



SORTA/Metro
 Planning and Operations
 January 21, 2025
 9:00 am-10:00 am Eastern Time

SORTA PLANNING AND OPERATIONS COMMITTEE MEETING

TUESDAY, JANUARY 21st, 2025 - 9:00 A.M.

SORTA/METRO AT HUNTINGTON CENTER,

SORTA BOARD ROOM (6th FLOOR)

525 VINE STREET,

CINCINNATI, OHIO 45202

General Items:

Call to Order

Pledge of Allegiance

- 1 Approval of Planning and Operations Committee Minutes: November 12th, 2024

Briefing Items

- 2 Good News! (Executive Team)
- 3 2024 Service Quality & Ridership Initiatives Q4 (Andy Aiello)
 - 3.1 2024 Key Metrics
- 4 Ridership Report as of December 31st, 2024 (Mark Samaan)
- 5 Velocia Presentation (Steve Anderson)
- 6 Action Items Matrix (Andy Aiello)
- 7 Proposed Resolution: Contract Modification for 099-2024 Masabi Mobility Rewards Program (Steve Anderson)
 - 7.1 Action Item:
- 8 Proposed Resolution: Contract Award for 167-2024 Diesel Fuel (Jeff Mundstock)
 - 8.1 Action Item:
- 9 Proposed Resolution: Contract Award for 168-2024 Gasoline (Jeff Mundstock)
 - 9.1 Action Item:
- 10 Proposed Resolution: Contract Award for 172-2024 Kings Island Family Day (Adriene Hairston)
 - 10.1 Action Item:
- 11 Emergency Preparedness Briefing (Bill Spraul)
- 12 Other Items:

New Business

The next regular meeting of the Planning & Operations Committee has been scheduled for

Tuesday, February 18th, 2025, at 9:00 a.m

PLANNING AND OPERATIONS COMMITTEE
TUESDAY, NOVEMBER 12TH, 2024 – 9:00 A.M.
SORTA/METRO AT HUNTINGTON CENTER
6th FLOOR SORTA BOARD ROOM
525 VINE STREET
CINCINNATI, OHIO 45202

COMMITTEE MEMEBERS APPOINTED: Dan Driehaus (Chair), Tony Brice Jr, Trent Emeneker, Pete Metz, Gwen Robinson, and Sara Sheets

COMMITTEE/BOARD MEMBERS PRESENT: Jay Bedi, Tony Brice, Chelsea Clark, Trent Emeneker, Blake Ethridge, Neil Kelly, Pete Metz, Briana Moss, Gwen Robinson, Sara Sheets, Greg Simpson and KZ Smith

COMMITTEE MEMBERS ABSENT: Dan Driehaus, Kala Gibson and Sonja Taylor

STAFF MEMBERS PRESENT: Andy Aiello, Steve Anderson, John Edmondson, Joe Ferguson, Darryl Haley, Adriene Hairston, Natalie Krusling, Sharyn Lacombe, Bradley Mason, Troy Miller, Jeff Mundstock, John Ravasio, Kevin Ruth, Mark Samaan, Bill Spraul and Tim Walker

OTHERS PRESENT: Kim Schaefer (Vory's)

1. **Call to Order**

Mr. Ethridge called the meeting to order.

2. **Pledge of Allegiance**

The Pledge of Allegiance was recited.

3. **Approval of Minutes of October 15th, 2024**

Mr. Ethridge made a motion and Ms. Robinson seconded the motion to approve the minutes of the October 15th, 2024, meeting.

By voice vote the committee approved the minutes.

4. **Good News!**

The Executive Team presented the Good News report. Ms. Hairston shared the September Silver Award recipients. Mr. Ravasio shared the UC Grant, Congratulated Khaled for helping to develop the Intermodal Passenger Facility Planning and Decision-Making for Seamless travel report, Congratulated Brandy for being awarded the Cincinnati Herald's Beauty Con 2024 Change Maker award, Suspended Roof Design for the BRT Stations and Blink Riders Speak via 2024 survey results.

The Committee accepted the report as presented.

5. **Ridership Report**

Mr. Samaan presented the October 2024 ridership reports. Total ridership for the month of October was 1,407,727 or 3.6% favorable to budget.

Mr. Samaan presented the October 2024 MetroNow reports. Total ridership for the month of October was 9,270.

Mr. Samaan presented the October 2024 Access ridership reports. Total ridership for the month of October was 16,637 or 4.2% favorable to budget.

The Committee accepted the report as presented.

6. **Proposed Motion: Approval of Agency Safety Plan**

Mr. Weil presented the Agency Safety Plan, to comply with Subpart B of 49 CFR Part 673, Section (a) (1), which requires The Public Transportation Agency Safety Plan and subsequent updates be signed by the Accountable Executive and approved by the agency's Board of Directors and Joint Safety Committee, or an Equivalent Authority.

The Committee accepted the report as presented and agreed to recommend the motion to the full Board for approval.

7. **Proposed Resolution: Approval of Contract Award for 153-2024 Microsoft 365 Enterprise Access**

Mr. Aiello requested approval for the 153-2024 Microsoft 365 Enterprise Agreement.

The Committee agreed to recommend the resolution to the full Board for approval on the consent agenda.

8. **New Business**

The next regular meeting of the Planning and Operations Committee has been scheduled for **Tuesday, December 10th, 2024, at 6:00 P.M.**

9. **Adjournment**

The meeting adjourned at 10:58 A.M.



Planning & Operations: Good News

January 21, 2025

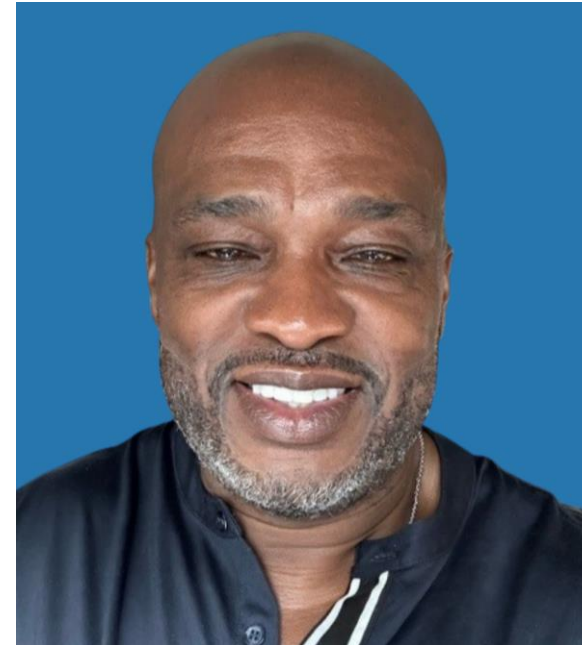


SILVER WHEEL
AWARD
Your accomplishments help
steer us in the right direction

November Silver Wheel Award Recipients



Leadership
Employee of the Month
Katrina Biggers



Administrative & Support
Employee of the Month
Rodney Pompey



**SILVER WHEEL
AWARD**
Your accomplishments help
steer us in the right direction

November Silver Wheel Award Recipients



Queensgate
Operator of the Month
Jeffrey Oliver



Queensgate Maintenance
Employee of the Month
Beverly Jones



**SILVER WHEEL
AWARD**
Your accomplishments help
steer us in the right direction

November Silver Wheel Award Recipients



Bond Hill
Operator of the Month
Steven Haught



Bond Hill Maintenance
Employee of the Month
Cody Bulach



Access
Employee of the Month
Will Howe

Metro Receives Visit Cincy Spirit Award



Metro was honored to receive the Horace Sudduth Progressive Business Award from Visit Cincy during their annual meeting last week. The award honors those supporting inclusion and diversity through leadership. Metro received his honor in recognition of our robust efforts in this space, including increasing DBE vendor spending, being named System of the Year by ODOT and a "Best Place to Work for Women of Color" recognition.

Welcome, Mark!



We are pleased to welcome Mark Ventura as our new Senior Manager of Ridership Development. He is responsible for making strategic business decisions and community connections that will grow ridership and business-related sales opportunities.

Mark is an accomplished sales professional with over a decade of strategic expertise, excelling in crafting impactful sales strategies, fostering influential relationships and driving successful community engagement initiatives.

Martin Luther King Jr. Day Walk



Metro was proud to once again participate in the annual Dr. Martin Luther King Jr. Day walk, which took place on Monday, Jan. 20, 2025. A Metro bus ensured that those unable to make the journey on foot from the Underground Railroad Freedom Center to Music Hall were able to participate in the commemorative walk.

University Partnerships Extended



Due to the tremendous success of Metro's partnerships with the University of Cincinnati, Cincinnati State and Xavier University (160% increase in ridership) students and staff at these institutions may continue to ride Metro FREE through the next semester. To learn more and register for the EZRide program visit: go-metro.com/university

Ohio Loves Transit Week



Ohio Loves Transit Week, Feb. 9-15 offers a great opportunity to celebrate the impact public transit has on the vibrancy and economy of Ohio, including here in Cincinnati. All week long we will be inviting the community to share with us how Metro impacts their lives. We'll also use the week to connect these messages with our state representatives in Columbus.

BRT Community Outreach

Metro will hold public meetings and engage with the community to collect BRT feedback in February. The open-house-format public meetings will feature a project update presentation, draft route maps, and the opportunity to talk with project team members.

Monday, February 24: 3:00 PM – 7:00 PM

Location: Avondale Town Center-Center for Social Justice

Tuesday, February 25: 3:00 PM – 7:00 PM

Location* Still working on finalizing

Wednesday, February 26: 11:00 AM – 2:00 PM & 4:00 PM – 7:00 PM

Location: Downtown Library

Metro representatives will also be at several upcoming community events to engage with the public. Visit MetroBRTproject.com for details.

... and That's the News!



Thank you to our amazing team members who kept us rolling & serving our community during the snow storm!



Lisa Bennett

Thanks because without you a lot of people wouldn't get where they have to go like work



Top fan

James Tegtmeier

Thank you for all your hard dedication of work in this crazy weather



Eric H Kearney @EricKearney · Jan 8

Everyone knows that @cincinnati metro goes through SNOW It's the easiest and safest way to GO The buses are WARM Keeping you away from the STORM Not to mention it saves you DOUGH! #buspoet



Scott Ford 🇺🇸 @GreatScottFord · Jan 8

Once again, @cincinnati metro proves to be reliable and efficient. Metro buses are not only clean but also running smoothly during our major snowstorm cleanup. I've been boarding buses the past few days, and I'm genuinely impressed by how clean they are with a foot of snow on the...

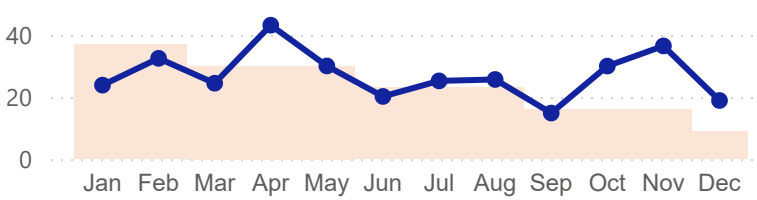




Metro is bringing to life its **Reinventing Metro** plan, offering the Greater Cincinnati region bold, new transit innovations that will help grow the regional economy and better connect our community to jobs, education, health care and entertainment. Concurrently, post-Covid commuting patterns and workforce dynamics have created challenges that impact ridership and service quality. Metro has created a set of strategic initiatives to maintain and improve key ridership and quality indicators. This dashboard tracks Metro's performance across 8 ridership and service quality metrics.

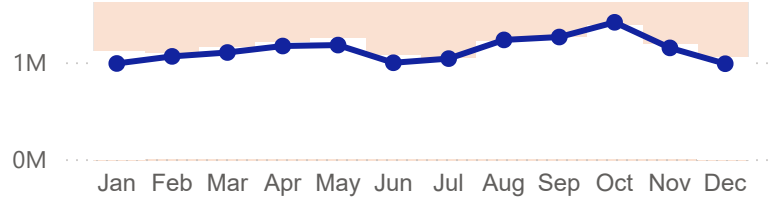
December 2024 Target: 9 December 2024 Actual: 19

Missed Trips (Avg. Weekday)



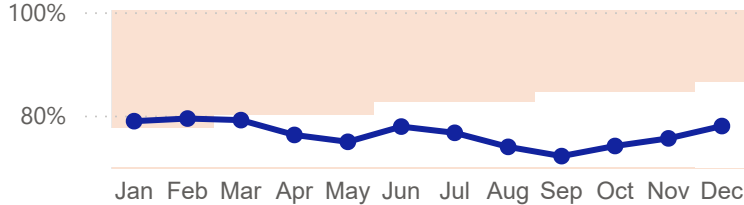
December 2024 Target: 1,054,389 December 2024 Actual: 984,485

Ridership



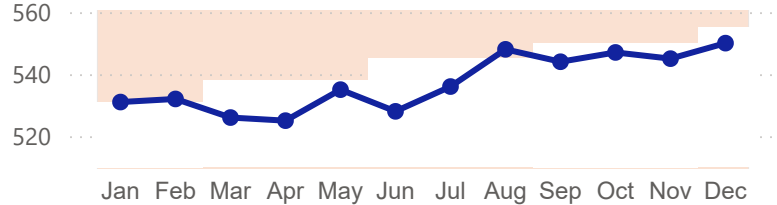
December 2024 Target: 86.5% December 2024 Actual: 78.0%

On-Time Performance



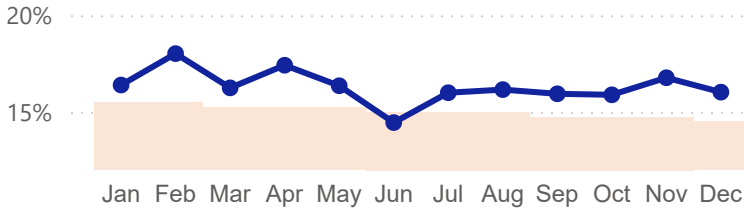
December 2024 Target: 555 December 2024 Actual: 550

Fixed Route Operators



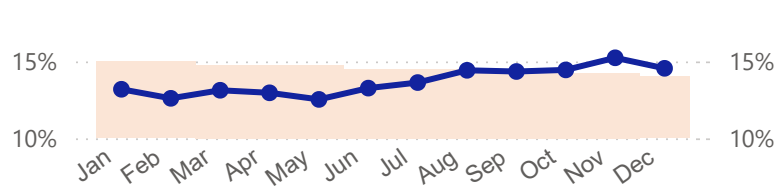
December 2024 Target: 14.5% December 2024 Actual: 16.0%

Operator Absenteeism



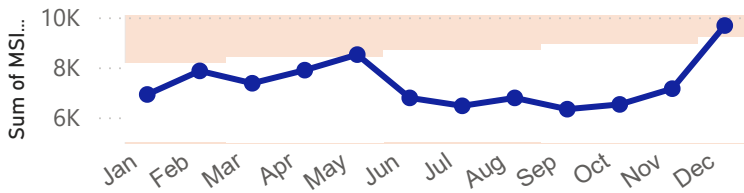
December 2024 Target: 14.0% December 2024 Actual: 14.5%

Operator Turnover



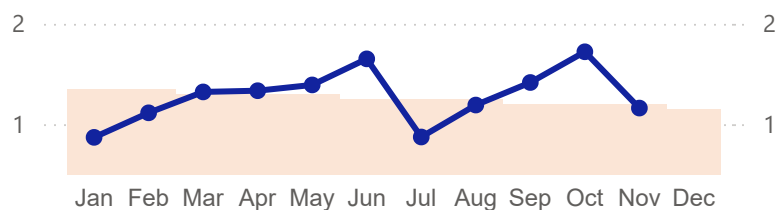
December 2024 Target: 9,200 December 2024 Actual: 10,602

Miles b/w Mech Service Interruptions



December 2024 Target: 1.15 December 2024 Actual: (Blank)

Preventable Acc per 100k Miles



2025 KPI Goals

Metric	2022	2023	Dec 2024	Goal – end of 2025
Missed Trips (weekday avg.)	95 (96.2% reliability)	37 (98.5% reliability)	19 (99.2% reliability)	<10 (99.6% reliability)
Ridership	9,847,273	13,137,001	13,556,847	14,796,000
Total Fixed Route Operators	483	531	550	570
Access/MetroNow! Operators	63	85	106	131
Operator Absenteeism	18.5%	15.2%	16.0%	16%
Operator Turnover (quarterly avg.)	17.0%	12.8%	14.5%	13%
On Time Performance	79.4%	76.7%	78.0%	83.5%
Miles b/w Mechanical Interruption	8,152	7,303	7,670	9,500
Preventable Accidents per 100k mi.	1.20	1.30	1.29	1.0



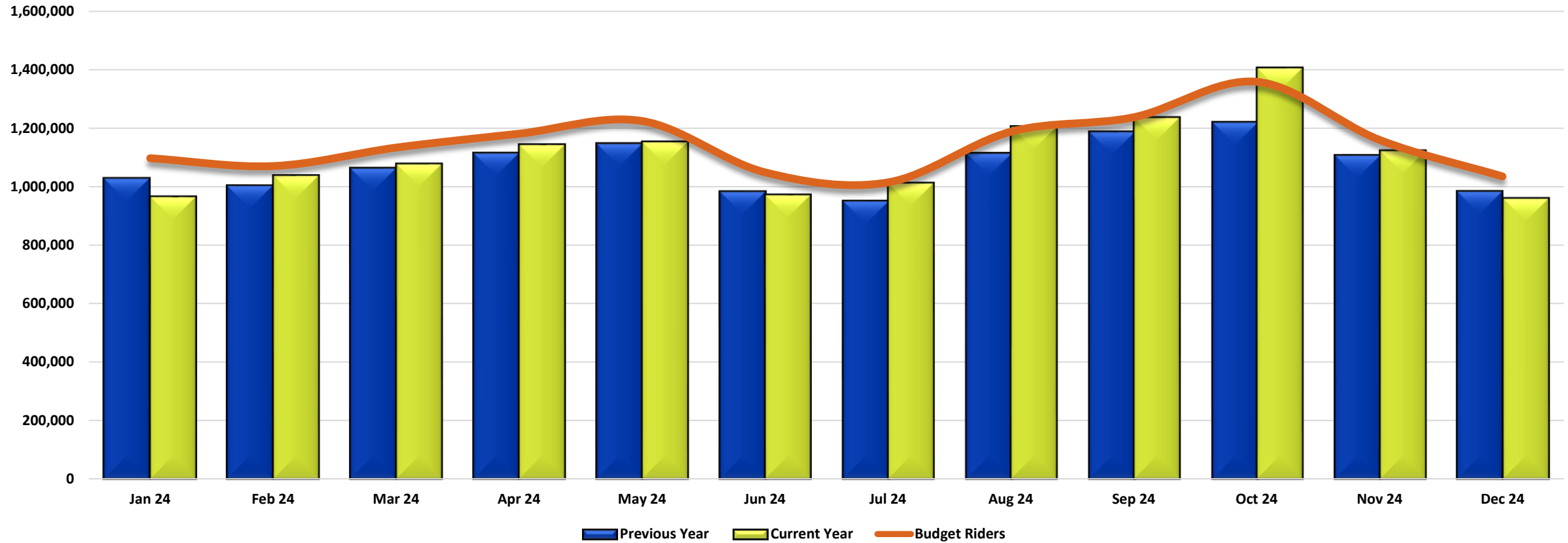
December 2024 Ridership Report

January 21, 2024 | SPDI



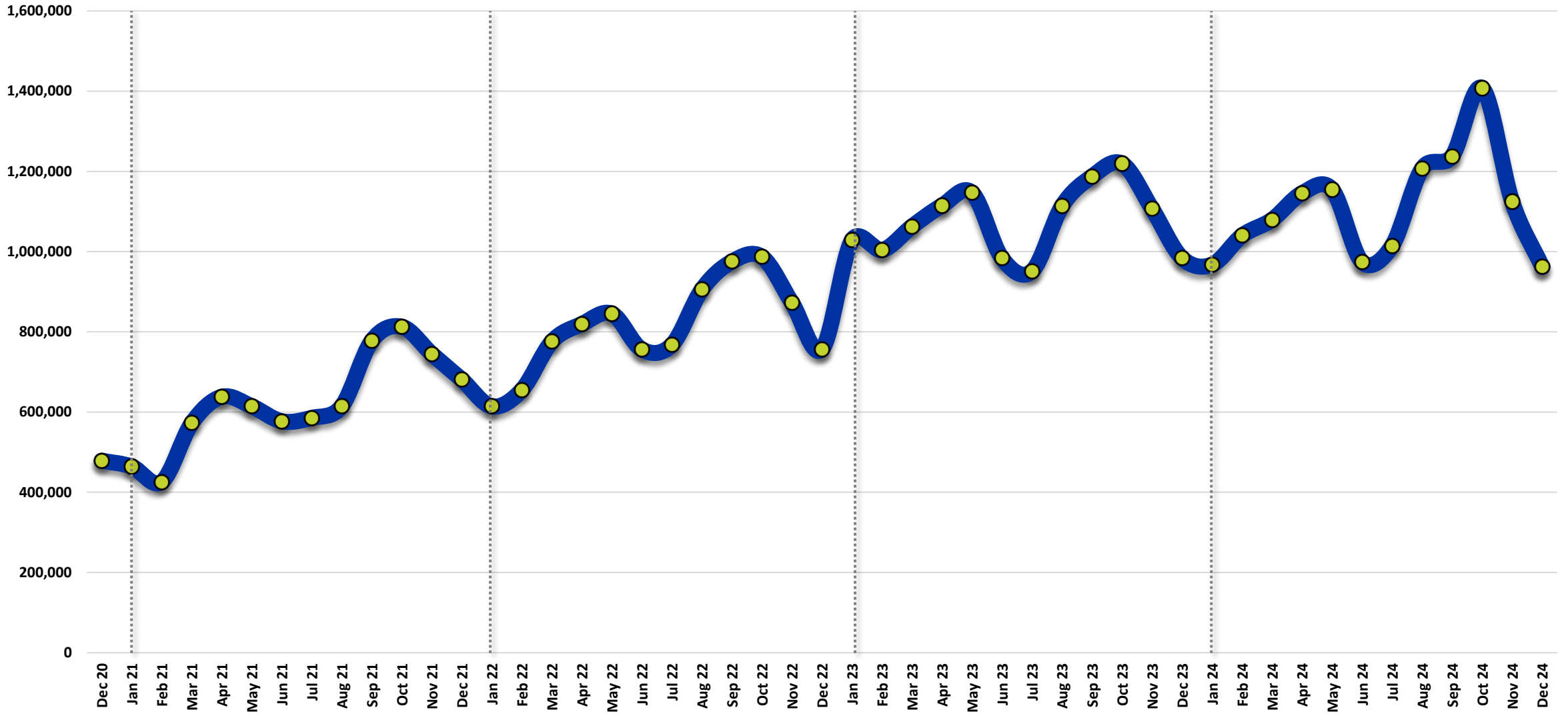
Fixed Route Ridership

Total Fixed Route Ridership YoY & Budget by Month

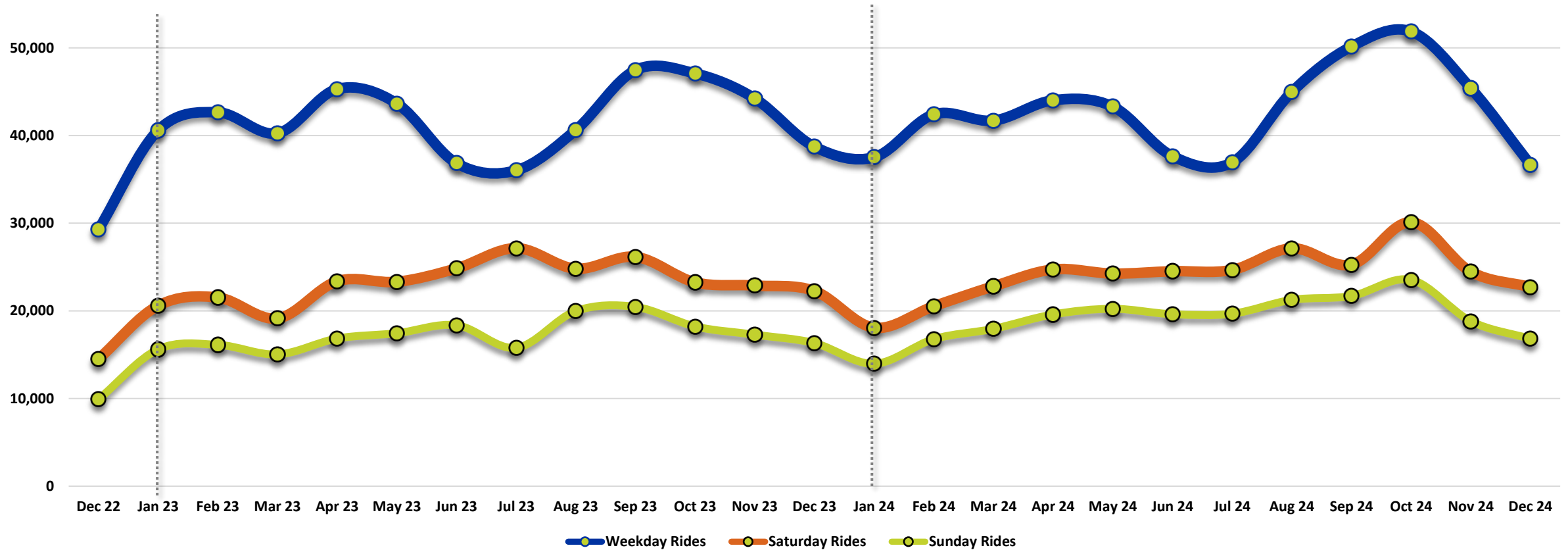


Service	Dec 24				Dec 23		
	Ridership	Budget	Budget Variance	% Budget Variance	Ridership	Past Year Variance	Past Year % Variance
Local	944,733	1,007,932	-63,199	-6.3%	961,378	-16,645	-1.7%
Express	17,378	27,023	-9,645	-35.7%	22,471	-5,093	-22.7%
Totals	962,111	1,034,955	-72,844	-7.0%	983,849	-21,738	-2.2%
Total (YTD)	13,315,630	13,749,994	-434,364	-3.2%	12,902,123	413,507	3.2%

Total Fixed Route Ridership by Month

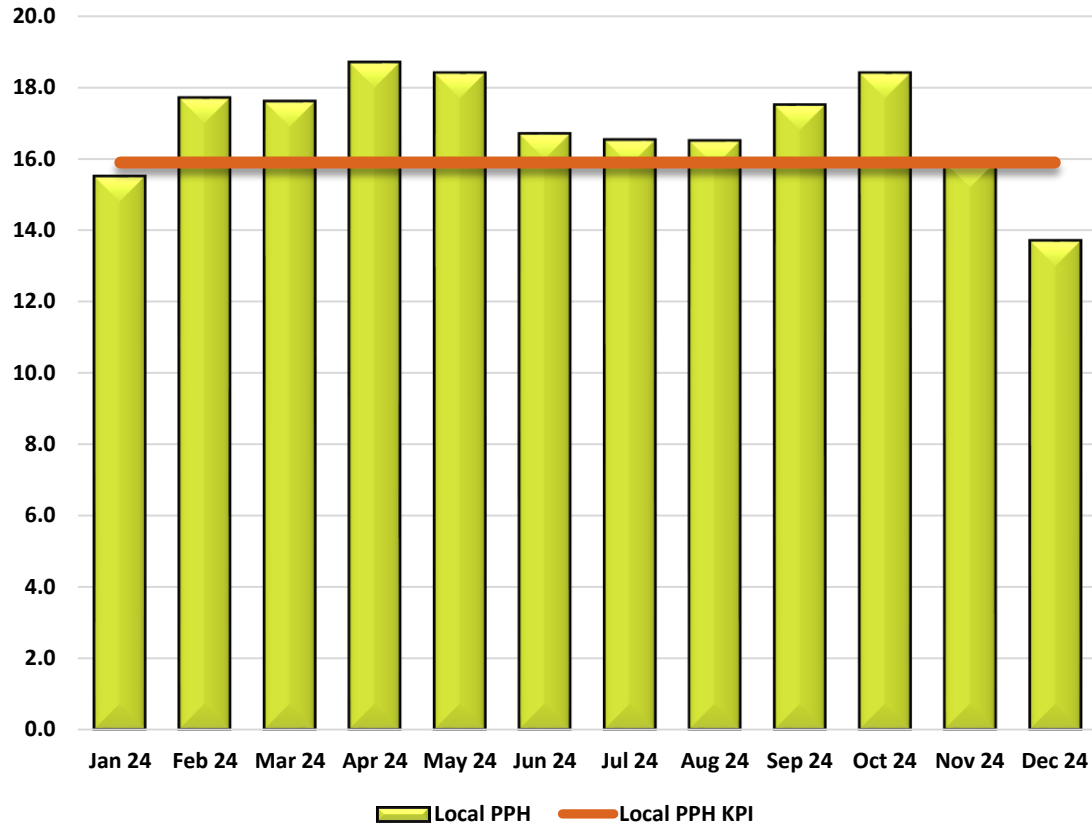


Average Daily Ridership (WD, SA, SU)

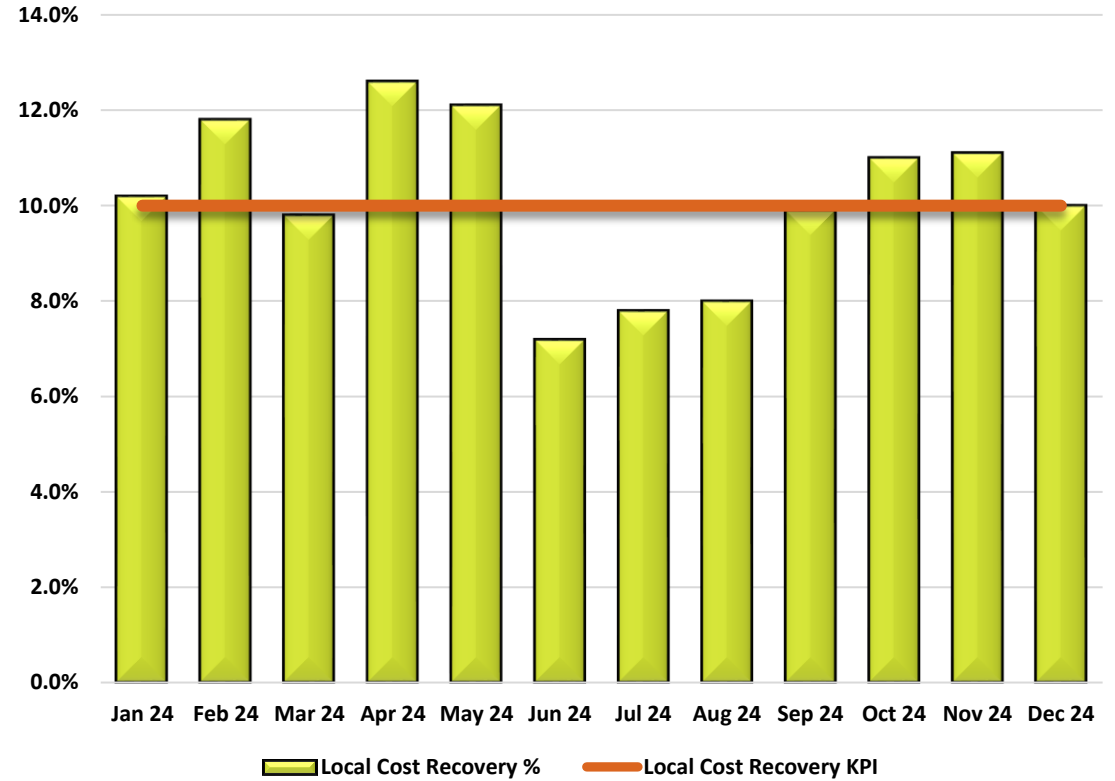


Service	Dec 24 Avg Daily	Dec 24 Avg Daily Budget	Budget % Variance	Dec 23 Avg Daily	Dec 23 - Dec 24 % Variance
WEEKDAY	36,687	41,234	-11.0%	38,727	-5.3%
SATURDAY	22,715	20,948	8.4%	22,276	2.0%
SUNDAY	16,811	14,208	18.3%	16,323	3.0%

Local Service Productivity (Last 12 Months)



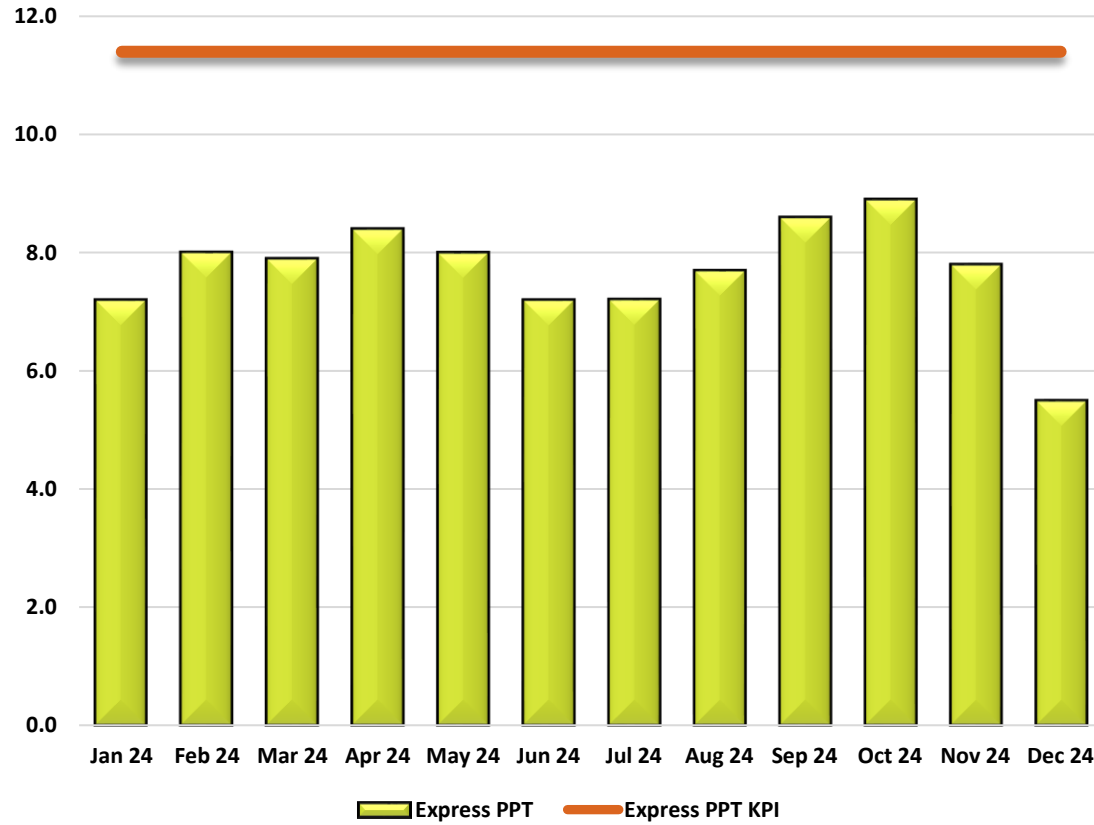
Local Service Cost Recovery & (Last 12 Months)



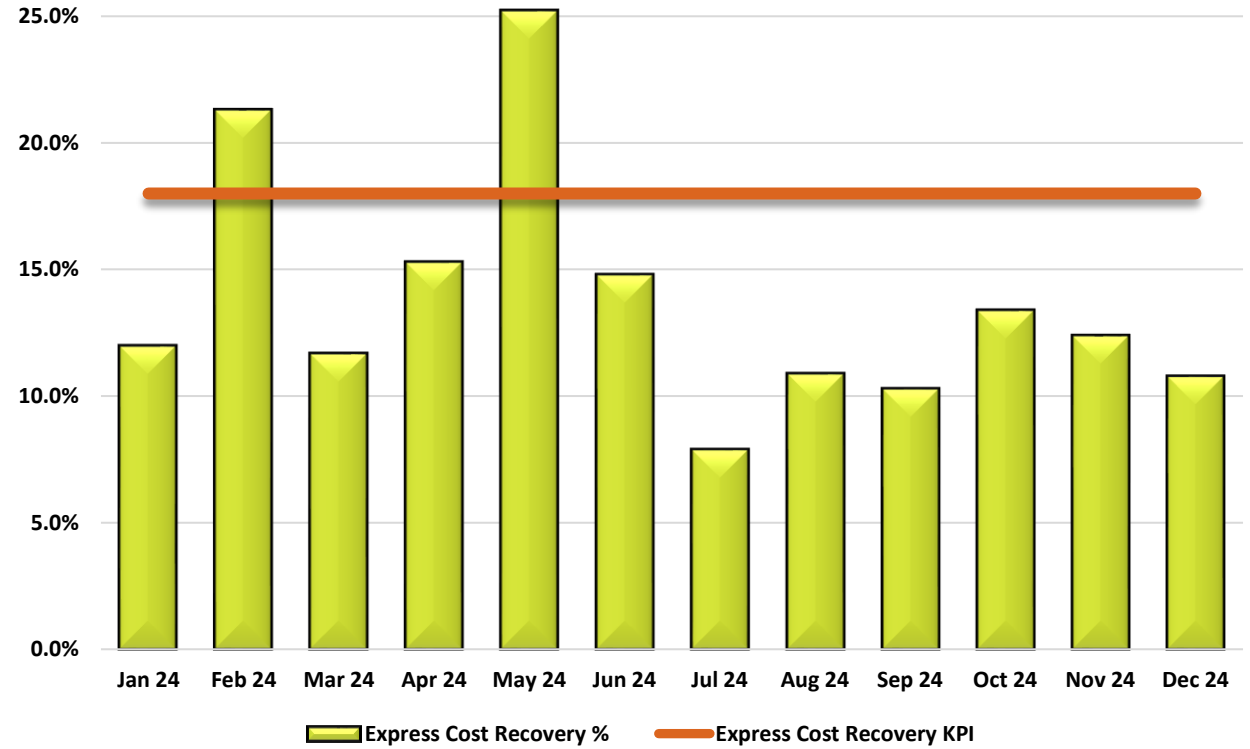
Local Service	Dec 24 Actual KPI	Dec 24 Budget KPI	Variance
Passengers Per Hour	13.7	15.9	-2.2
Cost Recovery	10.0%	10.0%	0.0%

*percentage points

Express Service Productivity (Last 12 Months)



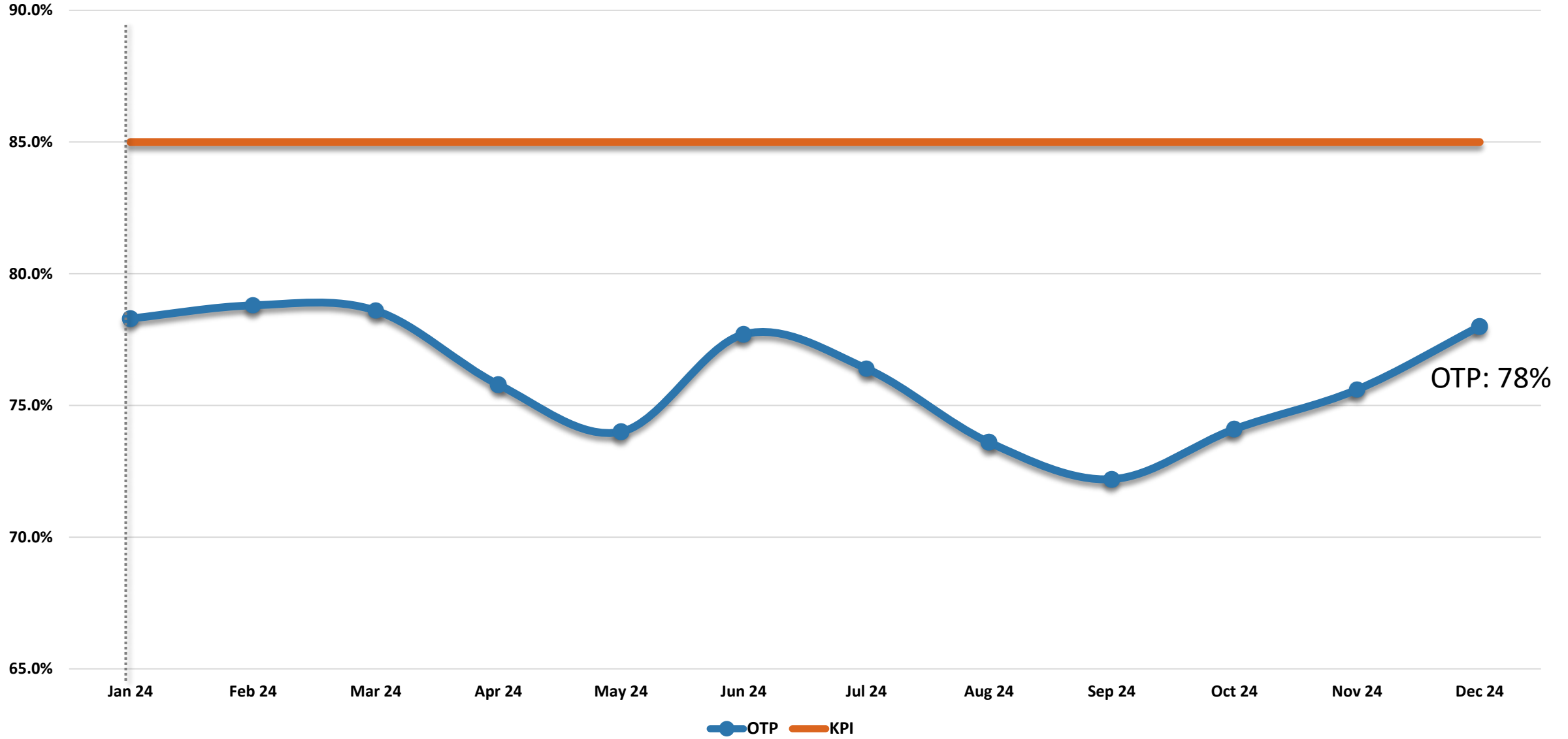
Express Service Cost Recovery % (Last 12 Month)



Express Service	Dec 24 Actual KPI	Dec 24 Budget KPI	Variance
Passengers Per Trip	5.5	11.4	-5.9
Cost Recovery	10.8%	18.0%	-7.2%

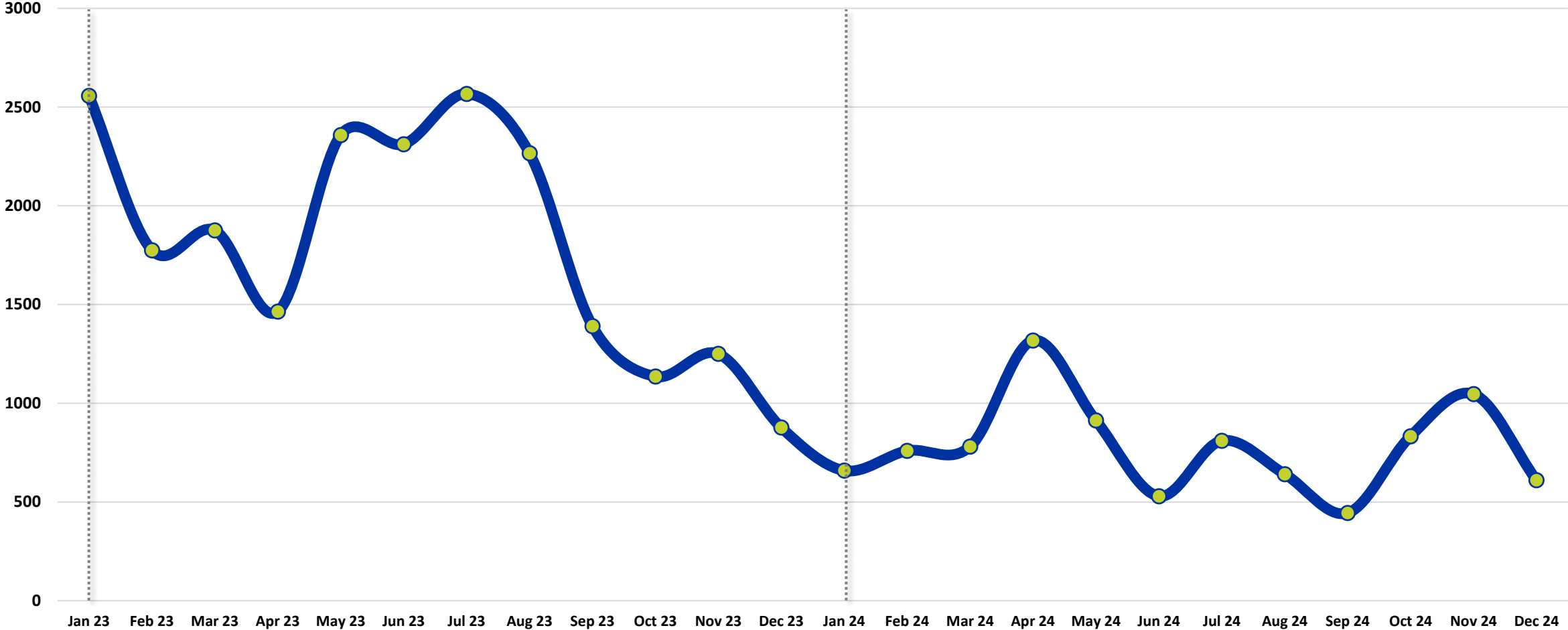
**percentage points*

Overall On-Time Performance (Last 12 Months)



OTP: 78%

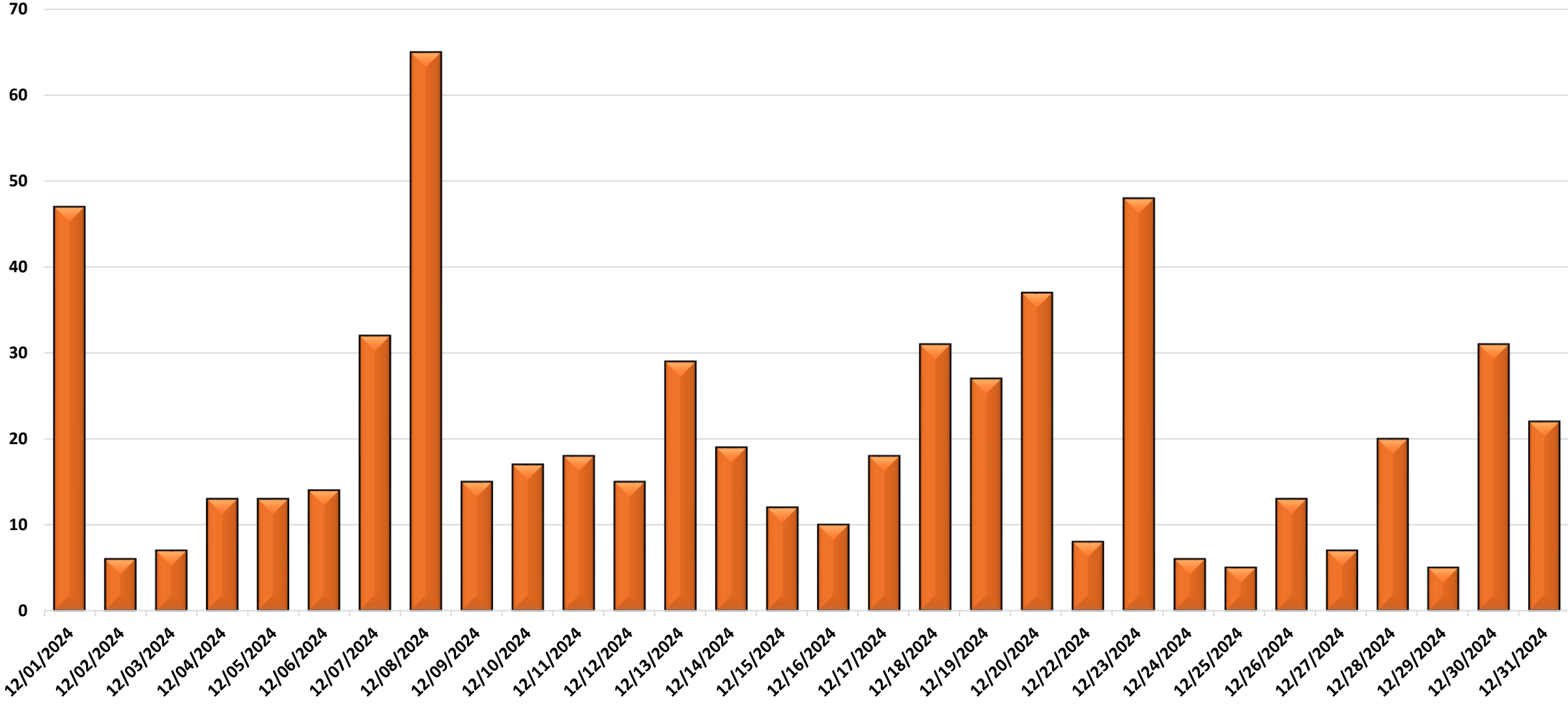
Fixed-Route Missed Trips by Month



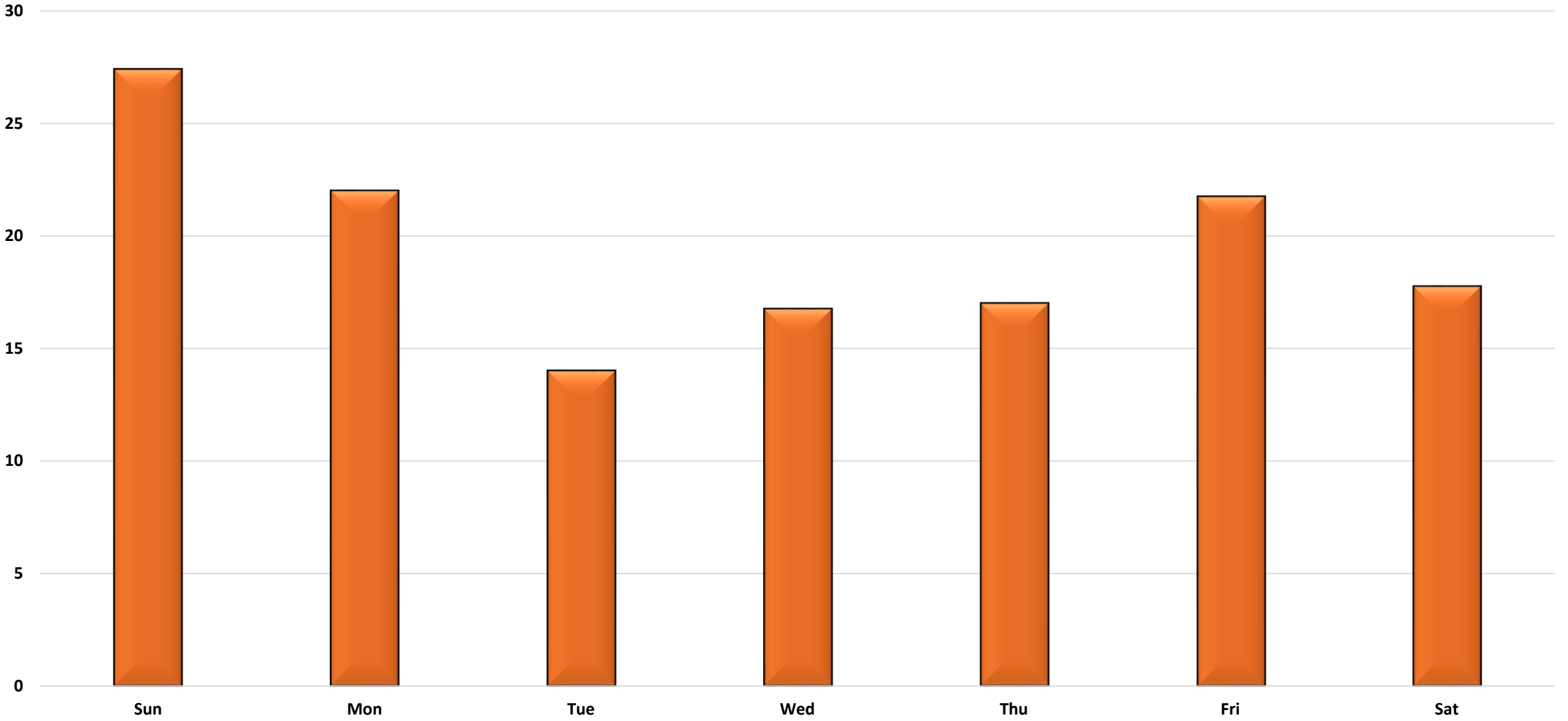
	Missed Trips	Total Trips Scheduled	% of Trips Operated	Monthly KPI	End of Year KPI
Dec 24	610	68,945	99.1%	99.6%	99.6%



Missed Trips by Day



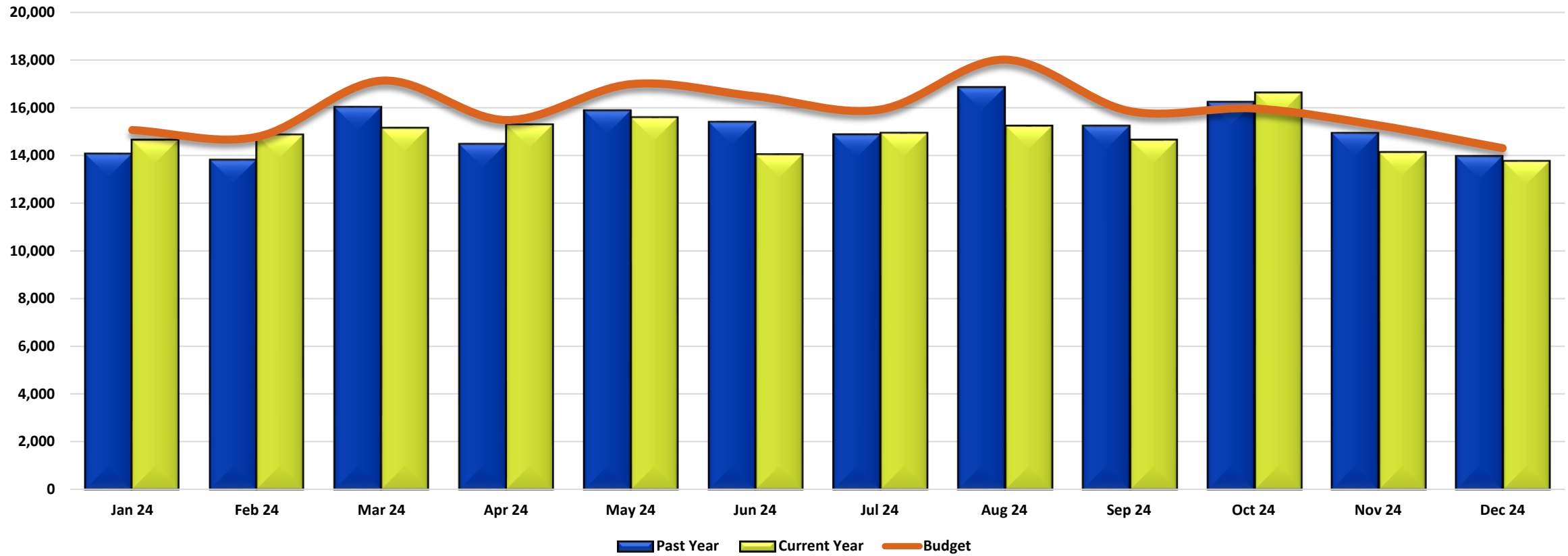
Avg Missed Trips by Day of Week





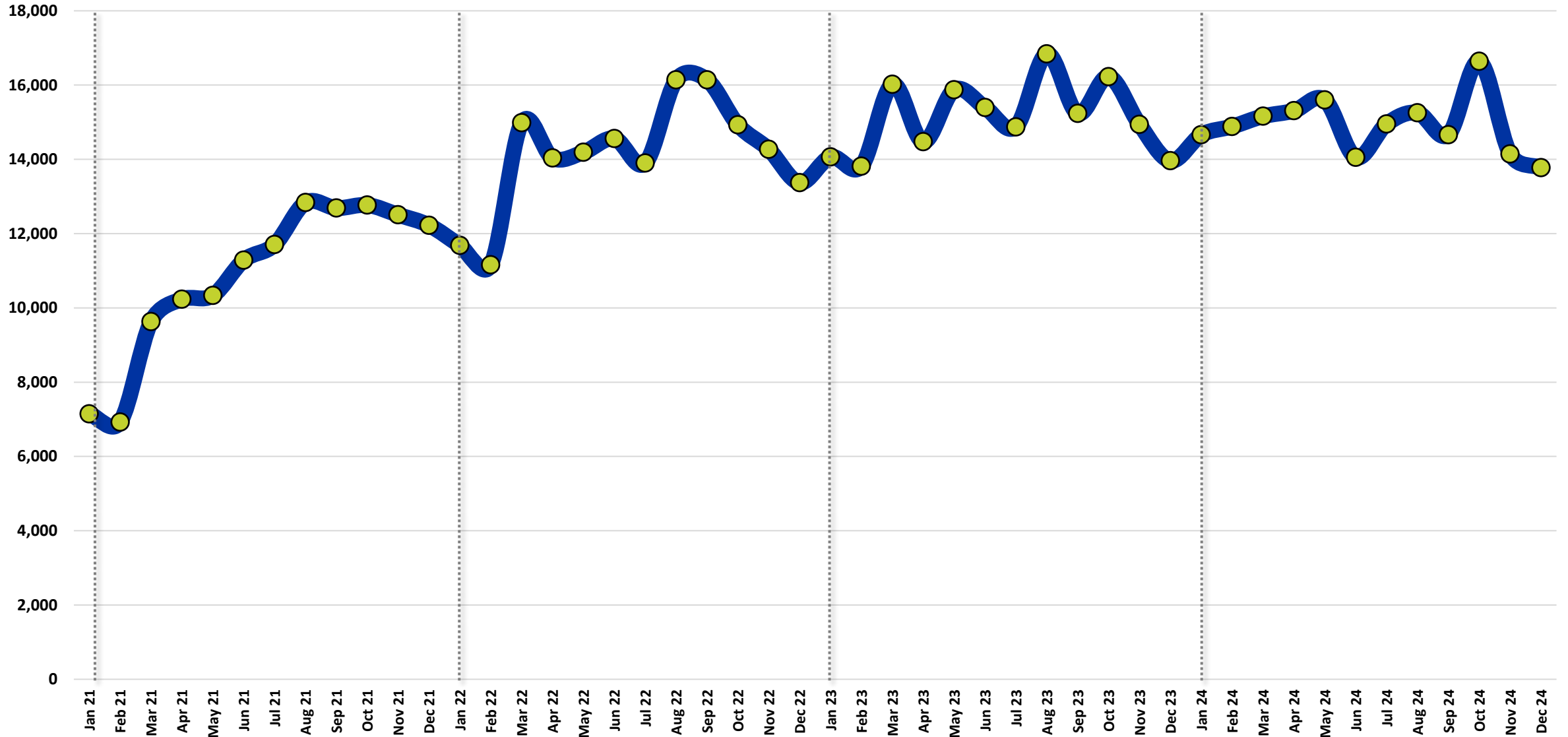
ACCESS Ridership

Total Access Ridership

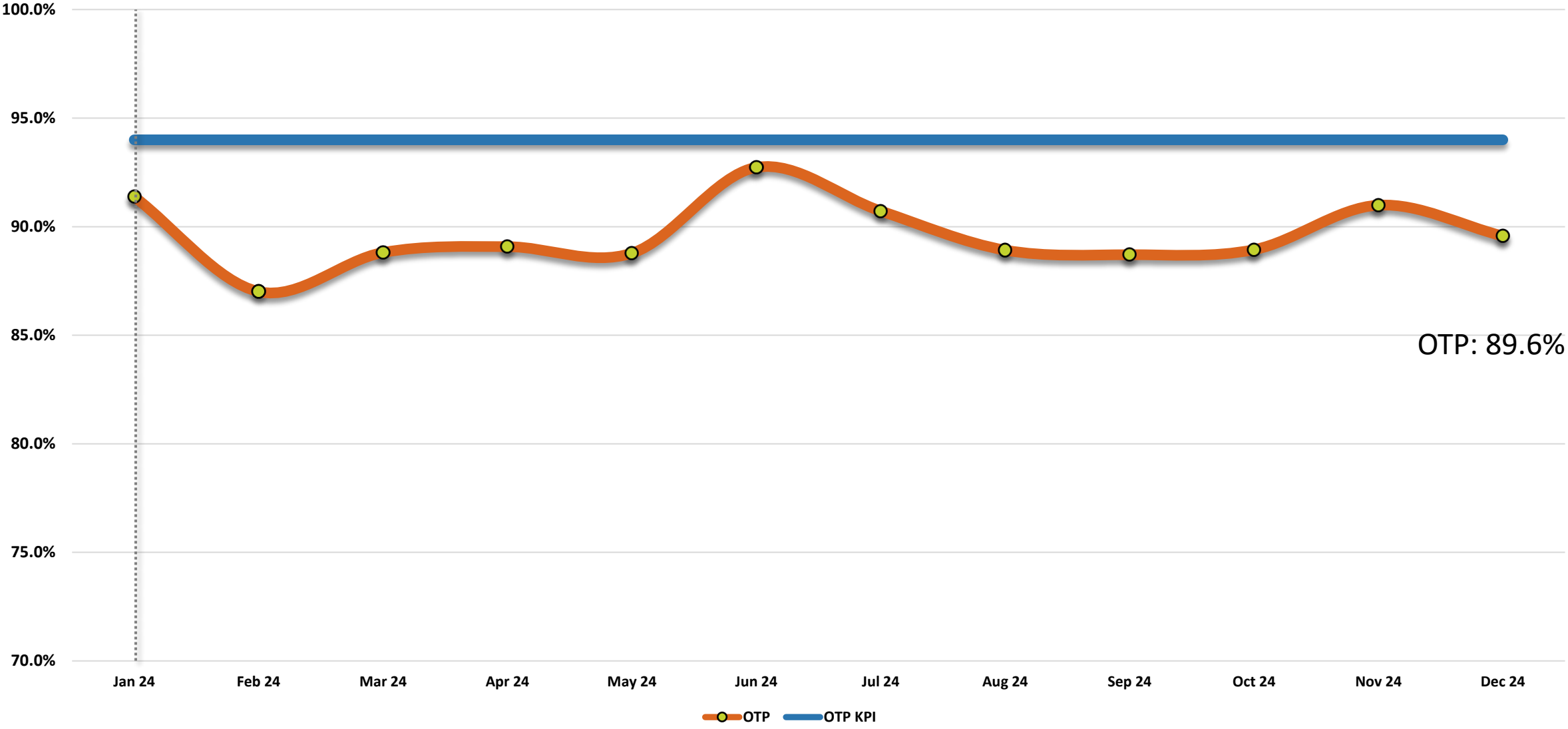


Dec 24	Dec 24 Ridership	Dec 24 Budget	Budget Variance	Dec 23 Ridership	Dec 23 - Dec 24 Variance
Total	13,774	14,307	-3.7%	13,961	-1.3%
Weekday	12,230			12,331	-0.8%
Saturday	675			847	-20.3%
Sunday	806			783	2.9%
Total (YTD)	179,023	191,309	-6.4%	181,712	-1.5%

Total Access Ridership by Month

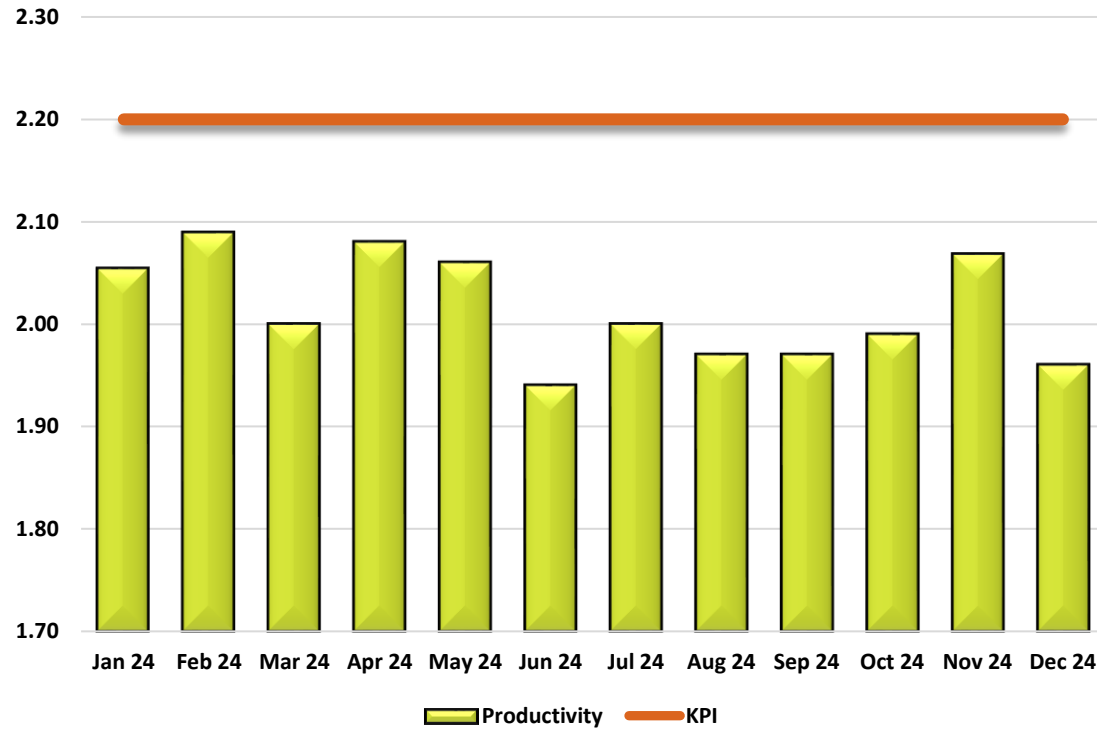


On-Time Performance - Access

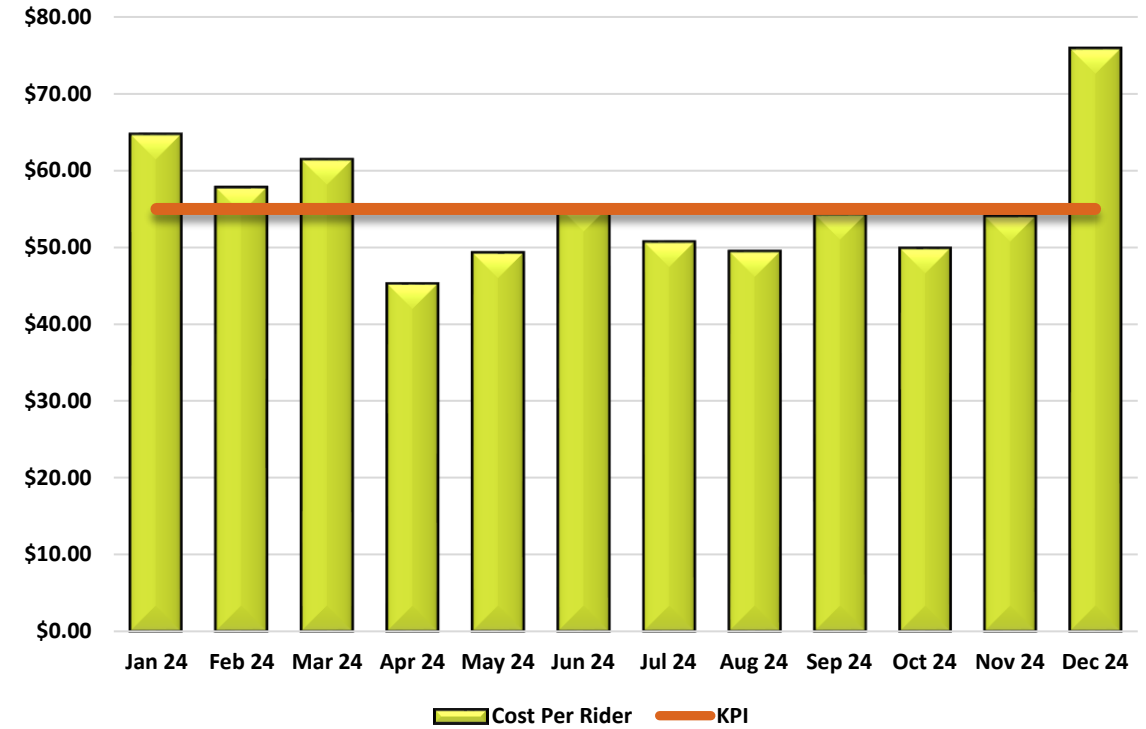


OTP: 89.6%

Access Service - Productivity



Access Service - Cost Per Rider



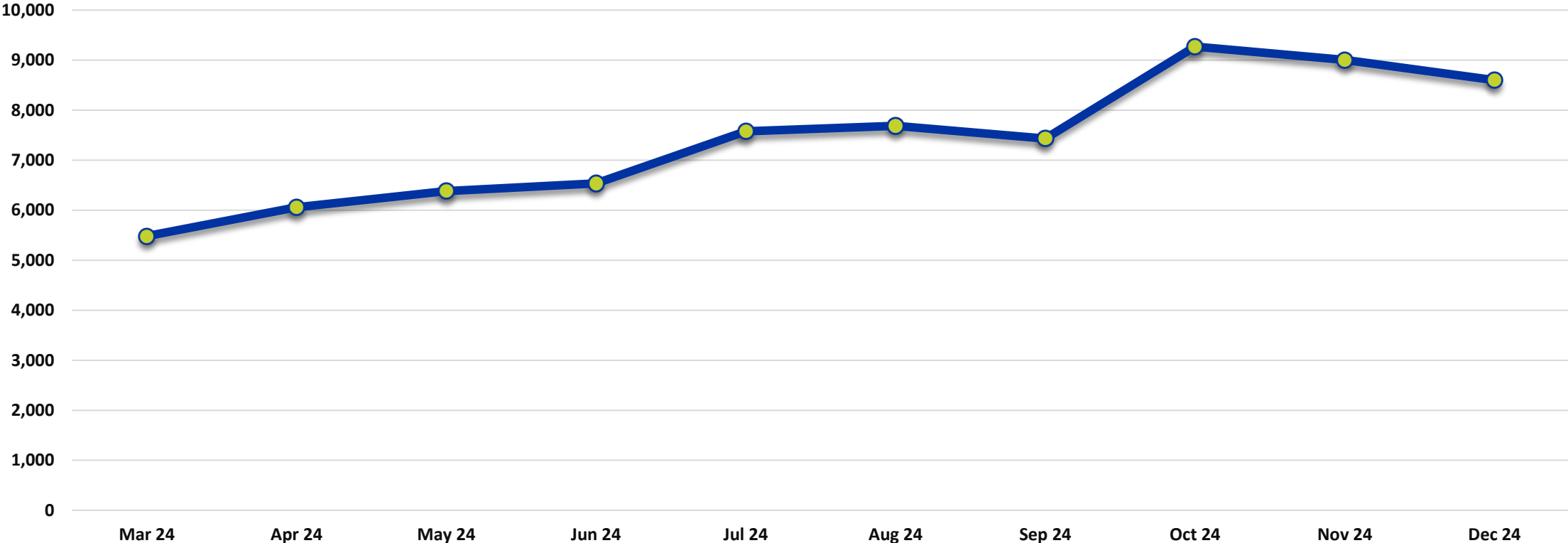
Dec 24	Dec 24 Actual	Dec 24 KPI	Variance
Cost Per Passenger	\$75.88	\$55.00	\$20.88
On-Time Performance	89.6%	94.0%	-4.4%
Passengers Per Hour	1.96	2.2	-0.24

*percentage points



MetroNow!

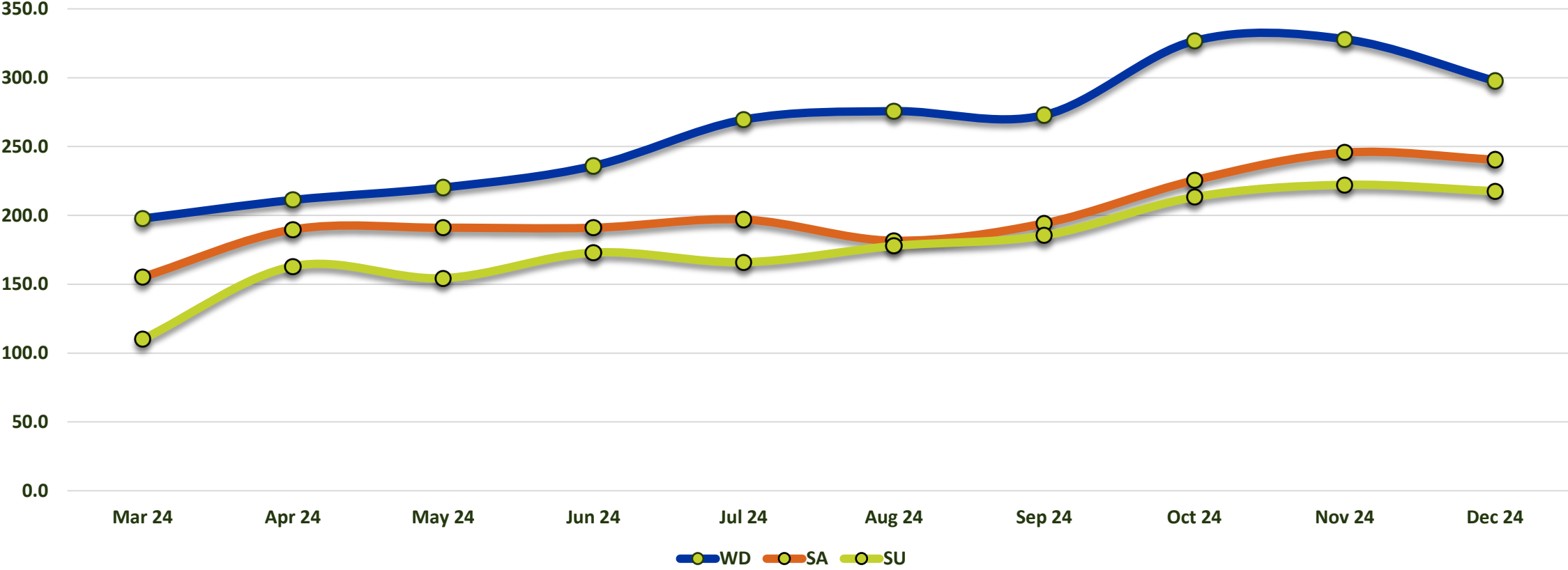
MetroNow Monthly Riders



December 2024	Dec 24 Actual
Monthly Riders	8,600
On-Time Performance (Pickup <5 min after schduled)	98.4%
Riders YTD (Jan - Dec, 2024)	84,002
Riders Since Launch (May, 2023)	104,771



MetroNow Ridership by Day Type

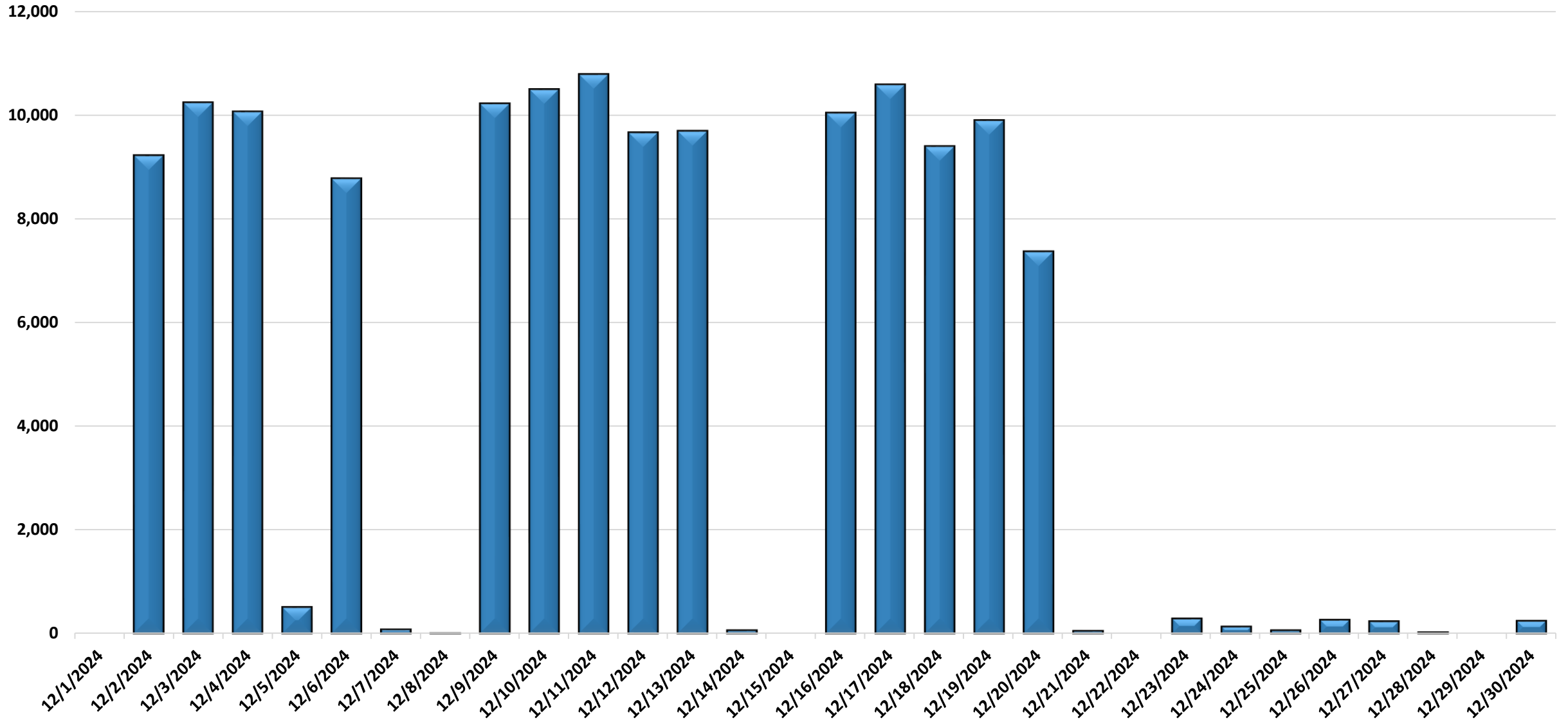


Dec 2024	Dec 24 Actual
Weekday Avg	297.7
Saturday Avg	240.5
Sunday Avg	217.6

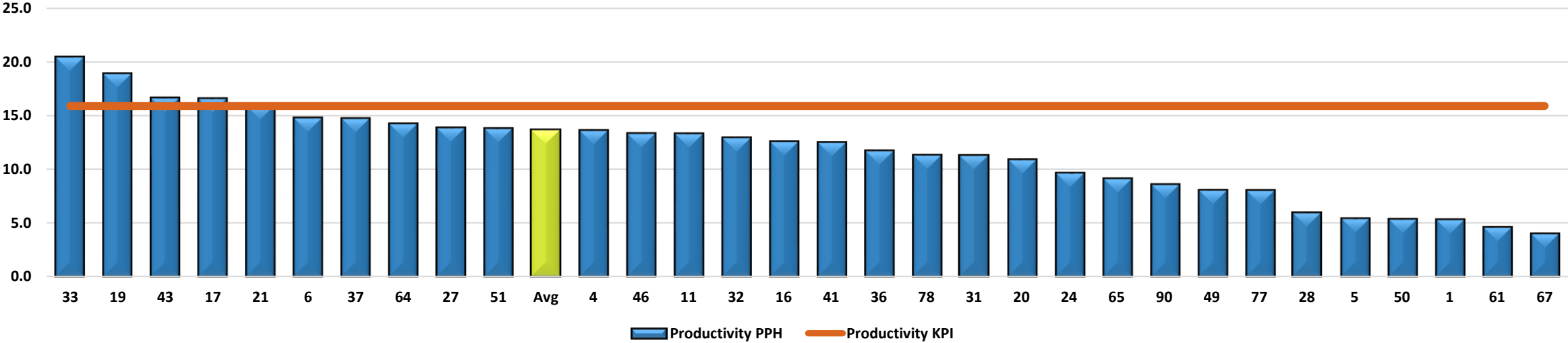


Route Level KPIs

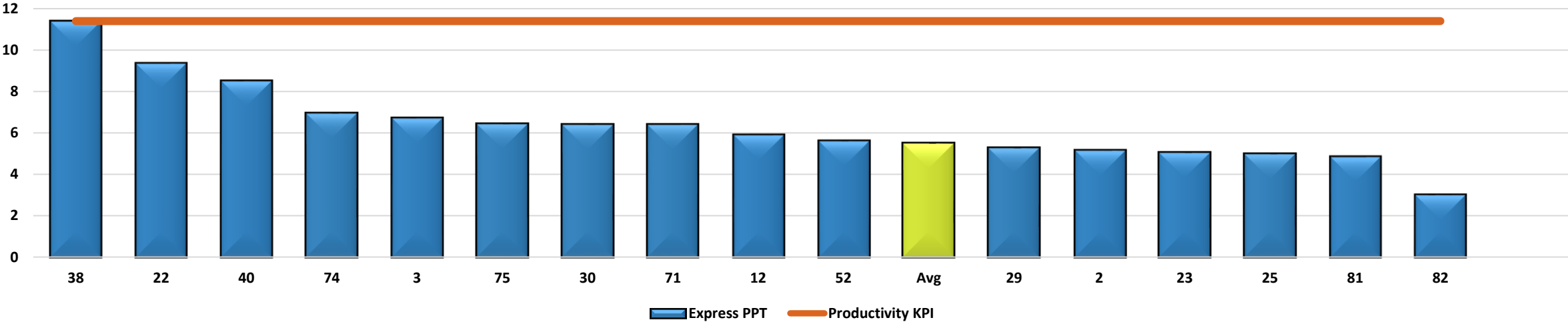
CPS Ridership by Day



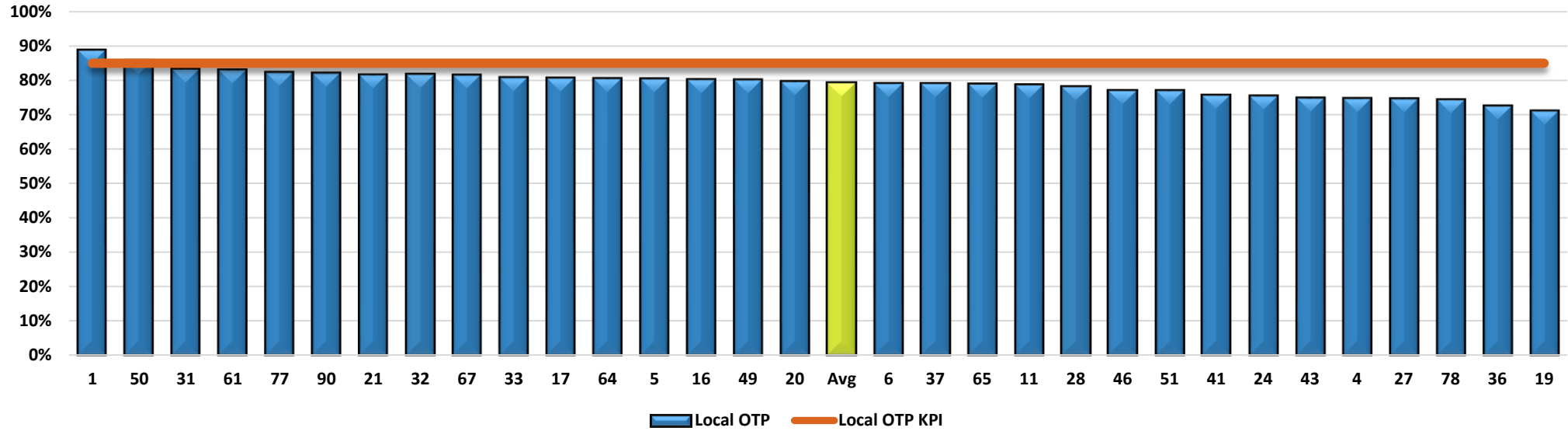
Productivity - Local



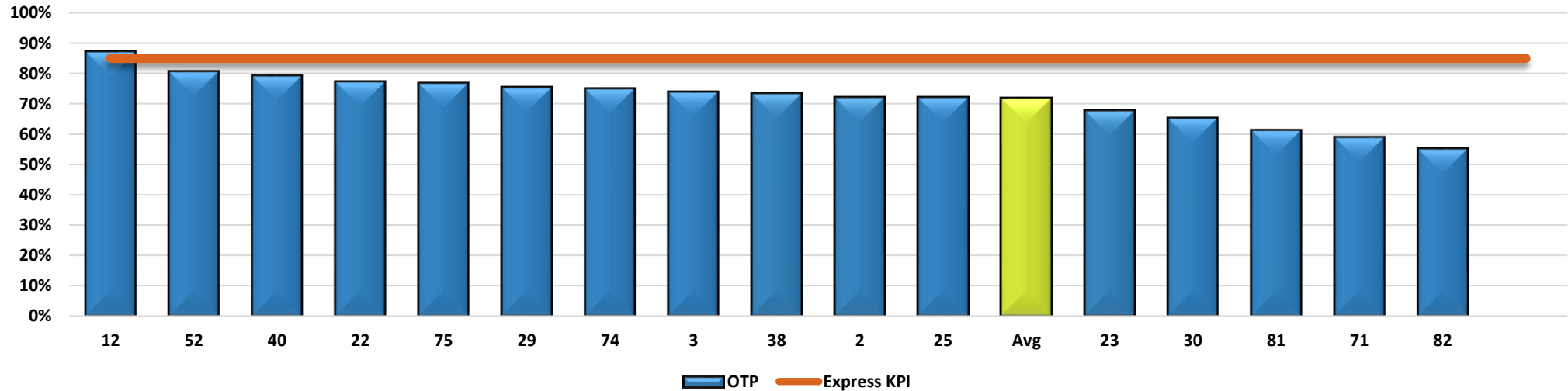
Productivity - Express



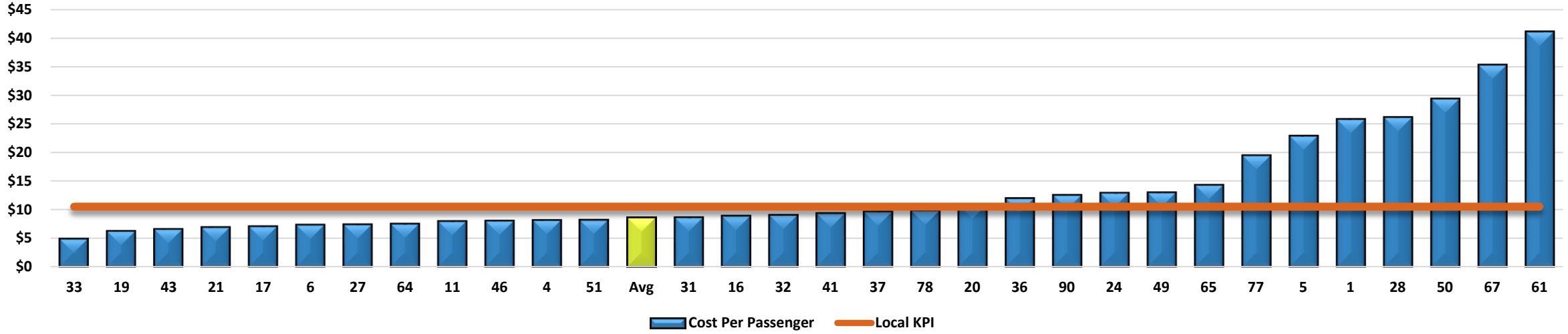
OTP – Local



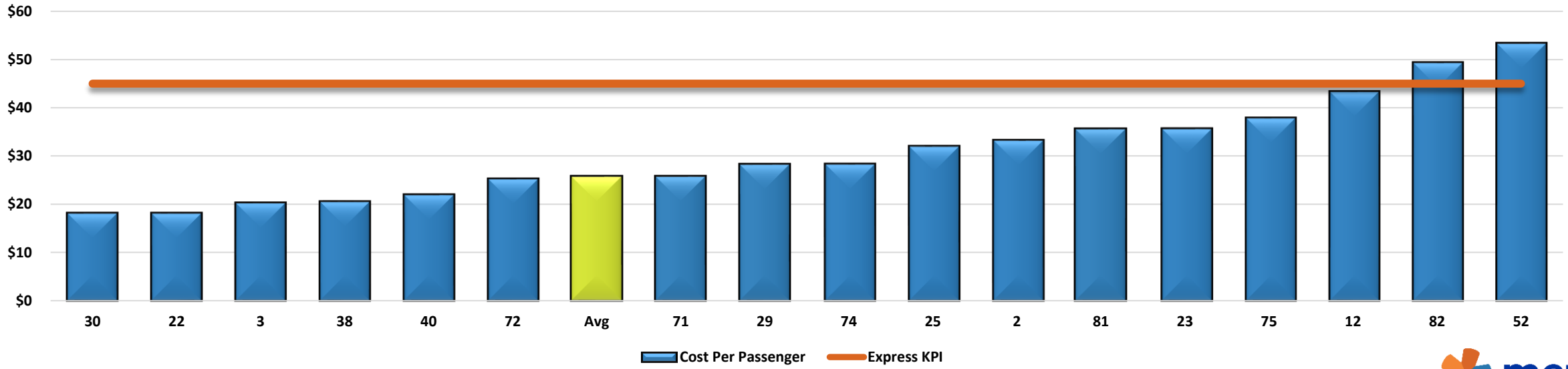
OTP – Express



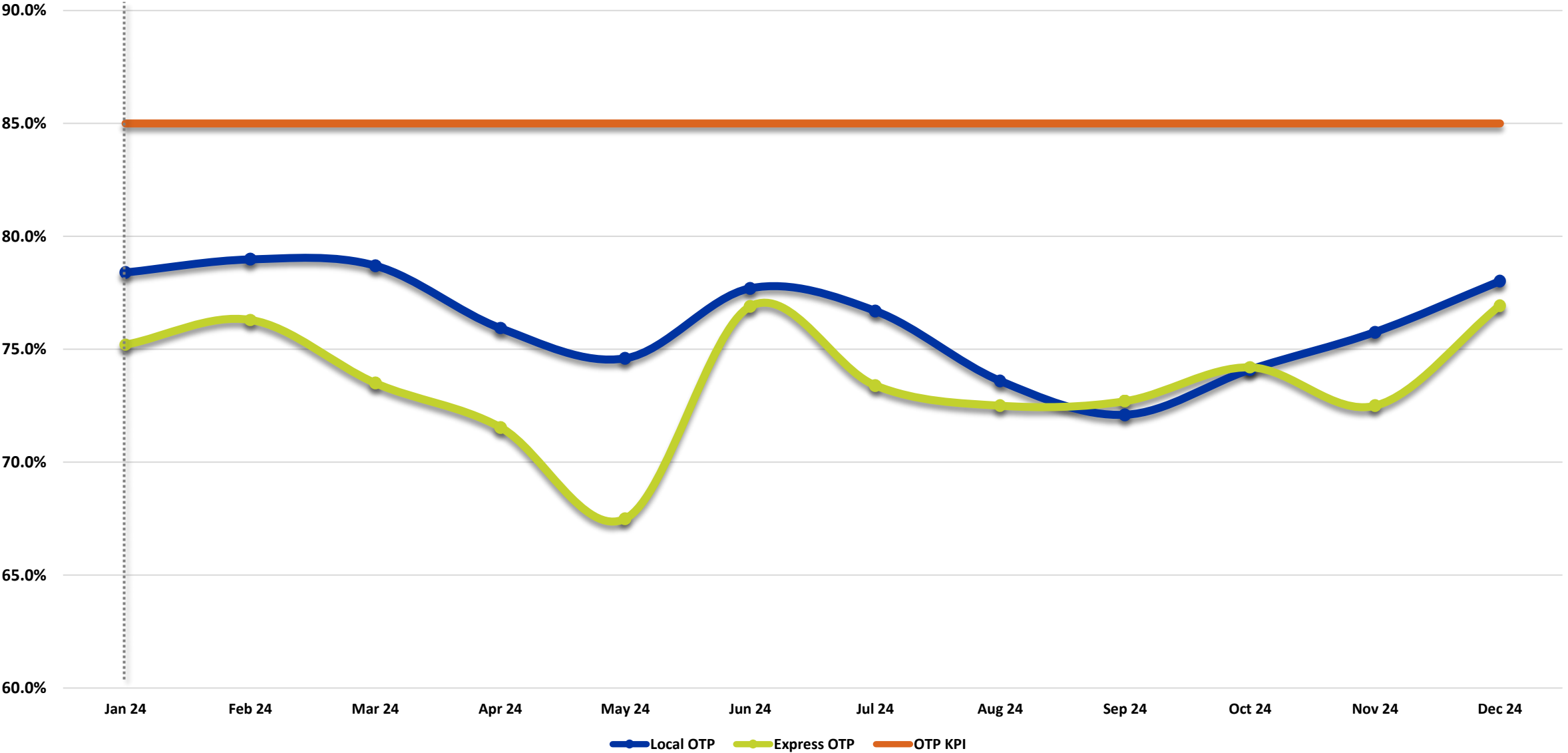
Cost Per Passenger – Local



Cost Per Passenger – Express



On-Time Performance Local & Express Service (Last 12 Months)

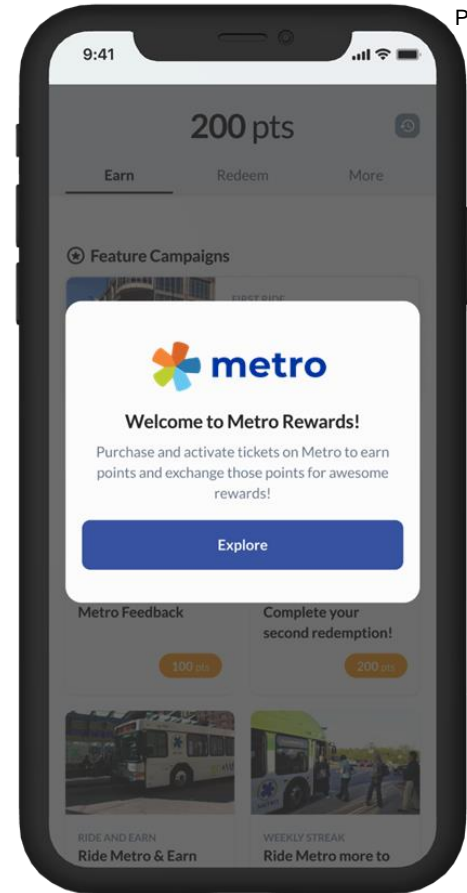




Velocia – SORTA Board Presentation

Velocia – Metro Rewards Overview

- Targeted incentives to change ride behavior
- Integrated into Metro's existing rider facing technology (Masabi)
- Riders can redeem for mobility options or local retailers
- Zero risk model with return on investment for Metro



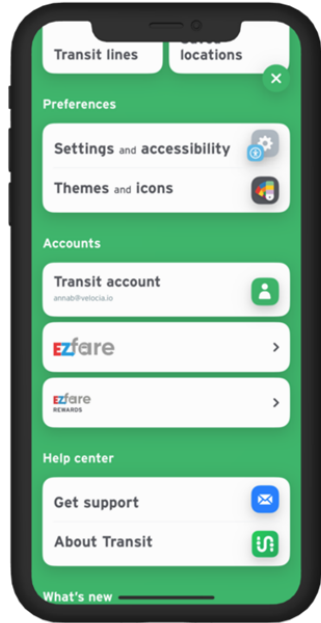
NEORide

- Metro participates in the EZFare fare collection contract
- Procured through competitive bid, administered by NeoRide, and awarded to Masabi
- Velocia is a sub-contractor to Masabi
- Contracting completed via Participation Agreement variation letter
- Signed between Masabi / Metro



Technology Integration Included

Rider Apps



Transit App & EZFare App

Behavior Validation



Redemptions



**National Retailers
(Starbucks, Chipotle, etc.)**

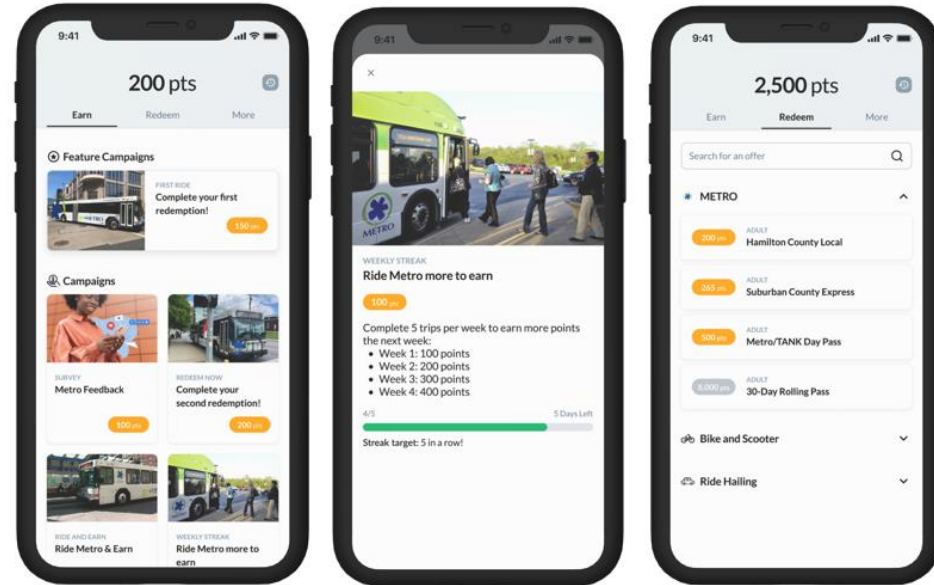
Campaigns

Goal: increase ridership

- Local routes / commuter routes
- College students
- Events

Success Measurement

- Increased ridership from existing riders
- Net new riders to the Metro system
- Evening engagement from College/University students

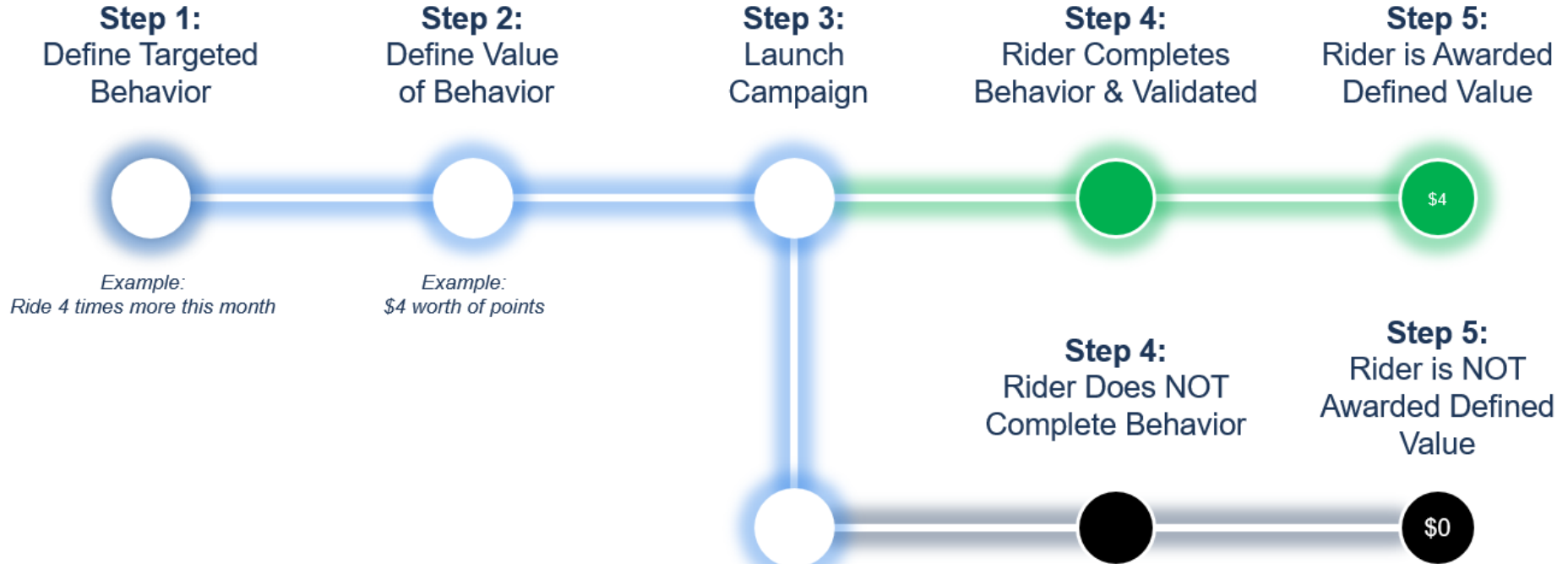


Engage

Earn

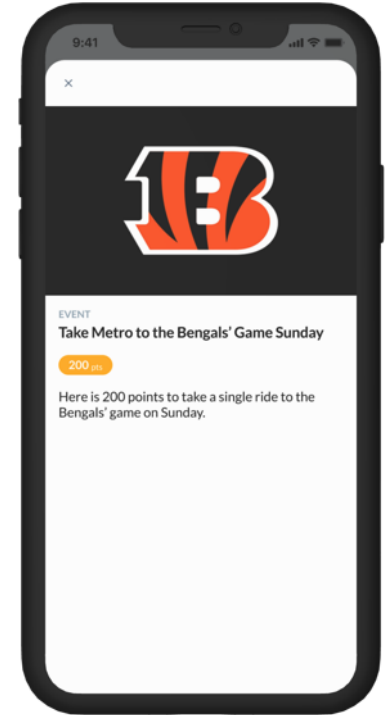
Redeem

Zero Risk Investment



Optional Additional Programs

- Large event management
- Transit validation to partner with local businesses/organizations
- Transit ambassador program
- Automated guaranteed ride home program





Q & A

Thank You

Project	Method	Vendor	Award	Term	Funding
099-2024* <i>Mobility Rewards Program</i>	Sole Source Award	NEORide	\$140,533 (o) <u>\$314,500 (m)</u> \$455,022	1 year Feb 2025 – Jan 2026	Budgeted Local Operating
167-2024 <i>Diesel Fuel Contract</i>	Invitation for Bid (IFB)	Colonial Oil Industries, Inc.	\$7,219,000	11 months Feb 2025 – Dec 2025	Budgeted Local Operating
168-2024 <i>Gasoline Fuel Contract</i>	Invitation for Bid (IFB)	Colonial Oil Industries, Inc.	\$823,742	11 months Feb 2025 – Dec 2025	Budgeted Local Operating
172-2024* <i>Kings Island Family Day</i>	Sole Source Award	Kings Island	\$310,904	10 months Feb 2025 – Oct 2025	Budgeted Local Operating

*denotes non-competitive or non-negotiable award

Supplier Diversity Summary

Total Awards for Month	\$8,668,146
Total Diversity Spend for Month	\$--
Addressable Awards	\$8,042,742
Effective Participation Rate	\$--
2024 Total Spend	\$101,756,326
2024 Diversity Spend	\$8,691,434 (8.5%)
2024 Total Addressable Spend	\$61,883,484
2024 Effective Participation Rate	14.0%



BOARD OF TRUSTEES
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY
RESOLUTION NO. 2025-xx

APPROVAL OF 099-2024 RIDER REWARDS PROGRAM (EZFARE MOBILE TICKETING)

WHEREAS:

1. In alignment with its goals of 20 million riders by 2026, Metro needs a transit ridership rewards software.
2. Metro has a current contract with Masabi that includes options for additional services, one of which is the software needed to support the rider incentive program.
3. A contract modification would provide the solution most advantageous to Metro.
4. SORTA staff recommends approval to execute modified Contract No. 099-2024, on behalf of Metro and Neoride increasing the total not to exceed value from \$140,522 to \$455,022, an increase of \$314,500.
5. The expenditures have been budgeted with local operating funds.

THEREFORE, BE IT RESOLVED:

6. The Board authorizes the CEO/General Manager/ Secretary-Treasurer or the CFO to execute modified Contract No. 099-2024, on behalf of Metro and Neoride increasing the total not to exceed value from \$140,522 to \$455,022, an increase of \$314,500.



BOARD OF TRUSTEES ACTION ITEM

DATE: January 21, 2025
FROM: John Edmondson, Sr. Director of Procurement
 Steve Anderson, Sr. Director of Transit Development & Innovation
PROJECT NO.: 099-2024 Rider Rewards Program (EZfare Mobile Ticketing)
REQUEST: Contract Award

BACKGROUND

In alignment with its goal of 20 million riders by 2026, Metro needs a transit ridership rewards software that incentivizes current and potential riders to use public transit more frequently, promoting sustainable mobility and addressing environmental and congestion concerns. The software should incentivize riders to take extra rides based on their demographic and/or usage patterns with discounted Metro fares, discounted mobility options (Uber, Lime, etc.) and/or discounted offers for everyday products such as coffee or fast food, etc.

BUSINESS PURPOSE

Metro has a current contract with Masabi that includes options for additional services, one of which is the software needed to support the rider incentive program. A contract modification would provide the solution most advantageous to Metro.

PROJECT FINANCING

The budget for the project is \$314,500 and is included in the approved FY2025 Operating budget.

The contract is structured as an indefinite delivery / indefinite quantity (“IDIQ”) contract since the exact amount to be purchased and the exact unit price is based on variables such as campaign options, ridership, and consumption. As such, the final project of cost \$314,500 is flat to budget.

PROJECT PROCUREMENT

This is a sole source award. No market competition is available for this item.

PROJECT DIVERSITY

This project is a sole source award with no subcontracting opportunities. As such, no vendor diversity goal has been established.

RECOMMENDED BOARD ACTION

Staff recommends the Board of Trustees approve a resolution authorizing the CEO/General Manager/Secretary-Treasurer or the Senior Director of Procurement to execute a modification to Contract No. 099-2024, on behalf of Metro with NEORide, increasing the total not to exceed value from \$140,522 to \$455,022, an increase of \$314,500.



BOARD OF TRUSTEES
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY
RESOLUTION NO. 2025-xx

APPROVAL OF 167-2024 DIESEL FUEL SUPPLY

WHEREAS:

1. Metro operates more than 300 buses and 20 paratransit vehicles in revenue service.
2. The vehicles require diesel fuel and consume approximately 280,000 gallons per month.
3. Metro is shifting from a quarterly solicitation and award to an annual award to increase purchasing power and lower pricing.
4. SORTA staff recommends approval to execute Contract No. 167-2024, on behalf of Metro and Colonial Oil Industries, Inc., with a not to exceed value of \$7,219,000.
5. The expenditures have been budgeted with local operating funds.

THEREFORE, BE IT RESOLVED:

6. The Board authorizes the CEO/General Manager/ Secretary-Treasurer or the CFO to execute Contract No. 167-2024, on behalf of Metro and Colonial Oil Industries, Inc., with a not to exceed value of \$7,219,000.



BOARD OF TRUSTEES ACTION ITEM

DATE: January 21, 2025
FROM: John Edmondson, Sr. Director of Procurement
 Jeff Mundstock, Director of Fleet & Facilities
PROJECT NO.: 167-2024 Diesel Fuel Supply
REQUEST: Contract Award

BACKGROUND

Metro operates more than 300 buses and 20 paratransit vehicles in revenue service that require diesel fuel, consuming approximately 280,000 gallons per month.

BUSINESS PURPOSE

Metro is shifting from a quarterly solicitation and award to an annual award to increase purchasing power and lower pricing.

PROJECT FINANCING

The budget for this project is \$7,219,000 and is included in the approved FY2025 Operating budget.

The contract is structured as an indefinite delivery / indefinite quantity (“IDIQ”) contract since the exact amount to be purchased and the exact unit price is based on fluctuating variables (e.g., price per gallon at the time of delivery, number of revenue vehicles in service, changes to routes, etc.). As such, the final project of cost \$7,219,000 is flat to budget.

Diesel fuel prices will vary daily. The contract price is structured such that Metro will pay a fee, referred to as a differential, above the price per gallon at the time of delivery. The unit price (i.e., differential fee) for the project is \$0.0125 per gallon delivered, **a savings of 70.3% per gallon.**

PROJECT PROCUREMENT

Based on the exact specifications and limited variables to consider, Procurement staff determined that an Invitation for Bid (“IFB”) was the appropriate method of procurement. Under this method, the contract is awarded to the lowest responsive, responsible bidder.

Staff targeted 10 specific vendors known to have the capacity to deliver on the requirements of the contract in addition to those notified through Metro’s e-procurement platform. 24 firms downloaded solicitation materials, and 8 vendors submitted responses. All bids were determined to be responsive. Below is a tabulated table of the responses:

Line Item	Description	Unit of Measure	Colonial Oil Industries, Inc.	Mansfield Oil Company of Gainesville, Inc	Petroleum Traders Corporation	Pinnacle Petroleum, Inc.	Ports Petroleum	Santmyer Energy	Sunoco LP	Tartan Oil LLC
			Unit Cost	Unit Cost	Unit Cost	Unit Cost	Unit Cost	Unit Cost	Unit Cost	Unit Cost
1	Queensgate Garage (120,000 - 150,000 gallons)	\$ Diff per Gallon	\$.0125	\$.0412	\$.0229	\$.0505	\$.0693	\$.0388	\$.0806	\$.033
2	Bond Hill Garage (90,000 - 120,000 gallons)	\$ Diff per Gallon	\$.0125	\$.0408	\$.0229	\$.0482	\$.0693	\$.0388	\$.0806	\$.033
3	Access (7,500 - 10,000 gallons)	\$ Diff per Gallon	\$.0125	\$.044	\$.0229	\$.0482	\$.0693	\$.0388	\$.0806	\$.033



The contract is an indefinite delivery, indefinite quantity contract (“IDIQ”) with a firm fixed unit cost and an 11-month period of performance (February 2025 – December 2025).

PROJECT DIVERSITY

Staff determined that the nature of the work to be performed did not present ample subcontracting opportunities. As a result, no diverse vendor participation goal was established for the award.

No XBE vendors responded to the solicitation.

RECOMMENDED BOARD ACTION

Staff recommends the Board of Trustees approve a resolution authorizing the CEO/General Manager/Secretary-Treasurer or the Senior Director of Procurement to execute Contract No. 167-2024, on behalf of Metro with Colonial Oil Industries, Inc., with a not to exceed value of \$7,219,000.



BOARD OF TRUSTEES
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY
RESOLUTION NO. 2025-xx

APPROVAL OF 168-2024 GASOLINE FUEL CONTRACT

WHEREAS:

1. Metro operates more than 60 revenue service (Paratransit, MetroNOW) and support vehicles that require gasoline for operating.
2. A new fueling station has recently been installed at the Access facility that allows for refueling of gasoline-powered vehicles.
3. Metro is shifting from a quarterly solicitation and award to an annual award to increase purchasing power and lower pricing.
4. SORTA staff recommends approval to execute Contract No. 168-2024, on behalf of Metro and Colonial Oil Industries, Inc., with a not to exceed value of \$823,742.
5. The expenditures have been budgeted with local operating funds.

THEREFORE, BE IT RESOLVED:

6. The Board authorizes the CEO/General Manager/ Secretary-Treasurer or the CFO to execute Contract No. 167-2024, on behalf of Metro and Colonial Oil Industries, Inc., with a not to exceed value of \$823,742.



BOARD OF TRUSTEES ACTION ITEM

DATE: January 21, 2025
FROM: John Edmondson, Sr. Director of Procurement
 Jeff Mundstock, Director of Fleet & Facilities
PROJECT NO.: 168-2024 Gasoline Fuel Contract
REQUEST: Contract Award

BACKGROUND

Metro operates more than 60 revenue service (Paratransit, MetroNOW) and support vehicles that require gasoline fuel for operating. A new fueling station has recently been installed at the Access facility that allows for refueling of gasoline-powered vehicles.

BUSINESS PURPOSE

Metro is shifting from a quarterly solicitation and award to an annual award to increase purchasing power and lower pricing.

PROJECT FINANCING

The budget for the project is \$823,742 and is included in the approved FY2025 Operating budget.

The contract is structured as an indefinite delivery / indefinite quantity (“IDIQ”) contract since the exact amount to be purchased and the exact unit price is based on fluctuating variables (e.g., price per gallon at the time of delivery, number of revenue vehicles in service, changes to routes, etc.). As such, the final project of cost \$823,742 is flat to budget.

Gasoline fuel prices will vary daily. The contract price is structured such that Metro will pay a fee, referred to as a differential, above the price per gallon at the time of delivery. The unit price (i.e., differential fee) for the project is \$0.0253 per gallon delivered, **a savings of 50% per gallon.**

PROJECT PROCUREMENT

Based on the exact specifications and limited variables to consider, Procurement staff determined that an Invitation for Bid (“IFB”) was the appropriate method of procurement. Under this method, the contract is awarded to the lowest responsive, responsible bidder.

Staff targeted 10 specific vendors known to have the capacity to deliver on the requirements of the contract in addition to those notified through Metro’s e-procurement platform. 24 firms downloaded solicitation materials, and 8 vendors submitted responses. All bids were determined to be responsive. Below is a tabulated table of the responses:

Gasoline - E10 87 Octane - 2025			Colonial Oil Industries, Inc.	Indigo Energy Partners	Mansfield Oil Company of Gainesville, Inc	Petroleum Traders Corporation	Ports Petroleum	Sunoco LP	Tartan Oil LLC
Selected	Line Item	Unit of Measure	Unit Cost	Unit Cost	Unit Cost	Unit Cost	Unit Cost	Unit Cost	Unit Cost
X	1	\$ Diff per Gallon	\$.0253	\$.0325	\$.0679	\$.0325	\$.0668	\$.056	\$.0469



The contract is an indefinite delivery, indefinite quantity contract (“IDIQ”) with a firm fixed unit cost and an 11-month period of performance (February 2025 – December 2025).

PROJECT DIVERSITY

Staff determined that the nature of the work to be performed did not present ample subcontracting opportunities. As a result, no diverse vendor participation goal was established for the award.

No XBE vendors responded to the solicitation.

RECOMMENDED BOARD ACTION

Staff recommends the Board of Trustees approve a resolution authorizing the CEO/General Manager/Secretary-Treasurer or the Senior Director of Procurement to execute Contract No. 168-2024, on behalf of Metro with Colonial Oil Industries, Inc., with a not to exceed value of \$823,742.



BOARD OF TRUSTEES
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY
RESOLUTION NO. 2025-xx

APPROVAL OF 172-2024 KINGS ISLAND FAMILY DAY

WHEREAS:

1. Metro has received consistent feedback related to under-developed employee appreciation efforts.
2. Senior leaders have generated several ideas designed to enhance the employee appreciation program at Metro.
3. A purchase agreement is needed to secure reduced ticket pricing and catering services for the event.
4. SORTA staff recommends approval to execute Contract No. 172-2024, on behalf of Metro and Kings Island, with a not to exceed value of \$310,904.
5. The expenditures have been budgeted with local operating funds.

THEREFORE, BE IT RESOLVED:

6. The Board authorizes the CEO/General Manager/ Secretary-Treasurer or the CFO to execute Contract No. 172-2024, on behalf of Metro and Kings Island, with a not to exceed value of \$310,904.



BOARD OF TRUSTEES ACTION ITEM

DATE: January 21, 2025
FROM: John Edmondson, Sr. Director of Procurement
 Adriene Hairston, Chief Human Resources Officer
PROJECT NO.: 172-2024 Kings Island Family Day
REQUEST: Contract Award

BACKGROUND

Metro has received consistent feedback related to under-developed employee appreciation efforts. As a result, senior leaders have generated several ideas designed to enhance the employee appreciation program at Metro. One such idea is a family day at a local amusement park.

BUSINESS PURPOSE

Metro's Family Day will take place at Kings Island and will include tickets to the park, a meal, and parking. A purchase agreement is needed to secure reduced ticket pricing and catering services for the event. The Family Day will be on August 9 and 10, 2025.

PROJECT FINANCING

The budget for this project is \$310,904 and is included in the approved 2025 Operating Budget. The itemized ticket price is below:

Year	No. of Employees	Admission	Meal	Parking Fee	Total per Employee	No. Tickets per Employee	Total Cost
2025	1,100	\$35.00	\$34.16	\$1.50	\$70.66	4	\$310,904
2024	1,100	\$35.00	\$28.83	\$1.50	\$65.33	4	\$288,332
2023	1,118	\$33.00	\$21.75	\$3.00	\$57.57	4	\$257,454

The 2025 cost per person is 7.6% higher than 2024 prices, due primarily to annual price increases from the vendor and additional meal options for employees.

The final project cost of \$310,904 is flat to budget.

The project will be financed with local operating funds.

PROJECT PROCUREMENT

This is a sole source award. No market competition is available for this item.

PROJECT DIVERSITY

This project is a sole source award with no subcontracting opportunities. As such, no vendor diversity goal has been established.



RECOMMENDED BOARD ACTION

Staff recommends the Board of Trustees approve a resolution authorizing the CEO/General Manager/Secretary-Treasurer or the Senior Director of Procurement to execute Contract No. 172-2024, on behalf of Metro with Kings Island, with a not to exceed value of \$310,904.