



BATA Regular Meeting Agenda
8527 E Government Center Dr, Suttons Bay, MI 49682
Thursday, May 22, 2025 @ 1:00pm

1. Call to Order
2. Pledge of Allegiance and Moment of Silence
3. Roll Call
4. First Public Comment*
5. Approval of Agenda/Declaration of Conflict of Interest

6. 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 17, 2025

Consideration of Accepting the following Reports

- b. Monthly Income Statement
- c. FY25 Q2 Strategic Plan Update
- d. Correspondence – Staff Compliments
- e. BATA Board Tracker

7. Any items removed from the Consent Calendar
8. Jerry Tomczak, Program Manager, Cunningham – Limp

9. Executive Director's Report – Chris Davis
10. Chairperson's Report
11. Old Business
12. New Business
 - a. 2025 Tax Rate Request Resolution, L4029 for Grand Traverse and Leelanau Counties – Justin Weston
 - b. Technology Roadmap Update – Eric Lingaur and Paul Clausen
 - c. Public Transit Agency Safety Plan (PTASP) – Erik Falcon
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 comment 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.

BATA Regular Board of Directors Meeting Minutes

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

Date/Time: 1:00PM, Thursday, April 17, 2025

1. Call to Order

The meeting was called to order by Chairperson Wayne Schmidt at 1:03 PM.

2. Pledge of Allegiance and Moment of Silence

3. Roll Call

- John Somnavilla - PRESENT
- Lance Boehmer – PRESENT
- Gwenne Allgaier – ABSENT
- Joe Underwood – PRESENT
- Scott Sieffert - ABSENT
- Brad Jewett - ABSENT
- Wayne Schmidt - PRESENT

4. First Public Comment*

No public comment was made at this time.

5. Approval of Agenda/Declaration of Conflict of Interest

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

- **Ayes: 4**
- **Nays: 0**
- **Motion Carries: 4-0**

6. Consent Calendar

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Consideration of Approving the Following

- a. Regular Board Meeting Minutes of February 27, 2025

Consideration of Accepting the Following Reports

- b. FY25 Q2 Ridership Report
- c. FY25 Q2 Turnover Report
- d. Correspondence - Staff Compliments
- e. MDOT Form 5572
- f. BATA Board Tracker
- g. Year Over Year Ridership Report

Moved by John Sommavilla and supported by Joe Underwood to approve the April 17, 2025, Consent Calendar as presented.

- **Ayes:4**
- **Nays: 0**
- **Motion Carries: 4-0**

7. Any items removed from the consent calendar.

No items were removed from the Consent Calendar.

8. Jerry Tomczak, Program Manager, Cummingham Limp

Jerry Tomczak gave an update to the Board regarding the Hall St Transfer Station Project List.

Key Points Include:

- Snow melt zone 5 replacement will also include the removal and reinstallation of concrete.
- Replacement of the brick, asphalt, and handicap ramp in the zone 5 area as well.
- Interior updates to include: expansion of the employee breakroom, adding another employee restroom, painting, flooring, public restrooms and the reconfiguration of hallway near employee entrance.
- Exterior cleaning of brick and overhang.
- Installation of level 3 EV Charger

Moved by Joe Underwood and supported by Lance Boehmer to move forward with the securing of permits to start the work on the replacement of snow melt in zone 5.

- **Ayes:4**
- **Nays:0**
- **Motion Carries: 4-0**

Solar Panel Update:

Key Points Include:

- Materials are on site.
- Pedestals are laid out on the roof.
- Completion of the project is the end of May.

9. Fiscal Year 24 Audit-Josh Rehmann

Josh presented the FY Audit for 2024.

Key Points Include:

- Statements of Net Position
- Statements of Revenue
- Expenses and Changes in Fund Net Position
- Statements of Cash Flow
- Notes on Financial Statements
- Summary of Audit Results

Moved by Lance Boehmer and supported by Joe Underwood to accept the Fiscal Year 2024 Udit as presented.

- **Ayes: 4**
- **Nays: 0**
- **Motion Carries: 4-0**

10. Executive Director's Report – Chris Davis

Chris informed the Board that a new Payroll and Benefits Specialist has been hired. A big thank you was given to Brittany B., HR Coordinator for stepping up and taking on the payroll while the team looked for a new person. An update was given on the two accidents that occurred at Crossing Circle on the same day. Neither accident was the fault of a BATA driver. Chris reached out to the local law enforcement and requested extra patrol at the intersection. Chris informed the Board of the GPS tracker device that was placed on a BATA bus. BATA is taking the matter very seriously. Local law enforcement has been made aware of the situation. Members of BATA staff attended Reasonable Suspicion training. Chris spoke with KLT in response to the message that was broadcasted on the radio station stating that they were banned on BATA buses. This is not true and KLT was asked to check with BATA first before submitting information on the air, if it pertains to BATA. Members of BATA staff attended the career fair at the Career Tech Center. Additional technology will now be done in-house, by members of BATA's IT team, to improve our technology, cybersecurity and save on costs from an external vendor.

11. Chairperson's Report

Chairman Wayne Schmidt reported to the Board that the Ad Hoc Committee held its first round of interviews for the Executive Director position. Great discussions were held by the committee and at this point and time we are continuing our search for the executive position.

12. Finance Reports

a. Income Statement FY25 Q2

Key Points Include:

- Increased Revenue due to additional GTI contract and additional bus for FY25
- Interest Revenue still averaging 4.4%
- Non-Trans Revenue from the sale of Diamond and the sale of 11 buses.
- Heating and gas bills are higher than projected in the budget.
- Fleet and Facility insurance coverage increased.

b. Operating Reserve Fund FY25 Q2

Key Points Include:

- Earned just under \$64,000 in income interest

c. Capital Reserve Fund FY25 Q2

Key Points Include:

- Interest income earned around \$171,000

d. New Facility Reserve Fund FY25 Q2

Key Points Include:

- Interest earned around \$110,000
- Sale of the Diamond Property

e. Net Position FY25 Q2

Key Points Include:

- Interest earned averaging 4.4156%
- State reimburses based on revised budget.

13. Old Business

No old business at this time.

14. New Business

No new business at this time.

15. Second Public Comment

No public comment was made at this time.

16. Director's Comments and Announcements/ Open Floor

No comments were made at this time.

17. Adjournment

Moved by John Somnavilla to adjourn the April 17, 2025, Regular Meeting of the BATA Board of Directors at 2:07 PM.

Meeting Minutes Submitted by: _____

Meeting Minutes Approved on: _____

Lance Boehmer, Secretary: _____

BATA Income Statement April 2025

	April 2025		\$ Over (Under)	April 2024
	Actual	Budget	Budget	Actual
Income				
Fare Box Revenue	\$ 337,632	\$ 329,583	\$ 8,049	\$ 378,724
Local Service Contracts	305,950 <u>1</u>	199,729	106,221	193,068
Auxiliary Trans Revenue	123,442 <u>2</u>	84,000	39,442	156,619
Non-Trans Revenue	157,995 <u>3</u>	438	157,557	1,944,676
Local Revenue	1,933,710	2,078,250	(144,540)	1,794,787
State Formula & Contracts	2,901,208 <u>4</u>	2,865,119	36,089	2,563,663
Federal Operating Grants	1,450,154 <u>5</u>	1,295,344	154,810	1,228,368
Other Revenue	459,558 <u>6</u>	116,667	342,892	560,827
Refunds and Credits	172,684 <u>7</u>	58,333	114,351	137,043
Total Income	\$ 7,842,334	\$ 7,027,463	\$ 814,871	\$ 8,957,775
Expense				
Salaries & Wages	\$ 4,026,873	\$ 3,971,175	\$ 55,698	\$ 3,626,562
Paid Leave	300,937	300,929	8	304,780
Fringe Benefits	1,230,648	1,170,335	60,313	1,071,930
Services	458,810	561,003	(102,193)	363,153
Fuel & Lubricants	330,247	415,397	(85,149)	402,314
Materials & Supplies	257,261	257,954	(693)	231,662
Utilities	205,178 <u>8</u>	120,325	84,853	81,980
Insurance	481,994 <u>9</u>	373,753	108,241	434,224
Misc Expense	46,731 <u>10</u>	30,863	15,868	44,172
Operating Leases & Rentals	2,383	3,886	(1,502)	10,381
Total Expense	\$ 7,341,062	\$ 7,205,620	\$ 135,443	\$ 6,571,159
Net Income before Depreciation	\$ 501,271	\$ (178,157)	\$ 679,428	\$ 2,386,617
Depreciation	675,991	654,883	21,108	697,137
Net Income (Loss)	\$ (174,720)	\$ (833,040)	\$ 658,320	\$ 1,689,480

BATA Income Statement Notes
April 2025

	<u>Account(s)</u>	<u>Explanation</u>
	Revenue	Revenue
<u>1</u>	Local Service Contracts	Increased Revenue due to additional GTI Contract, additional bus for FY25
<u>2</u>	Auxiliary Trans Revenue	Above expected Revenue - Advertising
<u>3</u>	Non-Trans Revenue	Net Sale of Diamond Property & Buses
<u>4</u>	State Formula & Contracts	Includes \$203,292 from FY2024
<u>5</u>	Federal Operating	Based on current year expenses, requesting fund from FTA quarterly
<u>6</u>	Other Revenue	Interest Revenue from investments and bank balances, still averaging 4.4%
<u>7</u>	Refunds & Credits	\$132k from Alternative Fuel Credit based on Propane Gallons used
	Expenses	Expenses
<u>8</u>	Utilities	New Headquarters heating and gas bills during winter were higher than projected in budget
<u>9</u>	Insurance	Fleet and Building coverage increased, fleet increased just due to industry.
<u>10</u>	Misc Expense	Loss on Disposal of 3 buses (\$4,687), membership dues, TAPTCO training



The Work Plan

In our pursuit of success and the fulfillment of our mission to improve lives by linking people and communities, we have prepared a series of important projects and programs over the coming year.

Each initiative is outlined on the following pages, including a dedicated team and owner to champion its key endeavors. Quarterly milestones have been devised to ensure the seamless execution of our plans.

Much like our success outcomes, the strategic initiatives detailed in the following pages of our work plan are harmoniously aligned with our six outcome areas:

Customer Experience

Employee Success

Community Value

Financial Health

Safety

Performance-Based Culture

2025 Customer Experience

WORK PLAN



Project Name

Customer Experience Survey

Project Owner

Eric

Project Description

Develop and conduct customer survey to gauge BATA's performance and help identify future service improvements.

FY 2025 Q1

- Explore and get estimates for an outside vendor to conduct BATA's Customer Experience survey. EL - Need to gather additional estimates, get pricing and determine next steps.

FY 2025 Q2

- Create survey, distribute, promote and gather results. EL - Selected Brand Tonic to help support survey creation and plan to launch in May 2025.

FY 2025 Q3

- Review findings and make any initial improvements as needed.

FY 2025 Q4

- Incorporate feedback into service improvements and implement changes as appropriate.



Project Name

Stop Improvements 2025

Project Owner

Bill/Kurt

Project Description

Increasing rider experience through stop amenity improvements.

FY 2025 Q1

- Order necessary components for improvements (shelter, benches, etc.)

FY 2025 Q2

- Prep locations with necessary infrastructure improvements (concrete)

FY 2025 Q3

- Install components on location

FY 2025 Q4

- Identify next years stop improvements within Capital Plan

2025 Employee Success

WORK PLAN



Project Name

**New Hire Orientation/Onboarding Process
(Completed)**

Project Owner

Chris/Brittany

Project Description

Ensure new employee orientation covers what employees need.

FY 2025 Q1

- Review current orientation/onboarding and identify areas in need of improvement

FY 2025 Q2

- Review current orientation/onboarding and identify areas in need of improvement



Project Name

Benefit Analysis

Project Owner

Chris

Project Description

Ensure employee benefits are competitive.

FY 2025 Q1

- Review Traverse Connect Benefit Analysis and determine what areas are missing

FY 2025 Q2

- Compare BATA's current benefits with Traverse Connect's Benefits Analysis. Prepare analysis of costs of benefit changes, if any. CD - In progress.

FY 2025 Q3

- Determine changes in benefits recommended to be changed

FY 2025 Q4

- Communicate changes to employees, and revise policies needing to be changed



Project Name

New HQ Technology

Project Owner

Kurt

Project Description

Ubisense yard management integration.

FY 2025 Q1

- Continue to develop efficiencies in UBI. KB - Continue back end work in program logic, very close to going live with the full version.

FY 2025 Q2

- Analyze efficiency gains to determine new processes (Porters/Fluid checkers/Grounds team). KB/SP - Working on specking the SQL server to setup the system.

FY 2025 Q3

- Develop Capital replacement schedules for all new HQ assets



Project Name

Employee Handbook Update

Project Owner

Chris

Project Description

Ensure Employee Handbook is reflective of current practices.

FY 2025 Q1

- Review/revise pages 27-41 and 41-46

FY 2025 Q2

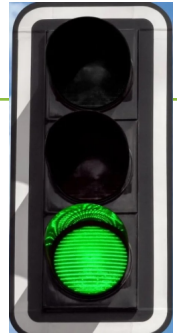
- Review/revise pages 47-61

FY 2025 Q3

- Share revisions with employees

FY 2025 Q4

- Publish revised Employee Handbook



Project Name

Succession Plan Development

Project Owner

Chris

Project Description

Have an action plan for key positions that become vacant.

FY 2025 Q1

- Review example Succession Plans. .

FY 2025 Q2

- Draft Succession Plan and review with Executive Director

FY 2025 Q3

- Finalize Succession Plan and communicate where necessary



Project Name

Administrative Manual Creation

Project Owner

Tracy / Chris

Project Description

Have a central location for key administrative policies and procedures.

FY 2025 Q1

- Review current policies to determine if changes are needed, and revise where necessary

FY 2025 Q2

- Meet with appropriate stakeholders to develop procedures needing to be written. CD - Lower on priority list at this time.

FY 2025 Q3

- Submit draft manual to managers/directors

FY 2025 Q4

- Publish Administrative Manual



Project Name

Employee Benefits Education

Project Owner

Chris/Jon

Project Description

Ensure that employees are aware of and utilize employee benefits to their potential.

FY 2025 Q1

- Identify benefits to educate staff on and determine who is best to provide the education

FY 2025 Q2

- Schedule education sessions



Project Name

Route To Excellence Training

Project Owner

Adam

Project Description

Staff will learn communication skills and techniques to improve customer interactions.

FY 2025 Q1

- Teach three classes with 5 to 8 staff members in each class

FY 2025 Q2

- Teach three classes with 5 to 8 staff members in each class

FY 2025 Q3


- Teach three classes with 5 to 8 staff members in each class

FY 2025 Q4

- Teach three classes with 5 to 8 staff members in each class



Project Name	All Computers on BATA's Domain Updated to Windows 11 (Complete)	
Project Owner	Paul	
Project Description	Upgrade to Windows 11 as Win 10 ends support Oct. 2025.	
FY 2025 Q1		
<ul style="list-style-type: none">• Address and determine all machines that require upgrades to meet requirements for Windows 11.		
FY 2025 Q2		
<ul style="list-style-type: none">•Finalize all update to Windows 11 on all domain PCs.		
FY 2025 Q3		
<ul style="list-style-type: none">• Complete		
FY 2025 Q4		
<ul style="list-style-type: none">•		





Project Name

New Software Setup & Performance

Project Owner

Kurt

Project Description

Retire RTA software and move to Fleetio.

FY 2025 Q1

- Integrate all RTA records and inventory including adjusting to new Bin numbering system for completion of ongoing cycle counting. KB - Switched fully to Fleetio for CMMS.
- Assess SOP tracking process. KB - Working with RTA/Fleetio side by side testing functionality.

FY 2025 Q2

- Integrate all RTA records and inventory including adjusting to new Bin numbering system for completion of ongoing cycle counting
- Assess SOP tracking process

FY 2025 Q3

- Develop new impact metrics inside of Fleetio

FY 2025 Q4

- Report on success of transition



Project Name

Operator's Handbook and Policies Review and Update

Project Owner

Erik

Project Description

Perform a full handbook review and update to reflect BATA's current practices.

FY 2025 Q1

- OPS team review of current handbook and policies.
- Identify areas that need updating.
- Create a handbook and policy review team comprised of drivers, dispatchers, and admin that will meet regularly. EF - Just need to create review team.

FY 2025 Q2

- The handbook and policy review team will submit a draft updated Operator's Handbook to the management team. EF - Get front line team together to conduct the review.

FY 2025 Q3

- Distribute and educate staff on the updated Operator's Handbook and policies



Project Name

Mentorship Program

Project Owner

Meredith

Project Description

Create a mentorship program that fosters a culture of learning and collaboration to support an individual's growth and development at BATA.

FY 2025 Q1

- Conduct mentor training. Launch mentorship program. EF - Training completed and program created, just need to launch.

FY 2025 Q2

- Gather feedback from mentors and mentees
- Check and adjust as needed ML - Development in progress

2025 Community Value

WORK PLAN



Project Name

HQ Relocation

Project Owner

Kurt

Project Description

Assess current storage needs, help staff to reduce surplus, plan cadence of move, execute plan and vacate old facilities, including remediation.

FY 2025 Q1

- Clean-up and remediate Cass & Diamond facilities for turnover to new owner - Complete

FY 2025 Q2

- Sell off used equipment still in possession (air compressor, tire machine, furniture). KB - Furniture, Tire Equipment sold, only air compressor remains. Another Milestone should be added to work out the MANY complications with the new facilities equipment and mechanical systems which are ongoing.



Project Name	New HQ Public Events
Project Owner	Eric
Project Description	Showcase BATA's new HQ with stakeholder and public facing activities.
FY 2025 Q1	
<ul style="list-style-type: none">• Host BATA friends and family / public event if not already completed in FY24 Q4. EL - Hosted events in October 2024	
FY 2025 Q2	
<ul style="list-style-type: none">• Look for additional ways to bring in community groups and other transit systems to tour BATA's new facility EL continuing to bring in groups to tour the facility and learn about BATA's services	
FY 2025 Q3	
<ul style="list-style-type: none">• Look for additional ways to bring in community groups and other transit systems to tour BATA's new facility	
FY 2025 Q4	
<ul style="list-style-type: none">• Celebrate one-year anniversary of moving into BATA's new HQ focusing on efficiencies and service delivery improvements	



Project Name

Strategic Communications Plan

Project Owner

Eric

Project Description

Create and execute a Community Strategic Communications Plan that provides consistent and comprehensive outreach focusing on:

- 1) Education
- 2) Attraction, and
- 3) Information.

FY 2025 Q1

- Start rolling out long term plan elements

FY 2025 Q2

- Review performance of initial activities and make adjustments if needed

FY 2025 Q3

- Implement second phase of the strategic plan

FY 2025 Q4

- Conduct a 12 month review of activities and develop next 12 month plans as needed



Project Name

After-Hours Airport Service

Project Owner

Adam

Project Description

Public transportation options to/from Airport for first flight out and last flight in.

FY 2025 Q1

- Identify additional service hours
- Board approval

FY 2025 Q2

- Launch service. AB - Service launched Feb. 26

FY 2025 Q3

- Modify service as needed

2025 Financial Health

WORK PLAN



Project Name

Financial Reporting by Mode

Project Owner

Justin/Shaughn

Project Description

Expand reporting of finance metrics to distinguish fixed route vs on-demand service costs and efficiencies, and increase transparency and create alignment with NTD reporting.

FY 2025 Q1

- Begin compiling reports for reporting on applicable NTD forms

FY 2025 Q2

- Refine reports and expense distribution



Project Name

Development of 5-Year Capital Plan

Project Owner

Kurt

Project Description

Develop GIS software tools to provide a comprehensive CP outlook while producing necessary information to keep the TAM plan and FCA up to date at all times.

FY 2025 Q1

- Organize all new facility compliance needs (services, repairs, useful life). KB - Continued with background data input from iAGis recognized need for re-imaging date TBD.

FY 2025 Q2

- Organize all new facility compliance needs (services, repairs, useful life). KB - Currently working to bring PM services under contract. Will still require JEG to provide useful life est's and replacement costs.

FY 2025 Q3

FY 2025 Q4

- Present results of 5-year Capital Plan



Project Name

Maximize Federal Funding Opportunities

Project Owner

Justin/Shaughn

Project Description

Develop an understanding of how STIC credits work and the rural vs. urban funding impacts.

FY 2025 Q1

- Contact FTA or State of Michigan to determine agency statistics and ensure data accuracy

FY 2025 Q2

- Monitor quarterly data statistics and begin collecting/reporting to STIC metrics
- Determine BATA numbers and compare to prior year baselines/averages



Project Name

New Finance Software

Project Owner

Justin/Paul

Project Description

Secure new finance software.

FY 2025 Q1

- Switched to QuickBooks online

FY 2025 Q2

- Determine if Quickbooks online will be a better option while looking into other software options
- * Explore other options, determine what software may work before considering a bid, need a tool with built in budgeting



Project Name

Ensure Finance Policies are Current

Project Owner

Justin

Project Description

Review and update finance policies.

FY 2025 Q1

- Review BATA Investment Policy, Capital Fund Policy, Operating Reserve Fund Policy

FY 2025 Q2

- Submit any recommendations for existing policies for review by Admin

FY 2025 Q3

- Update with recommendations and present to the BoD for approval as applicable



Project Name

Fare System Review and Replacement

Project Owner

All

Project Description

Review and replace aging fare system, and review fare pricing approach.

FY 2025 Q1

- Start researching fare system options

FY 2025 Q2

- Develop and distribute RFP. EL/PC - working on options and next steps to bring before the BATA Board for consideration.

FY 2025 Q3

- Choose vendor and begin implementation and rider education

FY 2025 Q4

- Finalize installation and begin utilization

2025 Safety

WORK PLAN



Project Name	Passenger Transportation Agency Safety Plan (PTASP) Creation
Project Owner	Erik
Project Description	Create and develop an agency safety plan and its components that meet FTA standards.

FY 2025 Q1

FY 2025 Q2

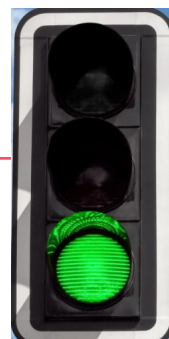
- Refine current safety policies and add them to the ASP, such as the Safety Management System (SMS) and Employee Safety Reporting Program (ESRP)

FY 2025 Q3

- Submit updated ASP to BATA board for approval, then update TRAMS



Project Name	Emergency Operations Plan for Hammond HQ
Project Owner	Erik
Project Description	Create an Emergency Operations Plan (EOP) for BATA's new HQ and current operations based on the comprehensive template shared by MDOT.
FY 2025 Q1	
FY 2025 Q2	
<ul style="list-style-type: none">• Work across departments and with partner agencies to document procedures and agreements	
FY 2025 Q3	
<ul style="list-style-type: none">• Submit a draft EOP for management team review• Refine and create final draft	
FY 2025 Q4	
<ul style="list-style-type: none">• Share final draft with local emergency response partners	



Project Name	MIOHSA Safety Requirements Compliance		
Project Owner	Kurt		
Project Description	Develop and implement MIOSHA Safe program including written programs, and safety assesments..		
FY 2025 Q1			
FY 2025 Q2			
• Engage MIOSHA-CET Division onsite, tour building discuss deficiancies. 30 days to bring company to comliance. Developed written plans, performed safety assessments, developed & performed training for all employees. Installed numerous safety enhancements. Submitted corrections to MIOSHA. Awaiting response.			
FY 2025 Q3			
• Conduct any additional follow up needed.			
FY 2025 Q4			
• Complete			

Date Received	Employee	Route #	Comment
04/09/25	Lorrie Towne	Dispatch	I talked to Shirley, and she would like to compliment Lorrie Towne. Shirley's granddaughter is autistic, and Lorrie took the time to carefully explain how the Loop and Link rides work. She was very appreciative of Lorrie's help.
04/14/25	Parker Wiltshire	Link	Hi, my name is Joanne Morell. I wanted to call in and compliment your driver Parker for last Saturday and helping me with my groceries. I'm still recovering from knee surgery, and it was very helpful. I just wanted you guys to know. Thank you. Bye-bye.
04/15/25	Justine Jones/ Sandra Send	Link	This is Jane Green calling from Bay Ridge West. I'm calling to commend the drivers who picked me up and dropped me off and picked me up again and brought me home. And they're just wonderful. I love BATA. I'm new to it. I learned that when I get on, it's not a free ride. I have a card, but I want to thank you all so much. And I look forward to future rides with you. And you all have a wonderful Easter, bye.
04/18/25	Nikeyia LaCount	Link	Hi, my name is Joanne Morel. I want to compliment your driver Nikeyia for helping us put on the extra seat belt, so Jim is secure in his seat. I appreciate the extra effort it takes. I just want to tell you that she was wonderful. We wanted to send our best wishes. So, thank you. Bye. Bye
04/24/25	Tim Wittersheim/ Craig Petersen	Link	Hi, this is Joanne Morrell. I just want to compliment Tim, my bus driver from the Senior Center to State Savings Bank. He understood and picked up the harness, so it went across my husband's body to keep him safe and prevent him from falling out of his chair. I also want to mention Craig, who brought us home from Firebird. He assisted me with getting on and off the lift, since I was carrying something on my walker. Craig also helped secure a strap across Jim. So, I just want to tell you they are both really great. We appreciate them.

4/29/2025	Pete Soliz/ Drew Donegan	Link	Hi, this is Joanne Morell. I want to compliment Pete for yesterday's bus ride. He was very helpful with my husband and myself. I'm really pleased with how your drivers behave-they really do care about their passengers. I also want to thank Drew, who helped me get my groceries home yesterday. Again, they've really been helpful to my husband and myself, and I want to give them the highest rating I can. Thank you. Bye-bye.
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The MAY 2025 INTERIM EXECUTIVE DIRECTOR REPORT

INTERNAL:

- *Chris Davis met as part of BATA's Wellness Team which meets monthly.
- *Chris and the other two directors met with all employees in our monthly Comms meetings.
- *Chris, Eric Lingaur and Justin Weston met with the two new April hires.
- *Chris and the HR Generalist conducted an orientation for the new bus drivers.
- *Chris and one of the Operations Managers co-chaired the monthly Safety Team meeting.
- *Chris gave the City Police liaison officer a tour of the new BATA headquarters.
- *Chris attended a meeting with BATA's IT Manager and others regarding the benefits of NeoRide.
- *Installation of the solar panels on the headquarters (HQ) roof is nearing completion. \$63,000 annual savings anticipated.
- *EV charger infrastructure work began at HQ.
- *Hall Street remodel and snowmelt work begins May 19.
- *iamGIS software initial data integration nearing completion.

EXTERNAL:

- *Chris contacted TransPro to get an update on their efforts to recruit an Executive Director. They have three candidates they are screening this week and Chris will meet with TransPro to set up interviews if needed.

- *Chris attended a meeting with the CEO, other staff members from the Municipal Employees Retirement System (MERS) and other governmental agencies who provide MERS to their employees.
- *Chris and staff met with a UKG staff member to discuss improved utilization of the UKG Ready HRIS system.
- *Eric and other staff represented BATA at the MiQuest at the GT County Civic Center where two thousand students from Northern Michigan attended.
- *Chris met with a HUB International contact for our monthly check-in on accidents and injuries.
- *Chris attended the Society for Human Resource Management Webinar on the Earned Sick Time Act (ESTA) and other HR issues.
- *Eric taught a BATA 101 class and answered questions from eight NMC students.
- *Eric spoke to five different classes (150) students at the Kingsley Middle School Career Day regarding BATA and public transit job opportunities.
- *Eric hosted the Train Study group at the BATA new headquarters to discuss next steps with the study and provided tours to those interested.
- *Eric promoted and received media coverage regarding BATA's new solar panels at the new headquarters, new EV vans and green transit activities.
- *BATA was awarded \$95,000 for the Mobility Management program with an additional \$19,000 state match.
- *NTD final report submitted May 15, 2025.
- *Four-year capital plans have been submitted to the MPO and FTA.
- *The FTA announced FY 2025 apportionments. BATA's apportionment is \$1,971,198. We budgeted/expected \$1,952,137.

Chris Davis

May14, 2025

2025 Tax Rate Request (This form must be completed and submitted on or before September 30, 2025)

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	2025 Taxable Value of ALL Properties in the Unit as of 05-27-2025 12,405,094,743
Local Government Unit Requesting Millage Levy Bay Area Transportation Authority (BATA)	For LOCAL School Districts: 2025 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 2025 tax roll.

(1) Source	(2) Purpose of Millage	(3) Date of Election	(4) Original Millage Authorized by Election Charter, etc.	(5) ** 2024 Millage Rate Permanently Reduced by MCL 211.34d "Headlee"	(6) 2025 Current Year "Headlee" Millage Reduction Fraction	(7) 2025 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	11/8/2022	.50000	.4726	.9851	.4655	1.0000	.4655	.4655	.4655	12/2027

Prepared by Justin Weston	Telephone Number (231) 933-5546	Title of Preparer Finance Director	Date 05/22/2025
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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		LANCE BOEHMER	05/22/2025
<input type="checkbox"/> Chairperson	Signature	Print Name	Date
<input checked="" type="checkbox"/> President		WAYNE SCHMIDT	05/22/2025

* 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 2025 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) 2025 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 2025 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: 2024 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 2024 permanently reduced rate can be found in column 7 of the 2024 Form L-4029. For operating millage approved by the voters after April 30, 2024, 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), *2025 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 2025 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, 2025. For debt service or special assessments not subject to a millage reduction fraction, enter 1.0000.

Column 7: 2025 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 2025 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 2025 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 2025. 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 (2025 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 2025. 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.

Justin Weston

From: Jim Baker <jbaker@gtcountymi.gov>
Sent: Monday, May 12, 2025 1:30 PM
To: Justin Weston
Subject: Re: [EXTERNAL SENDER] RE: [EXTERNAL SENDER] 2025 MRF for BATA
Attachments: Leelanau County 2025 L-4028.pdf

This is what I come up with when I combine the two counties. I sent a link to check the numbers for Grand Traverse County. I have also attached the Leelanau file I was sent.

TRANSIT AUTHORITY	11,555,377,249	12,405,094,743	55,235,956	369,328,892		
Ad Valorem Minus RZ	11,555,177,249	12,404,888,543	55,235,956	369,328,892	0.9851	0.9555
(from GRAND TRAVERSE)	7,623,554,486	8,196,743,941	46,007,928	275,082,798		
Ad Valorem Minus RZ	7,623,354,486	8,196,537,741	46,007,928	275,082,798		
(from LEELANAU COUNTY)	3,931,822,763	4,208,350,802	9,228,028	94,246,094		

<https://www.gtcountymi.gov/DocumentCenter/View/23779/2025-L-4028-612?bidId=>

James D. Baker, MMAO (4), MCPPE
Director of Equalization/GIS
Damage Assessment Coordinator
Address Authority Coordinator
County Designated Assessor
Grand Traverse County
231-922-4773

2025 Millage Reduction Fraction Computation

This form issued under authority of Sections 211.34d and 211.150, M.C.L. Filing of this form is mandatory. Failure to file is punishable under Section 211.119, M.C.L.

INSTRUCTIONS: This form is to be completed by the county equalization director for all taxing jurisdictions which levy a property tax in his/her county. This form is to be filed with each unit of local government and with the State Tax Commission. Also provide a copy of this form to the equalization director of each county which shares an intercounty taxing jurisdiction. On this initial computation form, the 2025 millage reduction fraction (MRF) can be calculated only for taxing jurisdictions located exclusively within a single county. This will include the county unit as well as all townships and nearly every city and village. The MRF for a school district which is not fractional with any other county can also be calculated and listed on this form. For any taxing jurisdiction which extends into one or more other counties, leave the MRF column blank and enter the notation "IC" for intercounty.

County GRAND TRAVERSE			2025 IRM 1.031					
Code Number	Taxing Jurisdiction	2024 Taxable as of 5/28/24	2025 Taxable as of 5/27/25	Taxable Value of Losses	Taxable Value of Additions	2025 M.R.F.	2025 BTRF	2025 TR/A
28	GRAND TRAVERSE COUNTY	7,623,554,486	8,196,743,941	46,007,928	275,082,798			
	Ad Valorem Minus RZ	7,623,354,486	8,196,537,741	46,007,928	275,082,798	0.9862	0.9566	1.0000
01	ACME TWP (01)	494,964,028	551,679,817	1,525,174	33,937,124			
	Ad Valorem Minus RZ	494,764,028	551,473,617	1,525,174	33,937,124	0.9826	0.9531	1.0000
02	BLAIR TWP (02)	475,547,281	520,894,933	3,234,236	27,422,262	0.9868	0.9571	1.0000
03	EAST BAY CHTR TWP (03)	840,574,067	899,091,254	5,331,540	23,415,700	0.9834	0.9538	1.0000
04	FIFE LAKE TWP (04)	79,845,154	86,180,869	254,642	2,896,281	0.9853	0.9556	1.0000
05	GARFIELD CHTR TWP (05)	1,320,509,770	1,448,623,267	13,461,842	82,324,500	0.9863	0.9566	1.0000
06	GRANT TWP (06)	75,515,857	80,570,277	48,813	2,166,623	0.9924	0.9625	1.0000
07	GREEN LAKE TWP (07)	419,122,881	450,626,015	392,981	10,968,780	0.9819	0.9524	1.0000
08	LONG LAKE TWP (08)	736,693,780	792,431,402	808,619	20,134,897	0.9824	0.9529	1.0000
09	MAYFIELD TWP (09)	91,057,424	97,469,976	555,810	3,060,000	0.9883	0.9586	1.0000
10	PARADISE TWP (10)	202,369,003	219,609,366	414,160	8,210,131	0.9849	0.9553	1.0000
11	PENINSULA TWP (11)	1,034,168,645	1,112,016,689	779,540	24,601,800	0.9798	0.9503	1.0000
12	UNION TWP (12)	38,011,259	40,297,297	6,375	1,073,800	0.9990	0.9689	1.0000
13	WHITEWATER TWP (13)	298,695,942	321,226,061	932,070	10,072,900	0.9866	0.9570	1.0000
51	TRAVERSE CITY (51)	1,516,479,395	1,576,026,718	18,262,126	24,798,000	I.C.	I.C.	I.C.
41	VILLAGE-FIFE LAKE (41)	18,276,033	19,612,787	5,522	290,400	0.9749	0.9456	1.0000
42	VILLAGE-KINGSLEY (42)	48,081,594	51,126,093	190,919	1,168,000	0.9883	0.9586	1.0000

2025 Millage Reduction Fraction Computation

This form issued under authority of Sections 211.34d and 211.150, M.C.L. Filing of this form is mandatory. Failure to file is punishable under Section 211.119, M.C.L.

County GRAND TRAVERSE			2025 IRM	1.031			
Code Number	Taxing Jurisdiction	2024 Taxable	2025 Taxable	Losses	Additions	2025 M.R.F.	2025 BTRF
School Districts							
05060 ELK RAPIDS SCHOOL		366,399,490	396,129,326	1,226,903	12,758,900	I.C.	I.C.
	Ad Valorem Minus RZ	366,199,490	395,923,126	1,226,903	12,758,900	I.C.	I.C.
	Non-PRE/MBT	141,259,237	156,370,122	671,203	9,251,900	I.C.	I.C.
01 ACME TWP (01)		69,046,542	75,919,860	294,833	2,688,500		
	Ad Valorem Minus RZ	68,846,542	75,713,660	294,833	2,688,500		
	Non-PRE/MBT Minus RZ	22,429,156	24,680,160	294,833	2,688,500		
13 WHITEWATER TWP (13)		297,352,948	320,209,466	932,070	10,070,400		
	Non-PRE/MBT	118,830,081	131,689,962	376,370	6,563,400		
10015 BENZIE COUNTY CENTRAL		1,763,160	1,942,098	4,500	2,200	I.C.	I.C.
	Non-PRE/MBT	621,569	762,712	0	2,200	I.C.	I.C.
06 GRANT TWP (06)		1,763,160	1,942,098	4,500	2,200		
	Non-PRE/MBT	621,569	762,712	0	2,200		
28010 TRAVERSE CITY AREA		6,770,191,090	7,276,040,159	43,375,901	244,990,090	I.C.	I.C.
	Non-PRE/MBT	2,765,294,911	3,047,029,096	7,474,199	149,616,047	I.C.	I.C.
01 ACME TWP (01)		425,917,486	475,759,957	1,230,341	31,248,624		
	Non-PRE/MBT	164,612,973	194,544,747	109,646	20,543,400		
02 BLAIR TWP (02)		455,235,147	499,031,218	3,116,946	26,579,489		
	Non-PRE/MBT	178,007,965	201,203,313	733,166	14,383,347		
03 EAST BAY CHTR TWP (03)		840,574,067	899,091,254	5,331,540	23,415,700		
	Non-PRE/MBT	329,108,788	364,706,285	744,611	16,983,400		
05 GARFIELD CHTR TWP (05)		1,320,509,770	1,448,623,267	13,461,842	82,324,500		
	Non-PRE/MBT	647,662,610	730,955,685	4,616,490	53,254,600		
06 GRANT TWP (06)		29,112,008	31,084,152	21,300	617,500		
	Non-PRE/MBT	11,270,592	11,879,158	20,700	3,200		
07 GREEN LAKE TWP (07)		387,432,799	416,954,129	363,647	10,718,080		
	Non-PRE/MBT	130,472,086	143,260,383	134,185	6,361,100		
08 LONG LAKE TWP (08)		736,693,780	792,431,402	808,619	20,134,897		
	Non-PRE/MBT	178,772,698	202,024,927	156,608	11,137,200		

11	PENINSULA TWP (11)	1,034,168,645	1,112,016,689	779,540	24,601,800		
	Non-PRE/MBT	286,456,837	322,432,830	368,319	13,874,900		
12	UNION TWP (12)	22,724,999	24,004,778	0	549,000		
	Non-PRE/MBT	12,422,490	13,188,235	0	354,300		
13	WHITEWATER TWP (13)	1,342,994	1,016,595	0	2,500		
	Non-PRE/MBT	869,917	528,854	0	2,500		
51	TRAVERSE CITY (51)	1,516,479,395	1,576,026,718	18,262,126	24,798,000		
	Non-PRE/MBT	825,637,955	862,304,679	590,474	12,718,100		
28035	BUCKLEY	63,636,017	68,339,792	26,413	2,136,190	I.C.	I.C.
	Non-PRE/MBT	16,188,307	18,225,450	16,700	1,193,923	I.C.	I.C.
06	GRANT TWP (06)	40,849,796	43,783,223	21,513	1,539,523		
	Non-PRE/MBT	9,043,748	10,396,017	11,800	961,723		
07	GREEN LAKE TWP (07)	502,299	532,562	0	0		
	Non-PRE/MBT	18,500	17,700	0	0		
09	MAYFIELD TWP (09)	22,283,922	24,024,007	4,900	596,667		
	Non-PRE/MBT	7,126,059	7,811,733	4,900	232,200		
28090	KINGSLEY	353,667,750	382,408,993	1,192,597	13,959,565	I.C.	I.C.
	Non-PRE/MBT	93,306,720	105,105,252	777,441	7,326,982	I.C.	I.C.
02	BLAIR TWP (02)	20,193,889	21,863,715	117,290	964,683		
	Non-PRE/MBT	4,672,837	4,898,734	3,800	122,800		
04	FIFE LAKE TWP (04)	21,583,844	24,290,812	78,503	1,724,081		
	Non-PRE/MBT	4,499,010	6,126,272	37,200	1,451,281		
06	GRANT TWP (06)	3,790,893	3,760,804	1,500	7,400		
	Non-PRE/MBT	2,319,734	2,239,349	1,500	2,500		
07	GREEN LAKE TWP (07)	31,187,783	33,139,324	29,334	250,700		
	Non-PRE/MBT	11,661,833	12,683,017	29,334	125,300		
09	MAYFIELD TWP (09)	68,636,026	73,445,969	550,910	2,605,070		
	Non-PRE/MBT	18,293,613	20,278,583	518,188	1,451,570		
10	PARADISE TWP (10)	154,287,409	168,483,273	223,241	7,042,131		
	Non-PRE/MBT	33,201,075	38,605,173	40,800	3,166,531		
12	UNION TWP (12)	5,906,312	6,299,003	900	197,500		
	Non-PRE/MBT	1,091,638	1,279,596	900	142,000		
42	VILLAGE-KINGSLEY (42)	48,081,594	51,126,093	190,919	1,168,000		
	Non-PRE/MBT	17,566,980	18,994,528	145,719	865,000		

40020 FOREST AREA	67,107,586	71,332,961	181,614	1,498,700	I.C.	I.C.
Non-PRE/MBT	30,238,633	32,455,866	63,979	873,700	I.C.	I.C.
04 FIFE LAKE TWP (04)	39,451,605	41,726,658	170,617	881,000		
Non-PRE/MBT	19,075,872	20,225,164	54,682	343,200		
12 UNION TWP (12)	9,379,948	9,993,516	5,475	327,300		
Non-PRE/MBT	3,553,284	3,983,113	5,475	322,600		
41 VILLAGE-FIFE LAKE (41)	18,276,033	19,612,787	5,522	290,400		
Non-PRE/MBT	7,609,477	8,247,589	3,822	207,900		
83060 MANTON	533,672	550,612	0	800	I.C.	I.C.
Non-PRE/MBT	29,447	30,763	0	800	I.C.	I.C.
04 FIFE LAKE TWP (04)	533,672	550,612	0	800		
Non-PRE/MBT	29,447	30,763	0	800		

2025 Millage Reduction Fraction Computation

This form issued under authority of Sections 211.34d and 211.150, M.C.L. Filing of this form is mandatory. Failure to file is punishable under Section 211.119, M.C.L.

County GRAND TRAVERSE			2025 IRM	1.031			
Code Number	Taxing Jurisdiction	2024 Taxable	2025 Taxable	Losses	Additions	2025 M.R.F.	2025 BTRF
COMMUNITY COLLEGES							
	NORTHWESTERN MI CC	7,623,554,486	8,196,743,941	46,007,928	275,082,798		
	Ad Valorem Minus RZ	7,623,354,486	8,196,537,741	46,007,928	275,082,798	0.9862	0.9566
INTERMEDIATE SCHOOLS							
	NORTH ED (TBAISD)	7,623,020,814	8,196,193,329	46,007,928	275,081,998	I.C.	I.C.
	Ad Valorem Minus RZ	7,622,820,814	8,195,987,129	46,007,928	275,081,998	I.C.	I.C.
	WEXFORD-MISSAUKEE ISD	533,672	550,612	0	800	I.C.	I.C.
AUTHORITIES							
	LIBRARY	7,623,554,486	8,196,743,941	46,007,928	275,082,798		
	Ad Valorem Minus RZ	7,623,354,486	8,196,537,741	46,007,928	275,082,798	I.C.	I.C.
	TC/GARFIELD REC AUTHORITY	2,836,989,165	3,024,649,985	31,723,968	107,122,500		
	TRANSIT AUTHORITY	7,623,554,486	8,196,743,941	46,007,928	275,082,798		
	Ad Valorem Minus RZ	7,623,354,486	8,196,537,741	46,007,928	275,082,798	I.C.	I.C.
	TRAVERSE CITY DDA	292,676,871	298,707,651	4,869,782	7,479,500	1.0000	0.9883

2025
LEELANAU COUNTY
MILLAGE REDUCTION FRACTIONS
(MRFs are calculated Less Renaissance Zone and Less Disabled Veterans Exemptions)

2025 - LEELANAU COUNTY MILLAGE REDUCTION FRACTIONS AND COMPOUNDED MILLAGE REDUCTION FRACTIONS DUE TO HEADLEE AMENDMENT - 2025

Code Number	Taxing Unit	2024 Taxable Value	2025 Taxable Value	Losses	Additions	2025 Millage Reduction Fraction	(B.T.R.F.) TRUTH IN TAXATION	TR/A
45	LEELANAU COUNTY	3,931,822,763	4,208,350,802	9,228,028	94,246,094			
45	LEELANAU COUNTY-REN ZONE EXC	3,931,822,763	4,208,350,802	9,228,028	94,246,094	0.9830	0.9535	1.0000
	TOWNSHIPS							
001	BINGHAM	315,589,916	333,284,079	521,585	2,765,800	0.9828	0.9533	1.0000
002	CENTERVILLE	152,140,839	161,883,528	219,199	3,468,754	0.9887	0.9590	1.0000
003	CLEVELAND	157,020,184	167,804,471	232,382	4,596,400	0.9904	0.9607	1.0000
004	ELMWOOD	455,184,456	481,417,202	473,523	5,342,528	0.9847	0.9551	1.0000
005	EMPIRE	293,665,957	313,945,444	1,426,888	7,237,268	0.9824	0.9528	1.0000
006	GLEN ARBOR	615,064,076	654,072,429	930,100	11,311,915	0.9851	0.9555	1.0000
007	KASSON	146,526,762	159,314,032	315,105	4,950,223	0.9766	0.9472	1.0000
008	LEELANAU	579,348,974	623,005,193	3,278,323	16,070,826	0.9786		
008	LEELANAU - REN ZONE EXC	579,348,974	623,005,193	3,278,323	16,070,826	0.9786	0.9491	1.0000
009	LELAND	647,643,342	691,613,044	990,335	11,359,400	0.9801	0.9506	1.0000
010	OLON	142,230,613	151,035,618	241,300	2,820,800	0.9877	0.9580	1.0000
011	SUTTONS BAY	357,117,067	385,843,942	552,288	12,646,780	0.9851	0.9554	1.0000
	VILLAGES							
041	EMPIRE	78,438,739	84,817,876	355,659	1,688,146	0.9684	0.9393	1.0000
042	NORTHPORT	71,755,983	80,640,301	356,561	2,401,260	0.9409		
042	NORTHPORT - REN ZONE EXC	71,755,983	80,640,301	356,561	2,401,260	0.9409	0.9126	1.0000
043	SUTTONS BAY	105,930,238	114,236,334	307,225	3,325,180	0.9818	0.9523	1.0000
	CITY							
051	TRAVERSE CITY	70,290,577	85,131,820	47,000	11,675,400	I.C.		
	DISTRICTS/AUTHORITY							
	TRAVERSE AREA DISTRICT LIBRARY	70,290,577	85,131,820	47,000	11,675,400	I.C.		
	TRAVERSE AREA DIST. LIBRARY-REN ZONE EXC	70,290,577	85,131,820	47,000	11,675,400	I.C.		
	GLEN LAKE DISTRICT LIBRARY	1,055,256,795	1,127,331,905	2,672,093	23,499,406	0.9831	0.9536	1.0000
	TRAVERSE CITY REC AUTHORITY	70,290,577	85,131,820	47,000	11,675,400	I.C.		
	TRAVERSE CITY REC AUTHORITY-REN ZONE EXC	70,290,577	85,131,820	47,000	11,675,400	I.C.		
	BAY AREA TRANSIT AUTHORITY	3,931,822,763	4,208,350,802	9,228,028	94,246,094	I.C.		
	BAY AREA TRANSIT AUTHORITY-REN ZONE EXC	3,931,822,763	4,208,350,802	9,228,028	94,246,094	I.C.		
	SUTTONS BAY BINGHAM DISTRICT LIBRARY	672,706,983	719,128,021	1,073,873	15,412,580	0.9840	0.9544	1.0000
	SB-BINGHAM FIRE & RESCUE AUTHORITY	672,706,983	719,128,021	1,073,873	15,412,580	0.9840	0.9544	1.0000
	SCHOOL DISTRICTS							
45010	GLEN LAKE - ALL PROPERTY	1,245,691,902	1,329,240,020	3,053,188	27,597,006	I.C.		N/A
	Non-PRE	749,455,100	810,527,119	1,691,423	21,804,511	I.C.		N/A
45020	LELAND - ALL PROPERTY	842,550,467	900,250,606	1,286,126	17,321,135	0.9823	0.9528	N/A
	Non-PRE	487,261,463	524,555,748	136,188	11,472,057	0.9788	0.9494	N/A
45040	NORTHPORT - ALL PROPERTY	576,655,766	620,067,335	3,219,628	15,998,272	0.9787	0.9493	N/A
	All (Ren Zone Exc)	576,655,766	620,067,335	3,219,628	15,998,272	0.9787	0.9493	N/A
	Non-PRE	352,673,410	388,795,821	570,144	13,485,541	0.9672	0.9382	N/A
45050	SUTTONS BAY - ALL PROPERTY	704,643,425	753,628,372	1,109,856	15,499,653	0.9827	0.9531	N/A
	Non-PRE	259,382,816	284,406,172	241,473	8,717,903	0.9691	0.9400	N/A
28010	TRAVERSE CITY AREA - ALL PROPERTY	562,281,203	605,164,469	559,230	17,830,028	I.C.	0.9564	N/A
	TRAVERSE CITY AREA - REN ZONE EXC	562,281,203	605,164,469	559,230	17,830,028	I.C.	0.9564	N/A
	Non-PRE	180,392,656	203,908,892	161,000	13,746,828	I.C.	0.9478	N/A
	INTERMEDIATE SCHOOL							
	NORTHWEST EDUCATION SERVICES	3,931,822,763	4,208,350,802	9,228,028	94,246,094	I.C.		N/A
	NORTH ED ISD-REN ZONE EXC	3,931,822,763	4,208,350,802	9,228,028	94,246,094	I.C.		N/A

**NOTE: P.A. 145 Provides that a Millage Reduction Fraction shall not exceed 1.0000

VILLAGE, CITY, COUNTY, TOWNSHIP AND SCHOOL MILLAGE REDUCTION FRACTIONS, COMPOUNDED FOR JUNE 1, 2025.

PREPARED BY LEELANAU COUNTY EQUALIZATION DEPARTMENT: ANDREW GIGUERE, DIRECTOR

*** NOTE: SB-BINGHAM FIRE & RESCUE AUTHORITY - SUTTONS BAY & BINGHAM

*NOTE: GLEN LAKE DISTRICT LIBRARY - KASSON, EMPIRE & GLEN ARBOR

NOTE: SUTTONS BAY LIBRARY - SUTTONS BAY & BINGHAM



Bay Area Transportation Authority

Board Meeting
May 22, 2025



Transit Technology Plan Update



BATA Board Presentation
May 22, 2025

Why did BATA develop a Technology Road Map?

- **Fulfilling Millage Promises:** Adding new user-friendly technology is one of the top improvements the community has requested.
- **Aging Technology:** BATA's technology has started to become antiquated and is having trouble meeting the current needs of the community and positioning to adapt to future growth.
- **Timeline and Budget and Integration:** Acquiring new technology takes planning and establishing a 5-year road map helps prioritize and provide direction to meet BATA's technology goals. Selecting technologies that integrate and allow future growth with a new facility on the horizon.
- **Approved:** BATA's Board approved the plan in February 2021.
- **Progress:** BATA has implemented several new technologies since approval and has completed 4 of the 6 projects outlined on the initial technology road map.

Ongoing 2020 – 2025 Technology Plan

- **Ubisense**

- GPS and vehicle telematics hardware and software for NTD reporting.
- Onsite fleet management and bus barn parking logic.
- Programing system functionality with go live slated for Summer 2025.

- **IamGIS**

- Building and infrastructure management system tracking all facility inventory, work orders, warranties, mechanicals via GIS and visual 3D renderings.
- Everything is rendered, assets tag and finalizing work order integration and testing.

Ongoing 2020 – 2025 Technology Plan

- **Project F: Fare System (Farebox & Central Fare System Replacement) – 2025/2026**
 - BATA's current fare system has reached the end of its useful life and is no longer supported by the vendor.
 - The current fare software is old and difficult to navigate limiting reporting and functionality.
 - Maintenance and repair of the mechanical fare box components is time consuming and disruptive to service delivery.
 - Projected cost originally budgeted at \$1.35 million (Combination of grant and capital improvement funding). Current estimates around \$500,000 - \$600,000.
 - Benefits:
 - Reduced required maintenance.
 - Better data reporting.
 - Automated farebox issue logging.
 - Self-serve reload web-portal for riders to purchase fare or renew fare passes.
 - Supporting all fare types on-board.



Projects & Estimated Costs

Project Recommendations – Improvement Areas & Costs

Project / Capital Expense Item	Improves Operations	Improves Customer Experience	2025 Expense	2026 Expense	2027 Expense	2028 Expense	2029/30 Expense	Total Budget (5 years)
Project A: Windows 10/11 Licensing & PC replacement	✓	✓	\$12,149					
Project B: Cradlepoint Vehicle Router Replacement	✓	✓		\$127,500				
Project C: Bus Camera System Replacement	✓				\$65,000			
Project D1: GMV Vehicle Tablet Replacement	✓	✓				\$150,000		
Project D2: APC/NTD Re-Certification	✓					\$5,000		
Project E: Head Sign (Marquee) Integration	✓	✓					\$75,000	
Total Estimated Expense			\$ 12,149	\$127,500	\$ 65,000	\$ 155,000	\$ 75,000	\$ 434,649

- All project capital expenses are conservative estimates and include full system features and functionality. Project costs can be potentially lowered by adjusting project scope and through a competitive bidding RFP process.

Priority Projects & Benefits

Project A: Windows 10/11 Licensing and PC Replacement – 2025 (complete)

- Windows 10 is reaching end of support in October 2025. Current PCs have been upgraded or replaced to run Windows 11.
- Benefits and Opportunities:
 - Increased security, OS consistency and compliance.
 - Better PC efficiency.



Priority Projects & Benefits

Project B: Cradlepoint Vehicle Router Replacements - 2026

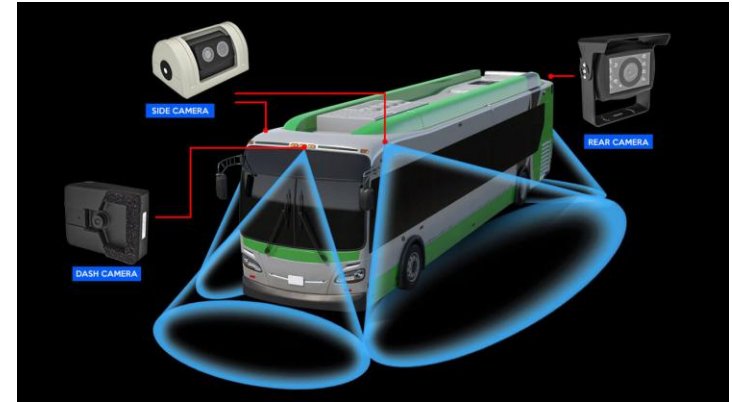
- Current on-board cellular routers are reaching end of life. This hardware provides cellular connectivity for all technology systems and provides on-board Wi-Fi.
- Need to upgrade the hardware to meet higher bandwidth requirements for new technologies being added to the fleet.
- IBR-920s will replace existing IBR-900s
 - Benefits and Opportunities
 - Continued support through vendor Net Cloud remote management system.
 - Better on-board connectivity.



Priority Projects & Benefits

Project C: Bus Camera System Replacement - 2027

- Current on-board camera system (REI) has temperamental hardware and an antiquated interface to view video footage.
- Exploring solid state hard drives with remote connectivity capabilities and user-friendly software interface.
 - Benefits:
 - Cloud accessibility to all vehicle footage.
 - Less staff time required to gather and review vehicle footage.
 - AI integration with safer driving practices and monitoring.



Priority Projects & Benefits

Project D1: Vehicle Tablet Replacements – 2028

- **Hardware refresh for GMV solutions.**
 - BATA's GMV Getac tablets will reach end of support and need upgrading.
 - Benefits:
 - Upgraded devices will provide additional features and capabilities.
 - Will also increase reliability with less failure points.



Priority Projects & Benefits

Project D2: APC / NTD Re-Certification – 2028

- The FTA requires re-certification of APC/NTD data every 3 years.



Priority Projects & Benefits

Project E: Head Sign (Marquee) Integration - 2029

- Connect external head signs to CAD/AVL system to automatically update route details and provide directional information.
- Currently BATA has 4 different marquee vendors, so each interface requires its own manual process to update the marquee text.
- Benefits:
- Provide real-time directional info for passengers.
- Auto upload marquee updates saving staff time and providing better information to riders reducing confusion.



Future Projects & Benefits

- **Financial Software Upgrade - TBD**
- Current Quickbooks software has limited functionality and BATA needs a financial software with better customization.
- **Rider Experience Improvements – TBD**
- On-board charging stations for passenger digital devices.
- On-board and stop location digital signage for real-time bus and stop information.



Bay Area Transportation Authority

Board Meeting
May 22, 2025

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
	Relevant Documentation (Title and Location)	

Version Number and Updates

Record the complete history of successive versions of this plan.

Version Number	Section/Pages Affected	Reason for Change	Date Issued
1.1	Sec 1 / Pg 1	Updated Accountable Executive	
1.1	Sec 2 / Pg 2	Updated compliance for PTASP Final Rule (05/2024)	
1.	Sec 3 / Pg 3	Updated compliance for PTASP Final Rule (05/2024)	
1.1	Sec 4 / Pg 3,4,5	Updated compliance for PTASP Final Rule (05/2024)	
1.1	Sec 5 / Pg 6,7	Updated compliance for PTASP Final Rule (05/2024)	
1.1	Sec 6 / Pg 9	Updated compliance for PTASP Final Rule (05/2024)	
1.1	Sec 7 / Pg 11,12	Updated compliance for PTASP Final Rule (05/2024)	

Annual Review and Update of the Agency Safety Plan

Describe the process and timeline for conducting an annual review and update of the ASP.

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/>.

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	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	0/500k VRM : 0/500k VRM	86%
DR	2 Events : 1.1/500k VRM	1.1/500k VRM	0/500k VRM : 1.1/500k VRM	0 : 0/500K VRM	0/500K VRM	2 : 1.1/500k VRM	0/500k VRM	0/500k VRM : 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.

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.

Communicating the purpose and benefits of the Safety Management System (SMS) to all supervisors, and employees.

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.

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.)

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.

Safety Management Policy Communication

Describe how the safety management policy is communicated throughout the agency. Include dates where applicable.

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.

Employees:

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:

Employee memorandum

Bulletin board notices

Employee email notification

Monthly communications meetings / Training sessions

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.

Depending on the importance of the policy or procedure change, an acknowledgement signature is required of each employee verifying their understanding of the change.

Riders:

If a rider policy is changed or added, BATA notifies riders through the following methods:

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

Any services impacted by policies changes will include outreach as required by Federal Guidance.

Authorities, Accountabilities, and Responsibilities

Describe the role of the following individuals for the development and management of the transit agency's Safety Management System (SMS).

Accountable Executive

The Executive Director serves as BATA's Accountable Executive with the following authorities, accountabilities, and responsibilities under this plan:

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>
Chief Safety Officer or SMS Executive	<p>Developing and maintaining SMS documentation;</p> <p>Directing hazard identification and safety risk assessment;</p> <p>Monitoring safety risk mitigation activities;</p> <p>Providing periodic reports on safety performance;</p> <p>Briefing the Accountable Executive and Board of Directors on SMS implementation progress;</p> <p>Planning safety management training.</p>
Agency Leadership and Executive Management	<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>
Key Staff	<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,</p> <p>Employee and Customer surveys</p> <p>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 LLC system of TAPCO , 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 simultaneously 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.

FY2024 Organization Impact Index included below

BATA 2024 Organization Impact Index													
Success Outcome	Metric	2023 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	84%	88%	10	Overall score on annual survey which determines if employees feel they would refer BATA to their friends/family	84%	9.55	84%	9.55	79%	8.98	92%	9.15
	Employees' Equipped for Success	88%	92%	10	Overall score on annual survey which determines if employees feel as though they have the tools needed to deliver quality service	88%	9.57	88%	9.57	96%	10	88%	9.58
				20			19.1		19.1		19.0		18.7
Community Value	Special Services Support	*New	12	10	Number of rides provided for special service and community support transportation such as festivals, gov't tours, and community high-impact events								
	Community Value	*New	70%	10	An annual evaluation of the % of the community that sees value in BATA								
				20*	*Beginning 10/1/24								
Financial Health	Cost recovery	9.25%	10%	5	The percent of eligible operating expenses recovered by direct revenues	12.35%	5.0	10.53%	5.0	10.84%	5.0	9.35%	5.0
	Operating Expense per Hour	\$77.64	\$77.64	5	Total eligible operating costs divided by number of service hours	\$91.61	4.2	\$95.40	4.1	\$95.21	4.1	\$106.73	3.6
	Operating Expense per Mile	\$5.35	\$5.35	5	Total eligible operating costs divided by number of miles	\$6.11	4.4	\$6.53	4.1	\$6.45	4.2	\$6.75	4.0
	Operating Expense per Trip	\$33.84	\$33.84	5	Total eligible operating costs divided by number trips (Link Only?)	\$ 38.00	4.5	\$ 39.57	4.3	\$28.87	5.0	\$36.89	4.6
				20			18		18		18		17
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	0.00	5.0
	Days Since Last Preventable Accident	45	48	5	Higest number of days between all preventable accidents. This includes both non-reportable and reportable collisions. Number can roll over from previous quarters.	33	3.4	27	2.8	30	3.1	43	4.5
	Preventable Reportable Collisions (per 100k miles)	0.3	0.2	10	Number of preventable, reportable vehicle collisions recorded each quarter per 100k miles driven	0	10	0.2	10	0.2	10	0	10
	# of days between employee injuries	118	40	5	Number of days between employee reportable injuries	199	5	257	5	98	5	101	5
				25			23		23		23		25
Performance-Based Culture	Average Department Scorecard Score	92%	95%	5	A quarterly average of departmental performance scores	87%	4.4	91%	4.6	91	4.8	89	4.7
	Departmental Scorecard Results Shared	NA	100%	5	Departmental Scorecard results shared within each department each month		5		5		5		5
	Bus Observations by Admin Staff	86%	90%	5	An average of 3 bus observations/quarter performed by each member of the admin staff	86%	4.3	90%	4.5	90%	5	90%	5
				15			14		14		15		15
Overall Performance Score				100			93		93		94		94