



NOTICE OF COMMISSION MEETING AND AGENDA

DES MOINES AREA REGIONAL TRANSIT AUTHORITY

DART MULTIMODAL ROOM, 620 CHERRY STREET/[ZOOM](#)

DIAL IN - +1-312-626-6799/ACCESS CODE – 821 4517 6176/PASSCODE - 831163

JUNE 4, 2024 – 12:00 PM

PAGE #

1.	CALL TO ORDER	
2.	ROLL CALL AND ESTABLISHMENT OF QUORUM	
3.	NOTICE OF MEETING	
4.	APPROVAL OF JUNE 4, 2024, AGENDA	
5.	PUBLIC COMMENT (Limit 3 minutes)	
6.	CONSENT ITEMS	
	A. Commission Meeting Minutes – May 7, 2024	2
	B. Health Insurance Renewal Update	7
	C. Caravan Intergovernmental Agreement	9
	D. On-Call Marketing Contract Amendment	15
	E. Mobility Services MOU Approval	16
	F. April FY 2024 Consolidated Financials	20
7.	ACTION ITEMS	
	A. FY25 Budget Approval	22
	B. August Service Change	25
	C. DART on Demand River Bend	27
	D. DART on Demand Jordan Creek	28
	E. DART on Demand Fare Increase	29
8.	DISCUSSION ITEMS	
	A. O&M Facility Project Update	31
	B. Updated Procurement Policy and Procedures Update	32
	C. Performance Report – April 2024	52
9.	DEPARTMENTAL MONTHLY REPORTS (BY EXCEPTION)	
	A. Operations	58
	B. Planning	60
	C. External Affairs	61
	D. Finance/IT/Procurement	65
	E. Human Resources/Training/Safety	68
	F. Chief Executive Officer (to include listed written reports)	74
10.	FUTURE AGENDA ITEMS	76
11.	COMMISSIONER ITEMS	
12.	NEXT MEETING: Regular DART Meeting - Tuesday, July 9, 2024 – 12:00 P.M. (week later due to Holiday)	
13.	ADJOURN	

Language, visual, hearing and transportation services are available at meetings upon request. For requests, please call DART at 515.283.8100 at least 48 hours in advance of the meeting.

**DES MOINES AREA REGIONAL TRANSIT AUTHORITY
COMMISSION MEETING MINUTES
MEETING HOSTED IN-PERSON AND VIRTUALLY
620 CHERRY STREET, DES MOINES IA 50309
May 7, 2024**



(Meeting was held in a hybrid format)

Commissioners/Alternates Present and Voting:

Todd Shafer, Srikant Mikkilineni, Connie Boesen, Andrew Borcharding, Paula Dierenfeld, Ross Grooters, Angela Connolly, Russ Trimble and Joseph Jones

Commissioners Absent:

Dean O'Connor, Tara Cox and Bridget Montgomery

Others Present (non-voting):

Chris Coleman, Doug Elrod (Mayor City of Bondurant) and A.J. Johnson (City Manager Urbandale)

CALL TO ORDER

Chair Russ Trimble called the meeting to order at 12:01 p.m. Roll call was taken, and a quorum was present.

Notice of the meeting was duly published.

APPROVAL OF AGENDA

Chair Russ Trimble requested a motion to approve the agenda as presented.

It was moved by Connie Boesen and seconded by Angela Connolly to approve the May 7, 2024, agenda. The motion carried unanimously.

CONSENT ITEMS

7A – Commission Meeting Minutes – April 2, 2024

7B – Financial Audit Services Approval

7C – Transportation Improvement Program (TIP) Approval FY2025

7D – March FY2024 Consolidated Financials

7E – Quarterly Investment Report

It was moved by Todd Shafer and seconded by Connie Boesen to approve the consent items. The motion carried unanimously.

**DES MOINES AREA REGIONAL TRANSIT AUTHORITY
COMMISSION MEETING MINUTES – MAY 7, 2024**



PUBLIC COMMENT:

Doug Elrod, Mayor of the City of Bondurant, asked the DART Commission if there could be a temporary amendment to give the attending representative from that city the ability to vote as the Primary and Alternate DART representatives for his city were not able to attend the meeting. It was shared by Chair Russ Trimble and DART's Legal Counsel, Brick Gentry, that the current language in DART's 28E does not allow for such a situation. This was noted so that when there are future changes in the governing 28E document this change will be taken into consideration.

There were no other public comments.

TRANSIT RIDERS ADVISORY COMMITTEE (TRAC) UPDATE

Jeremy Guenther, Vice Chair of the TRAC Committee, shared that at the committee's most recent meeting on Wednesday, May 1, 2024, a quorum was met. He also shared that Chief Strategy Officer, Erin Hockman, reviewed DART's current budget conversations as it relates to funding levels and potential for service reductions in the next fiscal year. This update highlighted the recent award of \$3.6 million from the Des Moines MPO as part of their Carbon Reduction Program essentially pausing any near-term service reductions. Part of this update included an introduction to DART and the Commission's vision for the potential Reimagine DART planning efforts.

Communications Manager, Sarah Welch, updated TRAC on the plan to do a fare increase on DART on Demand services to bring the fare in line with DART's other mobility services such as DART On Call. Chief Operating and Planning Officer, Luis Montoya, provided an overview of DART's current use of Taxi services to provide assistance with ambulatory Paratransit trips. Luis discussed the RFP process used to update our contract and the recommendation to add another provider to the contract giving DART flexibility in using our existing taxi provider, but also a new provider Transportation Network Company (TNC) UZURV.

The next hybrid TRAC meeting is currently scheduled for Wednesday, May 29, 2024.

ACTION ITEMS

8A – On-Call Taxi and Mobility Services Approval

Luis Montoya, Chief Operations and Planning Officer, shared that DART is seeking to contract with capable firms to manage and operate taxicab and overflow services to support demand-responsive transportation, including both public paratransit and general public transit programs. Qualified firms must supply sedans, vans, and/or accessible vehicles for these services. The use of transportation service contractors also serves to improve scheduling efficiency, reduce costs, mitigate demand fluctuations, and ensure seamless coordination with DART's services. Luis outlined the background on why these contracted services are needed and the procurement process, which included the Request for Proposals (RFP). Ten (10) organizations were solicited, DART received two (2) proposals which were deemed responsive; Translowa L.C. (dba Yellow Cab Company) and UZURV Holdings Inc. Both firms were interviewed and after determining each firms' backgrounds DART staff recommended awarding contracts to both firms, with the reasons outlined.

**DES MOINES AREA REGIONAL TRANSIT AUTHORITY
COMMISSION MEETING MINUTES – MAY 7, 2024**



It was moved by Angela Connolly and seconded by Todd Shafer to approve award contracts with Translowa L.C. and UZURV Holdings, Inc. both with a (1) year initial term with five (5) one (1) year renewal options for a combined Not to Exceed Amount of \$3,000,000 with contingency. The motion carried unanimously.

8B – Heavy Duty Bus Procurement Approval

Chief Operations and Planning Officer Luis Montoya shared that DART's Heavy-Duty buses used for fixed route service have a useful life of 12 years. Each year, DART replaces approximately 8 Heavy Duty (HD) buses that have reached the end of their useful life. DART has the option to purchase buses of various sizes to meet operational and budget needs. Since 2020, DART has received three orders of 30' Gillig buses, now totaling 16 30' buses in the fleet. DART staff recommend ordering four (4) 30-foot buses as replacements for 40-foot vehicles that have met their useful life (10 years) and are due for replacement. DART staff also recommends ordering ten (10) 40-foot buses as replacements for 40-foot vehicles that have met their useful life and are due for replacement. The procurement details were identified along with the funding for these purchases.

It was moved by Todd Shafer and seconded by Connie Boesen to approve the purchase of four (4) 30-Foot Heavy Duty Buses at a cost Not to Exceed \$3,090,863 and ten (10) 40-Foot Heavy Duty Buses at a cost Not to Exceed \$7,881,566 from Gillig, LLC. under the State of Iowa Purchasing Contract. The motion carried unanimously.

8C – Light Duty Procurement Approval

Luis Montoya, Chief Operations and Planning Officer, outlined that over the course of the last few years, staff have been evaluating options for the replacement of buses based on capacity needs, ride comfort, mobility device usability, fuel costs, maintenance costs, and ground clearance. DART has purchased twelve (12) New England Wheels Front Runners. Seven (7) in 2022 that arrived May 2023 and five (5) in 2023 arriving May 2024. Staff continue to experience improved ride comfort, fuel costs, maintenance costs, and ground clearance with an appropriate capacity for mobility services. DART staff recommend purchasing five (5) additional Frontrunners to replace five (2) medium-duty high-floor vehicles that have met their useful life and will result in a net increase of three (3) buses. The five (5) Frontrunners will be used to support DART's mobility services (Paratransit, DART On Demand, and On-Call), and potential other route types, bringing that fleet up from 33 buses to 36 buses. The procurement details were identified along with the funding for these purchases.

It was moved by Connie Boesen and seconded by Todd Shafer to approve the purchase of five (5) New England Wheels Front Runner Light Duty Buses from Hoglund Bus Co., Inc. at a cost Not to Exceed \$1,492,542. The motion carried unanimously.

DISCUSSION ITEMS:

9A – DART on Demand Update

Luis Montoya, Chief Planning and Operations Officer, provided an update on DART On Demand, including next steps for the DART On Demand pilots in River Bend and Jordan Creek, as well as a fare increase for DART On Demand.

**DES MOINES AREA REGIONAL TRANSIT AUTHORITY
COMMISSION MEETING MINUTES – MAY 7, 2024**



9B – Reimagine DART

Erin Hockman, Chief Strategy Officer, provided an update on Reimagine DART, and the Commission gave positive feedback on the plan for upcoming Member Community survey and interviews as well as facilitated Commission workshops. There was also support for doing a comprehensive, 12-18 month system redesign plan, over a shorter-term microtransit-focused plan.

QUARTERLY AND PERFORMANCE REPORTS

10A - Performance Report – March 2024

10B – Quarterly Financial Update

10C – Quarterly Safety Report

Due to time, Chair, Russ Trimble asked the Commission to refer to their packets to review the agenda items.

DEPARTMENTAL MONTHLY REPORTS (BY EXCEPTION)

Due to time, Chair Russ Trimble asked the Commission to refer to their packets to review the monthly department reports, except for the CEO report.

12A - Operations

12B – Planning

12C - External Affairs

12D – Finance/IT/Procurement

12E – Human Resources

12F – Chief Executive Officer

Amanda Wanke, Chief Executive Officer, thanked those Commissioners that have RSVP'd to drive the Rodeo, which will take place on Thursday, May 16, at the Iowa State Fairgrounds. She also thanked Mayor Dierenfeld and Commissioner Grooters for attending the APTA and Hill meetings in Washington DC and shared that we look forward to the Commissioners that will be able to attend the FTA meetings in DC later this week. Amanda asked the Commission to refer to the written item in her report as it relates to the August Service Change, which we will be looking for the Commission to approve at the June meeting. Finally, Amanda thanked DART staff, especially our Safety team and Operators for assisting during the recent weather activities in our communities and the tornado in the City of Pleasant Hill.

FUTURE AGENDA ITEMS

None

COMMISSIONER ITEMS

**DES MOINES AREA REGIONAL TRANSIT AUTHORITY
COMMISSION MEETING MINUTES – MAY 7, 2024**



Chair, Russ Trimble shared that he will be reaching out to DART Commissioners and inviting them to 'Ride the bus with Russ' in the upcoming months and encouraged everyone to join him.

NEXT MEETING:

Regular DART Meeting - Tuesday, June 4, 2024 – 12:00 P.M.

ADJOURN

Chair, Russ Trimble adjourned the meeting at 1:48 p.m.

Chair

Clerk

Date

CONSENT ITEM



6B:	Annual Health Insurance Renewal
Action:	Approve a one-year renewal of DART's health insurance coverage through Wellmark BCBS for FY 2025

Staff Resource: *Dan Washburn, Chief Financial Officer*

Background:

- DART has had a fully insured Medical Plan through Wellmark since July 1, 2017.
- Wellmark has proposed a 1.9% increase for FY25. DART's total expenditure for all medical plans is projected not to exceed \$2,636,973, this includes a 10% contingency should employees add or change coverages through the year.
- A breakdown of coverages, plan rates and estimated headcount per plan is attached.

Recommendation:

- Approval of a one-year renewal of DART's Health Insurance Coverage through Wellmark BCBS.

DART Health Insurance Renewal - July 1, 2024



Wellmark Renewal									
	\$1,000 Deductible Plan			\$3,200 HDHP Plan			\$5,000 HDHP Plan		
	Estimated Head Count	Rate	Annualized	Estimated Head Count	Rate	Annualized	Estimated Head Count	Rate	Annualized
Single	31	\$661.28	\$245,996	69	\$555.99	\$460,360	8	\$467.22	\$44,853
EE/Spouse	2	\$1,354.30	\$32,503	36	\$1,138.67	\$491,905	2	\$956.87	\$22,965
EE/Child	2	\$1,251.80	\$30,043	18	\$1,052.49	\$227,338	1	\$884.45	\$10,613
Family	3	\$2,029.47	\$73,061	37	\$1,706.33	\$757,611	0	\$1,433.90	\$0
	38		\$381,603	160		\$1,937,214	11		\$78,431
Combined Total							209		\$2,397,248
							with 10% contingency		\$2,636,973
Plan Design	\$1,000 Deductible Plan In Network			\$3,200 HDHP Plan In Network			\$5,000 HDHP Plan In Network		
Deductible	\$1,000/\$2,000			\$3,200/\$6,400			\$5,000/\$10,000 (Embedded)		
Coinsurance	80%/20%			100%/0%			100%/0%		
Out of Pocket Max.	\$3,000 / \$6,000			\$3,200 / \$6,400			\$5,000/\$10,000		
Office Services	\$25 PCP/\$25 Specialist			Deductible			Deductible		
Urgent Care	\$50			Deductible			Deductible		
Rx	\$10/\$20/\$40/\$40			Deductible			Deductible		
Inpatient	Deductible and Coinsurance			Deductible			Deductible		
Outpatient	\$150 copay followed by coinsurance			Deductible			Deductible		
Imaging (CT/PET scans, MRI's)	Deductible and Coinsurance			Deductible			Deductible		
Emergency Services	\$150 Copay followed by coinsurance			Deductible			Deductible		

CONSENT ITEM



6C:	Caravan Intergovernmental Agreement
Action:	Approve the Intergovernmental Agreement between DART and Siouxland Regional Transit

Staff Resource: *Erin Hockman, Chief Strategy Officer*

Background:

- DART is one of the only transit agencies in Iowa that directly operates its own vanpool program. Several rural and regional transit agencies have contracted with Enterprise to offer vanpooling services in a for-profit model.
- When DART's vanpool program began 30+ years ago, most of the vanpools were traveling from rural central Iowa communities into downtown Des Moines. Vanpool demand has shifted over time with fewer commuters traveling downtown.
- Current and future anticipated needs for workforce vanpools will primarily serve rural communities with manufacturing plants struggling to attract and retain employees. The long-term viability of DART's vanpool program, Caravan, requires DART to partner with rural agencies to operate vanpools outside of central Iowa. At the same time, DART's program meets needs for affordable workforce transportation for these employers and employees, which the Enterprise model has not been able to meet at this time.
- DART has an opportunity to operate 10+ vanpools in northwest Iowa for a large manufacturing employer and wants this program to be beneficial to all parties involved—employers, employees, DART and the local transit agency.
- After the DART Commission indicated support for pursuing a revenue-sharing partnership at its December 2023 meeting, DART staff have worked with Siouxland Regional Transit to finalize a revenue-sharing agreement between the two agencies.

Revenue-Sharing Agreement:

- For employer-funded vanpool programs with 5+ vanpools in operation, DART will charge up to an additional \$0.01 per passenger per mile with the additional revenue going to the transit agency where the vanpool originates.
- If approved, DART will cover its cost to operate the vanpools and the local transit agency will receive approximately \$1,900/year from each vanpool DART operates in its area. DART will send a check for the amount of revenue owed to Siouxland Regional Transit each quarter.
- As this is a pilot between DART and Siouxland Regional Transit Agency, the initial term will be in effect for one year but may be renewed for successive terms upon mutual agreement of both parties.

CONSENT ITEM

6C: Caravan Intergovernmental Agreement



	Normal fare \$0.095/mile	Additional \$0.01 (\$0.105/mile)
Daily Passenger Fare	\$5.70	\$6.30
Monthly Passenger Fare	\$125.40	\$138.60
Annual Passenger Fare	\$1,504.80	\$1,663.20
Total annual vanpool revenue	\$18,057.60	\$19,958.40

Recommendation:

- Approve the Intergovernmental Agreement Regarding Revenue Sharing for Vanpool Programs Between Des Moines Area Regional Transit Authority and Siouxland Regional Transit System.

**INTERGOVERNMENTAL AGREEMENT REGARDING REVENUE SHARING FOR
VANPOOL PROGRAMS
BETWEEN
DES MOINES AREA REGIONAL TRANSIT AUTHORITY
AND
Siouxland Regional Transit System**

THIS INTERGOVERNMENTAL AGREEMENT (the “Agreement”) is made and entered into this 27th day of June, 2024 (the “Effective Date”) by and between Des Moines Area Regional Transit Authority, an entity created pursuant to Chapter 28E of the Iowa Code (“DART”), whose address is 620 Cherry Street, Des Moines, Iowa 50309, and Siouxland Regional Transit System, whose address is 6401 Gordon Drive Sioux City, Iowa 51106 (the “Agency”).

RECITALS

- A. Agency provides transit services for the counties of Cherokee, Ida, Monona, Plymouth, and Woodbury in Iowa, Dakota County in Nebraska, and Southern Union County in South Dakota.
- B. DART has the objective to expand access to workforce transportation services through DART’s vanpool program (the “Program”).
- C. The Parties wish to supplement the transit services currently provided by the Agency to include DART’s vanpool program.
- D. DART and Agency recognize the importance of affordable workforce transportation and aim to collaborate on revenue-sharing arrangements for vanpool programs.
- E. This Agreement signifies the commitment of DART and the Agency to collaborate on revenue-sharing arrangements for vanpool programs, ensuring equitable benefits for all stakeholders involved.

NOW, THEREFORE, in consideration of the promises herein and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties hereby agree as follows:

AGREEMENT

1. **NATURE OF AGREEMENT.** This Agreement is made pursuant to Iowa Code Chapter 28E. No separate legal entity is established by this Agreement. Each party shall separately finance and budget for its activities under this Agreement. No real or personal property will be purchased, held, or disposed of in the performance of this Agreement.

2. **TERM.**

- a. Initial Term: This Agreement shall commence upon the date of execution and remain in effect for a period of one (1) year from that date (the “Initial Term”).
- b. Renewal Terms: Upon expiration of the Initial Term, this Agreement may be renewed for successive terms upon mutual agreement of both parties.

3. **AGREEMENT DESCRIPTION.** This revenue-sharing model is for Wells Enterprises, Inc. and its subsidiaries vanpool programs with five (5) or more vanpools in operation.

a. For each qualifying vanpool originating in the Agency's operating area, DART will charge Wells Enterprises, Inc. and its subsidiaries an additional \$0.01 per vanpool passenger mile. For the avoidance of doubt, a passenger mile is per each passenger per each mile of that passenger. The proceeds from this additional charge will be paid by DART to the Agency in accordance with Section 4 (Payment) below.

b. This Agreement calculates the amount due to the Agency based on the following formulas:

- i. (Assuming an average vanpool distance of 60 miles per day, 22 days per month) $\$.01 \times 60 \times 22 = \13.20 of revenue per month, per passenger
- ii. (Assuming an average vanpool runs 12 months per year) $\$13.20 \times 12 =$ approximately \$158
- iii. (Assuming an average vanpool has 12 passengers) $12 \times \$158 =$ approximately \$1900 of revenue for the Agency per year, per vanpool.

4. **PAYMENT.** DART will pay the Agency once a quarter the amount of revenue generated for the prior 3-month period as outlined in Section 3 (Agreement Description) above.

All notices and correspondence regarding billing and invoicing shall be delivered to:

Siouxland Regional Transit System
Attn: Sharon Burton
6401 Gordon Drive
Sioux City, IA 51106
Sharon@simpco.org

5. **MODIFICATIONS:** Any modifications or amendments to this Agreement shall be made in writing and signed by authorized representatives from both DART and the Agency.

6. **PROGRAM OVERSIGHT AND ADMINISTRATION.** DART is responsible for all Program oversight and administration and assumes all risk of loss or damage to the Agency resulting from the vanpool program.

7. **INDEMNIFICATION.** To the extent permitted by law, the Agency shall hold harmless, indemnify, and defend DART and its members, directors, officers, employees, agents and contractors and the heirs, personal representatives, successors and assigns of each of them from and against all liabilities, penalties, costs, losses, damages, expenses, causes of action, claims, demands or judgments, including, without limitation, reasonable attorney's fees, arising from, caused by, or in any way connected with any act, omission, breach or violation of any covenant, obligation, or duty hereunder or under applicable law by the Agency, its employees, or any other person for whom the Agency is legally responsible. DART shall hold harmless, indemnify, and defend the Agency and its directors, officers, employees, agents and contractors and the heirs, personal representatives, successors and assigns of each of them from and against all liabilities, penalties, costs, losses, damages, expenses, causes of action, claims, demands or judgments, including, without limitation, reasonable attorney's fees, arising from, caused by, or in any way connected

with any act, omission, breach or violation of any covenant, obligation, or duty hereunder or under applicable law by DART, its employees, or any person whom DART is legally responsible.

8. TERMINATION.

a. Termination for Convenience. Either party may terminate this Agreement upon ninety (90) days' prior written notice.

b. Termination for Minimum Vanpool Requirement. If minimum requirement of five (5) operational vanpools is not met, either party may terminate this Agreement with immediate effect upon written notice.

9. COMPLIANCE WITH LAW. Both parties agree to comply with all applicable federal, state, and local laws and regulations related to transit operations, fare collection, and revenue sharing.

10. NOTICES. All notices (other than billing and invoicing notices as otherwise set forth herein) required to be delivered by one party to the other shall be given by personal delivery or by certified U.S. mail, return receipt requested, as follows:

If to Company: Siouxland Regional Transit System (SRTS)
 Attn: Brian Pearson, Facility Director/Transit Director
 6401 Gordon Drive
 Sioux City, Iowa 51106
 BPearson@simpco.org
 712-577-2337

If to DART: Des Moines Area Regional Transit Authority
 Attn: Chief Strategy Officer
 620 Cherry Street
 Des Moines, IA 50309
 partnerships@ridedart.com

With a copy to: Des Moines Area Regional Transit Authority
 Attn: Caravan Department
 620 Cherry Street
 Des Moines, IA 50309
 rideshare@ridedart.com

11. ASSIGNMENT. The terms and provisions of this Agreement shall be binding upon DART and the Agency and their respective partners, successors, heirs, executors, administrators, assigns and legal representatives. The rights and obligations of DART and the Agency under the Agreement may not be transferred, assigned, pledged, or otherwise disposed of or encumbered in any way without DART's and the Agency's prior written consent.

12. GENERAL PROVISIONS.

a. Severability. The invalidity or unenforceability of any provision of this Agreement shall not affect the remaining provisions hereof. If any provision of this Agreement is held to be invalid, illegal, void, or unenforceable, in any respect by a court of competent jurisdiction, the remaining provisions shall remain in full force and effect.

b. Choice of Law and Venue. The rights, obligations, and remedies of the parties shall be governed by the laws of the State of Iowa. Venue for any action shall lie solely and exclusively in Plymouth County, Iowa. All performance under this Agreement will be controlled and governed by the laws of the State of Iowa, and any arbitration or litigation related to this Agreement must be filed in Plymouth County, Iowa. The parties hereby irrevocably submit to jurisdiction in Plymouth County, Iowa.

c. Survival. Any terms of this Agreement that would, by their nature, survive the termination or expiration of this Agreement shall so survive, including Section 7 (Indemnification) and Section 8 (Termination).

d. Entire Agreement; Amendment. This Agreement constitutes the entire Agreement between the parties hereto relating to the subject matter hereof, and any prior agreements, whether oral or written, not expressly set forth in this Agreement are of no force and effect. This Agreement may not be amended, modified or changed except in writing signed by the parties.

IN WITNESS WHEREOF, the authorized signatories named below have executed this Agreement on behalf of the parties as of the Effective Date.

Agency

DART

By:_____

By:_____

Name:_____

Name:_____

Title:_____

Title:_____

Date:_____

Date:_____

This Agreement must not begin until it has been signed by both parties and the Effective Date has occurred.

CONSENT ITEM



6D:	On-Call Marketing Services Contracts
Action:	Approve Not-to-Exceed Amount up to \$400,000 for the Life of the Contracts

Staff Resource: *Michael Gulick, Procurement and Contract Manager*

Background:

- Prior to FY21, DART had contracts with full-service marketing and public affairs firms. Staff made a recommendation to the Commission in FY21 to shift \$150,000 from the professional services budget to salaries/wages/fringes to bring most of this work in-house. Part of this proposal included contracting with freelancers or small, boutique firms that specialize in a particular area of expertise DART does not have on staff (e.g, videography, media buying). This has proven to be a cost-effective approach to increasing output by supplementing resources and expertise, when needed.
- Kazoo Marketing LLC (media buying and advertising), Red 11 Media LLC (videography), Hatch DSM LLC (brand refresh & marketing campaigns), Kristine Thompson Marketing LLC (marketing and communications freelancer), 1809 Design (graphic design freelancer), and New Tribe Media LLC (communications, videography and photography) provide on-call marketing services to DART. All six submitted proposals to DART's Marketing On-Call Services RFP (RFP FY22-R-003 On Call Marketing Services) and were awarded three-year initial terms with up to two annual renewals.
- The current contract term and spend for:
 - Kazoo Marketing, LLC initial term ends on May 22, 2025 (\$72,545.82)
 - Red 11 Media, LLC initial term ends on June 5, 2025 (\$11,800.00)
 - Hatch DSM, LLC initial term ends on June 12, 2025 (\$33,500.00)
 - Kristine Thompson Marketing, LLC initial term ends on June 12, 2025 (\$55,612.50)
 - 1809 Design initial term ends on July 12, 2025 (\$1,556.25)
 - New Tribe Media, LLC initial term ends on July 12, 2025 (\$3,800.00)
- To date, DART has paid \$178,814.60 toward the on-call marketing contracts.
- DART is requesting to continue purchasing on-call marketing services from these contracts on an as-needed basis subject to available budget throughout the life of the contracts.

Recommendation:

- Approve a combined not-to-exceed amount of \$400,000 for the life of these contracts. Any future increase exceeding \$400,000 will be subject to Commission approval.

ACTION ITEM



6E:	Amalgamated Transit Union (ATU) Local 441 Labor Contract Agreement and Memorandum of Understanding
Action:	Grant approval for the DART Chief Executive Officer to sign a Memorandum of Understanding with the Amalgamated Transit Union Local 441 related to pay and benefits for Mobility Services Operators

Staff Resource: *Kelley Burgess, Chief People Officer*
Erin Clanton, Brick Gentry, PC

Background:

- The duration of the current DART and the Amalgamated Transit Union Local 441 (ATU) labor agreement extends until June 30, 2025.
- DART's Mobility Services operators—currently 39 employees who drive paratransit, on-demand and on-call services—petitioned in January 2024 to join the ATU Local 441. The ATU is the union currently representing fixed route, maintenance and buildings and grounds employees.
- After the appropriate waiting period and opportunity, PERB recognized these operators as part of the ATU and negotiations began on a short-term MOU that would set in place the wage, benefits and work rules for these operators.
- These negotiations were discussed with the DART Executive Committee.
- Contract negotiations for the entire ATU Local 441 contract, which currently ends June 30, 2025, will begin later this winter and will hopefully come to an agreement in time for our budgeting work for FY26.

Memorandum of Understanding:

- DART proposes the following memorandum of understanding ("MOU") in conjunction with the 2022-2025 collective bargaining agreement. The purpose of this MOU is to immediately implement several changes agreed upon with the Mobility Services group joining the ATU.
- The provisions of the MOU are as follows:
 1. Wage increase of 5.0% for all mobility services operators, effective July 1, 2024.

Employee Classification	Current Rate	Adjusted Rate as of 7/1/2024
Student Pay	\$19.28	\$20.24
First Year (after graduation)	\$20.35	\$21.38
Regular (1 st year PT)	\$21.42	\$22.49
Regular (1 st year FT)	\$23.57	\$24.75

ACTION ITEM

9A: Amalgamated Transit Union Local 441 Labor Contract Agreement and Memorandum of Understanding

2. Section 5 – Insurance. Mobility Services operators eligible for same medical, dental, and vision benefits as ATU, effective July 1, 2024.
3. Section 7 – Vacation. Mobility Services operators eligible for same vacation plan, effective with new calendar year January 1, 2025.

Recommendation:

- Grant approval for the DART Chief Executive Officer to sign the memorandum of understanding with the Amalgamated Transit Union Local 441 that includes the outlined provisions provided above as part of this action item.
- A copy of the MOU is included in this Commission packet.

**MEMORANDUM OF UNDERSTANDING BETWEEN
DES MOINES AREA REGIONAL TRANSIT AUTHORITY AND
AMALGAMATED TRANSIT UNION LOCAL 441**

This Memorandum of Understanding (“Memo”) is entered into on this 18 day of May 2024, by and between the Des Moines Regional Transit Authority (“DART”) and the Amalgamated Transit Union Local 441 (“Union”).

WHEREAS, DART and Union entered into a collective bargaining agreement for the period of July 1, 2022 through June 30, 2025,” (the “Contract”); and

WHEREAS, on or about January 22, 2024, upon joint stipulation of the Parties, the Iowa Public Employment Relations Board entered an Order amending the bargaining unit to include all employees of the Mobility Services Department; and

WHEREAS, the Mobility Services Department (“Mobility Services”) employees are currently governed by the DART Paratransit Employee Handbook (the “Handbook”);

WHEREAS, the parties agree to amend the Handbook to make certain changes to the wages, health insurance, and vacation for Mobility Services employees; and

WHEREAS, it is anticipated that the Contract will be opened in fall of 2024, following the Union recertification election, to address revisions to the Contract; and

WHEREAS, this Memo sets forth the revisions negotiated between the parties.

IT IS THEREFORE AGREED, by and between DART and Union as follows:

1. The Handbook Payment of Wages Policy is amended as follows:

Mobility Services Department will receive a one-time 5% merit wages increase effective July 1, 2024.

2. The Handbook Health, Dental & Vision Benefits Policy is amended as follows:

Mobility Services Department employees will be eligible for the same medical and dental insurance plan offerings, health savings account contribution and cost share as set forth in Sections 5.3 and 5.4 of the Contract, for the enrollment period starting in May 2024, which is effective July 1, 2024.

3. The Handbook Paratransit Operator Vacation Policy is amended as follows:

Mobility Services Department employees will be governed by the same Vacation policy as set forth in Article 7 of the Contract, effective July 1, 2024.

4. All other sections of the Handbook remain unchanged.
5. The Contract remains unchanged.
6. Except as set forth herein, the Mobility Services Department employees will continue to be governed by the Handbook until such time as a new contract is negotiated.
7. The undersigned acknowledge and represent that they are authorized to enter into this Agreement and that the terms and conditions are binding upon the parties, their officers, members, successors and assigns.
8. This interpretation shall be effective upon the execution of this Memo.

Signatures:

Des Moines Regional Transit Authority

Amanda Wanke
Chief Executive Officer

Date

Amalgamated Transit Union, Local 441

John Rugama
President, ATU Local 441

Date

Signature: John S. Rugama
John S. Rugama (May 22, 2024 13:23 CDT)

Email: jrugama@ridedart.com

Signature:

Email: awanke@ridedart.com

CONSENT ITEM



6F: April FY2024 Consolidated Financial Report

Action: Approve the April 2024 Consolidated Financial Report

Staff Resource: Amber Dakan, Finance Director

Year-to-Date Budget Highlights:

Revenue:

- Fixed Route operating revenue is exceeding budget by 1.0% year-to-date. This is a result of higher revenues in Other Contracted Services, School Funding, and Mobile Ticketing Passes.
- Fixed Route non-operating revenue is trending over budget by 4.1% due to the higher than projected interest income from favorable interest rates as well as State Operating Assistance exceeding budget expectations.
- Mobility Services operating revenue is exceeding budget by 11.6% so far in FY2024. Polk County Funding, Cash Fares, Other Contracted Services, and Mobile Ticketing Passes are all ahead of budget projections.
- Mobility Services non-operating revenue is exceeding budget by 9.1% year-to-date resulting from the drawdown of CARES grant funding as well as additional 5310 grant funding drawn down to cover the higher levels of overflow taxi cab expense.
- Caravan revenues are under budget by 28.2% year-to-date due to lower than anticipated passenger fares. Caravan is working to add additional business partners to the program in FY25 as well as implement a new user platform.

Operating Expense:

- Fixed Route operating expenses are seeing a 4.3% savings from projections. Insurance, Salaries, Wages & Fringes, and Services are seeing the most savings to date.
- Mobility Services operating expenses are over budget by 8.4% year-to-date. Salaries, Wages, and Fringes, Purchased Transportation Services, and Fuel & Lubricants are seeing the highest over budget levels due to an increase in demand for these services.
- Caravan has budget savings of 26.9% year-to-date for operating expenses. Fuel and Lubricants and Services are seeing the largest savings to date, which reflects the reduced service levels.

Recommendation:

- Approve the April FY2024 Consolidated Financial Report.

**** TOTAL Un-Audited Performance of April FY2024 Year-to-Date as Compared to Budget:**

Fixed Route	\$ 2,444,015	Reserve for Accidents (See Balance Sheet):
Mobility Services	\$ 38,163	\$201,805
Caravan	\$ (5,660)	
Total	\$ 2,476,518	

FY2024 Financials: April 2024

FIXED ROUTE	April 2024				Year-To-Date-(10) Months Ending 4/30/2024		
	Actual	Budgeted	Variance		Actual	Budgeted	Variance
Operating Revenue	371,206	402,217	(31,011)		4,062,283	4,022,167	40,116
Non-Operating Revenue	2,726,170	2,674,281	51,889		27,839,207	26,742,808	1,096,399
Subtotal	3,097,376	3,076,498	20,878		31,901,490	30,764,975	1,136,515
Operating Expenses	2,936,720	3,076,498	139,778		29,457,475	30,764,975	1,307,500
Gain/(Loss)	160,656	-	160,656		2,444,015	-	2,444,015

MOBILITY SERVICES	April 2024				Year-To-Date-(10) Months Ending 4/30/2024		
	Actual	Budgeted	Variance		Actual	Budgeted	Variance
Operating Revenue	74,719	53,054	21,665		591,894	530,542	61,352
Non-Operating Revenue	210,312	343,925	(133,613)		3,750,882	3,439,250	311,632
Subtotal	285,031	396,979	(111,948)		4,342,776	3,969,792	372,984
Operating Expenses	430,894	396,979	(33,915)		4,304,613	3,969,792	(334,821)
Gain/(Loss)	(145,863)	-	(145,863)		38,163	-	38,163

CARAVAN	April 2024				Year-To-Date-(10) Months Ending 4/30/2024		
	Actual	Budgeted	Variance		Actual	Budgeted	Variance
Operating Revenue	14,677	33,333	(18,656)		194,786	333,333	(138,547)
Non-Operating Revenue	-	9,468	(9,468)		112,410	94,675	17,735
Subtotal	14,677	42,801	(28,124)		307,196	428,008	(120,812)
Operating Expenses	19,505	42,801	23,296		312,856	428,008	115,152
Gain/(Loss)	(4,828)	-	(4,828)		(5,660)	-	(5,660)

SUMMARY	April 2024				Year-To-Date-(10) Months Ending 4/30/2024		
	Actual	Budgeted	Variance		Actual	Budgeted	Variance
Operating Revenue	460,602	488,604	(28,002)		4,848,963	4,886,042	(37,079)
Non-Operating Revenue	2,936,482	3,027,673	(91,191)		31,702,499	30,276,733	1,425,766
Subtotal	3,397,084	3,516,278	(119,194)		36,551,462	35,162,775	1,388,687
Operating Expenses	3,387,119	3,516,278	129,159		34,074,944	35,162,775	1,087,831
Gain/(Loss)	9,965	-	9,965		2,476,518	-	2,476,518

ACTION ITEM



7A: FY 2025 Budget Adoption

Action: Approve the Proposed, Detailed FY 2025 DART Budget

Staff Resource: *Dan Washburn, Chief Financial Officer*

Background:

- Staff began preparing the FY 2025 DART budget this past fall and apprised the DART Commission regularly on the revenue and expense assumptions used to develop the proposed budget.
- A workshop was held with Commission members and city managers on February 23rd where staff shared the FY 2025 budget and service level details.
- As required by the 28M Agreement, the commission published and then held a public hearing on April 23rd. The budget presented at that time was a high-level budget referred to as the "Status Quo Budget" and adopted to provide the commission and staff the most flexibility of approving a budget to align revenues with expenses.
- Following the public hearing and commission approval, finance staff certified and filed the FY 2025 Budget reflective with the approved property tax levies with the Iowa Department of Management (IDOM) and Polk County in April.
- At this time, DART staff have been able to confirm many of the previously unknown funding components of FY 25 and have brought back a revised detailed FY 2025 budget for approval.
- The FY 2025 Budget is largely similar to the original "Status Quo" budget originally certified thanks largely to funding received through the MPO.

FY 2025 Budget:

- The DART FY 2025 budget proposed reflects a compilation of one-time DART funds used (\$1,500,000), Committed funding from the City of Des Moines over the .95 levy cap (\$1,500,000), and funding from the MPO through the Carbon Reduction Program (\$990,432).
- The FY25 budget reflects administrative cuts totaling \$900,000; \$400,000 in expense reductions introduced within the Status Quo budget proposed at the Budget Workshop and then an additional \$500,000 in expense reductions committed by DART staff as part of a two-year stability budget plan for FY25-FY26.
- **FY 2025 revenue assumptions include:**
 - Residential rollback 46.3428%, Commercial rollback 90% for value exceeding \$150,000.
 - Multi-Residential rollback now matches Residential rollback. Impact of more than \$2.5M cumulatively.
 - DART On Demand fare change increase.
 - Property tax revenue growth exceeding 4.5% to fund the original structural deficit.

ACTION ITEM

7A: FY 2025 Budget Approval

- Year four of the new property tax formula is used to calculate DART levy rates. Rates are based 60% on old formula and 40% on new formula.
- Loss of \$100,000 in property tax backfill due to new legislation (7-year phase out).
- \$1,500,000 in one-time funds will be used to reduce property tax requirements.
- **FY 2025 expenditure assumptions include:**
 - Service levels will be matched to funding availability.
 - 30% premium increase in property & casualty insurance.
 - IPERS rates steady at FY24 levels.
 - Mobility Services/Paratransit will see operator growth reflective of increasing Bus Plus Demand.
 - Expense reductions included in the status quo budget (\$400K) include:
 - Eliminating Business and Community Partnerships position.
 - Recruitment and employee advertising.
 - New employee physicals.
 - Advertising and sponsorships.
 - Professional services, dues, and staff training.
 - Tuition reimbursement.
 - Instructor wages.
- FY 2025 reduced budget expenses (\$500K) include:
 - Reduction of 2 administrative positions and combining one IT and Maintenance positions for a total reduction of 4 FTE's.
 - Changing customer service hours.
 - Reducing/eliminating technology platforms such as Wi-Fi on the buses, reducing memberships, and professional development.
 - Discontinuation of the D-Line to occur in November 2024.
- A detailed budget book will be shared with the Commission at Tuesday's meeting and shared with the public via DART's website after adoption.

Tax Levies (No Change to rates certified in April):

- Tax rates listed are calculated with the new property tax formula phase in.

ACTION ITEM**7A: FY 2025 Budget Approval**

Jurisdiction	FY2025 DART Levy	FY 2025 Annual Cost for \$200K Home	Jurisdiction	FY2025 DART Levy	FY 2025 Annual Cost for \$200K Home
Altoona	\$.759	\$70.35	Johnston	\$.649	\$60.18
Ankeny	\$.632	\$58.48	Pleasant Hill	\$.593	\$54.96
Bondurant	\$.606	\$56.17	Unincorporated Polk County	\$.487	\$45.13
Clive	\$.581	\$53.85	Urbandale	\$.635	\$58.86
Des Moines	\$.95 + \$2,737,096	\$88.05	West Des Moines	\$.919	\$85.18
Grimes	\$.574	\$53.16	Windsor Heights	\$.95 + \$12,334	\$88.05

Recommendation:

- Adopt the Proposed FY 2025 Budget as presented.

ACTION ITEM



7B: August Service Change

Action: Approve service changes to select fixed routes effective August 18, 2024

Staff Resource: *Tony Filippini, AICP, Planning & Development Manager*

Background:

- Each August, DART implements a service change to add service to support the Des Moines Public Schools academic year and make any necessary route and/or schedule changes to improve service for customers.
- DART contracts with the Des Moines Public Schools to supplement the district-operated yellow buses to transport students to and from school. To do this, DART runs additional trippers to add capacity on routes which students are assigned to take to their respective school.
- DART Planning staff have been engaged with the DMPS District Office to plan the 2024-2025 school year services.

Proposed Changes:

1. Supplemental Services for Des Moines Public Schools 2024-2025 Academic Year

- DART supplements current routes with additional trips to provide junior high and high school students transportation to Des Moines Public Schools. These trippers run on school days only.
- DMPS have changed the bell times for elementary and high schools for the coming school year. This change will impact DART trips to high schools by shifting the start and end of the school day 10-minutes earlier. School trippers will be adjusted to accommodate the new bell time. Some students are assigned trips on regular bus routes, which will also be adjusted to accommodate the new bell times. These changes will impact routes: 7, 8, 14, 15, 16, 92 and 98.
- In anticipation of the new school year, staff reviews the operation of routes in the previous school year and proposes adjustments to rebalance routes in effort to avoid over-crowding.
- The level of service provided to Des Moines Public School students will be similar to what was provided in the 2023-2024 school year. Final details will be provided when the contract pricing is brought to the Commission for approval.

ACTION ITEM

7B: August Service Change



2. Minor changes to Express Route trip times

- Express Routes have carried fewer passengers than prior to the 2020 COVID Pandemic due to changes in where people work and the greater flexibility in office hours.
- Prior to reimagining suburban services, an effort will be made to modify existing services to be more attractive to commuters in response to the current trends in ridership.
- Select trips will be moved to better align during busier periods, generally earlier in the afternoon. Changes will be made in a cost-neutral manner and will not change the daily number of trips provided on each route.

Title VI:

- As required by Federal regulations and consistent with DART's adopted Title VI Program, staff determined the proposed changes does not meet the threshold of a "major service change".

Impacts:

- Paratransit: Paratransit service areas and span will not be impacted by changes proposed in the June service package.
- Property Tax Formula: The proposed changes do not change any tier service levels for any community.

Recommendation:

- Approve service changes to select fixed routes effective August 18, 2024.

ACTION ITEM



7C: DART On Demand River Bend

Action: Approve service changes to DART On Demand River Bend

Staff Resource: *Luis Montoya, Chief Operating and Planning Officer*

Background:

- The Principal Foundation invited DART to apply for a grant in May 2022 after the Foundation expressed interest in evaluating ways to improve transportation access for lowans struggling to achieve financial stability. A new DART On Demand zone, focused in neighborhoods in the 50314 zip code, was proposed to provide new transportation opportunities in an area with identified mobility needs.
- Gaps in transportation can create significant barriers for individuals to access health care, services and maintain steady employment. The Community Foundation and United Way of Central Iowa partnered on a Transportation Gaps Analysis in 2019-2020 to understand transportation barriers for single moms, the physically or mentally disabled, refugees/new lowans, seniors, the A.L.I.C.E. population, young people and returning citizens. Among 1,308 survey respondents, only 4% indicated transportation is not a problem for them. Almost half (47%) indicated transportation is a big problem or a very big problem. The neighborhoods in the 50314 zip code on the Near Northside of Des Moines have been identified as the geographic area within the DART service area with the largest A.L.I.C.E. population.
- The pilot has been funded through a partnership with The Principal Financial Group Foundation, Mid-Iowa Health Foundation, Community Foundation of Greater Des Moines and the Iowa Department of Transportation.
- The On-Demand service launched June 12, 2023, primarily available in the neighborhoods of River Bend, Oakridge, King Irving, Mondamin Presidential; and Chautauqua Park. The service operates Monday through Friday from 8:00 am to 5:00 pm.
- After 1 year of operating, approximately 150 trips were provided through April 2024. Staff recommend ending the grant-funded pilot program and apply the lessons learned to future DART On Demand zones.
- An evaluation will be conducted to better understand why more people did not utilize the service.

Recommendation:

- Approve service changes to discontinue DART On Demand River Bend at the end of FY 2024 Fiscal Year, with final day of service on Friday, June 28, 2024.

ACTION ITEM



7D: DART On Demand Jordan Creek

Action: Approve service changes DART On Demand Jordan Creek

Staff Resource: *Luis Montoya, Chief Operating and Planning Officer*

Background:

- In March of 2022, the DART Commission approved the Transit Optimization Study as a framework for scaling DART services to the appropriate level to match user demand with available resources.
- To test various models of On Demand, a first-mile/last-mile zone was designed for the community of West Des Moines to extend DART services into the developing Grand Avenue corridor using a cost-neutral approach.
- The On-Demand service launched June 12, 2023. The service operates Monday through Friday from 7:30 am to 4:00 pm.
- After 1-year of operating, approximately 8 trips were provided through April 2024. In response to the low ridership, an alternative service has been considered to match resources with demand.

Jordan Creek On Call:

- The transition from On Demand to On Call will save operating resources when not in use but will require customers to book 1-day in advance. The Via app will no longer be used for the Jordan Creek zone, customers will need to make reservations by calling DART Customer Service.
- The On Call zone will be available Monday – Friday from 7:00 am to 6:00 pm.
- The zone will be slightly larger to include the new Des Moines University West Des Moines Campus

Recommendation:

- Discontinue DART On Demand Jordan Creek at the end of the Fiscal Year 2024, with final day of service on Friday, June 28, 2024, and launch Jordan Creek On Call on July 1, 2024 to operate Monday – Friday from 7:00 am to 6:00 pm.

ACTION ITEM



7E: DART On Demand Fare Increase

Action: Approve a fare increase for DART On Demand service

Staff Resource: *Luis Montoya, Chief Operating and Planning Officer*

Background:

- The first DART On Demand deployment in Ankeny was identified as a pilot project in the Transit Optimization Study as a way to increase mobility and local access and began operations in November 2021.
- The DART On Demand pilot launched with a \$1 promotional fare to help garner interest in the new service and incentivize new ridership.
- In August 2022, the DART Commission approved a fare structure for DART on Demand that mirrored the fixed route fare structure, which has a one-way base fare of \$1.75. The objectives were identified as:
 - To create incentives for ridership which maximizes efficiency and value by keeping the vehicles busy.
 - To account for potential scenarios where we replace a fixed route with DART On Demand and we don't wish to disenfranchise existing riders of the route to be discontinued.
 - To ensure that our fare policies are easy to understand and that methods of fare payment are seamless. For example, so that the same fare media can be used to transfer between DART On Demand and local fixed routes.
- Since that time, DART has monitored ridership and service reliability and found that more vehicles had to be added to the service to keep it reliable for customers. DART On Demand in Ankeny has grown from 1 vehicle initially to 3 vehicles during the peak demand.
- It is not viable for DART to continue to add vehicles to the service, so a fare increase is recommended to slow the growth in demand and reflect the premium nature of the service.
- The recommendation is to make the DART On Demand fare consistent with the On Call fare structure as follows:

ACTION ITEM

7E: DART On Demand Fare Increase

New Proposed DART On Demand Fares	
Adult	\$3.50
Half-Fare*	\$0.75
Children 6-10	\$0.75
Children under 5 (must be accompanied by an adult)	Free
Full-Fare Token	2 Tokens (10/\$17.50)
Half-Fare* Token	1 Token (10/\$7.50)
Weekly Pass + Upgrade (Pass + \$1.75)	\$16.00 + \$1.75/ride
Monthly Pass + Upgrade (Pass + \$1.75)	\$48 + \$1.75/ride
Half-Fare* Monthly	\$24.00
Monthly Express Plus (Pass + \$1.75)	\$58.00 + \$1.75

Public Input:

- DART staff conducted public outreach to share information about the proposed fare increase and allow customers an opportunity to provide feedback.
- A public meeting was held in Ankeny on May 28th, an electronic and paper survey was conducted, and information was shared electronically and on-board DART buses.
- Customer feedback was mixed, with many customers saying that the fare increase would negatively impact them. People noted that \$7 for round trip transportation will affect their access to medical care, education, work, and shopping needs. Several riders requested that the hours or service area in Ankeny be expanded if DART increases the cost.
- 44% of survey respondents reported that as a result of the fare increase, they would probably or definitely ride DART On Demand as much as they do today. Roughly 56% of survey respondents said they would ride DART On Demand less or not at all as a result of the fare increase.
- DART staff anticipated some of these concerns, which is why the Half-Fare for seniors, people with disabilities, students and low-income residents is recommended to stay at \$0.75. Staff will work on ensuring that customers who qualify for half-fare understand how to sign-up and that barriers to applying and using the half-fare discount are low.

Recommendation:

Approve an increase to the DART On Demand fare, as described above, effective in the new fiscal year.

DISCUSSION ITEM



8A:	O&M Facility Project Update
------------	--

Staff Resource: Luis Montoya, Chief Operating and Planning Officer

- DART staff will provide an update on the design, construction and funding of the new Operations and Maintenance facility.

DISCUSSION ITEM



8B:	DART Procurement Policy Changes
------------	--

Staff Resource: Mike Gulick, Procurement Manager

- A presentation regarding DART's Procurement Policy changes will be provided at the meeting.

Procurement Policy Update

4/8/2024

Rationale and Approach

The Procurement Department reviewed and updated the existing Public Procurement Policy and Procedures Manual, with the goal of ensuring that it aligns with regulatory requirements and provides DART with a reliable, user-friendly guide for all procurement activities performed in the organization. DART's lawyers have evaluated and approved the updated policy.

Normally when making routine policy updates, a redline copy would be provided to reviewers. However, the existing manual was overhauled and the version provided for review is entirely new content. Therefore, instead of providing a redline version, we've summarized key changes below.

Note: The Procurement Department is currently helping to draft a Signature Policy for DART, which the Procurement Policy will eventually reference. Which department/office will "own" the signature policy is to be determined.

Key Changes

- **Removed non-policy content:** The existing manual included both procurement *policy* and procurement *procedures*. This resulted in confusion between what was policy (which must be approved by commission and rarely changes) and what was procedure (which doesn't require approval and changes often). As a result of removing procedure content, the updated manual is considerably shorter. What's the difference between a policy and a procedure?
 - Policy: A high-level statement of DART's intentions, values, and overall approach to a particular area or issue. It provides a framework for decision-making.
 - Procedure: A detailed set of instructions that outlines how a task should be carried out. They're practical guides for employees to follow when implementing DART's policies.
- **Renamed document:** Because the updated manual contains only procurement policies, not procurement procedures, it was renamed to "DART Procurement Policy".
- **Removed language regarding state procurement regulations:** Because, according to DART's legal counsel, DART is a discrete "governmental entity" and is not an instrument of the state executive branch, DART is not bound to Iowa Code Chapter 8A procurement regulations. Therefore, language referring to such regulations was removed.
- **Removed Procurement Card content:** The PCard policy and procedures were removed because they are owned by the Accounting department. This content will live elsewhere.
- **Reorganized and streamlined content:** The existing manual had a complex structure and contained duplicative content. By reorganizing and streamlining it, it's now easier to navigate and was further shortened.
- **Adopted federal procurement guidelines:** The updated policy adopts federal guidelines for both procurements that use federal funds, as well as those that don't (although it waives federal provision and certification requirements for non-federally funded procurements).

Annual Reviews

The Procurement Department will review and update the policy annually and seek Commission approval of updates as needed. This will ensure that the policy remains current and effective in supporting DART's procurement initiatives.

Contents

Purpose and Scope	2
Applicability and Governance	2
Who May Procure for DART?	3
General Procurement Standards.....	3
Standards of Conduct.....	3
Sources	4
Geographic Preferences	4
Competition	4
Economic Purchasing and Price Principles	5
Price Reasonableness and Analysis	5
DART’s Third-Party Contract Provisions.....	6
Federal Third-Party Contract Provisions and Certifications	6
Specifications	7
Selection Procedures	7
Records / Documentation	8
Contract Period / Term	8
Resolution of Third-Party Contracting Issues	9
Contract Options.....	9
Contract Modifications	9
Procurement Thresholds	10
Micro-Purchases	10
Small Purchases.....	10
Large Purchases	11
Procurement Methods.....	12
Competitive Quotes	12
Competitive Sealed Bidding	12
Competitive Proposals	13
Specialty Procurements.....	13
Prohibited and Restricted Procurement Methods	17
Procurement Quick Reference	18

Purpose and Scope

- This document contains procurement policies, not procurement procedures.
- This policy:
 - Is a high-level statement that communicates DART's intentions, values, and overall approach to particular areas and issues.
 - Provides a framework for decision-making and actions at DART.
 - Is intended to set the direction, expectations, and principles that guide DART's employees', officers', agents', and Commission members' behavior and decision-making.
- This policy applies to all contractual actions by DART, with the following exceptions:
 - Transactions involving real estate
 - Joint development projects (in which DART forms a partnership with a private sector entity)
 - Purchases from government-regulated entities such as public utilities which are granted market exclusivity by the regulating agency
 - Purchases of professional subscriptions, memberships, seminars, and expenses in connection with industry meetings and conferences
 - Purchases for travel and living expenses on DART business and other similar expenditures incidental to the routine conduct of DART's business
 - Revenue contracts (contracts whose principal purpose is to generate revenue for DART) of the "open contract opportunities" sort (i.e., when a party seeks to contract with DART on an opportunity that is similarly open to any similar parties). At DART, these include Unlimited Access contracts, Caravan (vanpooling) contracts, and special event contracts.
 - Employment contracts

Applicability and Governance

- DART's procurement actions are governed by:
 - Federal regulations regarding procurements that use federal funds, including 49 U.S.C. (known as the Common Grant Rule)
 - FTA Master Agreement (FTA MA(31))
 - This procurement policy
- Guidelines for following federal regulations are provided in the following resources:
 - 2 CFR 200 (issued by the Office of Management and Budget (OMB) and commonly known as the "Uniform Guidance")
 - FTA C4220.1F (Third-Party Contracting Requirements); Note that this "applies to... regional public transportation authorities that are not a State" and allows for such an authority to "use its own procurement procedures, if those procedures conform to applicable Federal law and regulations, including the applicable Common Grant Rule."
 - Federal Acquisition Regulations (FAR)

- It's DART's policy to follow federal regulations for all procurements, even those that don't use federal funds. If no federal funds are used, federal provisions and certifications aren't required.

Who May Procure for DART?

Only DART employees who have received the appropriate level of training may procure goods and services for DART. All procurements over \$50,000 must be conducted by DART's Procurement Department.

Procurement Authority Levels *		
Contract Threshold**	Who May Conduct the Procurement?	Notes
Micro-Purchases (up to \$10,000)	Employees who have completed Micro Purchase training	The Procurement Department provides Micro-Purchase training
Small Purchases between \$10,001 and \$50,000	Employees who have completed Small Purchase training	The Procurement Department provides Small Purchase training
>\$50,000	Procurement Department must conduct all procurements over \$50,000	

* Procurement Authority is not the same as Signature Authority. For information about Signature Authority (i.e., who may approve/sign invoices, purchase orders, and other contracts), refer to DART's Signature Policy.

** Includes the entire life of contract, including the aggregate sum of all amendments, change orders, task orders, and renewals, of the contract

General Procurement Standards

Standards of Conduct

- The conduct of DART employees, officers, agents, and Commission members involved in procurement or contracting activities are governed by:
 - Chapter 68B of the Code of Iowa (Government Ethics and Lobbying)
 - 2 CFR 200 (issued by the Office of Management and Budget (OMB) and commonly known as the "Uniform Guidance")
 - This procurement policy
 - The Employee Code of Conduct & Ethics policy and the Conflict of Interest policy, located in the DART Handbook.

- Any person who knowingly and intentionally violates these standards is subject to disciplinary action, up to termination of employment.

Sources

To acquire property or services, DART can:

1. Use its own labor force and equipment
2. Enter into an agreement for shared use of property and services
3. Partner with another purchaser to complete a joint procurement
4. Use a State or local government purchasing schedule or purchasing contract
5. Use Federal excess and surplus property
6. Use a General Services Administration (GSA 70) federal supply schedule.
7. Use an existing contract that's held by another recipient (called "piggybacking")
8. Shop the open market (i.e., compare prices of vendors, solicit quotes, bids, and proposals, etc. to allow potential contractors to compete with one another)

Geographic Preferences

- With some exceptions, DART's competitive procurement decisions may not take into consideration any state or local geographic preferences, even if those preferences are imposed by state or local laws or regulations.
- Geographic location may be a selection criterion only in procurements for:
 - Architectural and engineering (A&E) services
 - State licensing requirements
 - Major disaster or emergency relief

Competition

- DART's competitive procurement transactions must be conducted in a manner that:
 - Maximizes full and open competition
 - Doesn't provide an unfair competitive advantage to any potential vendor
- Some situations considered restrictive of competition include:
 - Unreasonable business requirements for bidders or offerors
 - Unnecessary or excessive experience requirements, excessive bonding requirements, insurance, warranty, or similar requirements that affect an otherwise qualified firm's ability to compete
 - Noncompetitive pricing practices between firms or between affiliated companies.
 - Using prequalification procedures that conflict with FTA Circular 4220.1F, Chapter VI(1)(c)
 - Noncompetitive awards to any person or firm on retainer contract if that award is not for the property or services specified for delivery under the retainer contract
 - Specifying only a "brand name" product, without specifying that equivalent products will be accepted and without providing a description of equivalent products.
 - Any arbitrary action in the procurement process

- Competitive procurement standards may be waived:
 - When purchasing fleet replacement parts and related inventory, when doing so is necessary to:
 - Ensure the timeliness of the receipt
 - Maintain compatibility and warranty
 - Control shipping costs
 - When DART accepts from a private entity a grant that has specific requirements or stipulations
- It is the policy of DART that Disadvantaged Business Enterprises (DBEs), as defined in 49 C.F.R. Part 26, shall have an opportunity to participate in awards of DART's contracts and subcontracts. DART must make good-faith efforts to ensure utilization of DBEs. Refer to [DART's DBE Policy](#) for information regarding how Procurement is involved in DART's DBE program.

Economic Purchasing and Price Principles

- Duplicative and unnecessary purchases must be avoided. DART purchases only what it needs at the time of the acquisition.
- Duplicative procurement standards may be waived for fleet maintenance purposes, when it's necessary for DART to purchase backup/duplicative supplies of fleet replacement parts and related inventory.
- Consideration should be given to consolidating or breaking out procurements to obtain more economic pricing (or to provide opportunities for disadvantaged businesses, women-owned business, minority-owned businesses, or small businesses). However, it's prohibited to consolidate or break out procurements for the purpose of circumventing competitive procurement requirements.
- Where appropriate, analysis will be made of lease versus purchase alternatives or any other appropriate methodology to determine the most economical approach.

Price Reasonableness and Analysis

- Price reasonableness should be considered for every procurement.
- (FTA Best Practices Manual 4.6) For procurement actions (including modifications) above the Simplified Acquisition Threshold (SAT) and for public improvements (construction/building work), the following are required:
 - Independent Cost Estimate (ICE), and
 - Price Analysis or Cost Analysis

Independent Cost Estimate (ICE)

- The ICE is an estimate of what the product or service "should" cost.
- The ICE must be prepared without knowledge of the contractor's proposed pricing (i.e., the ICE must be performed before receiving bids or proposals).
- ICE sources/resources include:
 - Past purchases

- Published price lists
 - Historical pricing information
 - Comparable purchases by other agencies
 - Engineering estimates
 - Independent third-party estimates
- The source and date of an ICE must be documented

Price Analysis

- A Price Analysis is simply a comparative process involving total price.
- The accepted forms of price analysis techniques include:
 - Adequate price competition (at least two bidder responses)
 - Prices set by law or regulation
 - Established catalog prices and market prices
 - Comparison to previous purchases

Cost Analysis

- A Cost Analysis is an element-by-element analysis of the costs that make up the total price.
- If a reasonably sound Price Analysis cannot be determined, a Cost Analysis is required.

DART's Third-Party Contract Provisions

- **General Provisions:** DART's Procurement Department maintains a library of boilerplate contract provisions, which should be used as a starting point for its third-party contracts. These provisions include, for example, language regarding contract term, contract price, contractor obligations, scope of work, project schedule, contract modifications, delays, payment, dispute resolution, and more.
- **Special Provisions:** Certain types of contracts require DART's Data Privacy and Security Standards Provisions and/or SaaS Terms and Conditions.

Federal Third-Party Contract Provisions and Certifications

- Applicable federal provisions (which flow down to subcontractors) must be included in contracts that use federal funds.
- Which provisions are required depends on what the contract is for, what the price is, and more. For example, all contracts that use federal funds require an equal employment opportunity provision, but only construction contracts over \$2,000 require an anti-kickback provision.
- Contractors must sign applicable federal certifications. Which certifications are required depends on what the contract is for, what the price is, and more. For example, contracts for transit (people-moving) services require an Alcohol and Controlled Substances Testing certification.

Specifications

- Contract specifications describe in detail the requirements surrounding the product or service DART intends to procure.
- DART solicitations must include a clear, accurate description of the technical requirements for the material, product, or service to be procured.
- Whenever practical, requirements will be described in terms of functions to be performed or level of performance required, including the range of acceptable characteristics or minimum acceptable standards.
- Specifications should be detailed enough to ensure that bidders can submit pricing on a comparable basis. However, specifications or scopes of services for negotiated procurements may be more general and accommodate the possibility of alternative solutions or products.
- Specifications shouldn't contain details that could restrict competition or be so detailed as to restrict competition.
- When it's impractical to describe all technical requirements clearly and accurately, a "brand name or equal" description may be used to define the performance. This description should set forth those salient physical, functional, or other characteristics of the referenced product that an equal product must have in order to meet the recipient's needs. However, this method may not be used to limit competition, but rather to describe the characteristics of the product needed. The specifications must include the relevant characteristics that the product must meet and state that vendors may offer "equal" products meeting those characteristics. (If only a "brand name" or make/model is specified, without the "or equal" provision, the procurement must be processed as a sole source and is subject to justification requirements).
- Whenever practicable and economically feasible, products and services dimensioned in the metric system of measurement are acceptable.
- Whenever practicable and economically feasible, preference will be given to products and services that conserve natural resources, protect the environment, and are energy efficient.

Selection Procedures

- DART's selection procedures ensure fair, unbiased evaluation of competing offers for all types of competitive procurement transactions.
- When a purchase from a vendor exceeds the micro-purchase threshold, the vendor must be determined to be responsive and responsible. Responsibility determination must include a search of the online System for Award Management (<https://sam.gov/>) to determine that the vendor has not been debarred or suspended from federal awards.
- If there is a technical evaluation (often required in RFPs), it must be overseen by the Procurement Department to ensure it's fair, thorough, and adequately documented. A determination shall be made by the Procurement and Contracts Manager that the apparently successful offeror:
 - Is responsive (i.e., complies with all material elements of the solicitation)

- Is responsible (i.e., possesses the technical and financial resources to successfully perform the contract, and has a satisfactory record of past performance, compliance with public policy, and integrity).
- Is submitting a fair and reasonable price

Records / Documentation

- DART must maintain records detailing the history of a procurement in a manner consistent with its size, complexity, and cost. At a minimum, these records include:
 - **Signed/executed copy of contract**, if one exists
 - **Procurement Method**: The rationale for the method of the procurement (e.g., competitive sealed bidding, competitive negotiation, sole source, etc.)
 - **Contract Type**: The rationale for the selection of the contract type (e.g., fixed price, cost reimbursement, etc.)
 - **Contractor Selection**: The rationale for contractor selection or rejection, as well as a written responsibility determination for the successful contractor, if applicable
 - **Cost or Price**: The basis for the contract price, which is typically determined using an independent cost estimate, a cost analysis, or a price analysis
- Additional records to maintain could include things like bond documentation and contractor correspondence.
- DART's:
 - Record retention policy is here: K:\Procurement\Procurement\Records Retention\Final\DART Records Management Policy - Final.
 - Procurement record retention rules are located on the specified tab in K:\Procurement\Procurement\Records Retention\Final\Exhibit A - DART Record Retention Schedule

Contract Period / Term

The appropriate contract period (term) depends on the contract type.

Contract Type	Contract Period Not to Exceed
Rolling Stock and replacement parts	5 years
Services	6 years (maximum 3-year initial term, with up to three individual 1-year renewals)
Information Technology (e.g., SaaS)	10 years (maximum 5-year initial term, with up to five individual 1-year renewals)

Base contract periods on sound business judgment, including considerations like:

- The nature of the item being purchased
- The need to give the contractor the opportunity to recapture start-up costs
- The need to give competing vendors the opportunity to do business with DART

- The relative benefit to DART of a longer or shorter contract term

Resolution of Third-Party Contracting Issues

DART is responsible for resolving all contractual and administrative issues arising out of its third-party procurements, including source evaluation and selection, protests of awards, disputes, and claims using good administrative practices and sound business judgment. All DART contracts include terms for protests, disputes, and claims/litigation.

Contract Options

- A contract option is a unilateral right in a contract by which, for a specified time, DART may elect to purchase additional equipment, supplies, or services called for by the contract, or may elect to renew a contract.
- A contract renewal is a common type of contract option. (Note that a contract renewal is different from a contract extension, which is a type of contract modification).
- Official change orders (aka amendments) must be completed when a contract option is exercised.
- There are limitations to when and how contract options can be exercised. For example, if a contract's options were not evaluated as part of the original contract award, exercising those options after contract award will result in a sole source award requiring justification.
- Exercising an option after DART has negotiated a lower or higher price will also result in a sole source award unless that price can be reasonably determined from the terms of the original contract, or that price results from Federal actions that can be reliably measured, such as changes in federal prevailing labor rates.
- DART may not exercise an option unless it has determined that the option price is better than prices available in the market, or that when it intends to exercise the option, the option is more advantageous.

Contract Modifications

- Modifications to an active contract are often desired or required. A contract modification might, for example, alter a project timeline, modify tasks that were in the original scope of work, or extend a contract.
- Each contract modification must stand on its own merit, just like an original contract. Therefore, you must have:
 - A justification / reason (requirement) for the change
 - Funds to support the change
 - Evidence that prices are fair and reasonable
 - Documentation that tells the story of the purchase
- When modifying a contract, an official change order (aka amendment) must be completed, according to the terms outlined in the original contract. If a change order adds work, the work must be within the original scope of the contract.

Procurement Thresholds

The method of procurement/degree of competition required depends in part on the dollar value and the type of contract. Purchases may not be divided to be under a dollar threshold to avoid competition or procurement standards.

Price Threshold (for life of contract, including extensions)	Procurement Level	Method of Procurement / Minimum Degree of Competition
Up to Micro-Purchase Threshold (*\$10,000)	Micro-Purchase	No competitive quotes required.
Micro-Purchase Threshold up to Simplified Acquisition Threshold (SAT) (*\$250,000)	Small Purchase	At least two competitive quotes required (three or more are preferred)
Greater than Simplified Acquisition Threshold (SAT) (*\$250,000)	Large Purchase	Competitive sealed bidding or competitive proposals are required

* As of April 2024:

- The Micro-Purchase threshold is \$10,000 (as set by the FAR at 48 CFR part 2)
- The Simplified Acquisition Threshold is \$250,000 (as set by the FAR at 48 CFR part 2)

Micro-Purchases

Micro-purchases are typically made for items sold “off-the-shelf” to the general public (e.g., pencils, hand sanitizer). They are single, discrete purchases, or “one-off” purchases, to which contract periods/length of contract considerations don’t apply.

Competition: No competition is required, but it’s encouraged when practicable.

Contract Required: No contract or Purchase Order (PO) is required for micro-purchases.

Documentation:

- Most micro-purchases don’t require documentation (with some exceptions, such as construction projects over \$2,000 that use federal funds)
- It’s recommended that you retain the following records.
 - DART’s Written Record of Procurement Micro-Purchases form
 - Quote, order form, receipt, or invoice
 - If vendor requires it, the Purchase Order (PO)

Additional Information:

- Purchases may not be split into micro-purchases to avoid a competitive solicitation process.

Small Purchases

- Small purchases are relatively simple and informal solicitations for services, supplies, or other property.

- Small purchases could involve multi-year contracts, as long as contract aggregate expenditure doesn't exceed the SAT.
- Procurements over \$50,000 must be handled by DART's Procurement Department.

Competition Required: Competition is required. At least two (but ideally three) quotes or proposals from qualified sources must be sought out and documented.

Contract Required: A contract or PO is required, with applicable federal clauses and certifications included if using federal funds.

Documentation Required:

- DART's Written Record of Procurement – Small Purchases form
- Invoices
- Purchase Order, if above \$10,000
- Copy of solicitation correspondence (i.e., the letter or email that was sent to vendors)
- Responses received from bidders (in email or written form), and any other bidder correspondence
- DART's Bid Quotation Form, which includes reason for award determination and details such as buyer name, date, department, funding source, budgetary estimate, vendor information, item description, unit and total costs, and comments.
- DART Commission approval for procurement, if \$100,000 or greater
- See [Records / Documentation](#)

Large Purchases

Competition Required: Competitive sealed bidding through DART's eProcurement system is required.

Contract Required: Yes, with applicable federal clauses and contractor certifications included if using federal funds.

Documentation Required:

- DART's Record of Procurement – Large Purchases form
- Determination of responsiveness and responsibility
- Solicitation, including specifications, and amendments
- Advertisement of solicitation
- Notified vendors/bid list
- ICE Summary
- Price Analysis and (if needed) Cost Analysis
- Documentation concerning rebid or proposal conferences and/or any solicitation Q&As
- Notice of Intent to Award Contract
- Notice to Proceed
- Rejection letters
- Public Bid opening documentation
- Best and Final Offers (BAFOs)
- Protest letters, decisions, and related documents

- Signed federal clauses and certifications
- DART Commission approval for procurement
- Contractor-submitted data and reports
- Correspondence and documentation related to complaints or contractor performance
- Documentation regarding pre-award or post-award Mistakes in Bid
- Invoices / Purchase Orders
- Additional documentation is required for some contract (e.g., construction contracts)
- See [Records / Documentation](#)

Procurement Methods

Competitive Quotes

Definition:

- A method of procurement that involves soliciting quotes (via a Request for Quote, or an RFQ, usually via emails or letters) for specified goods or services from at least two (preferably three or more) vendors
- DART determines from which vendors to solicit the quote.
- A reasonable effort should be taken to solicit quotes from a range of vendors.
- The fixed-price award goes to the lowest quote. This method doesn't permit negotiations or consideration of qualitative factors, with some exceptions listed below.
- Results in a Firm Fixed Price Contract

When it's used/additional information:

- Competitive quotes are used to find vendors for micro-purchases and small purchases (although they're not required for micro-purchases).
- Occasionally negotiations are allowed during this type of procurement. For example:
 - Only a single quote was received, so DART negotiates with the vendor to ensure a fair price.
 - The lowest quote was too expensive, so DART negotiates with that vendor to obtain a price within available funds.

Competitive Sealed Bidding

Definition:

- A method of procurement that includes public notice of an Invitation for Bid (IFB) and evaluation of bids based on criteria established in the IFB.
- The fixed-price award goes to the lowest responsive and responsible bidder. This method doesn't permit bidder negotiations or consideration of qualitative factors, with some exceptions listed below.
- Results in a Firm Fixed Price Contract

When it's used/additional information:

- This is the preferred method for acquiring property, construction, and other well-defined services or goods. If a different method is used for these purposes, there must be a well-documented justification and it must be approved in advance by the Procurement Department.
- Occasionally negotiations are allowed during this type of procurement.
 - Examples:
 - Only a single responsive bid was received from a responsible bidder, so DART negotiates with the bidder to ensure a fair price.
 - The responsive bid from the lowest responsible bidder was too expensive, so DART negotiates with that bidder to obtain a contract price within available funds.
 - However, DART may not, as part of a negotiation process, alter the scope and specifications defined in the IFB in a manner that might have attracted additional bidders if it had been incorporated in the solicitation. The IFB must be canceled and started over.

Competitive Proposals

Definition:

- A method of procurement that includes the issuance of a written Request for Proposal (RFP), public notice of the RFP (if over SAT threshold), evaluation based on criteria established in the RFP, and negotiation with the top ranked Offeror.
- The negotiated award (of either a fixed price contract or a cost-reimbursement type contract) goes to the Offeror offering the best value to DART.

When it's used: Competitive Negotiation is required when the Procurement and Contracts Manager has determined that all of the following conditions exist:

- A complete, adequate, and realistic specification or purchase description isn't available.
- Two or more responsible offerors are willing and able to compete effectively for the award.
- The selection of the successful offeror requires consideration of factors other than price.
- Discussions with offerors are anticipated.

Specialty Procurements

Construction

Definition:

- Construction contracts are contracts for building, altering, repairing, improving, or demolishing any structure, building, or highway, and any draining, dredging, excavation, grading, or similar work upon real property.
- Requires competitive sealed bidding, except under very limited instances and with a written determination made in advance by DART's Procurement and Contracts Manager.

Special considerations:

- Davis-Bacon prevailing wage requirements apply to construction contracts exceeding \$2,000.
- DART will use value engineering for all construction projects over \$10 million.

Architectural and Engineering (A&E) Services

- FTA requires the use of the qualifications-based procurement procedures contained in the Brooks Act to acquire A&E services, and also for program management, construction management, feasibility studies, preliminary engineering, design, architectural, engineering, surveying, mapping, and related services. (49 U.S.C. Section 5325(b)(1))
- Geographic location may be a selection criterion if an appropriate number of qualified firms are eligible to compete for the contract.

Rolling Stock

The term “rolling stock” applies to vehicles used to transport passengers and includes buses and vans. Light duty vehicles used to transport passengers are considered rolling stock. Light duty vehicles such as vans, sedans, and pick-up trucks used for administrative and maintenance purposes are considered equipment.

DART will comply with the requirements of FTA C 4220.1F, Chapter 4, Section 2.e., Rolling Stock – Special Requirements when procuring rolling stock. These requirements include accessibility, special DBE requirements, minimum service life, spare ratios, air pollution and fuel economy, pre-award and post-delivery review, bus testing, and time limits on options.

Revenue

- A revenue contract is one in which DART provides access to public transportation assets to generate revenue or create business opportunities.
- There are two types of revenue contracts:
 - Limited Contract Opportunities: A contract opportunity that is not open to all similar parties due to its limited nature (e.g., there is limited space on the side of a bus for advertising). DART uses a competitive process for these to allow interested parties an equal chance to obtain that limited opportunity.
 - Open Contract Opportunities: A contract opportunity that is open to any interested party, so no competitive process is necessary. DART's open contract opportunities include Unlimited Access contracts, Caravan (vanpooling) contracts, and special events contracts.

Sole Source

Definition: A Sole Source procurement is one that has been accomplished through the solicitation and acceptance of a proposal from only one source, when normally competition would be required.

When It's Used:

- Sole Source procurements can be used only if only one source is practically available.
- Circumstances that may lead to and justify a sole source action are:
 - **Unique Capability or Availability.**

- Unique or Innovative Concept. The offeror demonstrates a unique or innovative concept or capability not available from another source. Unique or innovative concept means a new, novel, or changed concept, approach, or method that is the product of original thinking, the details of which are kept confidential or are patented or copyrighted, and is available to DART from only one source and has not in the past been available to DART from another source.
- Patent or Restricted Data Rights. Patent or data rights restrictions preclude competition.
- Substantial Duplication Costs. In the case of a follow-on contract for the continued development or production of highly specialized equipment or services and major components thereof, when it is likely that award to another contractor would result in substantial duplication of costs that are not expected to be recovered through competition.
- **Single Bid or Proposal.** Upon receiving a single bid or proposal in response to a solicitation, the Procurement and Contracts Manager will determine if competition was adequate. This should include a review of the specifications for undue restrictiveness and might include a survey of potential sources that chose not to submit a bid or proposal.
 - Adequate Competition: Procurement and Contracts Manager acknowledges competition to be adequate when the reasons for few responses were caused by conditions beyond DART's control. Many unrelated factors beyond DART's control might cause potential sources not to submit a bid or proposal. If the competition can be determined adequate, DART's competition requirements will be fulfilled, and the procurement will qualify as a valid sole source.
 - Inadequate Competition: Procurement and Contracts Manager acknowledges competition to be inadequate when caused by conditions within DART's control. For example, if the specifications used were within DART's control and those specifications were unduly restrictive, competition will be inadequate.
- All change orders (amendments) outside the scope of the original contract are considered a sole source procurement.
- A written justification for the sole source procurement is required.

Emergency

Definition: An Emergency Procurement is one that has been made without following normal procedures and competition guidelines, due to an emergency.

When It's Used/Additional Information:

- Emergency procurements are allowed only when a delay could result in jeopardy to persons or property.
- The situation leading to the emergency should be one that could not normally be anticipated.

- In all cases of emergency purchases, solicitations should be requested from as many potential sources as is practicable under the circumstance.
- Justification for the emergency procurement and a statement of reasonableness of costs must be documented and submitted to the Procurement and Contracts Manager for approval. This documentation must be attached to the purchase order and placed in the procurement file.

Approval: Must be approved by the Procurement and Contracts Manager. If it's above Commission threshold, it must be approved by the DART Commission at the next feasible opportunity following the emergency procurement.

State or Local Government Purchasing Schedules or Purchasing Contracts

A state or local government purchasing schedule or purchasing contract means an arrangement that a State or local government has established with multiple vendors in which those vendors agree to provide essentially an option to the State or local government, and its subordinate government entities and others it might include in its programs, to acquire specific property or services in the future at established prices.

State or local government purchasing schedule or purchasing contracts are subject to federal requirements, including, but not limited to, full and open competition, no geographic preferences, Buy America, and bus testing, and must include all FTA required clauses and certifications with its purchase orders issued under the State contract.

GSA's Cooperative Purchasing Program

- Per FTA Circular 4220.1F, DART can use the GSA's Cooperative Purchasing Program to purchase:
 - Information technology (Section 211 of the E-Government Act of 2002, 40 U.S.C. Section 502(c)(1)) and
 - Products and services to facilitate recovery from a major disaster (Section 833 of the John Warner National Defense Authorization Act for Fiscal Year 2007, Public Law 109-364, amended 40 U.S.C. Section 502(d)).
- All federal requirements, required clauses, and certifications must be properly followed and included, whether in the master contract or DART's purchase documents.

Piggybacking

DART can use contract options held by another recipient (known as "piggybacking") (per FTA C 4220.1F). When DART obtains contractual rights through assignment, it may use these rights only after determining that:

- The original contract price remains fair and reasonable
- The original contract provisions comply with all applicable Federal requirements, including the presence of an "assignability" clause
- The assigning recipient originally procured quantities necessary for their needs (i.e., they did not procure unreasonably large quantities)

- The quantities the assigning recipient acquired, together with the quantities the acquiring recipient seeks, do not exceed the amounts available under the assigning recipient's contract
- The agency with the contract complied with all FTA requirements relating to competition and performance of a cost or price analysis
- The prices it will pay are fair and reasonable (using Price Analysis or Cost Analysis)

All appropriate documentation from the original awarding agency must be obtained and retained in the procurement file for that acquisition.

Prohibited and Restricted Procurement Methods

- (Prohibited) **Cost Plus a Percentage of Cost** and **Percentage of Construction Cost**: In these contracts, the contractor's fee automatically increases when its costs (time, materials) increase. In other words, the more the contractor spends, the higher the contractor's fee is. This incentivizes inefficiency.
- (Restricted) **Cost Plus Fixed-Fee**
 - Also known as on-call contracts, task order contracts, or Indefinite Delivery Indefinite Quantity (IDIQ) contracts.
 - These contracts don't specify a fixed quantity of services and may be used only for projects for which the requirements and costs cannot be accurately defined upfront.
 - The contractor is reimbursed for its actual costs ("Cost"), and its required fee/profit ("Fixed Fee") is set at the beginning of the contract. Fee/profit is fixed regardless of performance.
 - The initial award should include a commitment from the contractor on rates the contractor will use in pricing each individual task. These rates will be fixed for the life of the contract and applied to each task order, as applicable.
- (Restricted) **Time and Materials**
 - In these contracts, the more time it takes the contractor to complete the work, the more it earns. This generates an open-ended contract price and offers the contractor no incentive to control costs.
 - Permitted only if:
 - No other type of contract is suitable, and
 - The contract specifies a ceiling price that the contractor may not exceed except at its own risk
 - DART must oversee these contracts to ensure the contractor is effectively controlling costs.

Procurement Quick Reference

	State/Local Government Purchasing Schedules/ Purchasing Contracts	Micro-Purchases	Small Purchase RFQ	Small Purchase RFP	Large Purchase IFB	Large Purchase RFP	Sole Source	Emergency
Amount of Contract	Any	Up to \$10,000	\$10,001-250,000	\$10,001-250,000	More than \$250,000	More than \$250,000	Varies	Varies
Competition Requirement	Already complete (although must be verified)	At least one quote	At least two quotes	At least two proposals	At least two bids	At least two proposals	Waived	Waived
Method of Award	Already awarded	A fair and reasonable price	Lowest bid	Multiple factors in addition to price	Lowest bid	Multiple factors in addition to price	Direct negotiation	Direct negotiation
Advertising Requirement	N/A	None	None	None	Formal advertisement	Formal advertisement	None/Waived	None/Waived
Procurement Lead Time	1-2 days	1-2 days	2-3 weeks	2-3 weeks	12-18 weeks	9-12 weeks	Varies	ASAP

MONTHLY REPORT



8C: Performance Report – April 2024

Staff Resource: Nate Bleadorn, Business Intelligence Manager

Summary of April 2024 Monthly Performance:

- Total April Ridership was up 15.04% compared to the same month last year with YTD ridership 10.5% higher than FY23 YTD. Driving this growth is:
 - Fixed route ridership was up 15% compared to April 2023 and YTD ridership is up 11%.
 - Paratransit ridership was up 19.65% compared to April 2023 and YTD ridership is up 11%. Paratransit crossed 100,000 rides for the fiscal year during the month of April.
 - DART On Demand ridership was up 40% compared to April 2023 and YTD ridership is up 41%.
- Preventable accidents were .94 per 100,000 miles in April, and non-preventable were .94 per 100,000 miles. Through April, our preventable accidents YTD were .64 per 100,000 miles, which meets our goal of less than 1 preventable accident per 100,000 miles. Non-preventable accidents per 100,000 miles YTD is 1.39.
- On-Time Performance (OTP) was 80.48% in April. This is below our target of 85%.
- Road calls per 100,000 miles, which is when buses need service while in operation, were 10.67 for fixed route in April. YTD we are at 10.99 road calls per 100,000 miles for fixed route, which does not meet our goal of fewer than 7 road calls per 100,000 miles. The higher number of road calls reflects our aging fixed route fleet. Because we have not purchased new buses for two years, we have several buses we are maintaining in service beyond their normal useful life.
- Caravan ridership is down 15% YTD through April. Rides for April were up 6.8% from April of 2023.
- April was our best performance of the fiscal year thus far on Complaints per 100,000 passengers, finishing the month at 13.62. We are at 17.8 YTD, which is a 5% improvement on last year.



Performance Summary - April 2024

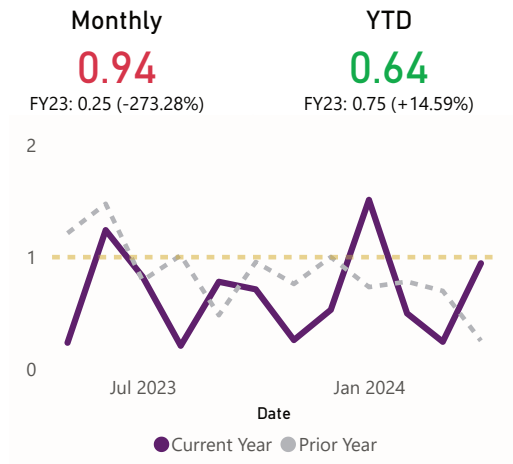
5/1/2023

4/30/2024

Ridership



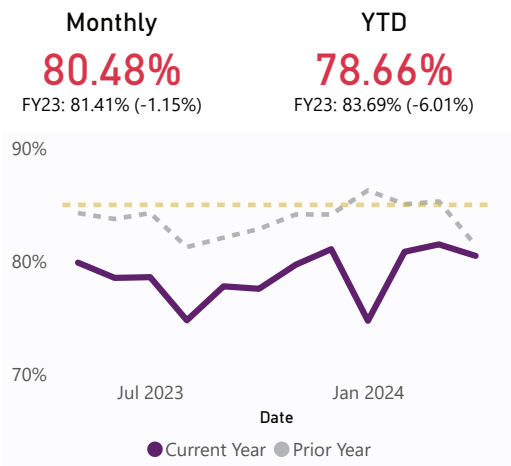
Preventable Accidents/100k Miles



Non-Preventable Accidents/100k



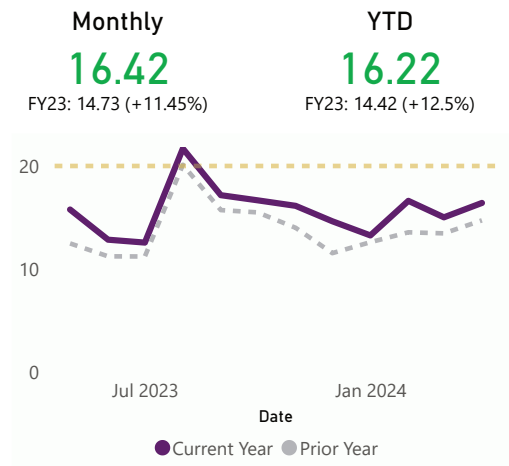
On-Time Performance



Farebox Recovery Ratio



FR Passengers / Revenue Hour





Fixed Route Performance

5/1/2023

4/30/2024

Ridership

Monthly

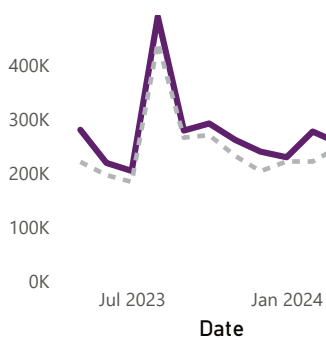
286,251

FY23: 248,886 (+15.01%)

YTD

2,821,883

FY23: 2,541,195
(+11.05%)



On-Time Performance

Monthly

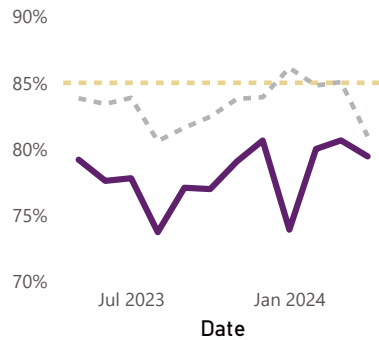
79.44%

FY23: 80.96% (-1.89%)

YTD

77.87%

FY23: 83.32% (-6.53%)



Operating Cost/Rev. Hour

Monthly

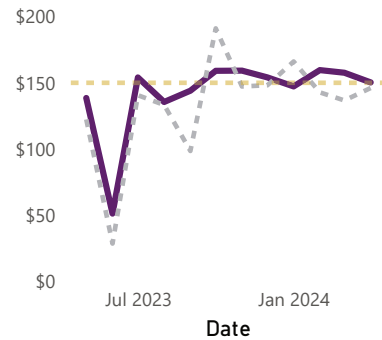
\$150.32

FY23: \$146.06 (-2.92%)

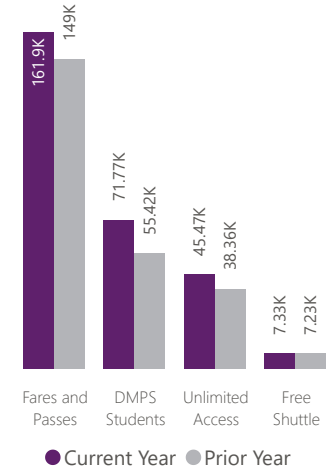
YTD

\$151.52

FY23: \$144.89 (-4.57%)



Monthly Ridership by Fare Group



Preventable Acc./100k

Monthly

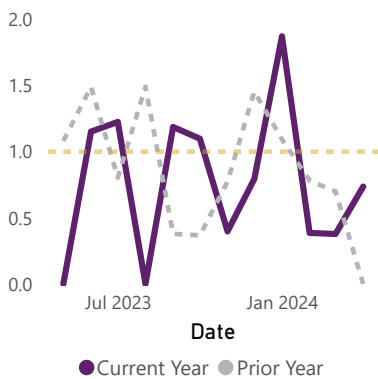
0.74

FY23: 0.00

YTD

0.78

FY23: 0.80 (+2.47%)



Non-Preventable Acc./100k

Monthly

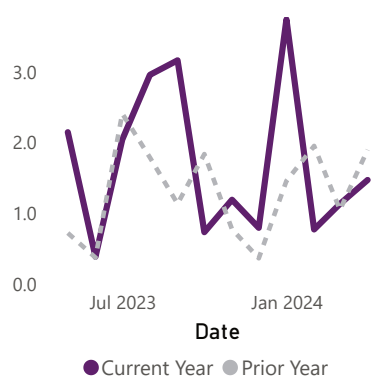
1.47

FY23: 1.90 (+22.51%)

YTD

1.83

FY23: 1.46 (-25.16%)



Road Calls/100k Miles

Monthly

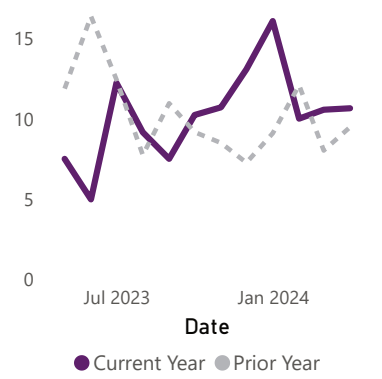
10.67

FY23: 9.49 (-12.36%)

YTD

10.99

FY23: 9.40 (-16.88%)



Complaints/100k Passengers

Monthly

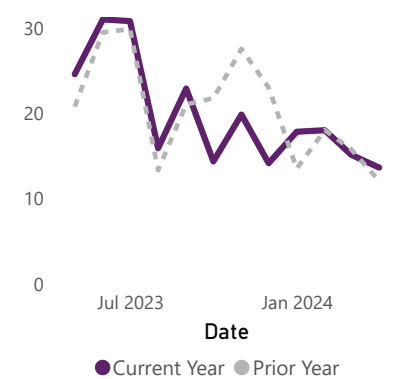
13.62

FY23: 12.05 (-13.03%)

YTD

17.79

FY23: 18.85 (+5.62%)





Paratransit Performance

5/1/2023

4/30/2024

Ridership

Monthly

11,338

FY23: 9,476 (+19.65%)

YTD

101,646

FY23: 91,172 (+11.49%)

On-Time Performance

Monthly

94.54%

FY23: 88.91% (+6.34%)

YTD

90.94%

FY23: 90.06% (+0.99%)

Operating Cost/Passenger

Monthly

\$48.16

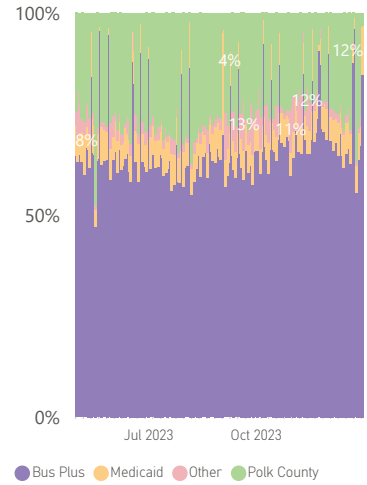
FY23: \$52.44 (+8.16%)

YTD

\$53.12

FY23: \$53.67 (+1.03%)

Paratransit Customer Type Breakdown



Preventable Acc./100k

Monthly

2.14

FY23: 1.25 (-71.27%)

YTD

0.59

FY23: 0.99 (+40.6%)

Non-Preventable Acc./100k

Monthly

0.00

FY23: 0.00

YTD

0.82

FY23: 0.99 (+16.84%)

RideShare - Ridership

Monthly

4,913

FY23: 4,600 (+6.8%)

YTD

50,161

FY23: 59,072 (-15.08%)

RideShare - Op. Cost/Passenger*

Monthly

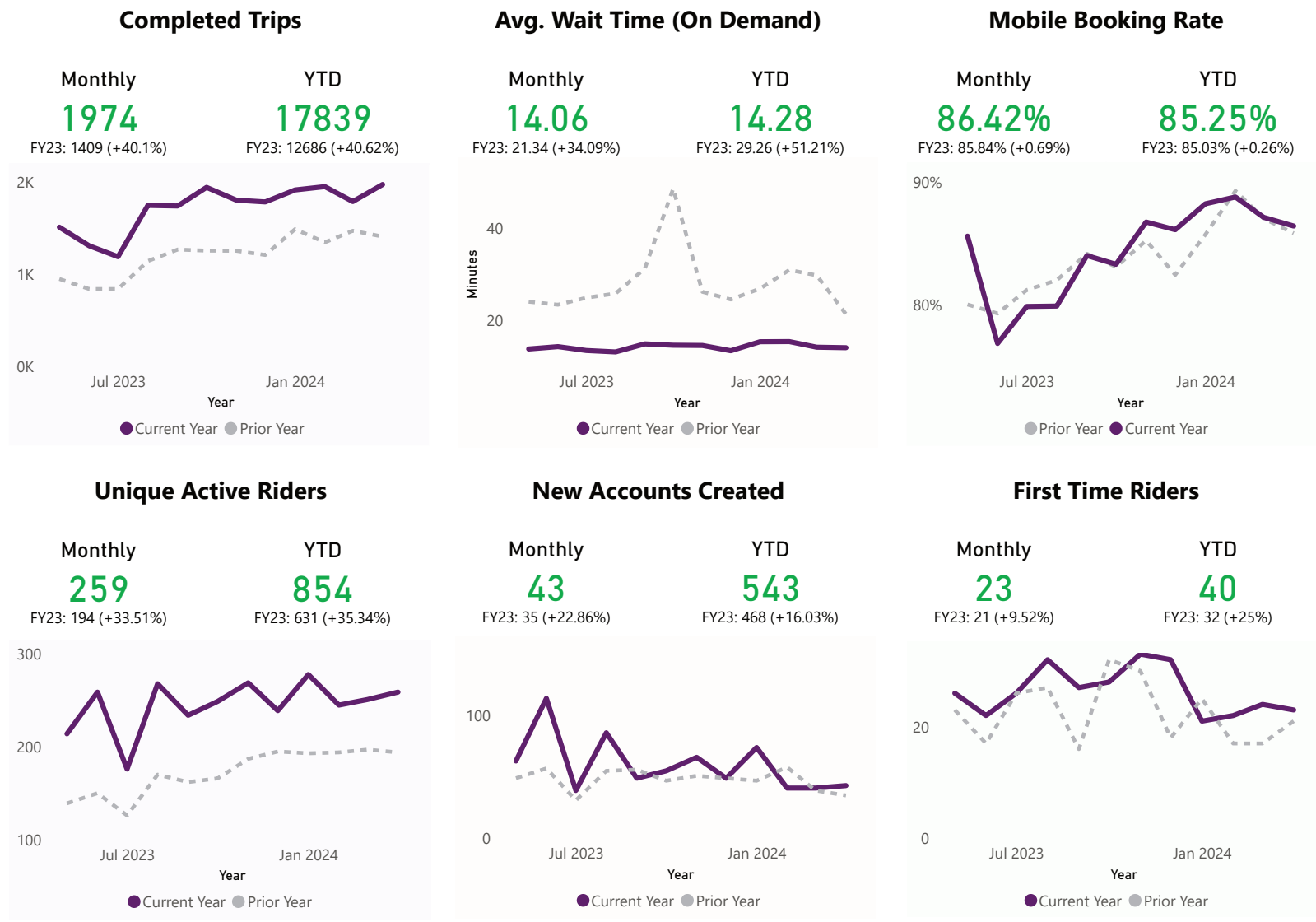
\$9.73

FY23: \$14.70 (+33.78%)

YTD

\$11.83

FY23: \$11.98 (+1.22%)





Route Details

Month

April 2024



Program	Route	Month Ridership	Month Last Year	YTD Ridership	Last Year YTD Ridership	YTD Change	YTD Change %	YTD Passengers/ Revenue Hour	YTD On-Time Performance
1. Local	#1 - Fairgrounds	12,133	10,728	346,344	325,875	20,469	6.3%	25.95	61.70%
	#2 - Maury St	104		219		219	Infinity	Infinity	
	#3 - University	28,101	24,559	254,626	233,395	21,231	9.1%	16.50	76.84%
	#4 - E. 14th	12,523	10,313	111,516	96,540	14,976	15.5%	13.36	78.84%
	#5 - Franklin Ave/Johnston	11,915	9,819	110,111	86,544	23,567	27.2%	11.63	79.75%
	#6 - Indianola	28,424	22,347	244,781	206,183	38,598	18.7%	22.98	82.98%
	#7 - SW 9th St.	29,967	26,809	271,343	244,895	26,448	10.8%	27.53	85.64%
	#8 - Fleur Dr.	2,860	2,059	27,474	21,823	5,651	25.9%	16.14	73.80%
	#10 - East University	1,701	1,188	12,587	9,725	2,862	29.4%	9.02	84.16%
	#11 - Ingersoll/Valley Junction	4,231	3,331	35,182	27,714	7,468	26.9%	20.08	64.88%
	#13 - Evergreen	6,401	4,636	46,780	41,251	5,529	13.4%	41.74	79.97%
	#14 - Beaver Ave.	15,884	14,261	137,667	131,475	6,192	4.7%	15.53	83.16%
	#15 - 6th Ave.	21,377	17,845	191,952	161,246	30,706	19.0%	22.43	76.64%
	#16 - Douglas Ave.	30,700	28,415	282,199	258,012	24,187	9.4%	18.63	79.20%
	#17 - Hubbell Ave.	20,543	19,197	202,873	180,728	22,145	12.3%	15.52	79.81%
	#50 - Euclid	5,689	5,433	58,568	50,225	8,343	16.6%	8.90	83.04%
	#52 - Valley West/Jordan Creek	12,369	8,412	112,022	90,181	21,841	24.2%	10.32	68.05%
	#60 - Ingersoll/University	25,530	22,792	229,760	213,276	16,484	7.7%	15.57	78.75%
	#72 - West Des Moines Loop	2,688	4,583	27,127	42,722	-15,595	-36.5%	6.14	75.97%
	#74 - NW Urbandale	368	647	3,892	5,163	-1,271	-24.6%	3.09	77.84%
2. Shuttle	Link Shuttle	1,138	1,127	8,635	7,861	774	9.8%	3.12	86.09%
	Downtown Shuttle	5,531	5,797	52,917	58,784	-5,867	-10.0%	9.29	82.88%
3. Express	#92 - Hickman	1,210	289	6,781	3,726	3,055	82.0%	6.36	68.63%
	#93 - NW 86th	722	738	7,789	6,515	1,274	19.6%	4.12	79.47%
	#94 - Westown	334	282	3,643	3,660	-17	-0.5%	5.29	80.71%
	#95 - Vista	251	158	2,826	2,102	724	34.4%	5.90	73.86%
	#96 - E.P. True	794	934	6,903	7,752	-849	-11.0%	7.16	70.87%
	#98 - Ankeny	1,976	1,858	19,044	19,490	-446	-2.3%	6.49	75.96%
	#99 - Altoona	370	329	3,007	2,617	390	14.9%	3.64	79.09%
5. On Call	Ankeny				1	-1	-100.0%		
	NW Johnston / Grimes								
	Regional				28	-28	-100.0%		
6. DART On Demand	#31 - DART On Demand - Jordan Creek			17		17	Infinity	18.89	
	#32 - DART On Demand - River Bend	34		154		154	Infinity	3.67	
	DART On Demand - Ankeny	1,940	1,409	17,711	12,760	4,951	38.8%	3.36	
Cab	Paratransit: Taxi	641	1,011	9,650	6,522	3,128	48.0%	3.44	
Paratransit	Paratransit: Bus/Van	8,723	7,061	74,354	71,686	2,668	3.7%	1.81	90.94%
RideShare	RideShare	4,913	4,600	50,161	59,072	-8,911	-15.1%	5.20	
Total		302,085	262,967	2,970,615	2,689,549	281,066	10.5%	12.76	78.66%

MONTHLY REPORT



9A: Operations Team Report - June 2024

Staff Resources: *Luis Montoya, Chief Operating and Planning Officer*

Iowa State Fair: Preparation for the Iowa State Fair Park and Ride service is well underway with the operations team beginning work on determining vehicle needs, creating schedules, recruiting additional temporary operations, finalizing contracts with the Iowa State Fair and the Park and Ride locations, and much more.

DART Commissioners are invited to help recruit bus operators through your local school district and other connections. We need 15-20 temporary bus operators each year and many of these are often school bus drivers who already have the necessary licensing and certifications, along with being available to help out for a couple weeks in the summer. If you are comfortable, we encourage you to share the job posting available at <https://ridedart.com/careers>.

Maintenance – Keith Welch, Fleet Manager

New Heavy Duty Bus Order: After Commission approval in May, we are waiting for final pricing from our vendor then will be placing an order for 4-30' buses and 10-40' buses to be delivered in 2025.

New Light Duty Bus Order: DART Planning and Operations teams are in the process of reviewing bus build specifications and pricing for the next light-duty bus build. We are waiting for final pricing from our vendor, then will be placing an order for 5 Frontrunner light-duty buses to be delivered in 2025.

Light Duty Buses Received: An order placed earlier this year for 5 Frontrunner light-duty buses was delivered. The buses will be outfitted with the necessary technology and painted by DART staff before being put into service in the coming months.

Transportation – Lewis Lowry, Transportation Director; Joy Crutcher, Fixed Route Manager; Skip Herbold, Mobility Services Manager

Teamwork at Its Best: On Tuesday, May 21st, the weather forecast called for severe weather in the Des Moines region. Des Moines Public Schools contacted DART to alert the transit agency that schools would be closed early. DART's staff immediately responded to the request, rescheduling school trippers and calling in operators to work early and on their days off. Some administrative staff who maintain their CDL were also enlisted to drive.

Bus Plus: Bus Plus paratransit trips continue to increase. Earlier this fiscal year we started offering free rides on fixed route for customers who qualify for paratransit. Since then, we have observed a steady increase in the number of fare-free fixed route trips that paratransit eligible customers are taking. In April, over 1,000 such trips were made that might otherwise have been on paratransit.

MONTHLY REPORT

9A: Operations Team Report



APTA International Rodeo and Mobility Conference: Congratulations to Cesar Chavez for his outstanding performance at the APTA International Rodeo in Portland, Oregon. A total of 76 bus operators from around the country competed in the prestigious event. We are happy to report that Cesar placed 17th in the competition. DART's very own Cesar Chavez was featured in [a recent article in DSM Magazine](#) highlighting our Rodeo.

Facilities – Ben Cross, Facilities Manager

1100 DART Way: With the amount of rain Des Moines has been receiving lately, Facility staff have been busy pumping water out of the underground fuel storage tanks as only an inch is allowed before the system sounds an audible fuel alarm.

Staff have also been working on patching new roof leaks. The tunnel is being monitored daily as it is taking in more ground water than normal through the tunnel walls. Facilities are getting a quote to have all the skylights in the maintenance shop and administration area re-sealed as water has been leaking in during heavy rain falls.



Additionally, there was an incident at 3 a.m. on 5/29 in which a garage door hit a sprinkler head, causing the system to activate and the Des Moines Fire Department to respond. Facilities staff were able to shut down the system and have the damaged section of pipe replaced very quickly. This is a repeat issue due to the small size of the bus storage barn and the need to place the sprinkler system high enough to avoid the buses, but just below the garage door tracks. There are only a few inches of clearance so when a door is off its track it can easily damage the sprinklers.

Shelter Damage: The bus shelter located at 6th and Boston was reported damaged on 5/22/2024. Staff found a broken rear panel and evidence that the electrical box had been broken off. Staff will replace glass with a panel that is in stock and replace the electrical box.

Staff Resources: Tony Filippini, AICP – Planning & Development Manager

Service Planning

- **August Service Change:** Staff are preparing schedules for the upcoming Des Moines Public Schools 2024-2025 academic year. Bell times for DMPS have been changed for elementary and high schools and all school-bound trips are being evaluated to ensure trips will continue to get students to school on time.
- **Fall Service Change:** A package of service changes is being developed for the fall 2024 proposal. Several routes will be evaluated for on-time performance and some route realignments will be developed to improve operations. In addition, the level of service will be adjusted to match the FY 2025 operating budget.
- **Park and Ride Lots:** The Planning team has worked with Facilities and Marketing to update customer information and make sure is consistent at all designated Park & Ride locations.

City Coordination

- **Transportation Master Plan (City of Ankeny):** Planning staff attended the open house hosted on May 8 at the Ankeny Public Library.
- **Multimodal Transit Strategy (City of Des Moines):** Upon request from the City of Des Moines and their consulting team at Via Mobility Services, DART prepared a package of transit data related to service levels and ridership. Data was transmitted on May 17th to the Via.
- **Euclid Avenue & Douglas Avenue (City of Des Moines):** Planning staff met with city staff regarding the improvements planned for Euclid Avenue and Douglas Avenue. The collaboration is intended to bring a data-driven approach to bus stop placements and roadway design to improve safety and user experience. DART will be evaluating performance of the route and collaborating with the City of Des Moines to demonstrate impacts of the 3-lane conversion on DART operations.
- **SW 9th Street (City of Des Moines):** Staff met with the city and consultants on roadway design project for SW 9th Street. The collaboration provides DART opportunity to review design alternatives and help the design team understand how DART operates along the corridor and potential impacts of various treatments.
- **Grand Avenue and Locust Street (City of Des Moines):** Staff met with city staff and consultants on the alternatives presented for Grand Avenue and Locust Streets in Downtown Des Moines. DART will be coordinating bus stop locations with the design team to consolidate locations and improve the operation of routes which travel Downtown Des Moines.

MONTHLY REPORT



9C: External Affairs Team Report

Staff Resources: Erin Hockman, Chief Strategy Officer

- **Federal Transit Administration Meeting:** During DMDC, DART Commissioners Carberry Montgomery and Grooters joined Amanda and Erin for a meeting with several key FTA officials. The meeting was an opportunity to provide an update on several DART initiatives, including DART's electric buses, the new operations and maintenance facility, among others.
- **Downtown Chamber Breakfast Before Business:** DART had the opportunity to host several dozen downtown business leaders at DART Central Station as the sponsor of the Downtown Chamber's Breakfast Before Business event on May 2. There was a high degree of interest from the group in learning more about DART.
- **May TRAC Meeting Canceled:** Due to a network outage on May 29, 2024, DART canceled the May TRAC meeting. In lieu of meeting, DART staff provided information via email about the DART On Demand changes staff will seek Commission action on at its June meeting.

Marketing – Carissa Meredith, Marketing Manager

- **D-Line Service to Downtown Farmers' Market:** The marketing team has worked with the Greater Des Moines Partnership to begin D-Line service at 8 a.m. every Saturday of the Farmers' Market. Promotions for this service include a refreshed online map, monthly social media posts, emails to current riders and printed promotional materials.
- **DART On Demand Service Adjustments:** Pending Commission approval, the Jordan Creek DART On Demand will transition to On Call and the River Bend DART On Demand zone will be discontinued, both are effective July 1. The marketing team will implement comprehensive communications plans to ensure riders of both services are aware of these changes and informed of alternative service options. Communication will include website and app updates, email communication, new collateral materials and direct contact with previous riders.

MyDART App Report

Metric	Nov. 2023	Dec. 2023	Jan. 2024	Feb. 2024	March 2024	April 2024	TOTAL FY 2024
Downloads	1,349	833	1,351	1,269	1,298	1,374	15,233
iOS	399	359	352	296	377	547	5,422
Android	956	474	999	973	921	827	9,827
Accounts Created	842	757	934	805	801	873	12,013
Orders Placed	6,470	6,364	6,294	6,425	6,625	6,973	69,954
Passes Purchased	8,815	8,507	8,550	8,870	9,214	9,617	101,237
Revenue	\$36,218	\$33,026	\$36,154	\$36,288	\$36,723	\$38,167	372,556

MONTHLY REPORT
9C: External Affairs Team Report



Marketing Analytics Report

Metric	Nov. 2023	Dec. 2023	Jan. 2024	Feb. 2024	March 2024	April 2024	April 2023	Year Prior
MyDART App Accounts	66,459	67,216	68,150	68,957	71,519	72,392	52,390	38%
Website Unique Visitors	18,534	15,688	21,691	23,016	18,423	20,901	20,632	1%
Facebook Followers	6,346	6,387	6,403	6,410	6,412	6,427	6,227	3%
Twitter Followers	2,564	2,580	2,583	2,584	2,586	2,591	2,547	2%
Instagram Followers	1,751	1,772	1,792	1,803	1,806	1,818	1,646	10%
LinkedIn Followers	1,056	1,064	1,123	1,141	1,148	1,164	949	23%
Email Subscribers	14,558	6,362	4,765	4,759	4,723	6,585	14,416	-54%
Trip Plans	53,907	49,333	46,372	54,913	55,978	42,619	49,176	-13%
Real-time Map	38,482	31,736	33,246	38,221	35,635	31,243	35,530	-12%
Next DART Bus	519,493	487,102	421,229	540,016	557,876	558,690	412,866	35%
SMS Text Messaging	122,021	113,801	134,277	128,123	135,782	125,269	125,269	11%

Communications – Sarah Welch, Communications Manager

- Rider Communications:** The Communications Team is implementing plans to update riders on several items. Communications being shared in late May and June include:
 - Summer service changes (school trippers for DMPS end, D-Line service extended for Farmers' Market, no service for Yankee Doodle Pops and 80/35 due to construction and location changes)
 - Ride to Thrive re-enrollment process for riders who have participated in the program for two years.
 - Additional changes coming July 1 (No Wi-Fi on buses, change in customer service hours, DART On Demand fare increase, and DART On Demand zone changes)
- Public Input on DART On Demand Fare:** Staff have implemented a variety of communications strategies to inform riders of the opportunity to provide feedback on how they could be impacted by an increase in the DART On Demand (DOD) fare. Strategies include sending emails to any rider who has booked more than one DART On Demand trip, distributing a flyer about the change on DOD buses, asking the City of Ankeny and other partners to share information, and promoting on social media. DART has received more than 70 responses to a survey. A public input meeting was held May 28 at DMACC to gather additional input.

MONTHLY REPORT

9C: External Affairs Team Report



- **Website updates:** Staff are working with DART's website contractor to make changes to improve how people find information on DART's website. Rider alerts, news, and events will be added to the navigation, with a goal of helping riders find timely updates, especially on detours. DART is also adding a blog to the website. The blog will provide community education about DART and public transit based on common topics we hear about, address questions based on search terms, and share stories. The blogs will be shared through email newsletters, on social media, and through other communications as a way of increasing engagement with DART.

DART in the News

[DART bus drivers take over fairgrounds for Roдео competition](#)

KCCI, 05/16/2024

[The Des Moines Farmers' Market grand opening is this weekend. Here's what you need to know](#)

Des Moines Register, 05/01/2024

[Bus drivers compete for 'roдео' glory](#)

DSM Magazine, 04/30/2024

[DART gets \\$3.6M to avoid cuts over next 2 years as it works to reimagine the bus system](#)

Des Moines Register, 04/25/2024

Caravan – Victoria Henderson Weber, Caravan Supervisor

- **Caravan Recovery & Data:** The entire External Affairs team is working to rebuild DART's vanpool program. The recovery strategy includes implementing an improved technology platform, updating the fare policy, rebranding the program, and increasing awareness to attract new vanpool participants and new vanpool partners.

Our goal is for each vanpool to have a minimum of 7 passengers. The program currently has on average 8+ people per vanpool, achieving the target for this key performance indicator shows program efficiency.

Staff is focused on increasing the number of vanpools in service and have set a target to have 46 vanpools in operation by the end of FY25. Based on conversations with several large employers, staff are on track to achieve this key metric.

FY	Vanpools	Ave. Pass Per Van	Pass Miles
FY19	88	7.24	8,467,267
FY20	49	4.29	6,197,708
FY21	48	4.96	3,074,463
FY22	32	6.53	3,318,638
FY23	27	5.86	3,347,794
July 2023	26	6.29	191,855
August 2023	25	6.52	212,816
September 2023	25	7.04	221,312
October 2023	26	8.15	278,085
November 2023	24	7.79	251,640
December 2023	24	7.96	193,175
January 2024	24	8.63	226,370
February 2024	23	9.09	249,106
March 2024	23	8.91	253,498
April 2024	23	8.74	234,222
FY25 Target	46	7.69	7,383,192

MONTHLY REPORT

9C: External Affairs Team Report

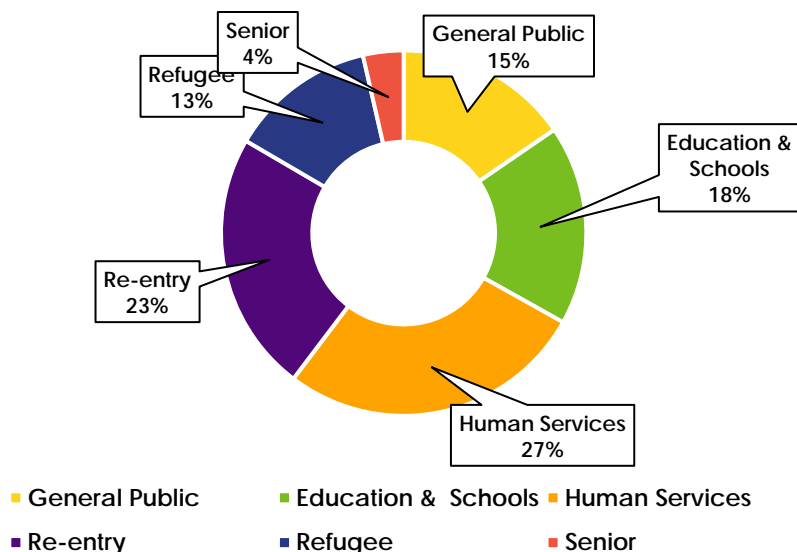


- **Ride Matching with the DOT Update:** DART staff and the DOT are working with HBSS to create a new ride matching website to replace iowarideshare.org. This website provides accessibility for individual passengers to join vanpools. The replacement website will serve much of the same purpose as well as support connectivity with other transit agencies for commuting opportunities. The DOT is fully funding the cost of the website.
- **Pending Partnership:** DART staff have been working with Wells, Inc. to develop a vanpooling program that would replace their private shuttle service and extend vanpooling opportunities to rural NW Iowa communities. The contract is currently being reviewed by Wells, Inc.'s legal team. We anticipate 8-10 vanpools being established initially for this partnership with opportunity for growth.

Business & Community Partnerships – Matt Harris, Business & Community Partnerships Manager

- **Unlimited Access:** As of April 2024, fiscal year-to-date ridership by Unlimited Access partners continues to trend 30% higher than FY2023, with a nearly 10% increase from March to April.
- **New partner campaign:** A direct-mail and email campaign to attract new Unlimited Access and Caravan partners will start this summer, with targeted outreach to prospects who have previously expressed interest in a contracted partnership with DART.
- **Art shelters:** Artist selection for shelter projects in Uptown at 42nd St. and University and along the SW 9th Corridor in Des Moines are nearing completion. Installations have been completed in Johnston and will soon be underway in Urbandale and Windsor Heights later this spring or early summer.
- **Mobility Coordination:** YTD mobility outreach training and participation through April 2024 is shown in the chart below.

FY2024 YTD Mobility Outreach Participants
2,787 Total Participants as of April 2024



MONTHLY REPORT



9D: Finance/Procurement/IT Team Report

Staff Resources: Dan Washburn, Amber Dakan, Mike Gulick, and Kyle Foster

Finance Department – Amber Dakan, Finance Director

- **FY 2025 Budget Planning:** The Finance Team has worked to create an FY 2025 budget for commission adoption at the June meeting that folds in \$500,000 in administrative expense reductions, committed funding from the City of Des Moines, as well as funding from the MPO.
- **HRIS System Implementation:** The Finance, HR, and IT staff continue the implementation work of UKG/Kronos in replacement of multiple systems including payroll processing. Parallel payroll testing went live on 5/26/24. Payroll go live is scheduled for 6/23/24.
- **2024 ICAP Educational Summit:** I had the opportunity to attend the Iowa Community Assurance Pool (ICAP) annual training and industry update in May. ICAP provides DART property and casualty insurance coverage through a risk pool arrangement. The property insurance arena continues to experience challenging market conditions and the agency is focusing on mitigating these factors as well as an emphasis around IT/Cyber Risk Control. DART is looking forward to receiving renewal information from ICAP for our FY 2025 budget year.

Procurement Department – Mike Gulick, Procurement Manager

- **Update of DART's Public Transit Authority Procurement Policy and Procedures Manual:** The goal of this project is to comprehensively update the existing Public Procurement Policy and Procedures Manual for DART to ensure alignment with both state and federal regulatory requirements. The updated manual will serve as a reliable guide for all procurement activities within the organization.
 - June 2024 Commission Information Item
 - July 2024 Commission Approval Item
- **Heavy Duty Bus Procurement:** Working through final quote and pre-award Buy America Certifications to formally place order for four 30-foot and ten 40-foot heavy duty buses. The approximate lead time is 18 to 24 months from the date of purchase order. Commission approved this purchase on May 7, 2024.
- **Light Duty Bus Procurement:** Working through final quote and pre-award Buy America Certification to formally place order for five light duty buses. The approximate lead time is 10 - 12 months from the date of purchase order. Commission approved this purchase on May 7, 2024.
- **On-Call Taxi and Mobility Services Contracts:** Trans Iowa (Yellow Cab) is signed and completed. UZURV is in process with a few contractual items being worked through with an expected completion date by the end of June 2024. Commission approved awarding both contracts on May 7, 2024.
- **Future Procurements**
 - On-Call Research Services
 - Reimagine DART

MONTHLY REPORT

9D: Finance/Procurement/IT Team Report

IT Department – Kyle Foster, IT Director

- **Technology Roadmap:** Underutilization of existing software and solutions as well as aging infrastructure equipment were two key points identified in a technology audit.
 - Systemwide upgrades of software, along with consolidation of duplicate solutions are a key focus for FY23 & FY24.
 - Half of our systems have been updated as of 6/28/2023.
 - The remaining systems are all being upgraded at once due to them sharing server infrastructure. The upgrade process started on 11/2/2023. Testing is 90% complete. There were a few bugs identified but are being resolved with a patch. We've pushed back the upgrade until September 2024, to focus all our attention on the UKG implementation.
 - Staff training will be coordinated after the upgrades are completed.
 - Server hardware is getting past its useful life. Storage, servers, and network equipment are all in the process of being upgraded in 2023/2024.
 - Storage has been replaced and cut over as of Q1 of 2023.
 - Compute servers have been installed and configured at both locations. Migration of the virtual servers from the old equipment to the new equipment is under way.
 - We are currently auditing our internal network infrastructure and internet line setup. A plan is being designed to simplify the setup at both Dart Way and DCS, as well as to easily add on the new Operations and Maintenance facility.
- **Disaster Recovery/Incident Response:** DART IT staff are currently undergoing a full update/re-write of our DR and Incident Response Plan. Cyber Security threats, loss of power, loss of facility, and individual system failures are all being taken into consideration to meet all critical system recovery time objectives. The plan is 75% completed,
- **Document Management Discovery:** DART has utilized many different solutions to store documents over time, which has caused inefficiencies and challenges in finding historical documents. It was identified as a priority to establish a single solution for all document management needs. A new SharePoint site has been built specifically focused on Document Management. AP and Policy storage have been the first projects selected to pilot this. Departmental sites are being built on an as needed basis to help with adoption to the new site. DART IT staff are actively working on building this out in house.
- **HRIS implementation:** As mentioned in earlier reports, DART has selected UKG/Kronos as our new HRIS (Human Resources Information System) vendor, and IT is heavily involved in supporting this implementation and transition.
 - Staff training has been completed.
 - Parallel payroll testing started on 5/26/2024.
 - Go live is scheduled for 6/23/2024.
- **Passenger Information Displays (PIDS):** As mentioned in earlier reports, DART has selected GMV Syncromatics as our vendor to replace the platform signs at DCS.
 - A kickoff call happened on 3/27/2024.

MONTHLY REPORT

9D: Finance/Procurement/IT Team Report

- A Site visit was performed by GMV on 4/24/2024 to finalize the build list.
- The component build is estimated to be completed late August, with scheduled install time of early September.

MONTHLY REPORT

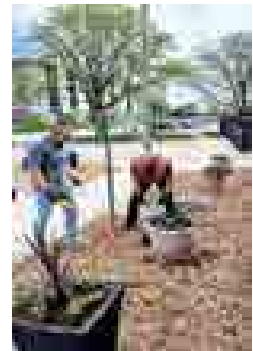
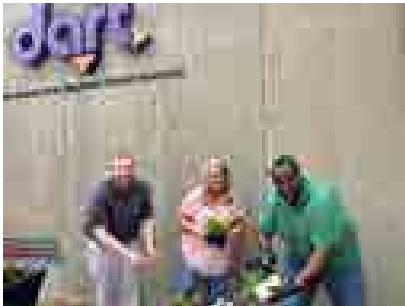


9E: Human Resources/Training/Safety Team/Customer Service Report

Staff Resources: Kelley Burgess – Chief People Officer

A. Employee Engagement:

May Day: We celebrated our first employee engagement activity of the year by planting flowers at DartWay and enjoying a “May Day basket” of freshly popped popcorn and candy. This effort was organized by the Admin, Maintenance, and People Team.



Mental Health Awareness Month: DART observed the first ever Mental Health Awareness Month by spreading awareness to “Make it OK” to talk about mental health. Through weekly messages from HR, employees received resources, fun activities, self-care tips, and desk drops to promote the campaign. The highlight of the month’s awareness activities was a Self-Care Walk and Wear Green day on May 16th.

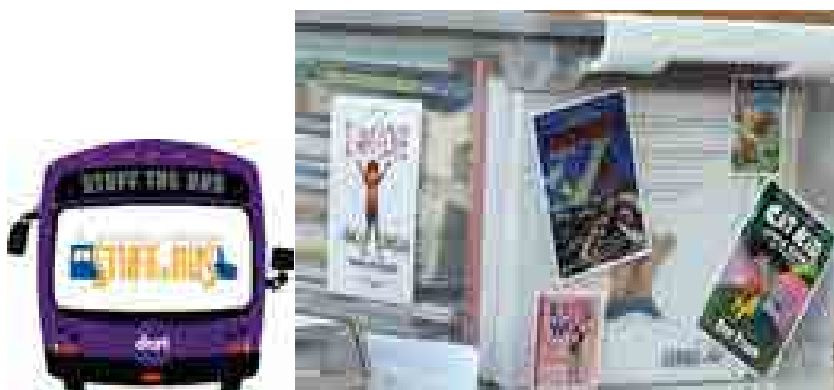


MONTHLY REPORT

9E: Human Resources/Training/Safety/Customer Service Team Report



United Way Book Campaign: DART collected over 250 books and donations for this year's Stuff the Bus campaign during the first two weeks of May.



DART Rodeo: On May 18, 2024, 17 bus operators competed in the DART Rodeo held at the Iowa State Fairgrounds. Winners of this competition will compete in the State Rodeo in Ames, IA on June 8, 2024. Here are your winners:

Small Bus Division		Large Bus Division	
Competition Class	Standings	Competition Class	Standings
Kurt Mackel-Wiederanders	1 st Place	Cesar Chavez	1 st Place
Joe Vitale	2 nd Place	Justin Hazebroek	2 nd Place
Michael Flaig	3 rd Place	Paul Mast	3 rd Place

MONTHLY REPORT

9E: Human Resources/Training/Safety/Customer Service Team Report

DART friends and family came out to support the annual competition. It was a great event, organized by our Safety and Training Teams. A huge shout-out to the entire DART Maintenance Team for all of their event support.



Employee Recognition: Over the last four weeks, the DART Team celebrated two bus operators' retirements, Daniel Garcia and Manuel Flores.

Daniel Garcia – 24 Years of Service



Manuel Flores – 25 Years of Service



MONTHLY REPORT

9E: Human Resources/Training/Safety/Customer Service Team Report

- B. HR Policy Review:** As we moved closer to the HRIS implementation, it became necessary to review certain HR policies and, where possible, standardize and streamline to align all employees, create efficiencies, and reduce potential issues.
- a. Compliance – PTO Request Increments increased and Part-Time Employee Classification limited to 29 hours or less
 - b. Standardization – PTO Accrual Schedules simplified, PTO Carryover standardized and Floating Holidays reclassified as PTO
 - c. Modernization – Work Hours updated to 8am-4:30pm with a 30-minute lunch break
 - d. Flexibility – Summer Office Hours (8am-4:30pm M-TH and 8am-12pm F). Optional for employees; workload prioritized appropriately
- C. HRIS Update:** Timeline is on track, build is near completion for core modules. Time-punching began Sunday, May 26th for maintenance employees and Tuesday, May 28th for all hourly admin employees. Two pay cycles of parallel testing will be completed, with a go-live date of June 23rd with the first payroll payment dated July 12th.

Human Resources – Alaina Severino, Human Resources Manager

- **Recruitment Update:** The HR department is currently interviewing for the following openings:
 - Bus Operator (Para & Fixed)
 - Building and Grounds person
 - Operations Dispatcher
 - Operations Supervisor
- **Recent Hires:**
 - 1 – IT Support Specialist
 - 1 – Service Person
 - 2 – Mobility Services Operators
- **Turnover Rate:** May 1.7%, YTD 7.9%
- UKG training is concluding the week of 5/27, with 100% participation. Further practice and prep work will continue throughout the month of June, with our projected Go-Live date of June 12, 2023
- Open Enrollment will take place May 29th through June 12th.

Training – Matt Johnson, Training Manager

- **Fixed Route New Hire Trainees:** Training continues for two Fixed Route operators.
- **Mobility Services New Hire Trainees:** Training continues for two Mobility Services operators.
- **Mobility Services Training Graduates:** One new operator completed all training requirements and graduated to Part-Time Mobility Services Operator.

MONTHLY REPORT

9E: Human Resources/Training/Safety/Customer Service Team Report

- **Fixed Route Training Graduates:** One new operator completed all training requirements and graduated to Part-Time Fixed Route Operator.
- **Operations Safety Meetings:** Safety meetings were held with all operators. Topics highlighted included a highlight of resources available to employees to promote mental health awareness. Operators were also engaged around accident preventability and a consideration of leading causes of accidents in our environment as well as how to prevent those personally.
- **Transit Ambassador for Customer Service Sessions:** Sessions continue for the Transit Ambassador Program. DART has utilized this program since 2017 as a focused development for experienced operators to further develop their skills around delivering a positive customer experience. A group of twenty-three operators are scheduled to complete the multi-session program by the end of June.
- **Learning Management System (LMS) Set Up:** Training worked with UKG on set up for the LMS system that will be included with the new Human Resources Information System. Training will continue to work through set up and implementation of the new LMS in coming months.

Safety – Pat Daly, Safety Manager

- **Emergency Response:** Assisted Polk County Emergency Management with two requests for emergency transport:
 - Responded to Pleasant Hill to transport two individuals and two pets whose homes were damaged by a tornado.
 - Responded to the Harriett Street boat launch on the Des Moines River to assist CISS with the transport of up to 50 individuals needing shelter due to forecasted severe storms. Ultimately transported two people.
- **New Employee Safety Orientations:** Delivered two new employee safety orientations that included an overview of DART's Agency Safety Plan, the Employee Safety Report Program, the hazard and near-miss reporting program, and safety familiarization tours of 1100 Dart Way and DART Central Station.
- **New Operator Accident Prevention Discussions:** We met with two groups of new operators finishing their classroom training to discuss accident preventability, show them the most common accidents new operators have, and talked about actions they can take to avoid those.
- **Safety Meetings:** Discussed recent accidents and near-misses, focusing on those attributed to distracted driving. Using video of the incidents, facilitated discussions on each incident, guiding operators to put themselves in the place of the operators involved and then express their thoughts on how the incidents could have been avoided.
- **DART Rodeo:** Set up the course for the 2024 DART Rodeo at the Iowa State Fair midway and held the Rodeo on May 18th. Additionally, held an event to allow DART Commissioners, and others, to challenge an abbreviated Rodeo course.
- **DART's "IPTA Drivers of the YEAR":** Coordinated the annual nomination and selection of DART's IPTA Drivers of the Year that will be honored at IPTA Annual Driver Appreciation and Awards Dinner on June 7th in Ames. This year DART's Drivers of the Year are Adam Weiss, Fixed Route and David Shore, Mobility Services.

MONTHLY REPORT

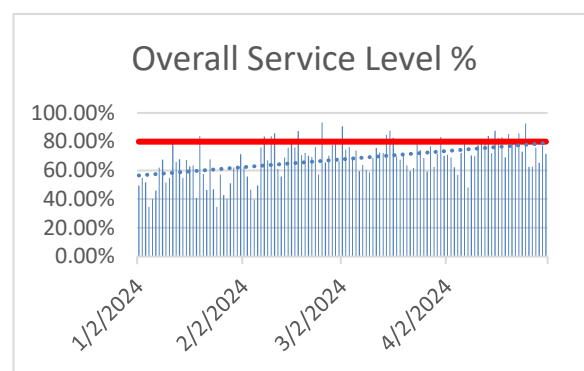
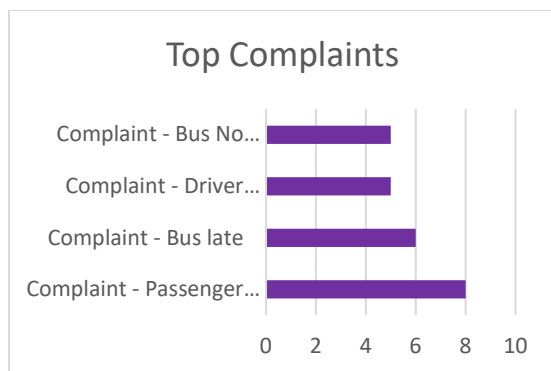
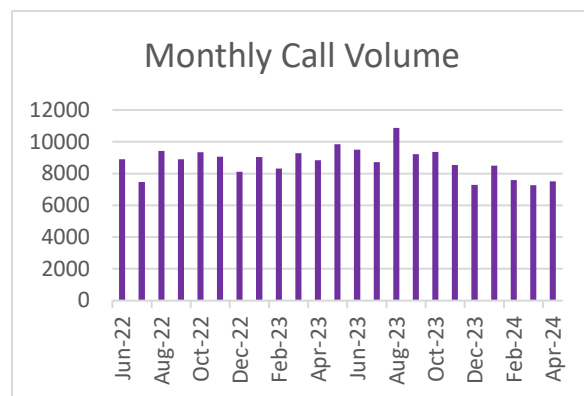
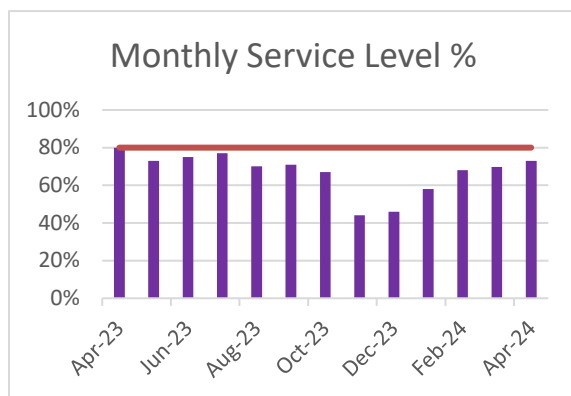
9E: Human Resources/Training/Safety/Customer Service Team Report

- **IPTA:** Participated, as DART's representative, in planning the 2024 Iowa Public Transit Association's Annual Meeting & Training Conference and ROADEO.

Customer Experience – Alyson Reimers, Customer Service Supervisor:

Service Levels – We are continuing to see our service levels trend in a positive direction. We're moving forward with hiring two permanent Customer Service Specialist roles.

Call Trends – We have continued to see normal call trends: schedule questions, Paratransit questions/reservations, etc. We continue to see a decrease in driver rudeness complaints in April versus March. We have also been seeing a decrease in Passenger passed up complaints.



MONTHLY REPORT



9F: Chief Executive Officer

Staff Resource: Amanda Wanke, Chief Executive Officer

- **DART Executive Committee** - The DART Executive Committee met on Wednesday, May 22, 2024. The discussion items presented during the meeting included:
 - Health Insurance Renewal Update
 - O&M Facility Project Update
 - Updated Procurement Policy and Procedures
 - DART Commission Survey and Facilitation
- **DART Roadeo/Opportunity to Drive a Bus** – As part of our annual DART Roadeo, where bus operators put their driving skills to the test by driving an obstacle course, we invited the DART Commission to a friendly competition of driving skills behind the wheel of a bus. It was a great event, and I would like to thank Commissioners Trimble, Grooters, Campbell, Boesen, Montgomery and Shafer for attending this fun and competitive event.



- **DART Commission Survey and Facilitation** - The DART Commission and staff are embarking on an 18-month regional planning effort, called Reimagine DART, with the goal of reaching consensus among member communities on funding and service levels by December 2025. This effort will begin with a three-phased approach exploring where there is agreement and/or disagreement on regional transit to work towards a shared vision. The three phases include:
 - Member community survey to collect input from all elected officials and City/County Managers or Administrators
 - Member community interviews with Commissioners, Alternates (or other elected officials) and City/County Manager or Administrator
 - Facilitated Workshops with DART Commissioners and Alternates

MONTHLY REPORT

11F: Chief Executive Report



The shared vision developed through these facilitated sessions will inform a network redesign that will begin in early fall. These sessions will be led by a team of facilitators from Baton Global, the Robert D. and Billie Ray Center, and TransPro Consulting.

- **One on One Meetings with DART Commissioners** – Vicky Barr will be reaching out to each Commissioner to schedule time for a one-on-one meeting between me and each Commissioner. This gives the opportunity for Commissioners to share any feedback with, get updates on what is happening in your community, discuss timely DART topics, and ensure we're communicating well and I'm meeting the goals you have set out for me. I look forward to these meetings and discussions.
- **Iowa Public Transit Association (IPTA) Annual Meeting** – I, along with several other DART staff and Operators, will be attending the IPTA Annual meeting which will be held in Ames June 5-7, 2024. This conference provides training on a variety of topics to benefit multiple staff positions such as transit leaders, managers, maintenance, driver, administrators, and mobility coordinators from around the State of Iowa. In addition, Saturday, June 8, is the State Rodeo. This annual competition is an opportunity for drivers to gain recognition for their driving skills, meet other drivers from the Iowa regions and test their limits in the categories of small and large bus. The winners will go on to compete at the national level. I am pleased to share that several DART operators have qualified to participate in this event on June 8th and we will keep the Commission updated on their progress.
- **Employee Town Hall Meetings** – During the month of May, we held several employee meetings to share updates on DART funding and initiatives and educational information and timelines for training for the new HRIS system. I would like to thank all the DART staff who worked so hard to get this implemented but especially the HR, IT and Finance teams who have taken a great deal of the lead on the system's implementation. Employee town halls will continue on a quarterly basis.

FUTURE DART COMMISSION ITEMS



Future Agenda Items:

July 9, 2024 – 12:00 P.M.	
Consent/Action Items	Information Items
<ul style="list-style-type: none"> Updated Procurement Policy and Procedures ICAP Renewal Des Moines Public School Services Contract Renewal Vontas Agreement 	<ul style="list-style-type: none"> Des Moines Metropolitan Planning Organization Update Transit Riders Advisory Committee Update November Service Change/Title VI Iowa State Fair Updates/Reminders HRIS Update Construction Contract Change Order Policy DART Signature Policy
August 6, 2024 – 12:00 P.M.	
Consent/Action Items	Information Items
<ul style="list-style-type: none"> November Service Change/Title VI Advertising Policy Construction Contract Change Order Policy DART Signature Policy 	<ul style="list-style-type: none"> Transit Riders Advisory Committee Update Iowa State Fair Updates/Reminders Business Plan Update Network Redesign Contract
September 3, 2024 – 12:00 P.M.	
Consent/Action Items	Information Items
<ul style="list-style-type: none"> Network Redesign Contract O&M Facility Construction Contracts 	<ul style="list-style-type: none"> Transit Riders Advisory Committee Update Mobility Coordinator Update Quarterly Investment Report Quarterly Financial Update Quarterly Safety Report

Upcoming DART Meetings:

MEETING	DATE	TIME	LOCATION
DART Executive Committee Meeting	Wednesday, June 19, 2024	12.30 p.m.	Zoom