



BATA Regular Meeting Agenda
115 Hall Street, Traverse City, MI 49684
Thursday, May 28, 2026

1. Call to Order
2. Pledge of Allegiance and Moment of Silence
3. Roll Call
4. Oath of Office
 - a. Janice Wyant
5. First Public Comment*
6. Approval of Agenda/Declaration of Conflict of Interest

7. Consent Calendar

The purpose of the consent calendar is to expedite business by grouping noncontroversial items together to be dealt with in one Board motion without discussion. Any member of the Board, staff or the public may ask that any item on the consent calendar be removed and placed elsewhere on the agenda for full discussion. Such requests will be automatically respected. If an item is not removed from the consent calendar, the action noted in the parentheses on the agenda is approved by a single Board action adopting the consent calendar.

Consideration of Approving the following Minutes

- a. Regular Board Meeting Minutes of April 23, 2026
- b. Governance Meeting Minutes of April 23, 2026
- c. Governance Meeting Minutes of May 4, 2026

Consideration of Accepting the following Reports

- d. Monthly Income Statement
- e. Correspondence – Staff Compliments
- f. BATA Board Tracker

8. Any items removed from the Consent Calendar
9. Executive Director's Report – Chris Davis
10. Chairperson's Report
11. Old Business
 - a. Resolution Calling for Public Transportation Millage – Chris Davis
 - b. Fare System Project Update – Eric Lingaur
12. New Business
 - a. 2026 Tax Rate Request Resolution, L4029 for Grand Traverse and Leelanau Counties
 - b. VIA Renewal Agreement – Eric Lingaur
 - c. Public Transit Agency Safety Plan (PTASP)
13. Second Public Comment*
14. Directors' Comments and Announcement/Open Floor
15. Adjournment

*Public Comment:

Any interested party or person may address the board on any matter of BATA concern during public comment. Comments will be limited to 5 minutes, and a one-minute warning will be given when needed. Any public comment that becomes disruptive, unduly repetitive, or impedes the orderly progress of the meeting may be terminated by the presiding officer. Once you have completed your public comments the board may ask any clarifying questions. If needed, you will be assigned a member of BATA's staff to follow up directly on any open concerns.

* The next BATA Board of Directors meeting is June 25, 2026

Oath of Office

I, _____, do solemnly swear that I will faithfully, truly, impartially and honestly, to the best of my judgement, skill and ability, execute and perform the duties required of me as a member of the Bay Area Transportation Authority Board of Directors.

BATA Regular Board of Directors Meeting Minutes

Location: Hall St. Transfer Station, 115 Hall St. Traverse City, MI

Date/Time: Thursday, April 23, 2026

1. Call to Order

The meeting was called to order by Chairperson Wayne Schmidt at 1:07 PM.

2. Pledge of Allegiance

3. Roll Call

- John Sommavilla - PRESENT
- Lance Boehmer – PRESENT
- Gwenne Allgaier – PRESENT
- Fern Spence – PRESENT
- Sarah Bye - PRESENT
- Wayne Schmidt - PRESENT

4. First Public Comment*

Fred Bimber of 1223 Randolph St, addressed the Board in regard to the East Bay Beach District proposal, TIF plan. Mr. Bimber commented that BATA needs to make a decision regarding the TIF prior to May 8. Mr. Bimber stated his opinion would be in BATA's best interest to opt out, noting concerns regarding loss of tax revenue and the impact of incremental funding being directed to the TIF. Mr. Bimber also referenced potential future opportunities for revenue sharing if BATA opts out. Additional concerns were raised regarding tax impacts, including capping, inflation, and property tax considerations. Mr. Bimber further compared the size of the East Bay district to the TIF 97 district and recommended that BATA opt out to avoid other entities capturing tax revenues.

Beth Friend, East Bay Township Manager, expressed appreciation for BATA's involvement as a partner since the beginning of the project and in helping develop shared goals. She stated that the Beach District goals align with BATA's mobility goals and noted that the Bayline is a positive addition to the area, improving safety and accessibility. She also referenced political and emotional considerations related to the City's TIF district and noted that the TIF is planned as a 20-year district, with BATA's capture included in the plan. She indicated openness to negotiating with BATA to develop a mutually beneficial agreement.

5. Approval of Agenda/Declaration of Conflict of Interest

Moved by Lance Boehmer and supported by John Sommavilla to approve the Agenda/Declaration of Conflict of Interest as presented.

- **Ayes: 6**
- **Nays: 0**
- **Motion Carries: 6-0**

6. Consent Calendar

The purpose of the consent calendar is to expedite business by grouping non-controversial items together to be dealt with in one Board motion without discussion. Any member of the Board, staff, or the public may ask that any item on the consent calendar be removed and placed elsewhere on the agenda for full discussion. Such requests will be automatically respected. If an item is not removed from the consent calendar, the action noted in parentheses on the agenda is approved by a single Board action adopting the consent calendar.

Consideration of Approving the Following

- a. Regular Board Meeting Minutes of February 26, 2026
- b. Regular Board Meeting Minutes of March 26, 2026

Consideration of Accepting the Following Reports

- c. Monthly Income Statement
- d. FY26 Q2 Ridership Report
- e. FY26 Q2 Turnover Report
- f. MDOT Form 5572
- g. Correspondence – Staff Compliments
- h. BATA Board Tracker

Moved by John Somnavilla and supported by Lance Boehmer to approve the April 23, 2026, Regular Board Meeting, Consent Calendar as presented.

- **Ayes:6**
- **Nays: 0**
- **Motion Carries: 6-0**

7. Any Items Removed from the Consent Calendar.

No items were removed from the Consent Calendar.

8. Fiscal Year 25 Audit – Josh Sullivan

Key Points Include:

- Rehman conducted the audit and went through with a clean and unmodified opinion.
- Strong balance sheet with positive net position.
- Capital asset with larger purchases being vehicles, liability is down since the construction projects are wrapping up.
- BATA's pension liability funding level is strong, almost at 100%
- Slight decrease in cash flow compared to year over year.
- Compensated absences and how they are tracked is a new item this year to track under GASB.
- Clean audit, everything was in compliance.
- Suggestion for improvement, for instance, IT software that is a subscription vs. what is owned. (cloud-based example)

- Board Director, John Sommovilla suggested that a policy be created to address outstanding invoices on an annual basis, to do a write-off for aging accounts receivable

9. Executive Director's Report

Chris informed the Board that BATA qualified for additional Small Transit Intensive Cities funding from the FTA. New buses have been ordered, the timeline for arrival is approximately six months. Chris, Eric Lingaur and Bill Clark presented at Rotary this month. Chris attended a webinar regarding employee benefits. BATA attended two job fairs, NMC and Career Tech. Eric Lingaur and Wayne Stevens presented at MPTA in Mt. Pleasant. Eric Lingaur and Bill Clark met with local business in Northport to discuss options for seasonal workforce transportation support.

10. Chairman's Report

No report given at this time.

11. Finance Report

Key Points Include:

- The sales ads for this year have already surpassed the amount that was budgeted. Great job to Wayne Stevens.
- State Formula reimbursement rate of 34.8467% for FY26
- Federal operating based on current year expenses, requesting from FTA quarterly. Reimbursement of 18%
- Interest rates from investments 3.7443%

Moved by Fern Spence and supported by Sarah Bye to approve the FY26 Q2 Finance Report as presented.

- **Ayes: 6**
- **Nays: 0**
- **Motion Carries: 6-0**

12. Old Business

GMV Renewal

Key Points Include:

- Automatic announcements, passenger counters, fixed routes are some of the items that are used in the GMV system.
- Eric spoke with Operations and they confirmed that BATA can utilize this software for 2 years.
- Lance Boehmer asked if the agreement includes an SLA. Eric Lingaur stated that he will follow up.

Moved by Fern Spence and supported by Gwenne Allgaier to approve the renewal of the GMV contract for 2 years not to exceed the total amount of \$137,000 as presented.

- **Ayes: 6**
- **Nays: 0**
- **Motion Carries: 6-0**

b. East Bay Beach District TIF Update

Key Points Include:

- At the time the presentation was made to the Board in January, the tax values in the quarter that were given were \$138,807,135. which presented as a 2.5% increase from the previous year. The consultant projected a 2% increase for the next 20 years; the total came to \$309,193 for the next 20 years. The Board supported the TIF and supported East Bay Township at the time of the presentation in January.
- Updated information has been received, and the taxable values are \$150,698,313, which is about a 9% increase. A projection for the next 20 years at 4 % would be \$769,490.
- BATA improvements are 11 shelters and amenities which total around \$935,000

Discussion that was had:

Fern Spence suggested a revenue sharing agreement be pursued for a better focus over the next 20 years. Lance Boehmer asked if the county opted out of the TIF. Fern Spence supports the East Bay Township plan but feels like the funding approach needs to be different. Make sure that it is a limited 20-year TIF and have it aligned with the tax sharing policy. Lance Boehmer is supportive of the TIF but also understands financial growth and constraints. Wayne Schmidt wants to make sure that we support East Bay and enter into an agreement with the purpose to enter into a revenue sharing plan. It was determined that more information is needed at this time.

Moved by Fern Spence and supported by Lance B that the BATA Board of Directors move to opt out of the East Bay TIF until Grand Traverse County has updated their 2012 tax sharing policy, which includes the TIF policy and explore entering into a revenue sharing agreement with East Bay Township.

Roll Call Vote:

- **Ayes: John Sommavilla, Lance Boehmer, Fern Spence, Sarah Bye, Gwenne Allgaier and Wayne Schmidt**
- **Nays:0**
- **Motion Carries: 6-0**

c. 2026 Millage Discussion

Key Points Include:

- Information was provided to the Board regarding what the Mills might look like in preparation for the May Meeting. A resolution was drafted for the Board to go over and that would be voted on at the May meeting.
- Will be placed on the November ballot and recommending 7 years, 2028-2034

- Gwenne Allgaier asked what the service delivers in Leelanau County costs vs millage funds collected. BATA will bring the millage numbers and funding numbers to the May meeting.

13. New Business

a. Discussion on moving the location of the May Board of Directors Meeting.

Moved by Lance Boehmer and supported by Fern Spence to change the location of the May Board Meeting to Hall St and have the September Board Meeting moved to Leelanau County.

- **Ayes: 6**
- **Nays: 0**
- **Motion Carries: 6-0**

14. Second Public Comment

Fred Bimber thanked the BATA Board for opting out and exploring what the county model looks like. Fred also wanted to give kudos to the advertising revenue.

Claire Carner from the East Bay Beach District – Working with BATA on tax sharing agreements. Claire gave some highlights of some of the positive improvements which include 11 different locations, shelters and benches and making mobility improvements. Year-round maintenance and snow removal along the sidewalks and access to the bus shelters. There will also be safe crossings from one side to the other and will really help with pedestrian traffic. Make sure that 20 years is built into the draft and revisit the plan in the future.

Beth Friend from East Bay Beach District thanked the Board and the value they have in TIF and East Bay Township. Beth stated that they are currently negotiating an agreement with their administrative staff and the county. There was no re-draft of the plan and reordered for the better understanding of the TIF. Did make calculations on the 4% increase vs the 2%. Looking forward to working with staff.

15. Director's Comments and Announcements/ Open Floor

Sarah Bye asked where the link buses are located, dwell time and where they are going. Eric Lingaur responded that yes, BATA can track that information and can be provided.

Lance Boehmer stated that the Complete Streets Advisory will have some upcoming recommendations. Fuel – diesel costs and the price point. The city is paying more for fuel than BATA and Lance asked how we monitor that. Eric Lingaur responded that Operations monitors that daily and communicates with the drivers where they will need to fuel that day for either gas or diesel.

Chris Davis thanked Justin Weston for his service as the Finance Director at BATA. Justin has agreed to work some evenings until the next Finance Director is appointed.

John Sommovilla asked about the recruitment of the next finance director and stated that the new executive director should have some input into who the new finance director should be.

John Sommovilla asked if there was any update to the legal situation. Chris Davis said that she can provide that at the next meeting.

Fern Spence provided an update on the BATA Board's next director. Interviews are scheduled to take place between May 5-12th

16. Adjournment

Moved by Lance Boehmer to adjourn the April 23, 2026, Regular Meeting of the BATA Board of Directors at 2:55 PM. The next BATA Board meeting is scheduled for May 28, 2026, at 1:00 at Hall St.

Meeting Minutes Submitted by: _____

Meeting Minutes Approved on: _____

Gwenne Allgaier, Secretary: _____

BATA Governance Committee Meeting Minutes

Location: BATA Hall St Transfer, 115 Hall St

Date/Time: 11:30 PM, Thursday, April 23, 2026

1. Call to Order

The meeting was called to order by John Sommavilla at 11:35 AM.

- John Sommavilla PRESENT
- Fern Spence PRESENT
- Lance Boehmer PRESENT

2. First Public Comment

No public comment was made.

3. Old Business

No old business.

4. New Business

a. Update from Kate Greene at HR Partners

Key Points Include:

- Kate Greene was present at the meeting today to discuss the results from the first stage of the Executive Director search.
- The search brought in 44 applicants in total.
- Kate reminded the Board of the key traits that the Board and Management agreed that were the most important. The result included candidates that not only had transportation experience but also whose resumes and cover letters demonstrated and conveyed the key traits which the Board was looking for.

b. Review of Candidates

Key Points Include:

- Kate Greene explained to the Board that she brought 15 candidates to review. These candidates were separated into two groups, A and B+
- The candidates that were selected for review had their information redacted in order to have confidentiality and keep the search unbiased as possible.
- The Board reviewed all candidates in depth.

- The Board decided on 10 candidates to move forward with the phone interview stage.
- Kate Greene will perform the phone interviews.

c. Moving Forward.

Key Points Include:

- Reminder was given to the committee that the interviews that are scheduled for May 13th and 14th will be in person. Hoping to have 4-6 people to interview in the next round, based on the results of the phone interviews.
- Kate stated to the Board that they will need to figure out how they would like to coordinate out-of-state interviews. Kate's recommendation to the committee is that if they cannot be interviewed in person then the committee should see them all remote, to ensure an even playing field.
- Dates to remember: May 27th meet and greet portion and May 28th finalists will be brought to full board.

5. Second Public Comment

No public comment was made.

6. Adjournment

Meeting adjourned at 12:59PM.

Meeting Minutes

Search Committee Meeting, Bay Area Transportation Authority (BATA)

115 Hall Street, Traverse City, MI

May 4, 2026

1. Meeting called to order at 1:05pm. Minutes were recorded by G. Allgaier.
2. Roll call for attending Board Members: John Sommavilla, Gwenne Allgaier and Fern Spence.
3. Motion: To approve Agenda.
 - a. Moved by G. Allgaier.
 - b. Second by J. Sommavilla.
 - c. Vote: Passed unanimously.
4. Public Comment -none
5. The Chair noted that the Committee requested Kate Greene, search consultant, to join the closed session to facilitate review of candidate materials.
6. Motion made by J. Sommavilla that the Search Committee enter closed session pursuant to Section 8(1)(h) of the Michigan Open Meetings Act under (MCL 15.268(1)(h)) to consider applicant materials that are exempt from disclosure under the Freedom of Information Act. Second by Allgaier.
 - a. Roll call vote: Sommavilla – Yes, Allgaier – Yes, Spence -Yes. Motion passed.
7. Committee entered into closed session at 1:07pm.
8. The Committee returned to open session at 2:18pm.
9. Motion: to advance Candidates 1, 2, 5, and 11 to first-round interviews, and to conditionally advance Candidate 9 pending receipt of additional information, and to authorize reasonable travel reimbursement for candidates as needed.
 - a. Moved by: J. Sommavilla
 - b. Second by: F. Spence.
 - c. Vote: Passed unanimously.
10. Public Comment - None
11. Closing comments
12. Motion: to adjourn.
 - a. Moved by: G. Allgaier.
 - b. Second by: J. Sommavilla.
 - c. Vote: Passed unanimously.

BATA Income Statement April 2026

	April 2026		\$ Over (Under)	April 2025
	Actual	Budget	Budget	Actual
Income				
Fare Box Revenue	\$ 362,974	\$ 335,417	\$ 27,558	\$ 337,327
Local Service Contracts	221,753 1	325,752	(103,999)	305,950
Auxiliary Trans Revenue	231,853 2	139,183	92,670	123,442
Non-Trans Revenue	105	3,500	(3,395)	157,995
Local Revenue	1,992,090 3	2,097,726	(105,636)	1,933,710
State Formula & Contracts	2,792,257 4	2,456,103	336,153	2,819,659
Federal Operating Grants	1,451,706 5	1,463,559	(11,854)	1,531,703
Other Revenue	389,334 6	145,833	243,501	459,558
Refunds and Credits	64,117	29,167	34,950	172,684
Total Income	\$ 7,506,189	\$ 6,996,241	\$ 509,948	\$ 7,842,029
Expense				
Salaries & Wages	\$ 4,103,804	\$ 4,227,848	\$ (124,045)	\$ 4,026,873
Paid Leave	392,070	392,064	6	300,937
Fringe Benefits	1,351,107 7	1,262,220	88,887	1,230,648
Services	601,238 8	615,795	(14,558)	479,735
Fuel & Lubricants	290,148 9	346,383	(56,235)	339,725
Materials & Supplies	303,608 10	250,417	53,191	257,531
Utilities	193,779 11	200,124	(6,344)	196,793
Insurance	458,461	464,336	(5,876)	481,994
Misc Expense	43,086 12	37,338	5,748	46,731
Operating Leases & Rentals	900	1,050	(150)	2,383
Total Expense	\$ 7,738,201	\$ 7,797,576	\$ (59,375)	\$ 7,363,351
Net Income before Depreciation	\$ (232,012)	\$ (801,335)	\$ 569,323	\$ 478,678
Depreciation	2,092,239	1,111,387	980,852	675,991
Net Income (Loss)	\$ (2,324,251)	\$ (1,912,722)	\$ (411,529)	\$ (197,313)

BATA Income Statement Notes
April 2026

	<u>Account(s)</u>	<u>Explanation</u>
	Revenue	Revenue
<u>1</u>	Local Service Contracts	Contract with Grand Traverse Industries, billed actual hours beginning in FY26. Billed within 10 days after the end of the month.
<u>2</u>	Auxiliary Trans Revenue	Big advertising contracts executed.
<u>3</u>	Local Revenue	Winter tax levy funds
<u>4</u>	State Formula & Contracts	Actual based on eligible expenses thru April 2026, reimbursement rate of 34.8467% for FY26
<u>5</u>	Federal Operating	Based on current year expenses, requesting funds from FTA quarterly. Reimbursement rate of 18%.
<u>6</u>	Other Revenue	Interest Revenue from investments, averaging 3.7478% (flat from March) as well as refunds/insurance claims
	Expenses	Expenses
<u>7</u>	Fringe Benefits	Slightly higher costs identified in healthcare, capturing more costs in Admin group than budgeted. Also changes throughout the year based on new enrollments and employee changes
<u>8</u>	Services	Service Contracts will be paid throughout the year when due, budget based on average over 12 months, several big IT contracts paid early in year.
<u>9</u>	Fuel & Lubricants	Budget reflects new propane contract pricing, \$0.29 less per gallon for FY26. New Contract starts December 2025.
<u>10</u>	Materials & Supplies	Custodial Supplies/Vehicle parts are trending higher and will continue to be monitored
<u>11</u>	Utilities	Billing is a month behind, budget is a 12 month average
<u>12</u>	Misc Expense	Dues for most partners paid, dues slightly higher than budget increased over last year

Staff Compliments

*Dispatch, Logan Cibik – A passenger wrote to thank dispatch for the great service and care she always receives. She was able to get home safely recently from her LASIK surgery. Dispatch went out of their way by sending a West bus instead of waiting for a link bus. In addition, Logan was very nice. She said you guys are all the best!

*Josh Stone, All Staff – A passenger called to say that she loves you guys, that you guys are awesome, and she doesn't know what she would do without BATA. She gave a great big compliment to Josh. He is always polite and says yes, ma'am. He is so patient, kind and courteous with her. She said all of our dispatchers, bus drivers, people at Hall Street, office people and everybody at BATA are wonderful. She said every time she talks to drivers they say they love working for BATA.

*Andrew Donegan, Linda Cushman, Lee Lawrence, Michael Bennett, Adam Peplinski, and Doris Morgan – Shout out to everyone involved in the team effort and good judgement used during the major lightning storm on April 14 and the communication used to let others know they shut down the propane fueling station. Also, Lee made a critical call at the Beitner stop by taking the time to speak with the county crew instead of crossing the bridge so the rest of our buses were diverted the night the bridge went out. The culture of teamwork is one of BATA's greatest strengths.

*Josh Stone – A passenger called to say how much Josh helped him get set up as a new rider. He answered all of his questions and gave him really important information.

*Cheryl Treadwell, Seth Halbert – A dispatcher wrote to thank Cheryl and Seth for volunteering to go down to Hall Street for going above and beyond to get a bus that was used as a shuttle.

*Mark Draeger - The Director of Communication for the City of Traverse City wrote to thank Mark for the great job he did providing transportation support for their City Academy.

*Bill Clark, Mackenzie Dusseau, Mark Ewing, Eric Lingaur and BATA Max (Phil Hodges), Wayne Stevens – Shout out to everyone who helped with the hundreds of students at Kingsley Elementary School event even though it was abruptly ended due to rain.

*Misha Barney – A frequent rider since 2014 called to compliment Misha. The rider said Misha is excellent, magnificent, exceptional, always so helpful and goes the extra yard.

*Cheryl Treadwell – A passenger called to say that Cheryl is amazing. She goes above and beyond and is always friendly as are all BATA staff. He said he is disabled, a veteran and has a hard time getting around. He said BATA provides good transportation.

BATA Board Tracker

Board Meeting Date Discussed	Board/Staff Member	Topic	Status
6/27/2024	Adam BeVier	Link Service	Will revisit again at a later date. TBD.
2/27/2025	Eric Lingaur Bill Clark	Year over year ridership report	Presented at the April 2025 meeting. COMPLETED
5/22/2025	Eric Lingaur Kurt Braun	Location of BATA bus stops.	Will revisit again at a later date. Discussion being held at the 10/23/25 meeting. COMPLETED

MAY INTERIM EXECUTIVE DIRECTOR UPDATE

INTERNAL:

Submitted the Waiver and Consent forms for uncollectable property taxes for Acme, Blair, Long Lake and Suttons Bay Townships

Put on a taco bar for employees in honor of Cinco de Mayo

Attended and presented to monthly Comms meetings with all employees

Put on a celebration for a driver for her 20th anniversary with BATA

Met with two new hires

Met with BATA's Safety Team for which I serve on

Working on EZ Fare Setup for testing to start the week of May 25 with a launch of mid- to late August

Content pages created for the new BATA.net Redesign

EXTERNAL:

Presented information on BATA to the noon Rotarians at the Hagerty Center

BATA attended the MI Career Quest at the GT County Civic Center with over 2,000 freshmen from all over Northwest Lower Michigan teaching about potential transportation jobs and how to use public transit

Attended NMC Campus Day and showed 14 students how to use public transit

Attended the TC Senior Expo where approximately 1,000 seniors attended and answered BATA questions and handed out educational materials

Presented a legislative update to the Traverse Area Human Resources Association (TAHRA) Board of Directors

Attended the weekly noon Rotary meetings

Attended the TAHRA Benefits Broker Panel presentation and presented an update to the TAHRA membership on the 20th Annual Golf Outing that I chair

Met with two staff members from MDOT and gave them a tour of headquarters

Met with Executive Leaders in the Community at Building 50 as a part of our monthly meeting schedule

Attended the virtual Statewide Urban Operators Meeting

BATA participated in Kingsley Elementary's Jobs on Wheels event where students were taught about using public transit

CHRIS DAVIS

BAY AREA TRANSPORTATION AUTHORITY
RESOLUTION CALLING FOR PUBLIC TRANSPORTATION MILLAGE

At a meeting of the Board of the Bay Area Transportation Authority, Grand Traverse County, State of Michigan, held on May 28, 2026, at 1:00 p.m., prevailing Eastern Time.

PRESENT: _____

ABSENT: _____

The following preamble and resolution were offered by _____ and supported by _____:

WHEREAS, the Bay Area Transportation Authority (“BATA”) is a public transportation authority subject to the provisions of the Public Transportation Authority Act (“Act 196”), 1986 PA 196, MCL 124.451 *et seq.*; and

WHEREAS, the jurisdiction of BATA is comprised of all that territory consisting of the jurisdictional limits of Grand Traverse and Leelanau Counties (the “BATA District”); and

WHEREAS, pursuant Section 18 of Act 196, BATA may levy a tax on all taxable property within the BATA District upon approval of the ballot proposal by the electors; and

WHEREAS, voters previously approved a five (5) year millage in the amount of .4788 mills to fund BATA and that millage expires on December 31, 2027; and

WHEREAS, that millage has been rolled back under the Headlee Amendment to the State Constitution to .4589 mills; and

WHEREAS, the Board of BATA (“Board”) determines that it is in the best interests and welfare of the BATA District and its residents that revenue be authorized for all public transportation authority purposes permitted by law, including all operational and capital expenses and providing transportation services to seniors and persons with disabilities; therefore, BATA has determined to request from voters of the BATA District a millage in the amount of .4589 mill, a renewal millage of the .4788 mills rolled back to .4589 mills under the Headlee Amendment; and

WHEREAS, the Board determines that it is in the best interests of the BATA District that such millage be voted on at an election to be held in the BATA District on November 3, 2026.

NOW, THEREFORE, BE IT RESOLVED, by the Board of the Bay Area Transportation Authority that:

1. The Board certifies and calls for the proposition shown on attached Exhibit A to be submitted to a vote of the qualified electors of the BATA District of the Bay Area Transportation Authority, Grand Traverse and Leelanau Counties, State of Michigan, at an election to be held on November 3, 2026.

2. The Executive Director is hereby directed to file a certified copy of this Resolution with the Clerks of Grand Traverse County and Leelanau County so that the County Clerks can undertake all obligations to place the proposition on the ballot as required by Section 18 of Act 196.

3. All public officials of the counties, State of Michigan, and all governmental units hereof, within such time as shall be required by law, be and are directed to perform all acts which shall be necessary in order to submit the above stated proposition to the duly qualified voters of said counties at the election to be held on November 3, 2026.

3. All resolutions and parts of resolutions that are in conflict with the provisions of this Resolution are rescinded.

AYES: Authority Board Members: _____

NAYS: Authority Board Members: _____

RESOLUTION DECLARED ADOPTED.

STATE OF MICHIGAN)
)ss
COUNTY OF GRAND TRAVERSE)

I, the Interim Executive Director of the Bay Area Transportation Authority, hereby certify that the foregoing is a true and complete copy of a resolution adopted by the Board of the Bay Area Transportation Authority, Grand Traverse and Leelanau Counties, State of Michigan, at a meeting held on _____, 2026, and that said meeting was conducted and public notice of said meeting was given pursuant to and in full compliance with the Open Meetings Act, being Act 267, Public Acts of Michigan, 1976, as amended, and that the minutes of said meeting were kept and will be or have been made available as required by said Open Meetings Act.

Chris Davis, Interim Executive Director
Bay Area Transportation Authority

EXHIBIT A

Bay Area Transportation Authority

Millage Proposal

Shall the Bay Area Transportation Authority for Grand Traverse and Leelanau Counties, Michigan, be authorized to levy annually an amount not to exceed .4589 mills (\$0.46 per \$1,000 of taxable value), a renewal of the .4788 mills reduced to .4589 mills under the Headlee Amendment, on taxable property within its jurisdiction for seven (7) years, 2028 through 2034, inclusive, to fund public transportation capital and operating expenses and provide transportation services for seniors and persons with disabilities? The estimated first year revenue is approximately \$6,041,755.

By law, a portion of millage will be distributed to other governmental tax-capturing entities, including the Traverse City, Village of Kingsley, Village of Fife Lake and Interlochen Downtown Development Authorities and the Grand Traverse and Leelanau County Brownfield Redevelopment Authorities.

Yes

No

New Fare System (EZfare) Update 05.20.26

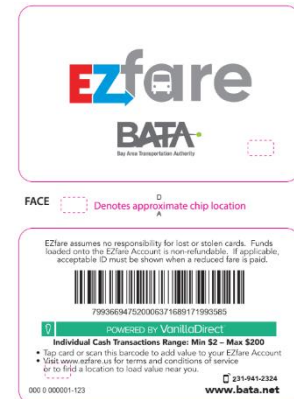
Ticket Vending Machines (TVMS):

- Quantity: Purchase of 2 large Flowbird TVMs with current budget as part of NeoRide contract
- Note: 6-12 month ordering/delivery window
- Locations:
 - LaFranier Park-n-Ride (shelter)
 - Hall Street Transfer Station (tarmac outside)



EZfare Roll External Out and Education Timeline:

- Staff training and testing: June 1 - 30
- Tease: Start the week of June 8 (around Smart Commute Week and Local Advisory Council meeting)
- Push: Start the week of July 13 or July 20 (6 weeks before launch)
 - Education Sessions at Hall Street (at least 3) and other places in the community like the Library, Senior Center, etc.
 - Start signing people up for accounts and downloading the EZ Fare app
- Start Distributing Cards: Aug. 17, 2026
- Implementation / Launch: Week of Aug. 17
 - Week of Aug. 17: Soft Launch
 - Week of Aug. 24: Bigger Push
 - Week of Aug. 31: Final push with day after Labor Day being official launch day



Last Day of GenFare Sales and Accepting Old Passes:

- Zip Tickets: Aug. 17
- Zoom Cards: Aug. 17
- Commuter Pass: Aug. 17, 2026
- Seasonal Worker Passes: Bill Clark monitoring
- Student Annual Passes: Stop selling ASAP
- Last Day of Accepting GenFare Media on the bus and at Hall Street: Dec. 31, 2026



2026 Tax Rate Request (This form must be completed and submitted on or before September 30, 2026)

MILLAGE REQUEST REPORT TO COUNTY BOARD OF COMMISSIONERS

Carefully read the instructions on page 2.

This form is issued under authority of MCL Sections 211.24e, 211.34 and 211.34d. Filing is mandatory; Penalty applies.

County(ies) Where the Local Government Unit Levies Taxes Grand Traverse and Leelanau Counties	2026 Taxable Value of ALL Properties in the Unit as of 05-26-2026 13,165,734,757
Local Government Unit Requesting Millage Levy Bay Area Transportation Authority (BATA)	For LOCAL School Districts: 2026 Taxable Value excluding Principal Residence, Qualified Agricultural, Qualified Forest, Industrial Personal and Commercial Personal Properties.

This form must be completed for each unit of government for which a property tax is levied. Penalty for non-filing is provided under MCL Sec 211.119. The following tax rates have been authorized for levy on the 2026 tax roll.

(1) Source	(2) Purpose of Millage	(3) Date of Election	(4) Original Millage Authorized by Election Charter, etc.	(5) ** 2025 Millage Rate Permanently Reduced by MCL 211.34d "Headlee"	(6) 2026 Current Year "Headlee" Millage Reduction Fraction	(7) 2026 Millage Rate Permanently Reduced by MCL 211.34d "Headlee"	(8) Sec. 211.34 Truth in Assessing or Equalization Millage Rollback Fraction	(9) Maximum Allowable Millage Levy *	(10) Millage Requested to be Levied July 1	(11) Millage Requested to be Levied Dec. 1	(12) Expiration Date of Millage Authorized
VOTED	Operating	11/8/22	.50000	.4655	.9860	.4589	1.0000	.4589	.4589	.4589	12/2027

Prepared by Justin Weston	Telephone Number (231) 933-5546	Title of Preparer Finance Director	Date 05/28/2026
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CERTIFICATION: As the representatives for the local government unit named above, we certify that these requested tax levy rates have been reduced, if necessary to comply with the state constitution (Article 9, Section 31), and that the requested levy rates have also been reduced, if necessary, to comply with MCL Sections 211.24e, 211.34 and, for LOCAL school districts which levy a Supplemental (Hold Harmless) Millage, 380.1211(3).

<input type="checkbox"/> Clerk	Signature	Print Name	Date
<input checked="" type="checkbox"/> Secretary		Gwenne Allgaier	05/28/2026
<input type="checkbox"/> Chairperson	Signature	Print Name	Date
<input checked="" type="checkbox"/> President		Wayne Schmidt	5/28/2026

* Under Truth in Taxation, MCL Section 211.24e, the governing body may decide to levy a rate which will not exceed the maximum authorized rate allowed in column 9. The requirements of MCL 211.24e must be met prior to levying an operating levy which is larger than the base tax rate but not larger than the rate in column 9.

** **IMPORTANT:** See instructions on page 2 regarding where to find the millage rate used in column (5).

Local School District Use Only. Complete if requesting millage to be levied. See STC Bulletin 2 of 2026 for instructions on completing this section.

Total School District Operating Rates to be Levied (HH/Supp and NH Oper ONLY)	Rate
For Principal Residence, Qualified Ag., Qualified Forest and Industrial Personal	
For Commercial Personal	
For all Other	

Instructions For Completing Form 614 (L-4029) 2026 Tax Rate Request, Millage Request Report To County Board Of Commissioners

These instructions are provided under MCL Sections 211.24e (truth in taxation), 211.34 (truth in county equalization and truth in assessing), 211.34d (Headlee), and 211.36 and 211.37 (apportionment).

Column 1: Source. Enter the source of each millage. For example, allocated millage, separate millage limitations voted, charter, approved extra-voted millage, public act number, etc. Do not include taxes levied on the Industrial Facilities Tax Roll.

Column 2: Purpose of millage. Examples are: operating, debt service, special assessments, school enhancement millage, sinking fund millage, etc. A local school district must separately list operating millages by whether they are levied against ALL PROPERTIES in the school district or against the NON-HOME group of properties. (See State Tax Commission Bulletin 2 of 2026 for more explanation.) A local school district may use the following abbreviations when completing Column 2: "Operating ALL" and "Operating NON-HOME". "Operating ALL" is short for "Operating millage to be levied on ALL PROPERTIES in the local school district" such as Supplemental (Hold Harmless) Millages and Building and Site Sinking Fund Millages. "Operating NON-HOME" is short for "Operating millage to be levied on ALL PROPERTIES EXCLUDING PRINCIPAL RESIDENCE, QUALIFIED AGRICULTURAL, QUALIFIED FOREST AND INDUSTRIAL PERSONAL PROPERTIES in the local school district" such as the 18 mills in a district which does not levy a Supplemental (Hold Harmless) Millage.

Column 3: Date of Election. Enter the month and year of the election for each millage authorized by direct voter approval.

Column 4: Millage Authorized. List the allocated rate, charter aggregate rate, extra-voted authorized before 1979, each separate rate authorized by voters after 1978, debt service rate, etc. (This rate is the rate before any reductions.)

Column 5: 2025 Millage Rate Permanently Reduced by MCL 211.34d ("Headlee") Rollback. Starting with taxes levied in 1994, the "Headlee" rollback permanently reduces the maximum rate or rates authorized by law or charter. The 2025 permanently reduced rate can be found in column 7 of the 2025 Form L-4029. For operating millage approved by the voters after April 30, 2025, enter the millage approved by the voters. For debt service or special assessments not subject to a millage reduction fraction, enter "NA" signifying "not applicable."

Column 6: Current Year Millage Reduction Fraction. List the millage reduction fraction certified by the county treasurer for the current year as calculated on Form 2166 (L-4034), *2026 Millage Reduction Fraction Calculations Worksheet*. The millage reduction fraction shall be rounded to four (4) decimal places. The current year millage reduction fraction shall not exceed 1.0000 for 2026 and future years. This prevents any increase or "roll up" of millage rates. Use

1.0000 for new millage approved by the voters after April 30, 2026. For debt service or special assessments not subject to a millage reduction fraction, enter 1.0000.

Column 7: 2026 Millage Rate Permanently Reduced by MCL 211.34d ("Headlee") Rollback. The number in column 7 is found by multiplying column 5 by column 6 on this 2026 Form L-4029. This rate must be rounded DOWN to 4 decimal places. (See STC Bulletin No. 11 of 1999, Supplemented by Letter of 6/7/2000.) For debt service or special assessments not subject to a millage reduction fraction, enter "NA" signifying "not applicable."

Column 8: Section 211.34 Millage Rollback Fraction (Truth in Assessing or Truth in Equalization). List the millage rollback fraction for 2026 for each millage which is an operating rate. Round this millage rollback fraction to 4 decimal places. Use 1.0000 for school districts, for special assessments and for bonded debt retirement levies. For counties, villages and authorities, enter the Truth in Equalization Rollback Fraction calculated on STC Form L-4034 as TOTAL TAXABLE VALUE BASED ON CEV FOR ALL CLASSES/TOTAL TAXABLE VALUE BASED ON SEV FOR ALL CLASSES. Use 1.0000 for an authority located in more than one county. For further information, see State Tax Commission Bulletin 2 of 2026. For townships and cities, enter the Truth in Assessing Rollback Fraction calculated on STC Form L-4034 as TOTAL TAXABLE VALUE BASED ON ASSESSED VALUE FOR ALL CLASSES/TOTAL TAXABLE VALUE BASED ON SEV FOR ALL CLASSES. The Section 211.34 Millage Rollback Fraction shall not exceed 1.0000.

Column 9: Maximum Allowable Millage Levy. Multiply column 7 (2026 Millage Rate Permanently Reduced by MCL 211.34d) by column 8 (Section 211.34 millage rollback fraction). Round the rate DOWN to 4 decimal places. (See STC Bulletin No. 11 of 1999, Supplemented by Letter of 6/7/2000.) For debt service or special assessments not subject to a millage reduction fraction, enter millage from Column 4.

Column 10/Column 11: Millage Requested to be Levied. Enter the tax rate approved by the unit of local government provided that the rate does not exceed the maximum allowable millage levy (column 9). A millage rate that exceeds the base tax rate (Truth in Taxation) cannot be requested unless the requirements of MCL 211.24e have been met. For further information, see State Tax Commission Bulletin 2 of 2026. A LOCAL School District which levies a Supplemental (Hold Harmless) Millage shall not levy a Supplemental Millage in excess of that allowed by MCL 380.1211(3). Please see the memo to assessors dated October 26, 2004, regarding the change in the collection date of certain county taxes.

Column 12: Expiration Date of Millage. Enter the month and year on which the millage will expire.

Bay Area Transportation Authority



Resolution: 2026-03
Approval of 2026 Tax Rate Request Form L-4029

WHEREAS, the Bay Area Transportation Authority (the "Authority") was created pursuant to the Michigan Public Transportation Act of 1986, P.A. 196, to provide public transportation in Grand Traverse and Leelanau Counties, and;

WHEREAS, on November 8, 2022, the voters of Grand Traverse and Leelanau Counties approved a renewal of the original .5000 millage and establishing the maximum allowable millage levy of .4788, and;

WHEREAS, the Authority is authorized to collect property taxes in Grand Traverse and Leelanau Counties, and;

WHEREAS, the Authority's Board of Directors have reviewed and approved the 2026 Tax Rate Request Form L-4029, and;

WHEREAS, the Authority has historically collected on the summer tax roll in conjunction with Traverse City Area Public Schools ("TCAPS") and reimburse TCAPS for its share of the collection costs, and;

WHEREAS, the following municipalities collect on the summer tax roll; Acme Township, Blair Township, East Bay Charter Township, Garfield Charter Township, Grant Township, Green Lake Township, Long Lake Township, Peninsula Township, Whitewater Township, City of Traverse City, and;

WHEREAS, the following municipalities collect on the winter tax roll; Fife Lake Township, Mayfield Township, Paradise Township, Union Township, and all townships in Leelanau County, and;

WHEREAS, the Authority operates on a fiscal year end basis ending on September 30, and;

WHEREAS, tax collections from the summer tax roll will be used for operations in the fiscal year ending September 30, 2026, and;

WHEREAS, tax collections from the winter tax roll will be used for operations in the fiscal year ending September 30, 2027.

NOW, THEREFORE, BE IT RESOLVED that at a regular meeting of the Board of Directors of the Authority held on this 28th day of May 2026, that this Authority, in accordance with the truth in budgeting act, hereby makes its intentions known to issue the maximum allowable millage levy of .4589 mills in 2026.

Wayne Schmidt, Chairman

Dated: _____

**Appendix A to the Master Services Agreement between Via Mobility LLC and NEORide
Form of Service Order – Participating Agency**

By this service order (the “**Order**”), Via Mobility LLC, a Delaware company with its principal office located at 114 5th Avenue 17th Floor New York, NY 10011 (“**Via**”), and the Participating Agency identified below (“**Participating Agency**”) agree to collaborate towards the operation by The Participating Agency of on-demand transit deployment (the “**Deployment**”) in Traverse City, Michigan. This Order shall be governed by the terms and conditions set forth in the Master Terms and Conditions for the Via Solution and Support Services Agreement (the “**Agreement**”) entered into between Via and NEORide. Terms used but not defined herein shall have the meanings assigned them in the Agreement.

Participating Agency: **Bay Area Transportation Authority (BATA)** (“the **Participating Agency**”)

Participating Agency Notice Address: **115 Hall St. Traverse City, MI 49684**

Participating Agency Email: **lingaure@bata.net**

Fees: The Participant Agency shall pay monthly fees outlined are in accordance with Appendix B of the Agreement. For the avoidance of doubt, the Fees are as follows:

	Description	Year 1	Year 2	Year 3	Total 3 Years
Monthly Fees (Per Year 4 of NEORide Agreement)	Monthly Per-Agency Fees	\$1,695	\$1,780	\$1,870	
	Monthly Fee per Vehicle - Vehicles 1-100	\$290	\$300	\$310	
	Monthly Fee per Vehicle - Vehicles 101+	\$225	\$235	\$345	
Total Cost (Via)	25 Vehicles	\$107,340	\$111,360	\$115,440	\$334,140

The table above outlines Monthly Per-Agency fees, along with Monthly Per-Vehicle fees, and includes an annual estimate based on a 25-vehicle fleet size. For this term, the Participant Agency’s monthly vehicle minimum will be **25 vehicles**. *Please note, Year 2 and 3 fees are estimates and are subject to renegotiation as part of any future NEORide agreement.*

Term: The duration of the Deployment shall last for a period of 36 months, starting June 20, 2026 until June 19, 2029. NEORide entered into the Agreement, on behalf of the Participating Agency identified above. The rights and benefits of NEORide that are identified in the Agreement are hereby passed through to the Participating Agency by execution of this Order.

The Participating Agency will receive access to the standard Via Solution and automatic software updates, which include the following:

- Fully localized proprietary routing and matching algorithms that analyze all trip requests, assign riders dynamically to the best-suited vehicle, and group passengers headed in the same direction into efficient shared rides powered by Via’s patented technology.

- Downloadable iOS and Android rider apps, and web booking portal, that allow customers to book microtransit rides, track vehicles in real time, pay for trips, and troubleshoot any issues.
- The Participating Agency may receive a white-labeled Rider App (which will be available for free download in both the iOS and Android app stores) that meets the agency’s desired look, feel, and functionality for their services. Alternatively, the Participating Agency will receive a unified app that is deployed to all NEORide agencies.
- Downloadable driver app that provides efficient turn-by-turn directions; the app allows drivers to start and end driving time, take breaks, and contact live support
- Access to the Via Operations Console (“VOC”), which allows the partnering agency, and the EZConnect Mobility Center ((if Participating Agency is a member of the NEORide EZConnect program) to perform a variety of functions, including booking trips, checking trip details, adjusting rider account information, providing customer support, and accessing reports. For every user, the Participating Agency and Via project team will establish user permission levels that will grant access to the appropriate set of information and system components.
- Outbound IVR functionality through our in-house IVR solution, based on Via’s existing integration with Twilio, will be available to the Participating Agency. This solution enables automated phone calls and SMS reminders/updates regarding upcoming trips, including booking confirmations and notifications of driver lateness or reassignments. Such calls and notifications can be configured specifically for the Participating Agency, on a per agency basis. The solution also enables ad hoc phone calls and SMS to/from the Operations Center for staff to communicate with riders/drivers. While riders are always able to leverage the web or mobile application to book rides, view ride statuses/ETAs or cancel rides at all times these inbound IVR features are not yet available in Via and will be available to the Participating Agency in the future when they are built into Via’s standard commercial off the shelf solution.
- “Deep link” integration with Masabi if Participating Agency is a member of the NEORide EZFare program. This integration will allow riders to select “EZFAre” as their payment method in the Rider App. They will then go to the EZFAre app to buy their ticket independently (Via can facilitate this step through a link or pop-up in the Rider app to direct riders). Riders will then scan their ticket purchased in the EZFAre app or display it to the driver. They will also maintain the ability to pay with alternative payment methods, such as a credit card.
- Deep link integration with Transit App if Participating Agency partners with Transit App where riders are able to search for and plan Via microtransit trips in Transit App and receive information on payment and wait times. Once they are ready to request a Via trip, they are automatically redirected to the Via Rider App to finish the trip request.
- Access to the data reporting set below in Appendix 1 will be made available via the VOC. To protect Via’s intellectual property and the privacy of riders, Via will provide the following data tables and dashboards in the form of aggregated reports and data tables to The Participating Agency through VOC:
 - Service KPI Dashboards: Visualized dashboards and graphs of Key Performance Indicators. These dashboards provide a high-level view of the overall service performance across several metrics and periods of time. Dashboards are available for download as .jpeg files or in raw form as excel spreadsheets.

- Data Generator: Set of tables with granular raw data about the service that are available for download as excel or csv spreadsheets.

The reports will be refreshed daily. The reports are aggregated and any information about individual riders is de-identified. Additional off-the-shelf reporting may be made available to the Participating Agency upon request at Via's discretion. Custom reports will need to be scoped and may come at additional cost.

Optional Features (no additional cost):

- € Integrated multimodal trip planning: Through integration with public GTFS feeds, Via's rider-facing mobile application can display real-time schedule information about other available transit modes in the region. Via can configure our platform so that riders in the Participating Agency can view live bus or train schedules and book on-demand trips to any fixed-route services.
- Via Media Solutions: A proprietary and modular transit advertising service that will seamlessly integrate with the NEORide and the Participating Agency services. VMS can unlock an additional source of non-fare revenue by enabling partnerships with local businesses through a range of innovative offerings, at no additional cost.

Support Services – Ongoing: The following services are included for the Participating Agency in the fees up to the number of hours per month identified below:

- Operational support and system adjustments: Includes algorithm adjustments and changes to virtual bus stops / pickup points at request of The Participating Agency: up to 10 hours per month
- Expert consulting: up to 5 hours per month
 - Marketing and growth: help setting up complex promotions, review and assistance for third party tools that can integrate into Via's tech
 - Operations: Including supply optimization analysis, payment & fraud investigation, and business case/unit economics analysis
 - Service expansion: Including feasibility analysis for service expansions or additional projects
- Tech Support: Dedicated customer success Via point of contact will use commercially reasonable efforts to respond within one business day for non-critical issues (upon receipt of a detailed description of the issue as requested by Via) and to ensure that assistance is provided within a reasonable time frame. Via will also provide the Participating Agency with an appropriate channel for alerting Via to system outages or other critical issues, with respect to which Via will provide emergency assistance.

Via will notify The Participating Agency if The Participating Agency is within 1 hour of exceeding capped hourly limit on Operational Support and System Adjustments and/or Consulting Services. Via support for technical issues that negatively impact service is not allocated towards the hourly quota. If requested, hours beyond those set forth above will be charged on an hourly rate, ranging from \$165-\$225.

Participating Agency Responsibilities:

- **General:** NEORide and the Participating Agency will operate and manage the Deployment as set forth in the Agreement. NEORide and the Participating Agency shall cooperate with Via as necessary for the purpose of setting up the Deployment and its specifications, including by providing prompt feedback to Via's inquiries and providing local insights, in order to meet mutually agreed upon deadlines.
- **Zone:** Any changes or expansions to the initially agreed upon zone(s) may result in additional fees.
- **Support Requests:** At the start of the project, Via will direct NEORide and the Participating Agency towards the relevant CRM tools to log requests. In order to trigger a Product Maintenance request, requests for product maintenance must contain detailed information about the nature of the request. Requests for additional features may be subject to additional fees.
- **Payment Processing:** The fees set forth above do not include any owed to the third-party payment processor (Braintree). Via will facilitate an introduction to its recommended payment processor and The Participating Agency is responsible for entering an agreement with such payment processor in order to be able to process credit card payments.
- **Unified Rider Experience:** As a part of a unified rider experience vision, NEORide and participating agencies will agree upon some unified parameters like payment methods and rider account fields. These unified parameters will be agreed upon in NEORide board meetings.

BATA Service Details:

This Order shall be governed by the terms and conditions set forth in the Agreement. By signing below, the parties agree to those terms and conditions.

VIA MOBILITY LLC

Authorized Signature

Name

Title

Date

BAY AREA TRANSPORTATION AGENCY (BATA)

Authorized Signature

Name

Title

Date

Appendix 1 to Service Order

VOC use and Data Sharing

Authorized Users

The below exhibit sets forth the members of the Participating Agency’s “Core Team” of personnel who are designated authorized users of the VOC including access to the data detailed below (the “Core Team”). Access to the VOC is conditional upon Participating Agency notifying Via with reasonable advance notice of the name, title, email address and any other details Via may reasonably require of the members of the Participating Agency Core Team. The Core Team may be updated during the Term subject to Via’s consent.

Exhibit 1.

Core Team	
Title	Name
[Participating Agency to provide details no later than one month prior to Launch]	[Participating Agency to provide details no later than one month prior to Launch]

Participating Agency Core Team will be granted suitable permissions to allow them to manage and authorize access of additional Participating Agency personnel as secondary users (“Secondary Users”) to the VOC. All Core Team and Secondary Users will be subject to Participating Agency’s confidentiality and non-disclosure obligations, as described in the Agreement. For the avoidance of any doubt, Participating Agency’s Core Team responsibility includes granting permissions to Secondary Users only to the extent such permission is needed for the Participating Agency’s operation of the Deployment and in compliance with applicable privacy legislation, and removing any Secondary User access once it is no longer needed. Via retains the right to deny or revoke any Core Team or Secondary User access if Via suspects that such access may be causing or have caused a breach of the Agreement, or any user guidance Via issues from time to time.

Authorized Operators

Participating Agency may not provide access to the Via Solution to any third party except with Via’s prior written consent. In the event that Participating Agency wishes to engage a third-party operator (“Operator”) to operate the Deployment, Participating Agency shall provide Via a copy of an Operator Acknowledgement Form in the form required by Via, duly executed by such Operator, as a prerequisite for Via’s allowing the Operator access to the Via Solution. For the avoidance of doubt, no Operator will be allowed access to the Via Solution without having signed the Operator Acknowledgement Form. Participating Agency Core Team will be responsible for grant of VOC permissions to the Operator’s team, which will be considered Secondary Users for all purposes. As between Participating Agency and Via, Participating Agency shall remain responsible for acts and omissions of any Operator as it relates to Operator’s access to the Via Solution.

Data Sharing Plan

As part of the Deployment, and as detailed below, Via will make access to data available to members of the Participating Agency's Core Team, and any above-authorized Participating Agency's Secondary User(s) and/or Operator(s), for the purpose of research and program evaluation for the duration of the Term. The data will be accessible in the VOC, and may not be shared through any other method unless otherwise authorized in writing by Via. Any and all data made available under this Order are trade secrets of Via, and subject to the confidentiality and other protective provisions set forth in the Agreement at all times. Participating Agency may not share any such data with anyone not authorized in accordance with this Appendix 1.

To protect Via's Intellectual Property Rights and the privacy of riders, Via will provide the following data tables and dashboards in the form of aggregated reports and data tables to Participating Agency through VOC:

- Service KPI Dashboards: Visualized dashboards and graphs of Key Performance Indicators. These dashboards provide a high level view of the overall service performance across a number of metrics and periods of time. Dashboards are available for download as .jpeg files or in raw form as excel spreadsheets.
- Data Generator: Set of tables with granular raw data about the service that are available for download as excel or csv spreadsheets.

The reports will be refreshed daily. The reports are aggregated and any information about individual riders is de-identified. Additional off-the-shelf reporting may be made available to Participating Agency upon request at Via's discretion. Custom reports will need to be scoped and may come at additional cost.

SERVICE KPI DASHBOARD	
Dashboard	Report Metrics
Service Operations Metrics & Graphs	<ul style="list-style-type: none"> ● Total ride requests ● Requests during service hours ● Met Demand ● Met Demand Rate ● Completed rides ● Completed Rides Rate ● Detailed Ride Requests Status ● Active Riders ● Driver Hours ● Utilization
Rider Experience Metrics & Graphs	<ul style="list-style-type: none"> ● Average Ride Duration ● Average Ride Rating ● Average Pickup Walking Distance (<i>corner-to-corner services only</i>) ● Aggregation Rate ● Average ETA ● Dropoff Time Requested vs. Scheduled* ● Dropoff Time Scheduled vs. Actual* ● Pickup Time Requested vs. Scheduled* ● Pickup Time Scheduled vs. Actual* <p><i>*Pre-booked rides only</i></p>
Rider Growth Metrics & Graphs	<ul style="list-style-type: none"> ● Accounts Created ● Active Riders ● Total Riders Who Requested a Ride ● Total Riders Who Completed a Ride ● Completed Rides Per Rider

Ride Rating Metrics and Graphs	<ul style="list-style-type: none"> ● Avg. Ride Rating ● Total Bookings with Ratings ● Percent Bookings with Ratings ● Total Five Star Ratings ● Percent Five Star Ratings ● Label per Rating ● Rating Distribution
Advanced Prebooking Metrics & Graphs <i>(prebooking only)</i>	<ul style="list-style-type: none"> ● Request Source ● Recurring Type ● Hours Booked in Advance ● Hours Canceled in Advance

DATA GENERATOR	
Table	Data Columns
Ride Request Table	<ul style="list-style-type: none"> ● Request Creation Date & Time ● Request ID ● Request Status ● Rider ID ● Wheelchair Accessible ● Booking Method ● Number of Passengers ● Booking type <i>(PB+OD only)</i> ● Origin Address ● Origin Lat + Long ● Destination Address ● Destination Lat + Long ● Actual Pickup Time ● Cancelation Time ● No Show Time ● Ride Price ● Ride Distance ● Ride Duration (min) ● Ride Rating

<p>Rider Activities Table</p>	<ul style="list-style-type: none"> ● Rider ID ● Account Creation Date ● Total Requests ● Total Completed Rides ● Total Cancellations ● Total No Shows
<p>Drivers Table</p>	<ul style="list-style-type: none"> ● Drive ID ● Driver Name ● Driver Email ● Active Status ● Total Shift Hours ● Avg. Shift Hours Per Day ● Avg. Shift Hours From First Assignment Per Day ● Avg. Break Hours Per Day ● Total Accepted Rides ● Avg. Rating From Riders

<p>Vehicles Table</p>	<ul style="list-style-type: none"> ● Vehicle ID ● Active Status ● Visual ID ● Short Visual Identifier ● Maker ● Color ● Vehicle Capacity ● Max Capacity ● Wheelchair Capacity
<p>NTD S-10 Report <i>Available upon request for reporting to the FTA. (United States only)</i></p>	<ul style="list-style-type: none"> ● Service Date ● Day of the Week ● Vehicles Operated in Maximum Service (VOMS) ● Actual Vehicle Hours ● Actual Vehicle Miles ● Vehicle Revenue Hours ● Vehicle Revenue Miles ● Unlinked Passenger Trips ● Passenger Miles Traveled

Bay Area Transportation Authority: Public Transportation Agency Safety Plan (PTASP)

1. Transit Agency Information

Transit Agency Name	Bay Area Transportation Authority (BATA)		
Transit Agency Address	1340 W Hammond Rd, Traverse City, MI 49686		
Name and Title of Accountable Executive	Interim Executive Director: Chris Davis		
Name of Chief Safety Officer or SMS Executive	Operations Manager: Erik Falcon		
Mode(s) of Service Covered by This Plan	Bus (MB) Demand Response (DR)	List All FTA Funding Types (e.g., 5307, 5337, 5339)	5307, 5311, 5339
Mode(s) of Service Provided by the Transit Agency (Directly operated or contracted service)	Bus (MB) Demand Response (DR)		
Does the agency provide transit services on behalf of another transit agency or entity?	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>	Description of Arrangement(s) NA
Name and Address of Transit Agency(ies) or Entity(ies) for Which Service Is Provided	NA		

2. Plan Development, Approval, and Updates

Name of Entity That Drafted This Plan	BATA	
Signature by the Accountable Executive	Signature of Accountable Executive	Date of Signature

Approval by the Board of Directors or an Equivalent Authority	Name of Individual/Entity That Approved This Plan	Date of Approval
	BATA Board of Directors	
	Relevant Documentation (Title and Location)	
	Board Meeting Minutes/BATA network	
Certification of Compliance	Name of Individual/Entity That Certified This Plan	Date of Certification
	Erik Falcon	5/21/2026
	Relevant Documentation (Title and Location)	
	BATA network	

Version Number and Updates			
<i>Record the complete history of successive versions of this plan.</i>			
Version Number	Section/Pages Affected	Reason for Change	Date Issued
1.2	Sec 3 / Pg 3	Updated metrics	

Annual Review and Update of the Agency Safety Plan
<i>Describe the process and timeline for conducting an annual review and update of the ASP.</i>
<p>BATA management and safety team will review the PTASP annually, update the document as necessary, and implement the changes within a time frame that will allow BATA to submit the annual self-certification of compliance in a timely manner and no later than July 15th. Annual self-certification will consist of the Accountable Executive reviewing, approving and signing the document and submitting to the BATA Board for their approval. Necessary updates outside the annual update window will be handled as PTASP addenda which will be incorporated in the body of the PTASP. The PTASP updates will be shared with the MPO, MDOT, and FTA. A copy of the PTASP can be found on BATA’s website at https://www.bata.net/about-us/policies/.</p>

3. Safety Performance Targets

Safety Performance Targets									
<i>Specify performance targets based on the safety performance measures established under the National Public Transportation Safety Plan.</i>									
Mode of Transit Service	Major Events (Count : Rate)	Collisions (Rate)	Pedestrian Collisions : Vehicular Collisions (Rate)	Fatalities (Count : Rate)	Transit Worker Fatalities (Rate)	Injuries (Count/Rate)	Transit Worker Injury (Rate)	Assaults on Transit Workers (Count : Rate)	System Reliability (Long term % & short term % divided by daily #'s)
MB	4 Events : 1.7/500k VRM	1.7/500k VRM	0/500k VRM : 1.7/500k VRM	0 : 0/500k VRM	0/500K VRM	2 : 0.8/500k VRM	0.4/500k VRM	1 : 0.4/500k VRM	86%
DR	0 Events : 0/500k VRM	0/500k VRM	0/500k VRM : 0/500k VRM	0 : 0/500k VRM	0/500K VRM	0 : 0/500k VRM	0/500k VRM	0 : 0/500k VRM	86%

Safety Performance Target Coordination		
<i>Describe the coordination with the State and Metropolitan Planning Organization(s) (MPO) in the selection of State and MPO safety performance targets.</i>		
BATA Executive Director and the BATA board share the BATA PTASP, including Safety performance Targets with the MPO each year after the board has adopted the plan and BATA staff have assured that its content has met the requirements of CFR 49,part 673;PTASP.		
Targets Transmitted to the State	State Entity Name	Date Targets Transmitted
	Michigan Dept of Transportation	
Targets Transmitted to the Metropolitan Planning Organization(s)	Metropolitan Planning Organization Name	Date Targets Transmitted
	Traverse Transportation Coordinating Initiative (TTCI)	

4. Safety Management Policy

Safety Management Policy Statement
<i>Use the written statement of safety management policy, including safety objectives.</i>
BATA strives to provide a Safe environment for employees, passengers and guests. BATA aims to support a Robust Safety Culture, and achieve a High Level of Safety Performance. We also work to ensure that all employees are provided with adequate and appropriate safety information and training. We have established Safety performance targets to help us measure effectiveness of our processes.

<p>BATA has a Safety Team that is comprised of frontline staff from Drivers, Dispatchers, and Maintenance as well as members from Administration. They meet monthly. The Safety Team is a proactive group that find leading indicators of safety issues and work to find solutions that mitigate the risks. The Safety Team reviews the ASP annually prior to being certified by the AE and the Board.</p> <p>Communicating the purpose and benefits of the Safety Management System (SMS) to all supervisors, and employees.</p> <p>Providing a culture of open reporting of all safety concerns, ensuring that no action will be taken against any employee who discloses a safety concern through BATA's Employee Safety Reporting Program (ESRP), unless such discloser indicates, beyond a doubt, an illegal act, gross negligence, or a deliberate or willful disregard of regulations or procedures.</p> <p>Identifying hazards and unsafe work conditions and analyzing data from all sources. (After analyzing provided data, BATA Management will develop processes and procedures to mitigate safety risks to an acceptable level.)</p> <p>Establishing Safety Performance Targets that are realistic, measurable, and data driven. Continually improving our Safety Performance through management processes that ensure appropriate safety management action is taken and is effective. BATA takes these commitments seriously as the lives of BATA employees, riders, and the general public depend on BATA's ability to operate in a culture of Safety.</p>	
<p>Safety Management Policy Communication</p> <p><i>Describe how the safety management policy is communicated throughout the agency. Include dates where applicable.</i></p>	
<p>BATA realizes the importance of employee engagement is crucial to a functioning Safety Management System (SMS). Communication is in place to enable awareness of BATA's Safety Objectives/Safety Performance Targets as well as provide on-going safety communications up, down, and across the organization. Management proactivity engages employees and works to keep the lines of safety communications honest and open.</p> <p>Employees:</p> <p>BATA is constantly evaluating existing policies and procedures to verify their effectiveness. To do this, BATA seeks input from all staff to determine if change is necessary based on trends, data analysis, operational changes, or new assets. Several methods are used to communicate policy and/or procedure changes, including:</p> <ul style="list-style-type: none"> Employee memorandum Bulletin board notices Employee email notification Monthly communications meetings / Training sessions <p>BATA includes a training element for safety management policies impacting safety or service delivery and is conducted before the policy effective date. New policies and procedures are incorporated into orientation training for new employees as well.</p> <p>Depending on the importance of the policy or procedure change, an acknowledgement signature is required of each employee verifying their understanding of the change.</p> <p>Riders:</p> <p>If a rider policy is changed or added, BATA notifies riders through the following methods:</p> <ul style="list-style-type: none"> Notice posted on vehicle and facilities including effective date and who to contact for more information Changes to digital rider guidance including schedules and ride guides as appropriate Public Meetings Social Media <p>Any services impacted by policies changes will include outreach as required by Federal Guidance.</p>	
<p>Authorities, Accountabilities, and Responsibilities</p> <p><i>Describe the role of the following individuals for the development and management of the transit agency's Safety Management System (SMS).</i></p>	
<p>Accountable Executive</p>	<p>The Executive Director serves as BATA's Accountable Executive with the following authorities, accountabilities, and responsibilities under this plan:</p> <ul style="list-style-type: none"> Responsible for ensuring an SMS culture for BATA employees Controls and directs human and capital resources needed to develop and maintain the PTASP and SMS.

	<p>A single person who has ultimate responsibility for carrying out the PTASP; and control or direction over the human and capital resources needed to develop and maintain both in accordance with 49U.S.C.5329(d).</p> <p>Designates a Chief Safety Officer who reports directly to the Accountable Executive, the AE.</p>
<p>Chief Safety Officer or SMS Executive</p>	<p>Developing and maintaining SMS documentation; Directing hazard identification and safety risk assessment; Monitoring safety risk mitigation activities; Providing periodic reports on safety performance; Briefing the Accountable Executive and Board of Directors on SMS implementation progress; Planning safety management training.</p>
<p>Agency Leadership and Executive Management</p>	<p>Agency Leadership are responsible for the safety performance of all personnel and equipment under their supervision. They are responsible for the initial investigation of all accidents and incidents, and for reporting these accidents and incidents to the Human Resources Department.</p>
<p>Key Staff</p>	<p>All BATA personnel are responsible for performing their work safely and for following established safety-related rules, procedures, and work practices. This includes reporting all accidents, incidents, and hazards to their supervisor per established requirements for the protection of themselves, co-workers, customers, facilities, and equipment.</p> <p>BATA's staff are responsible for maintaining high standards of safety, customer service, and security. The Employee Safety Reporting Program (ESRP) will define the employees' role to identify and mitigate risk through open communication to superiors including the CSO and AE. Administrative staff will be instrumental in ensuring action is taken to reduce risk and the whole system is continuously monitored to ensure actions are effective and appropriate.</p> <p>BATA staff will be involved with updates, modifications and implementation of the PTASP. Each staff member brings a valued perspective to the development of policies and procedures he or she will be expected to implement. Every opportunity will be given for employees and riders to provide input to increasing safety at BATA. Those opportunities include:</p> <p>Monthly employee meetings, and Safety training, Employee and Customer surveys BATA has an open-door policy with access to all management staff.</p>
<p>Employee Safety Reporting Program</p> <p><i>Describe the process and protections for employees to report safety conditions to senior management. Describe employee behaviors that may result in disciplinary action (and therefore, are excluded from protection).</i></p>	
<p>BATA is committed to the safest operating standards possible. To achieve this, it is imperative that BATA have uninhibited reporting of all incidents and occurrences which may compromise the safe conduct of our operations. To this end, every employee is responsible for the communication of any information that may affect the integrity of transit safety. BATA encourages employees to identify safety concerns in their day-to-day duties and to report them to management in good faith without fear of retribution. Examples of items to be reported include, but are not limited to, assaults on transit workers, near misses, and unsafe acts and conditions.</p> <p>BATA encourages participation in the ESRP by protecting employees that report safety conditions in good faith. However, BATA may take disciplinary action if the safety report received is from a source other than the employee, or involves an illegal act, gross negligence, or a deliberate or willful disregard of promulgated regulations or procedures.</p> <p>There are many ways employees can report Safety conditions</p> <p>Pre/Post Trip Inspections</p> <p>Report conditions directly, in person or via email, to a Supervisor, an Operations Manager, the Fleet and Facilities Manager, the CSO, and the AE, or any office management staff at that time.</p> <p>Report conditions to a member of the Safety Team</p>	

Report conditions through the Training Program
Rider and Public Complaint/Compliment Process
All Staff Monthly Communications Meetings
Incident/Accident Reports and Investigations

5. Safety Risk Management

Safety Risk Management Process

Describe the Safety Risk Management process, including:

- *Safety Hazard Identification: The methods or processes to identify hazards and consequences of the hazards.*
- *Safety Risk Assessment: The methods or processes to assess the safety risks associated with identified safety hazards.*
- *Safety Risk Mitigation: The methods or processes to identify mitigations or strategies necessary as a result of safety risk assessment.*

BATA provides training to all personnel in the identification of hazards and security threats while also providing tools to enable personnel to report these risks. Once the risk has been identified, BATA conducts an assessment of the risk to determine the necessary response and response time. The response may include further investigation or monitoring, action(s) to mitigate the hazard or security threat, and follow-up assessment to ensure action taken is appropriate and effective.

Safety Hazard Identification:

Hazard and security threats are identified through different methods of monitoring the system. This includes system, employee, and asset assessments conducted daily and on incremental basis. Additionally, BATA communicates with peers across the state, FTA and MDOT, MPTA, CTAA, CDC, and State of MI Health Department to identify common hazards impacting multiple systems. BATA conducts the following routine and random evaluations of the system in the following departments:

Personnel

Each BATA employee is evaluated annually to ensure they are performing their job to the expectations of the Agency. As part of their orientation process the employee is provided training and tools to perform their job.

Additional evaluations of the employee are conducted throughout the year through spot-checks of some aspect of their job function. If through spot-check or annual evaluation it is determined the employees' performance does not meet expectations or training standards, remedial training will be provided and additional evaluations will take place to ensure remedial training was effective.

Assets

Rolling stock, facilities, and equipment are monitored through a vigorous preventive maintenance plan aimed at identifying hazards and deficiencies as part of daily and scheduled inspections. The Maintenance Department coordinates the preventive maintenance program including Daily Vehicle Inspection Reports (DVIR) and incremental/semi-annual inspections.

BATA updates the FTA required Transit Asset Management (TAM) Plan annually with data relevant to each asset to include a condition assessment, miles (with rolling stock and non-revenue vehicles) and age as to whether the asset is in a State of Good Repair (SGR). The TAM Plan allows BATA management to plan asset replacement or rehabilitation for future years.

System

As part of BATA's safety management system monitoring, the agency uses service evaluations when planning, spot-checking or responding to an event like an accident or incident. New routes are strategically developed with safety being the first priority. BATA route planners plan and test all routes before activating the route for revenue service. All routes are reviewed periodically to determine if environmental hazards may exist requiring modification to the route, schedule, or vehicle.

All front-line staff have been trained to note any changes to service which may be considered a hazard or security threat and through the ESRP, notify their supervisors immediately or upon return to BATA depending on the severity of the hazard.

Hazard Identification Procedure

Any employee seeing something through inspection or observation they deem to be a hazard are instructed to immediately report that hazard to dispatch or the immediate supervisor regardless of the perceived level of threat.

If the hazard requires immediate mitigation, the employee will be instructed on steps to take to reduce the risk which may or may not alleviate the risk completely. Additional actions may be taken once the immediate risk mitigation has been taken. Some hazards may not pose an immediate risk but are still reported and the CSO will be responsible for risk assessment, investigation and mitigation strategy.

In some cases, a passenger or member of the general public may call BATA with a complaint about a front-line employee which may rise to the level of hazardous behavior or actions. BATA documents all customer complaints/compliments and takes appropriate action to investigate any complaints. Complaints deemed hazardous will trigger immediate action by on-duty supervisors.

Safety Risk Assessment

All BATA staff have been provided with training appropriate for their positions within the organization. BATA expects its employees to respond to hazards or threats with professional judgement as sometimes there might not be time to contact a supervisor to prevent an emergency event. In cases where the hazard can be reported without immediate risk, the employee will make an initial assessment of the risk as part of their report.

Once received by the CSO, the initial risk assessment may be amended requiring immediate, short, or long-term response.

Level 1 - Immediate: A deficiency, threat, or hazard requiring immediate attention to mitigate risk either temporarily until further action can be taken or complete mitigation.

Level 2 - Short Term: Action is needed within seven days to mitigate an identified deficiency, threat or hazard. The deficiency, threat, or hazard does not pose immediate danger but if no action is taken could elevate to an immediate level risk.

Level 3 - Long Term: A deficiency, threat, or hazard has been identified but does not pose a threat currently but could at a later time. Continued monitoring and awareness are required.

Safety Risk Mitigation

In response to all identified and assessed hazards, BATA will take steps to mitigate the hazard and reduce or eliminate the risk to employees, riders, and public. Mitigation strategies will be dependent on results of investigation into the elements contributing to the risks. The investigation may include more than one department and may include interviews outside of the transit system, such as FTA, MDOT, CDC, and etc..

Actions to mitigate risk can include all employees, riders, and public who may be impacted by either the hazard or the actions to reduce or alleviate the risk. BATA will communicate actions to appropriate staff through methods appropriate for risk assessment. In some cases, immediate communication through two-way communications (dispatch system, text burst, email, or web alert) may be necessary. In other cases, bulletin board notices or memorandum posting may be appropriate.

Once a risk mitigation strategy has been implemented, BATA will monitor the actions to determine if full mitigation is possible and if not, is additional action necessary to alleviate the risk or is stepped up monitoring necessary. Some risks may not be completely mitigated but awareness to the risk is important. Safety is a top priority.

6. Safety Assurance

Safety Performance Monitoring and Measurement

Describe activities to monitor the system for compliance with procedures for operations and maintenance.

Safety performance monitoring and measurement involves the continual monitoring of the transit agency's activities to understand safety performance. Through these efforts, BATA can determine whether it is meeting its safety objectives and safety performance targets, as well as the extent to which it is effectively implementing Safety Management Systems (SMS).

BATA is constantly striving to maintain the highest level of safety through its monitoring methods to include adherence to policies and procedures, safety and maintenance plans, and system and employee evaluation processes. These methods allow BATA to determine the need to make changes to improve policies, employee training, and service delivery.

The CSO will monitor operations daily through observation, data analysis, communication, and safety updates to identify mitigation strategies that may be ineffective. If mitigation actions are found to be ineffective additional strategies will be developed through key and impacted staff feedback.

In general, maintenance procedures are designed to ensure that the maintenance recommendations of the manufacturer are met, maximum efficiency in performance and operation is obtained, and maximum bus life and condition are maintained. Daily bus inspections, an active Preventive Maintenance Program, and careful monitoring are included in procedures to ensure the safety of buses and adequacy of the Fleet Maintenance Plan.

Operator Inspections. All operators are required to perform one or more of the following: a pre-trip, mid-trip, and/or post-trip inspection to ensure that the vehicle is safe and in good operating condition. If defects are noted by the operator in the DVIR, the fleet services coordinator and mechanics will determine the appropriate follow-up actions, depending on the severity and extent of the defect. In the case of a defect that develops or is noted once a vehicle is in service, the operator is instructed to communicate the problem to Dispatch, who will then notify Maintenance and receive guidance.

Mileage-Based Maintenance Inspections. All buses receive preventive maintenance inspections at designated mileage intervals. Mileages are determined by vehicle and subcomponent manufacturers and real-world experience. A description of the schedule and type of inspection and service performed for each bus series is included in the BATA Maintenance Plan.

Semi-annual Safety Inspections. All buses receive preventative maintenance and safety inspections at least once every six months, however it is usually closer to every 4 months. A description of the schedule, type of inspection, and service performed for each bus series is included in the BATA Maintenance Plan.

Frequency

Mechanics and Facilities Maintenance employees look for potential hazards with equipment whenever they are using that equipment. The vehicle hoists in the vehicle maintenance shop are inspected annually by contractors. Preventive maintenance of equipment and facilities is performed in accordance with the manufacturers' recommended practice. Hazards are also identified by analyzing work accident trends.

Safety Events

Accident and Incident Reporting Process

All accidents and loss incidents are to be investigated. BATA's safe driving standards require professional safe performance of all operators. To ensure better than average safety performance, BATA uses TAPTCO (Transit and Paratransit) LLLC defensive driving training, National Safety Council, RTAP, other guidelines to determine if a collision or onboard incident could have been prevented. All personnel operating any BATA vehicle are held to this standard.

Transit Operations coordinates with outside law enforcement agencies if they investigate an event.

Administrative staff coordinates with outside insurance providers and provides support among BATA departments and independent investigations to manage BATA's liability and claims.

Most accidents and incidents involving BATA are relatively minor in severity and are investigated by Operations Supervisors and Managers. Since most accidents involve buses, this section focuses on bus accidents. However, all non-bus accidents and incidents are also investigated.

Notification

Bus Operators are to notify Dispatch anytime a BATA vehicle might have been damaged, anytime a BATA vehicle and another vehicle come into contact, or anytime an instance occurs in where a customer may have been injured. Management on duty will be directed to the scene. Police and ambulance will be dispatched, if necessary.

At-Scene Procedures

Bus Operators will adhere to the following procedures defined in the BATA Operator's Handbook :

- Make sure everyone is o.k., ask the obvious, "Is everyone o.k.?", then call dispatch using the two-way radio.
- Safety first, property damage later
- When police arrive, be prepared to give them your driver's license, vehicle registration and proof of insurance.
- Make no apologies and make no admissions of guilt.
- Get the other driver's insurance information, address and license number. Remember, we cannot force them to do so.
- Get information from the agency law enforcement officer, report #, business card, etc.
- Talk to witnesses and passengers on the bus. Have them complete the Courtesy Cards and collect them.

- Whenever possible, take pictures (this is very important) – specifically of the vehicles involved, all sides (especially of the back of the car with the license plate). Remember, no pictures of any persons at the scene of an accident should be shared with a third party.

- Memories can fade quickly, try to write down the details of the accident at the time with as much information as you can. Don't forget to collect the Courtesy Cards from your passengers.

- Complete an accident report by the end of your work day and submit your photos and police information along with it.

Management On-Duty are responsible for conducting on-scene investigations of accidents and incidents. Depending on the severity and the nature of the event, various mechanisms will be used for preserving transient evidence. These may include digital photography, bus video, field sketches, interviews, observations, and other on-board technologies.

Describe activities to monitor operations to identify any safety risk mitigations that may be ineffective, inappropriate, or were not implemented as intended.

Performance Measures

Through a series of performance measures relative to operations, maintenance, and safety, BATA can monitor the system's safety by identifying trends and gaps in policies, procedures, training, and monitoring efforts. The following performance measures are on a daily, monthly, and quarterly basis.

Maintenance

Fleet Maintenance Compliance – determines the effectiveness of the maintenance department to ensure all inspections are conducted per manufacturers, MDOT, and BATA mileage/calendar intervals.

Annual Vehicle Condition Assessment – through vehicle inspection, determines on a scale of 1-5 the overall condition of the asset. This performance measure is also used in annual updates to BATA's Transit Asset Management Plan.

Operations

Customer Complaints Per Month – tracks all customer complaints to identify areas of deficiency with vehicle, driver or other BATA areas. All customer comments are routed to the appropriate department(s) for investigation, mitigation, and response. Complaints may be a result of phone calls, email, or other BATA public forums.

On-time Performance – serves as an indicator to issues with time management, environmental factors, scheduling, and vehicle and driver performance.

Customer Surveys – conducted annually, allow BATA to receive rider feedback about bus operator performance, customer service, and vehicle safety.

Safety

Safety Performance Measure: Major Events (Per NTD definition and reports)

Safety Performance Measure: Major Event Rate (Per NTD definition and reports / RVM)

Safety Performance Measure: Collision Rate (Per NTD definition and reports / RVM)

Safety Performance Measure: Pedestrian Collision Rate (Per NTD definition and reports / RVM)

Safety Performance Measure: Vehicular Collision Rate (Per NTD definition and reports / RVM)

Safety Performance Measure: Fatalities (Per NTD definition and reports)

Safety Performance Measure: Fatality Rate (Per NTD definition and reports / RVM)

Safety Performance Measure: Transit Worker Fatality Rate (Per NTD definition and reports / RVM)

Safety Performance Measure: Injuries (Per NTD definition and reports)

Safety Performance Measure: Injury Rate (Per NTD definition and reports / RVM)

Safety Performance Measure: Transit Worker Injury Rate (Per NTD definition and reports / RVM)

Safety Performance Measure: Assaults on Transit Workers (Per NTD definition and reports)

Safety Performance Measure: Rate of Assaults on Transit Workers (Per NTD definition and reports / RVM)

Safety Performance Measure: System Reliability (Long term % & short term % divided by daily #'s)

Describe activities to conduct investigations of safety events, including the identification of causal factors.

Accident Review Process

Accidents and Incidents are classified as Preventable or Non-Preventable. Preventable accidents are defined as those accidents that could have been reasonably avoided if the operator had followed all defensive driving techniques as

established by the National Safety Council Guidelines, the LLLC system of TAPTCO , and/or Operations Procedures and Policies.

After reviewing all related documents and evidence, the investigating Supervisor or Manager makes an independent preliminary determination of whether the accident was preventable. The final accident determination is made by a committee of at least two of the following: the HR Director, the Fleet and Facilities Manager, and/or an Operations Manager. Vehicle accident determinations consider, but are not limited to, policies, procedures, training, traffic code, law enforcement accident reports, driver statements, video, witness statements, and/or other information gathered from onboard technologies.

Follow-up

Follow-up in the form of corrective actions is the responsibility of the employee's manager or supervisor.

Any disciplinary action will be assessed using the Collective Bargaining Agreement procedures and/or BATA's work rules. Disciplinary consequences for accidents may include warnings, suspensions, and discharge.

Training will be provided, in most cases, for employees who have been involved in a preventable event. Training and re-training are not disciplinary in nature.

Describe activities to monitor information reported through internal safety reporting programs.

BATA responds to safety issue reports with the appropriate priority level for the issue. The Operations team meets weekly and keeps operations related safety issues on its agenda or schedules follow up until long term results indicate the issue has been mitigated. If there is a need for a policy or procedural change, the operations team works with HR to update or create the new policy/procedure. Operations managers meet biweekly with the Executive Director. These meetings include updates on the progress of existing safety issues.

The Maintenance team have daily passdown meetings that include safety issue reporting follow up. Safety issues on vehicles are reported through the DVIR process. Follow up is tracked through maintenance software. Fleet wide issues are tracked by project.

BATA's management team consists of the Executive Director, the Director of HR, the Director of Marketing and Communications, the Director of Finance, the Operations Managers, the Fleet and Facilities Manager, and the IT Manager. BATA's management team meet bi-weekly. The primary goal of these meetings is to ensure team alignment, provide information, and maintain focus on achieving goals pertinent to the organization's current projects and tasks. Department scorecard results are shared monthly/quarterly. Scorecards include many safety metrics. Updates and follow up results to safety issues are shared in these meetings.

7. Safety Promotion

Competencies and Training

Describe the safety training program for all agency employees and contractors directly responsible for safety.

Operator Selection

Hiring Practices

Selecting applicants best suited to excel at the Bus Operator job requirements is critical to safe transit operations. The transit Bus Operator is directly responsible for the safety of not only the passengers, but also the pedestrians, bicyclists, drivers, and all others who share the road with the transit vehicle. BATA's hiring process includes the following components:

Applications

Applicants are sought through postings in traditional and culturally diverse media, referrals from current employees, posted on BATA's website, and applications filed by prospective candidates when there are no positions available. The applications are screened by key personnel in Human Resources and Operations.

Interview

After application reviews, applicants are then interviewed by a panel comprised of two of the following: an Operations Supervisor, an Operators Manager, and a member of the HR Department. The interview process is designed to evaluate a candidate's strengths in customer service, the ability to simultaneous perform tasks, conflict resolution, and the ability to perform well under temporal and interpersonal pressure.

Driving Record

To be eligible for hire, a candidate must have a Michigan driver's license. The HR Department will review applicants Motor Vehicle Record (MVR) dating back five years. This establishes 21 years as the de-facto minimum age requirement for new hire Bus Operators.

Licensing

To be eligible for hire, a candidate must be able to earn a CDL B with Air Brake and Passenger endorsements.

Criminal Background Check

To be eligible for hire, a candidate must submit to a Criminal Background Check. The results must meet all statutory and BATA standards for the Bus Operator position.

Drug Testing

To be eligible for hire, a candidate must produce a negative result for a pre-employment drug test.

Training

There are formal training programs for Bus Operators, Maintenance employees, and Operations employees. These include training classes, manuals, BATA Operating Procedures, and on-the-job training.

The safety component of training is designed to make employees aware of the hazards associated with their jobs and the appropriate methods for controlling these hazards. The training is intended to motivate employees to work safely. Trainings fall into three main categories: (1) Initial, (2) Periodic, and (3) Remedial or Refresher.

Initial Bus Operator Training

New Bus Operators receive an intensive 48 hours of classroom training that covers every aspect of their new job. There is also another two weeks of Coach Ridealong training, or on-route training with experienced bus operators. The training includes, but is not limited to, the following areas:

TAPTCO (Transit and Paratransit Company training courses including LLLC Defensive Driving)

Orientation to Bus System

Basic Bus Maneuvers

Advanced Bus Maneuvers

Service Stops

System Overview

System Procedures

Communication skills

Customer Service

Accessible Service

Emergency Management

Fleet Services

Personal Safety

Health/Injury Prevention

Stress Management

CDL Preparation, if required.

De-escalating Customer Interactions

Vehicle Orientation

Preventing Fatigue

Safety Reporting

On-route training provides real service experience with an experienced operator during regularly scheduled work shifts. Trainees rotating amongst coaches provides each trainee with experiences across a variety of routes, vehicles, times of day, instructional styles, and driving conditions.

Annual Training for All Bus Operators

Every year, each Bus Operator receives refresher and topical training. The training addresses, but is not limited to, a rotation of the following topics:

Fatigue Awareness
Dealing With Difficult People
Resolving Conflict
Harassment
Effectively Dealing With People of Differing Ages
Proper Securement of Mobility Devices
LLLC Defensive Driving
Bloodborne Pathogens
Injury Prevention
Accessible Service Sensitivity
Reporting Safety Concerns

Initial Operations Supervisor Training
An Operations Supervisor receives training initially, but not limited to, the following areas:
Drug & Alcohol (Policy and procedures for all types of FTA-mandated testing)
Accident Investigation
Emergency Procedures
Security Procedures
Data Entry and Recordkeeping
Harassment
Coaching/Criticism/Discipline
Dispatch Operations
Field Operations
Conflict Resolution

Maintenance and Facilities Department Training
Mechanics are required to be licensed by the state of Michigan. They also complete specialized training from Roush to repair propane powered vehicles.
Facilities Support staff receive training

- Slips, Trips, and Falls
- Personal Protection Equipment
- Safety Data Sheets (SDS) and Labels
- Bloodborne Pathogens
- Hazardous Materials Storage
- Fall Protection/Ladder Safety

Safety Communication

Describe processes and activities to communicate safety and safety performance information throughout the organization.

Safety performance targets are set and tracked by each department. Targets are communicated to the organization through monthly all-staff communications meetings, weekly department meetings, emails, and bulletin boards. Sharing scorecard metrics is part of BATA's performance based culture and is tracked on the Organization level scorecard.

Additional Information

Supporting Documentation

Include or reference documentation used to implement and carry out the ASP that are not included elsewhere in this Plan.

FY2025 Organization Impact Index included below

BATA 2025 Organization Impact Index													
Success Outcome	Metric	2024 Benchmark	Performance Goal	Points	Metric Definition	Q1	Pts	Q2	Pts	Q3	Pts	Q4	Pts
Customer Experience	Net Promoter Score	58%	61%	10	The percentage of promoters minus the percentage of detractors in response to the Net Promoter Score question	58%	9.5	58%	9.5	58%	9.5	58%	9.5
	Overall Customer Satisfaction	82%	86%	10	Average percentage of customer satisfaction with BATA's service delivery	82%	9.5	82%	9.5	82%	9.5	82%	9.5
				20			19.0		19.0		19.0		19.0
Employee Success	Employee Satisfaction	85%	88%	10	Overall score on annual survey which determines if employees feel they would refer BATA to their friends/family	92%	10.0	92%	10.0	92%	10.0	88%	10.0
	Employees' Equipped for Success	90%	92%	10	Overall score on annual survey which determines if employees feel as though they have the tools needed to deliver quality service	88%	9.6	88%	9.6	88%	9.6	95%	10.0
				20			19.6		19.6		19.6		20.0
Community Value	Special Services Support	*New	100	10	Number of rides per quarter provided for special service and community support transportation such as festivals, gov't tours, and community high-impact events	70	7.0	1063	10.0	21,625	10.0	240	10.0
	Community Value	*New	70%	10	An annual evaluation of the % of the community that sees value in BATA (Source Community Value Survey Q#22)	89%	10.0	89%	10.0	89%	10.0	89%	10.0
				20*	*Beginning 10/1/24		17.0		20.0		20.0		20.0
Financial Health	Cost recovery	10.77%	10%	5	The percent of eligible operating expenses recovered by direct revenues	6.49%	3.2	2.92%	1.5	4.00%	2.0	2.66%	1.3
	Operating Expense per Hour	\$97.24	\$77.64	5	Total eligible operating costs divided by number of service hours	\$49.00	5.0	\$58.48	5.0	\$50.02	5.0	\$54.89	5.0
	Operating Expense per Mile	\$6.46	\$5.35	5	Total eligible operating costs divided by number of miles	\$5.88	4.6	\$6.41	4.2	\$5.45	4.9	\$6.01	4.5
	Operating Expense per Passenger/Trip	\$35.83	\$33.84	5	Total eligible operating costs divided by number trips (Link Only?)	\$ 27.98	5.0	\$ 34.86	4.9	\$24.43	5.0	\$29.62	5.0
				20			18		16		17		16
Safety	Preventable Passenger Injuries per 500k miles	0.34	0.34	5	Number of preventable passenger injuries per 500k miles.	0.00	5.0	0.00	5.0	0.00	5.0	0.0	5.0
	Days Since Last Preventable Accident	33.25	48	5	Highest number of days between all preventable accidents. This includes both non-reportable and reportable collisions. Number can roll over from previous quarters.	26	2.7	38	4.22	23	2.4	31.0	3.2
	Preventable Reportable Collisions (per 100k miles)	0.0	0.2	10	Number of preventable, reportable vehicle collisions recorded each quarter per 100k miles driven	0	10	0	10	0	10	0.0	10.0
	# of days between employee injuries	164	40	5	Number of days between employee reportable injuries	199	5	282	5	56	5	104.0	5.0
			25			23		24		22		23	
Performance-Based Culture	Average Department Scorecard Score	90%	95%	5	A quarterly average of departmental performance scores	90%	4.7	80%	4.2	86%	4.5	82%	4.3
	Monthly Departmental Scorecard Results Shared	NA	100%	5	Departmental Scorecard results shared within each department each month	100%	5	100%	5	100%	5	100%	5
	Bus Observations by Admin Staff	89%	90%	5	An average of 3 bus observations/quarter performed by each member of the admin staff	65%	3.6	58%	3.2	65%	3.6	71%	3.9
			15			13		12		13		13	
Overall Performance Score				100			93		91		91		91