has jurisdiction over urban development and urban mass transit.

APTA Endorses Senate Permitting Bill

- On November 2, the American Public Transportation Association (APTA) endorsed the Bipartisan American Affordability and Jobs Act of 2026 (BAAJA) (S. 5653). APTA argued that the bill:

    - **Provides Faster Repairs:** Exempts repair and replacement of existing public transit and passenger rail facilities from National Environmental Policy Act (NEPA) review when function is preserved and capacity grows no more than 20 percent.

    - **Cuts Duplication:** Allows comparable State environmental reviews to satisfy federal environmental requirements.

    - **Establishes Firm Deadlines:** Sets enforceable timelines for federal agencies to act on environmental reviews and permits.

    - **Speeds Court Reviews:** In ongoing litigation, authorizes projects to move forward while federal agencies fix any deficiencies a court finds in a project's environmental review.

- APTA asserted that "this bill provides public transit and passenger rail agencies the certainty they need to plan, build, and maintain their systems, and deliver improvements to riders sooner." The Senate began consideration of the bill on November 9.

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Administration Update

Mark Aesch Nominated to Lead FTA

- President Trump formally nominated Mark Aesch to be Administrator of the Federal Transit Administration (FTA). Mr. Aesch is the founder and CEO of TransPro, a consulting firm that advises public-sector agencies on performance and financial turnarounds. He also previously led the Rochester Genesee Regional Transportation Authority. President Trump also nominated Loren A. Smith, to be an Assistant Secretary of Transportation.

- Both nominations now move to the Senate for review and confirmation.

Shaw Yoder Antwih Schmelzer & Lange

November 12, 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 – December 2026

General Update

Following November's General Election, the Legislature will convene the 2027-28 Legislative Session on December 7, 2026, for the swearing-in of members and will then enter recess until January 4. We expect the 2027 Legislative Calendar to be released in the coming weeks.

California Election Results

The General Election was held on Tuesday, November 3. In addition to all statewide offices (e.g. Governor, Lieutenant Governor, Attorney General, etc.), all 80 Assembly seats and 20 of the 40 Senate seats were up for election. As expected, Xavier Becerra easily won the race for California Governor, securing 64 percent of the vote.

In the State Legislature, 21 seats were considered "open" heading into the election. As a reminder, Democrats have a super-majority in both the Assembly and Senate and were expected to maintain their heavy majorities into the 2027-2028 Legislative Session. Nationwide, Democrats won key (and sometimes surprising) US Senate and House races, and California is showing similar signs. As of this writing, close to a dozen Republican incumbents in both Congress and the State Legislature are currently losing their campaigns for re-election. You can view election results here.

In SamTrans' legislative delegation, Assembly Member Marc Berman (D-Menlo Park), Assembly Member Catherine Stefani (D-San Francisco), and Assembly Member Diane Papan (D-San Mateo) were all re-elected to the Assembly. In addition, Senator Scott Wiener (D-San Francisco) won his race for Congress. Congressman-elect Wiener's seat in the State Senate will be filled by a special election next year.

Bay Area voters also **approved** the Regional Transit Measure (RTM), imposing a half-cent sales tax in Alameda, Contra Costa, San Mateo, and Santa Clara counties, and a one-cent sales tax in the City and County of San Francisco, for 14 years beginning in 2027. The measure is projected to generate approximately $980 million annually to support public transit operations across the five-county region, including SamTrans, Caltrain, BART, AC Transit, and more. As of this writing, the RTM has received just over 60 percent support from San Mateo County voters. Also worth noting: Measure H in San Francisco – a parcel tax funding transit operations is currently passing with over 72 percent of the vote.

Voters were also asked to act on 14 statewide propositions. High-profile measures included the wealth tax on billionaires and an initiative to require voter ID. Of interest to SamTrans, **Proposition 43,** which

would have prohibited a local government (or voters) from establishing a special tax, including by the citizens' initiative process, unless the tax is approved by a two-thirds vote. This would effectively close the "Upland Loophole," which has permitted local governments to enact special taxes by a simple majority vote if the tax was initiated by a group of local voters via the initiative process. **Proposition 43 failed to pass, securing only 44% of the vote.**

The November ballot also included two propositions supporting housing – Propositions 1 and 37 – which combined would provide over $35 billion in funding to affordable housing and for middle-income homebuyer assistance loans. **These measures both passed.**

Finally, Proposition 45, which would have created a streamlined environmental review process for a myriad of infrastructure projects, including schools, clean energy facilities, housing, transportation, and healthcare facilities, **failed to pass**.

Update on State Grant Awards

On November 10, the California State Transportation Agency (CalSTA) announced the next series of awards ("Cycle 8") for the Transit and Intercity Rail Capital Program (TIRCP), a highly competitive statewide grant program funded by Cap-and-Invest revenues and vehicle registration fees and typically awarded every two years. Due to significantly worse-than-expected Cap-and-Invest revenues over the past several auctions, this cycle's total funding was just shy of $550 million, spread across 19 projects (in contrast, Cycle 7 of the TIRCP awarded more than $1.3 *billion* in 2024).

Earlier this year, SamTrans had applied for a TIRCP grant for its Integrated Zero-Emission Fleet, Infrastructure, and Transit Signal Priority Program. Unfortunately, this project did not receive a TIRCP award. The next opportunity to apply for these funds will be in 2028.

SamTrans is applying for another state funding opportunity through the California Transportation Commission's Local Partnership Competitive Program (LPP-C) to fund improvements to high-priority bus stops identified in the SamTrans Bus Stop Improvement Plan and procure 37 zero-emission buses to replace aging vehicles. The application closes on November 18.

San Mateo County Transit District
Staff Report

To: Legislative Committee

Through: April Chan, General Manager/CEO

From: Emily Beach, Chief Communications Officer

Subject: **Draft 2027 Legislative Program**

Action

Staff proposes the Board of Directors (Board) receive the attached draft 2027 Legislative Program for the San Mateo County Transit District.

Significance

Legislative and regulatory actions have the potential to significantly benefit San Mateo County Transit District (District or Agency) programs and services. The actions also have the potential to present serious challenges that threaten the Agency's ability to meet the county's most critical transportation demands.

The 2027 Legislative Program establishes the principles that will guide the Agency's legislative and regulatory advocacy efforts through the 2027 calendar year, including the first half of the 2027-2028 State Legislative Session and first session of the 120th Congress.

The program is intended to be broad enough to cover the wide variety of issues that are likely to be considered during that time and flexible enough to allow the Agency to respond swiftly and effectively to unanticipated developments. The program is in alignment with existing Board-adopted policies and procedures. Expansion of the program beyond those adopted policies and procedures would require Board approval.

Objectives

The 2027 Legislative Program is organized to guide the Agency's actions and positions in support of three primary objectives:

- Maintain and enhance funding opportunities to support transit in general as well as the Agency's specific projects, programs and services;

- Seek a regulatory environment that streamlines project delivery and maximizes the Agency's ability to meet transportation service demands; and

- Reinforce and expand programs that build and incentivize public transportation ridership and improve safe and quality transportation choices.

Issues
The Legislative Program is structured to apply these core objectives to a series of State and Federal issues falling in these categories:

- Budget and Transportation Funding Opportunities
- Transportation Project Requests and Needs
- Regulatory, Legislative, and Administrative Actions

Should other issues surface that require the Board's attention, actions will be guided by the three policy objectives listed above. If needed, potential action on issues that are unrelated to these policy goals will be brought to the Board for consideration.

Advocacy Process
Staff will indicate on each monthly legislative update to the Board recommended positions for pending bills or policy initiatives. Once the Board has an opportunity to review the recommended position, staff will communicate the position to the relevant entities (such as the bill author, relevant legislative committees, agencies, or stakeholders). If legislation falls outside of the scope of the Board's adopted Legislative Program, Board approval will be required prior to the Agency taking a position. In rare circumstances, should a position on a bill or legislation fall outside the scope of the Board's adopted Legislative Program and be needed in advance of a Board meeting, staff will confer with the Board Chair.

Public Engagement Strategies
Staff, led by the Communications Division and its legislative consultants, will employ a variety of public engagement strategies to support the 2027 Legislative Program, including:

- Direct Engagement
  Engage policymakers, sponsor or support legislation, submit correspondence and provide public testimony that communicates and advances the agency's legislative priorities and positions.

- Coalition-based Engagement
  Engage stakeholders to build awareness about specific issues and participate in local, regional, statewide and national coalitions organized to advance positions that are consistent with the Legislative Program.

- Media Engagement
  Build public awareness and communicate the Agency's legislative priorities by issuing press releases, organizing media events, and using social media.

Budget Impact
There is no impact on the budget.

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

San Mateo County Transit District
202~~6~~7 Legislative Program

Purpose
Legislative and regulatory actions have the potential to significantly benefit San Mateo County Transit District (Agency) programs and services. They also have the potential to present serious challenges that threaten the Agency's ability to meet the county's most critical transportation demands.

The 202~~6~~7 Legislative Program establishes the principles that will guide the Agency's legislative and regulatory advocacy efforts through the 202~~6~~7 calendar year, including the first half of the 202~~5~~7-2~~6~~8 State Legislative Session and ~~second~~ first session of the 1~~20~~19th Congress.

The program is intended to be broad enough to cover the wide variety of issues that are likely to be considered during that time and flexible enough to allow the Agency to respond swiftly and effectively to unanticipated developments. The program is in alignment with existing Board-adopted policies and procedures. Expansion of the program beyond those adopted policies and procedures would require Board approval.

Objectives
The 202~~6~~7 Legislative Program is organized to guide the Agency's actions and positions in support of three primary objectives:

- Maintain and enhance funding opportunities to support transit in general as well as the Agency's specific projects, programs and services;
- Seek a regulatory environment that streamlines project delivery and maximizes the Agency's ability to meet transportation service demands; and
- Reinforce and expand programs that build and incentivize public transportation ridership and improve safe and quality transportation choices.

Issues
The Legislative Program is structured to apply these core objectives to a series of State and Federal issues falling in these categories:

- Budget and Transportation Funding Opportunities
- Transportation Project Requests and Needs
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Should other issues surface that require the Board's attention, actions will be guided by the three policy objectives listed above. If needed, potential action on issues that are unrelated to these policy goals will be brought to the Board for consideration.

Advocacy Process
Staff will indicate on each monthly legislative update to the Board recommended positions for pending bills or policy initiatives. Once the Board has an opportunity to review the recommended position, staff will communicate the position to the relevant entities (such as the bill author, relevant legislative committees, agencies, or stakeholders). If legislation falls outside of the scope of the Board's adopted Legislative Program, Board approval will be required prior to the Agency taking a position. In rare circumstances, should a position on a bill or legislation fall outside the scope of the Board's adopted Legislative Program and be needed in advance of a Board meeting, staff will confer with the Board Chair.

Public Engagement Strategies
Staff, led by the Communications Division and its legislative consultants, will employ a variety of public engagement strategies to support the 2026~~6~~7 Legislative Program, including:

- Direct Engagement
  Engage policymakers, sponsor or support legislation, submit correspondence and provide public testimony that communicates and advances the Agency's legislative priorities and positions.

- Coalition-based Engagement
  Engage stakeholders to build awareness about specific issues and participate in local, regional, statewide and national coalitions organized to advance positions that are consistent with the Legislative Program.

- Media Engagement
  Build public awareness and communicate the Agency's legislative priorities by issuing press releases, organizing media events, and using social media.

The adopted legislative program will guide the Agency's legislative advocacy efforts until approval of the next program.

State and Regional
Budget and Transportation Funding Opportunities

- Work with the Agency's state legislative delegation, state and regional agencies, transit systems and transit associations to identify and advance opportunities for funding supporting the Agency's transportation priorities and operations.

- Advocate for full funding of all state programs supporting the Agency's operations and capital initiatives.

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- Support fully funding the Transit and Intercity Rail Capital Program (TIRCP) and Low Carbon Transit Operations Program (LCTOP) at the levels established in Senate Bill (SB) 840 (Limon, 2025)—the 2025 Cap-and-Invest agreement—using Greenhouse Gas Reduction Fund (GGRF) revenues or other available state funding sources.

- Champion efforts to secure additional funds for transit operations and capital projects.

- Work to ensure committed funds are appropriated and available in a timely manner and not withheld or diverted for other purposes.

- Advocate for flexible funding mechanisms that can adapt to changing transit demands.

- Support local and regional funding options that preserve and enhance funding for the Agency and sister agencies.

- Support efforts to reduce barriers to transit funding ~~for~~ secured through voter-approved ballot measures, legislation, and other funding mechanisms.

- Assess and participate in the development of transit-related ballot measures relevant to the Agency's interests.

- Work to ensure the Agency's projects are competitive for all ~~applicable Cap-and-Invest~~ competitive and formula-based state transportation funding programs~~, including discretionary funding~~.

- Advocate against efforts to impose unjustified and/or overly burdensome financial regulations and requirements on ~~granting~~ funding impacting Agency initiatives.

- Evaluate efforts to replace or supplement the gas tax with other funding mechanisms and advocate for maintaining current levels of funding dedicated to transportation operations, projects and programs.

Transportation Project Requests and Needs

- Collaborate with regional transit agencies, business, community, ~~transportation~~ and other stakeholders to enhance, support and advocate for equitable transportation access and mobility in the Bay Area.

- Champion policies and projects to improve safety and encourage the use and development of public transit, first/last mile and other multimodal transportation options and infrastructure throughout San Mateo County and the region.

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- Engage with legislators, government officials and stakeholders to build support for the efficient and cost-effective development of the Dumbarton Rail Corridor and related projects. Work to maintain all existing Agency rights to the corridor, enhance its development potential, and limit regulatory and other hurdles.

- Advocate for regional and state transit-supportive policies that improve bus stops, bus speed and reliability, bike and pedestrian safety and accessibility on streets in the SamTrans network, including El Camino Real.

- Advocate for the Agency to be able to develop its property in the manner most beneficial to Agency needs and goals.

- Engage with state or regional efforts that directly link transportation funding and/or policies to housing and provide for higher density housing projects near transit stations.

- Support partners in the development of grade separation projects in San Mateo County.

- Support policies that encourage the use of transportation demand management (TDM) and efforts that provide more TDM tools and funding opportunities.

- Work to ensure state and regional policies support the Agency's employee recruitment and retention goals and the effective administration of employee policies such as sick leave.

- Work to ensure state and regional policies improve operator, employee, and passenger safety.

- Champion efforts to prioritize San Mateo County projects in regional plans such as Plan Bay Area and the State Transportation Improvement Program.

Legislative, Regulatory, and Administrative Actions

- Advocate for regional and state policies that remove barriers and promote effective implementation and delivery of transportation projects.

- Engage with the Metropolitan Transportation Commission (MTC) and other regional bodies, the Legislature, sister agencies, and stakeholders on policies related to regional coordination to enhance the transit experience in the Bay Area.

- Ensure requirements for transit agencies—including implementation of the statewide transit stop registry established in AB 1599 (Ahrens)—are practical, limit administrative and financial burdens, and do not ~~result in tradeoffs with~~ create unintended ~~consequences~~ tradeoffs for transit riders ~~and~~ or the community.

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- Evaluate and engage in efforts to modernize the California Environmental Quality Act (CEQA) to expedite delivery of Agency projects.

- Seek clear state guidance and, if necessary, statutory amendments to SB 79 to confirm that the law does not apply to SamTrans' Reimagine Dumbarton and Grand Boulevard Initiative projects.

- Engage in efforts to seek amendments to the Innovative Clean Transit (ICT) regulation.

- Advocate for funding for zero-emission buses and charging/refueling infrastructure to facilitate compliance with the ~~Innovative Clean Transit (~~ICT~~)~~ regulation.

- Advocate for policies that advance zero-emission bus deployment and reliable transit operations, including ~~for the~~ re-establishing~~ment of~~ the partial sales and use tax exemption for zero-emission buses and recognizing transit agencies as essential-use customers during blackouts, brownouts, and other outages.

- Work to ensure state regulations related to greenhouse gas emissions (GHG) reduction and Climate Plan for Transportation Infrastructure (CAPTI) implementation align with the goals of the Agency.

- Evaluate and engage with legislation ~~that makes additional changes~~ related to the Brown Act. Support changes that ~~clarify application of Senate Bill 707 (2025) and~~ promote government efficiency, ~~while continuing to~~ provide flexibility for Board and non-elected advisory/oversight committee members participating in meetings remotely, and increase participation in public meetings.

- Evaluate and engage with legislation related to the California Public Records Act. Assess potential operational, administrative and financial impacts on the Agency.

- Monitor new litigation related to the Public Employees' Pension Reform Act (PEPRA) and participate in conversations to advance the Agency's interests.

- Evaluate state and regional efforts to update implementation of Sustainable Communities Strategies and work to ensure the Agency's projects remain eligible for funding.

- Advocate against efforts to impose unjustified and/or overly burdensome regulations or restrictions impacting Agency initiatives.

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Federal

Budget and Transportation Funding Opportunities

- Work with the Agency's federal legislative delegation, members of the administration, federal departments, national organizations, other transit systems and associations to identify and advance opportunities for funding or legislative policies supporting the Agency's transportation priorities and operations.

- Identify, pursue and support federal funding opportunities, including but not limited to Community Project Funding/Congressionally Directed Spending requests and discretionary grant programs—for operations and capital projects.

- Work to ensure committed funds (discretionary and formula) are available in a timely manner and not withheld or diverted for other purposes.

- Advocate for flexible funding mechanisms that can adapt to changing transportation needs and demands in San Mateo County.

- Work to ensure the Agency remains competitive and eligible for all applicable federal discretionary grant funding programs.

- Advocate for the preservation or reinstatement of previously awarded funding ~~transportation projects in San Mateo County~~ to the Agency, including federal hydrogen hub funding through the Alliance for Renewable Clean Hydrogen Energy Systems (ARCHES) California Hydrogen Hub.

- Support efforts to ensure tax provisions that benefit Agency priorities are included in any tax or finance proposal.

- Advocate against suspension of the federal gas tax.

- Monitor tariff and trade policies that could increase costs, disrupt supply chains, delay project delivery or limit the availability of transit vehicles, parts, equipment, construction materials and technology needed to support Agency operations and capital projects.

- Advocate against efforts to impose unfunded mandates, unjustified and/or overly burdensome financial regulations and requirements on ~~granting~~ funding impacting Agency initiatives.

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- Support federal grantmaking policies and regulations that provide transparent, merit-based, and reliable award processes; protect awarded and obligated funds from arbitrary delay, suspension, termination or additional conditions; and limit unnecessary administrative burdens on recipients.

Legislative, Regulatory and Administrative Actions

- Advocate for programs and policies in the Surface Transportation Reauthorization bill and any other applicable federal policy or regulatory initiative that are beneficial to the Agency's goals, including securing removal of any federal right, title or interest in the Colma Park-and-Ride Lot.

- Support a regulatory environment that will help transportation projects in San Mateo County move through the different stages of planning, environmental, and construction phases.

- Support opportunities to improve the ability of the Agency to conduct safe and efficient transportation operations, administration, planning and project delivery.

- Work to ensure federal policies improve operator, employee, and passenger safety.

- Advocate for the Agency to be able to develop its property in the manner most beneficial to Agency needs and goals.

- Collaborate with transportation providers, transportation advocacy groups and other stakeholders to coordinate support for regulations that maximize benefits for transportation programs, services and users.

- Evaluate and engage in efforts to modernize the National Environmental Protection Act (NEPA) to expedite delivery of Agency projects.

- Advocate against efforts to impose unjustified and/or overly burdensome regulations or restrictions impacting Agency initiatives.

- Support policies that will allow for effective public private partnerships and alternative project delivery methods.

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