



SORTA/Metro  
Board Meeting  
January 27, 2026  
9:00 am-10:00 am Eastern Time

SORTA BOARD OF TRUSTEES MEETING  
TUESDAY, JANUARY 27th, 2026 – 9:00 A.M.  
SORTA BOARD ROOM 6th FLOOR  
525 VINE STREET,  
CINCINNATI, OHIO, 45202

**General Items:**

Call to order  
Pledge of Allegiance  
Hearings from citizens  
Chair Update

**Action Item:**

- 1 Approval of Board Minutes December 16th, 2025

**Finance Committee (Chelsea Clark)**

**Briefing Item:**

- 2 Financial Results for December 31st, 2025 (Tim Walker)

**Action Items:**

- 3 Proposed Resolution: Approval of Purchase Threshold Increase (Tim Walker)

3.1 Action Item:

- 4 Proposed Motion: Approval of 2026 SORTA Meeting Schedule (Andy Aiello)

4.1 Schedule:

**Planning & Operations Committee (Pete Metz)**

**Procurement Consent Agenda:**

- 5 Proposed Resolution: Contract Award for 154-2025-SS-L for MTIF Technical Support Consultants (Khaled Shammout)

5.1 Action Item:

- 6 Proposed Resolution: Contract Award for 155-2025-SS-L for Police Detail (Mike Weil)

6.1 Action Item:

- 7 Proposed Resolution: Contract Award for 129-2025-IFT-L for Diesel Fuel 2026 (Tony Balmert)

7.1 Action Item:

8 Proposed Resolution: Contract Award for 49-2025 CMAR Preconstruction Services (Sharyn LaCombe)

8.1 Action Item:

9 Proposed Resolution: Contract Award for 130-2025-IFT-L for Gasoline Fuel 2026 (Tony Balmert)

9.1 Action Item:

10 Proposed Resolution: Contract Award for 133-2025-IFB-L for Transit Bus Brake Kits (Jeff Mundstock)

10.1 Action Item:

**Infrastructure, Bike and ROW Committee (Dan Driehaus)**

**Briefing Item:**

11 Storytelling (Brandy Jones)

**Governance Committee (Dan Driehaus)**

**Action Item:**

12 Election of Officers – 2026 Chair, Vice Chair and Secretary-Treasurer of the SORTA Board of Trustees (Dan Driehaus)

**Briefing Items:**

13 Progress and Priorities (Andy Aiello)

14 New Business

**Other Items:**

Adjournment

The next regular meeting of the SORTA Board of Trustees is scheduled for

**Tuesday, February 24th, 2026, at 6:00 p.m.**

**SORTA BOARD OF TRUSTEES  
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY  
SORTA/METRO AT HUNTINGTON CENTER  
SORTA BOARD ROOM-6<sup>th</sup> FLOOR  
525 VINE STREET, CINCINNATI OHIO 45202**

MINUTES OF: Regular Meeting of the SORTA Board of Trustees

DATE: Tuesday, December 16<sup>th</sup> 2025, 6:00 p.m.

BOARD MEMBERS PRESENT: Tianay Amat, Jay Bedi, Tony Brice, Dan Driehaus, Trent Emeneker, Blake Ethridge, Pete Metz, Briana Moss, KZ Smith, Rickell Smith and Sonja Taylor

BOARD MEMBERS ABSENT: Chelsea Clark, Kala Gibson, Neil Kelly, Sara Sheets and Greg Simpson

STAFF MEMBERS: Andy Aiello, Pat Gibson, Adriene Hairston, Christina Harvey, Brandy Jones, Natalie Krusling, Sharyn Lacombe, Brad Mason, John Ravasio, Jason Roe, Tony Russo, Khaled Shammout, Bill Spraul, Tim Walker and Mike Weil

LEGAL COUNSEL: N/A

GUEST/PUBLIC PRESENT: Cameron Hardy and Rowan Grisez (Better Bus Coalition), Mark Edwards (Citizen), Matt Smeal (CTSD) and Anshul Sulchlecha (Downtown Residents Council)

**CALL TO ORDER**

Mr. Ethridge SORTA Board Chair, called the meeting to order.

**PLEDGE OF ALLEGIANCE**

The Pledge of Allegiance was recited.

**HEARING FROM CITIZENS**

Mr. Anshul Sulchlecha from the Downtown Residents Council asked the board to restore service to area D for bus routes 21 and 78.

Mr. Rowan Grisez from the Better Bus Coalition asked the board to restore service to area D for bus routes 21 and 78. He recently missed a transfer bus at the government square because of the bus stop move.

Mr. Cam Hardy from the Better Bus Coalition asked the board to stream the meetings. He asked the board to restore service to area D for bus routes 21 and 78 as his mother is not riding the bus at this time because of the bus stop move. He mentioned that everyone needs to collaborate about the safety at the government square and asked how many people rode the bus today.

**CHAIR UPDATE**

Mr. Ethridge recapped the good news from 2025. We said goodbye to great leaders and hello to a new leader, Andy Aiello. It is great that we are transporting so many students every day. There has been an immense amount of work done in regards to BRT.

**MEETING MINUTES**

Mr. Driehaus made a motion that the minutes of the November 18<sup>th</sup>, 2025, board meeting be approved as previously mailed and Mr. Brice seconded the motion.

By voice vote, the SORTA Board approved the minutes.

Mr. Driehaus made a motion that the minutes of the December 2<sup>nd</sup>, 2025, board meeting retreat be approved as previously mailed and Mr. Brice seconded the motion.

By voice vote, the SORTA Board approved the minutes.

**FINANCE COMMITTEE**

Mr. Ethridge reported on the Finance Committee meeting held on December 9<sup>th</sup> 2025, and there were items(s) to present for Board Approval.

**FINANCIAL REPORTS AS OF NOVEMBER 30<sup>th</sup>, 2025**

Mr. Walker presented the November financial results. Total revenues were \$14.7 million, which was favorable to budget by \$249K. Total expenses were \$13.6 million, which is unfavorable to budget by \$150k. Operating Capital Contribution was \$1.1 million, which was favorable to budget by \$98k. Ridership was 1,067k, which was unfavorable to budget by 214k. Mr. Walker then reviewed the contributing factors to these variances.

The SORTA Board accepted the report as presented.

**PROPOSED RESOLUTION NO: 53: APPROVAL OF CONTRACT FOR EXCESS WORKERS COMPENSATION**

Mr. Ethridge moved for adoption and Ms. Moss seconded the motion. The contract will approve 2026 Excess Workers Compensation on behalf of Metro and Assured Partners from January 1, 2026 – January 1, 2027, at a total cost not to exceed \$132,108.

By roll call, the Board approved the resolution.

**PLANNING AND OPS COMMITTEE**

Mr. Ethridge reported on the Planning and Ops Committee meeting held on December 9<sup>th</sup> 2025, and there were items(s) to present for Board Approval.

**PROPOSED RESOLUTION NO: 54: APPROVAL OF CONTRACT AWARD FOR 33-2020 TRAPEZE SOFTWARE MAINTENANCE AGREEMENT**

Mr. Metz moved for adoption and Ms. Taylor seconded the motion. The contract will approve contract no. 33-2020 on behalf of Metro and Trapeze Software Group, Inc., increasing the total not to exceed value from \$2,890,296 to \$5,559,926, an increase of \$2,669,630.

By roll call, the Board approved the resolution.

**PROPOSED RESOLUTION NO: 55: APPROVAL OF CONTACT AWARD FOR 45-2020 APC REPORTING SOFTWARE**

Mr. Metz moved for adoption and Ms. Taylor seconded the motion. The contract will approve contract no. 45-2020 on behalf of Metro and Urban Transport Associates, Inc., increasing the total not to exceed value from \$322,840 to \$459,360, an increase of \$136,520.

By roll call, the Board approved the resolution.

**PROPOSED RESOLUTION NO: 56: APPROVAL OF CONTRACT AWARD FOR 100-2025-RFP-L STAKEHOLDER SURVEYS**

Mr. Metz moved for adoption and Ms. Taylor seconded the motion. The contract will approve contract no. 100-2025-RFP-L on behalf of Metro and ETC Institute, at a total cost of \$631,750.

By roll call, the Board approved the resolution.

**PROPOSED RESOLUTION NO: 57: APPROVAL OF CONTRACT AWARD 141-2025-SS FOR ANNUNCIATOR REMEDIATION**

Mr. Metz moved for adoption and Ms. Taylor seconded the motion. The contract will approve contract no. 141-2025-SS on behalf of Metro and Trapeze Software Group, Inc., at a total cost of \$339,682.

By roll call, the Board approved the resolution.

**PROPOSED MOTION: APPROVAL OF CONTRACT AWARD 144-2025-SS-L PROFESSIONAL LEGAL SERVICES**

Mr. Metz moved for adoption and Ms. Taylor seconded the motion. The contract will approve contract no. 144-2025-SS-L on behalf of Metro and Vory's Sater, Seymour and Pease LLP., at a total cost of \$300,000.

By roll call, the Board approved the resolution.

**PROPOSED RESOLUTION NO: 58: APPROVAL OF CONTRACT AWARD 2016-R PAYROLL HUMAN RESOURCES INFORMATION SYSTEM**

Mr. Metz moved for adoption and Ms. Taylor seconded the motion. The contract will approve contract no. 2016-R on behalf of Metro and Paycor Inc., increasing the total not to exceed value from \$1,513,904 to \$2,504,528, an increase of \$990,624.

By roll call, the Board approved the resolution.

**PROGRESS AND PRIORITIES**

Mr. Aiello presented the progress and priorities report and reviewed the Procurement Department now reports to the CFO, Project Management Office reports to Chief of Staff, Operator Training Manager reports to Operations as well as the addition of Transit Operator Success Coaches and the Implementation of a new Maintenance Apprenticeship Program.

The SORTA Board accepted the report as presented.

**NEW BUSINESS**

N/A

**ADJOURNMENT**

The meeting adjourned at 6:44 p.m.

**NEXT MEETING**

The next regular meeting of the SORTA Board of Trustees has been scheduled for  
**January 27<sup>th</sup>, 2026, at 9:00 A.M.**  
the SORTA/Metro Board Room, at 525 Vine Street, Cincinnati, Ohio.

APPROVED:



Blake Ethridge  
Chair, SORTA Board

ATTESTED:



Andy Aiello  
CEO/General Manager/Secretary-Treasurer



## Financial Summary - December 2025

January 20, 2026

## Agenda – Financial Summary

- Statement of Operations for December '25
  - Key Drivers
  - Detail Profit & Loss Statement
  - County Sales Tax Trend
- Cashflow and Obligation Report
- Investment Balance Update

## Summary

- Total Revenue \$17.8M - favorable to Budget \$911k or 5.4%
- Total Expense \$15.0M - unfavorable to Budget (\$869k) or (6.1%)
- Operating Capital Contribution \$2.8M - favorable to Budget \$42k
- Note: Ridership total is 1,015k – unfavorable to Budget (134k) or (11.6%)

## Revenue

- Total Operating Revenue \$1.6M - unfavorable to Budget (\$159k) or (8.8%)
- Non-Transportation \$1.7M – unfavorable to Budget (\$219k) or 11.2%
- County Sales Tax \$12.9M – favorable to Budget \$1.3M based on receipts thru December
- Federal Grants \$1.5M - on Budget

## Expense

- Wages & Benefits \$10.8M - unfavorable to budget (\$244k) or (2.3%)
- Fuel and Lubricants \$640k - favorable to budget \$90k or 12.3%
- Parts & Supplies \$1.1M – unfavorable to Budget (\$306k) or (38.0%)
- All Other \$2.5M – unfavorable to Budget (\$405k)



12 Mos Ending Dec 31, 2025 (\$ In Thousands)		Month			Year to Date			
		Actual	Budget	Fav(Unfav)	Actual	Budget	Fav(Unfav)	Prior Year
Ridership								
Regular		866,607	999,583	(132,976) (13.3%)	11,552,661	12,881,605	(1,328,944) (10.3%)	11,737,998
CPS		120,127	118,800	1,327 1.1%	1,622,071	1,639,300	(17,229) (1.1%)	1,577,632
Subtotal Fixed Route		986,734	1,118,383	(131,649) (11.8%)	13,174,732	14,520,905	(1,346,173) (9.3%)	13,315,630
Access		14,049	15,699	(1,650) (10.5%)	180,090	188,227	(8,137) (4.3%)	179,023
MetroNow!		14,259	14,800	(541) (3.7%)	140,022	129,500	10,522 8.1%	84,008
Total Ridership		1,015,042	1,148,882	(133,840) (11.6%)	13,494,844	14,838,632	(1,343,788) (9.1%)	13,578,661
Operating Revenue								
Metro Fares	\$	1,012	\$ 1,204	\$ (192) (15.9%)	\$ 13,519	\$ 15,806	\$ (2,287) (14.5%)	\$ 13,810
Access Fares		60	62	(2) (2.8%)	734	765	(31) (4.0%)	701
MetroNow! Fares		36	28	7 26.5%	316	256	59 23.2%	170
CPS Fares		324	291	32 11.1%	3,971	3,248	723 22.3%	3,423
Other Contract Revenue		207	212	(5) (2.5%)	2,487	2,447	40 1.6%	2,220
Total Operating Revenue		1,638	1,797	(159) (8.8%)	21,027	22,522	(1,495) (6.6%)	20,324
Non-Operating Revenue								
County Sales Tax		12,894	11,605	1,289 11.1%	124,062	121,865	2,197 1.8%	119,332
Federal Subsidies		1,513	1,513	- -	18,155	18,155	- -	10,112
Non Transportation		1,736	1,955	(219) (11.2%)	10,324	10,336	(13) (0.1%)	11,731
Total Non-Operating Revenue		16,143	15,073	1,070 7.1%	152,541	150,357	2,184 1.5%	141,175
Total Revenue		17,781	16,870	911 5.4%	173,568	172,879	689 0.4%	161,499
Expenses								
Employee Wages & Benefits		10,759	10,515	(244) (2.3%)	122,052	124,216	2,164 1.7%	118,606
Fuel & Lubricants		640	730	90 12.3%	8,335	8,548	212 2.5%	8,220
Parts & Supplies		1,111	805	(306) (38.0%)	11,913	9,836	(2,077) (21.1%)	10,159
Everybody Rides Metro Fund		40	35	(5) (13.3%)	321	420	99 23.5%	114
Other		2,470	2,065	(405) (19.6%)	24,466	23,427	(1,038) (4.4%)	20,772
Total Expenses		15,020	14,150	(869) (6.1%)	167,087	166,448	(640) (0.4%)	157,871
Operating Capital Contribution	\$	2,761	\$ 2,720	\$ 42	\$ 6,480	\$ 6,431	\$ 49	\$ 3,628

# County Sales Tax – Year to Date



\* November through December of 2025 are recorded at estimates based on current year trends due to the delay in reporting from State Office



# Cashflow and Obligation Report

Overnight Investments	\$22,049,875
Securities & CD's	\$120,114,729
<b>Total All Securities (12/31/2025)</b>	<b>\$142,164,604</b>

## Current Capital Reserve Obligations

BRT Project Development (Hamilton & Reading Corridors) - Amts Pd	\$29,513,344
Future BRT Capital Match (Fed 70% & Local 30%)	\$40,500,000
Total BRT	\$70,013,344
Local Match - FTA and ODOT Grants	\$11,495,087
100% Local Projects (Prior Years Open + Current Year)	\$30,626,653
2 Months of Operating Expenses	\$26,000,000
All Other Obligations	\$3,500,000
<b>Total Current Capital Reserve Obligations</b>	<b>\$141,635,084</b>

<b>Net Unrestricted Securities Available</b>	<b>\$529,520</b>
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2025 Remaining Operating Budget Surplus (Deficit)	\$0
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<b>Net Unrestricted Securities + '25 Operating Budget Surplus</b>	<b>\$529,520</b>
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BOARD OF TRUSTEES  
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY  
RESOLUTION NO. 2026-59

APPROVAL OF RECOMMENDED INCREASE PROCUREMENT TRANSACTION  
THRESHOLDS

WHEREAS:

1. On July 1, 2025 HB 54 became effective. Among the changes brought about by the bill was an increase from \$100,000 to \$250,000 for the Simplified Acquisition Threshold ("SAT") and approval by the Board of Trustees ("Board"). This increase aligns with the SAT threshold for federal purchases currently in place with the FTA.
2. SORTA staff recommends approval to increase from \$100,000 to \$250,000 to align better with changes to CRC requirements and the FTA's SAT threshold.

THEREFORE, BE IT RESOLVED:

3. The board authorizes the procurement procedures be revised to initiate a review and approval process by the Board for contract modifications of more than 10% of the authorized not to exceed value of the award or \$250,000, whichever is less.

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MOVED BY: Chelsea Clark

SECOND BY: Pete Metz

VOTE Aye: Ms. Clark, Mr. Brice, Mr. Driehaus, Mr. Ethridge, Mr. Metz, Ms. Sheets and Mr. Smith

Nay: None

Abstain: None

ABSENT AT  
THE TIME: Ms. Amat, Mr. Gibson, Mr. Kelly, Ms. Moss, Ms. Smith and Ms. Taylor

PRESENT  
NON-VOTING  
MEMBERS:  
Greg Simpson

ABSENT NON-  
VOTING  
MEMBERS AT  
THE TIME:  
APPROVED:  
Jay Bedi and Trent Emeneker  
January 27, 2026



## BOARD OF TRUSTEES ACTION ITEM

**DATE:** January 20<sup>th</sup>, 2026

**FROM:** Jason Roe, Director of Procurement

Tim Walker, Chief Financial Officer

**REQUEST:** Approval of Recommended, Increase Procurement Transaction Thresholds

### **BACKGROUND**

On July 1, 2025, HB 54 became effective. Among the changes brought about by the bill was an increase from \$100,000 to \$250,000 for the Simplified Acquisition Threshold ("SAT") and approval by the Board of Trustees ("Board"). This increase aligns with the SAT threshold for federal purchases currently in place with the FTA.

### **BUSINESS PURPOSE**

Current procurement policy states, no contract for goods and services or modifications to existing contracts may be awarded without the advance written approval of the SORTA Board of Trustees if the aggregate or the sum of all phases of the contract is expected to exceed \$100,000. Increasing the policy threshold to \$250,000, aligns SORTA with both the State and FTA requirements.

The current threshold at which the competitive procurement process is required, commonly referred to as the Micro-purchase threshold, is \$10,000 and was set in 2018 after the FTA set a similar competitive threshold. However, 2 CFR §200.320 allows subrecipients to increase the micro-purchase threshold to \$50,000 provided that, among other requirements, the threshold is "consistent with State law." Effective July 1, 2025, Ohio increased the micro-purchase threshold to \$77,250 (ORC 9.17).

### **FINANCIAL CONSIDERATIONS**

An analysis of purchase order data from FY2022 through FY2025 to date reveals the following information (illustrated in Table 1) relative to the current Board threshold:

- Metro has issued 23,914 purchase orders totaling more than \$285 million.
- 99.20% of purchase orders are issued below the current Board approval threshold of \$100,000.
- 79.51% of the total spend for the review period was reviewed and approved by the Board.

**TABLE 1 – PURCHASE ORDER ANALYSIS**

FY 2022			FY 2023		FY 2024			FY 2025			Grand Totals		
PO Value	No. PO's	Total Cost	No. PO's	Total Cost	No. PO's	Total Cost	No. PO's	Total Cost	No. PO's	% of No.	Total Cost	% of Cost	
<b>CURRENT APPROVAL LEVELS (\$100,000)</b>													
Under \$100,000	7,003	\$15,722,495	7,269	\$16,412,885	6,191	\$17,347,042	3,259	\$8,929,544	23,722	99.20%	\$58,411,966	20.49%	
\$100,000 and up	60	\$42,118,658	65	\$67,958,005	48	\$102,012,511	19	\$14,562,426	192	0.80%	\$226,651,601	79.51%	
Total	7,063	\$57,841,153	7,334	\$84,370,890	6,239	\$119,359,553	3,278	\$23,491,971	23,914		\$285,063,566		

FY 2022			FY 2023		FY 2024			FY 2025			Grand Totals		
PO Value	No. PO's	Total Cost	No. PO's	Total Cost	No. PO's	Total Cost	No. PO's	Total Cost	No. PO's	% of No.	Total Cost	% of Cost	
<b>NEW APPROVAL LEVELS (\$250,000)</b>													
Under \$250,000	7,032	\$20,478,794	7,285	\$18,633,733	6,209	\$20,487,800	3,263	\$9,569,014	23,789	99.48%	\$69,169,341	24.26%	
\$250,000 and up	31	\$37,362,359	49	\$65,737,157	30	\$98,871,753	15	\$13,922,957	125	0.52%	\$215,894,225	75.74%	
Total	7,063	\$57,841,153	7,334	\$84,370,890	6,239	\$119,359,553	3,278	\$23,491,971	23,914		\$285,063,566		

A change in the Board approval threshold to \$250,000 will have a minimal impact. Specifically, the Board will continue to review 75.74% of all third-party spend; a decrease of 3.77% from the current threshold.

#### **RECOMMENDED BOARD ACTION**

The Procurement department recommends the following policy revisions:

**Board Approval:** The requirement for Board approval shall increase from \$100,000 to \$250,000 to align better with changes to ORC requirements and the FTA's SAT threshold.

**Board Approval of Contract Modifications:** For Board-level contracts, procurement procedures shall be revised to initiate a review and approval process by the Board for contract modifications of more than 10% of the authorized not to exceed value of the award or \$250,000, whichever is less.





Attachments:

BOARD OF TRUSTEES  
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY  
MOTION

APPROVAL OF 2026 BOARD AND COMMITTEE MEETING SCHEDULE

The SORTA Board approves and adopts the 2026 Board and Committee Meeting Schedule as attached.

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MOVED BY: Chelsea Clark

SECOND BY: Sara Sheets

VOTE Aye: Ms. Clark, Mr. Brice, Mr. Driehaus, Mr. Ethridge, Mr. Metz, Ms. Sheets and Mr. Smith

Nay: None

Abstain: None

ABSENT AT  
THE TIME: Ms. Amat, Mr. Gibson, Mr. Kelly, Ms. Moss, Ms. Smith and Ms. Taylor

PRESENT  
NON-VOTING  
MEMBERS:  
Greg Simpson

ABSENT NON-  
VOTING  
MEMBERS AT  
THE TIME:  
APPROVED:  
Jay Bedi and Trent Emeneker  
January 27, 2026



## SORTA Schedule of Meetings 2026

<u>Finance Committee</u> Tuesday 8:30 a.m.	<u>Planning &amp; Operations Committee</u> Tuesday 9 a.m.	<u>Ad Hoc Committees</u> Executive, Governance & Nominating, Infrastructure, Bike & ROW, Labor and Paratransit Coordination 10:00 a.m.	<u>SORTA Board</u> Tuesday 9 a.m./6 p.m.
January 20	January 20	Infrastructure, Bike and ROW January 20  Governance Nominating	January 27 9 a.m.
February 17	February 17	Paratransit February 17	<b>February 24 6 p.m.</b>
March 17	March 17	Infrastructure, Bike and ROW March 17	March 24 9 a.m.
April 21	April 21	Paratransit April 21	<b>April 28 6 p.m.</b>
May 19	May 19	Infrastructure, Bike and ROW May 19	May 26 9 a.m.
June 16	June 16		<b>June 23 6 p.m.</b>
<b>Thursday, July 23</b>	<b>Thursday, July 23</b>	Paratransit July 23	July 28 9 a.m.
August 18	August 18	Infrastructure, Bike and ROW August 18	<b>August 25 6 p.m.</b>
September 15	September 15		September 22 9 a.m.
October 20	October 20	Paratransit October 20	<b>October 27 6 p.m.</b>
November 10	November 10		November 17 9 a.m.
December 8	December 8	Infrastructure, Bike and ROW December 8	<b>December 15 6 p.m.</b>

**Notes:**

- Committee and Board meetings meet the 3<sup>rd</sup> and 4<sup>th</sup> Tuesday each month.
- Ad Hoc Committees meet as noted above and as needed.
- November and December Committee and Board meetings were moved to the 2<sup>nd</sup> and 3<sup>rd</sup> Tuesday of the month due to holidays.

Project	Method	Vendor	Award	Term	Funding
<b>154-2025-SS*</b> <i>MTIF Technical Support Consultants</i>	Sole Source Award / Professional Services	AECOM Technical Services Woolpert	\$310,000 \$310,000 \$620,000	3 year Feb 2026 – Jan 2029	Budgeted Local Operating
<b>155-2025-SS*</b> <i>CPD Police Detail</i>	Sole Source Award	RollKall Technologies, LLC	\$1,407,531	1 year Feb 2026 – Jan 2027	Budgeted Local Operating
<b>49-2025</b> <i>BRT CMAR Services</i>	Request for Qualifications (RFQ)	Herzog Contracting Corp.	\$5,125,303	1 year Feb 2026 – Jan 2027	Budgeted Local Capital
<b>129-2025</b> <i>Diesel Fuel</i>	Invitation for Bid (IFB)	Mansfield Oil Company	\$7,051,928	1 year Feb 2026 – Jan 2027	Budgeted Local Operating
<b>130-2025</b> <i>Gasoline Fuel</i>	Invitation for Bid (IFB)	Gresham Petroleum Company	\$782,639	1 year Feb 2026 – Jan 2027	Budgeted Local Operating
<b>133-2025</b> <i>Transit Bus Brake Kits</i>	Invitation for Bid (IFB)	Aftermarket, Gillig, Muncie, Neopart & TLG	\$780,090	2 year Feb 2026 – Jan 2028	Budgeted Local Operating

\*denotes non-competitive or non-negotiable award

### Metro MAX Spend Summary (Maximizing Access for XBE's)

**Total Awards for Month** **\$15,767,094**  
**Total MAX Spend for Month** **\$0**

**Addressable Awards** **\$0**  
**Effective MAX Participation Rate** **0%**

**2025 Total Spend** **\$50,388,492**  
**2025 MAX Spend** **\$14,258,898 (28.3%)**



**BOARD OF TRUSTEES  
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY  
RESOLUTION NO. 2026-60**

## APPROVAL OF CONTRACT NO 154-2025SSL MTIF TECHNICAL SUPPORT CONSULTANTS

**WHEREAS:**

1. The Southwest Ohio Regional Transit Authority (SORTA) manages the Transit Infrastructure Fund (TIF) program, which is funded by the sales tax levy that was passed in 2020.
2. The funding model is for 0.8 cent sales tax for the next 25 years; 75% of the funds go toward funding Metro's bus service operations and capital costs, the remaining 25% is allocated toward road, bridge, and sidewalk infrastructure improvements that are located within  $\frac{3}{4}$  mile of a bus service area.
3. The Ohio Revised Code provides for contracts related to professional services that are highly technical, may be exempt from the competitive process.
4. SORTA staff recommends approval to execute Contract No. 154-2025SSL on behalf of Metro with AECOM Technical Services, Inc. and Woolpert, with a total not to exceed value of \$310,000 per contract, \$620,000 in total.
5. The expenditure will be financed using local operating funds.

**THEREFORE, BE IT RESOLVED:**

6. The board authorizes the CEO/General Manager/Secretary-Treasurer or the Director of Procurement to execute Contract No. 154-2025SSL on behalf of Metro with AECOM Technical Services, Inc. and Woolpert, with a total not to exceed value of \$310,000 per contract, \$620,000 in total.

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MOVED BY: Pete Metz SECOND BY: Chelsea Clark

**VOTE Aye:** Ms. Clark, Mr. Brice, Mr. Driehaus, Mr. Ethridge, Mr. Metz, Ms. Sheets and Mr. Smith

Nay: None

SECOND BY: Chelsea Clark

Nay:

Ms. Clark, Mr. Brice, Mr. Driehaus, Mr. Ethridge, Mr. Metz, Ms. Sheets and Mr. Smith

Nay: None

Abstain: None

**ABSENT AT  
THE TIME:** Ms. Amat, Mr. Gibson, Mr. Kelly, Ms. Moss, Ms. Smith and Ms. Taylor

PRESENT  
NON-VOTING MEMBERS: Greg Simpson

ABSENT NON-  
VOTING  
MEMBERS AT  
THE TIME: Jay Bedi and Trent Emeneker  
APPROVED: January 27, 2026



## BOARD OF TRUSTEES ACTION ITEM

**DATE:** January 20<sup>th</sup>, 2026  
**FROM:** Jason Roe, Director of Procurement  
Khaled Shammout, Deputy Innovation and Vision Officer  
**PROJECT NO.:** 154-2025SSL, MTIF Technical Support Consultants  
**REQUEST:** Contract Award

## **BACKGROUND**

The Southwest Ohio Regional Transit Authority (SORTA) manages the Transit Infrastructure Fund (TIF) program, which is funded by the sales tax levy that was passed in 2020. The funding model is for 0.8 cent sales tax for the next 25 years; 75% of the funds go toward funding Metro's bus service operations and capital costs, the remaining 25% is allocated toward road, bridge, and sidewalk infrastructure improvements that are located within  $\frac{3}{4}$  mile of a bus service area.

## **BUSINESS PURPOSE**

Metro requires technical consultant services to assist with the Metro Transit Infrastructure Fund Grant Program. Related services include project field reviews, technical evaluations, project scoring, ranking of applications for surface transportation improvements by local governments or public agencies in Hamilton County as well as technical support, the review of applicant reimbursement requests, and assistance to Metro for the continued refinement of program criteria.

## **PROJECT FINANCING**

The budget for this project is \$620,000 (\$206,667 per fiscal year FY2026 – 2028) and will be financed using local operating funds. The cost for consultant services will be included in the annual budget review and approval process.

The final contract(s) cost is \$620,000 and is flat to budget.

## PROJECT PROCUREMENT

The Ohio Revised Code provides for contracts related to professional services that are highly technical, may be exempt from the competitive process. As such, no competition occurred for this award.

Proposals were requested from each consulting firm for the review and negotiation of hourly rates, overhead percentage and profit. The negotiated fees were determined to fair and reasonable.

## SMALL BUSINESS ENGAGEMENT

The award is a sole source award pursuant to Ohio Revised Code. No vendor diversity analysis or activity occurred.

## **RECOMMENDED BOARD ACTION**

Staff recommends the Board of Trustees approve a resolution authorizing the CEO/General Manager/Secretary-Treasurer or the Director of Procurement to execute Contract No.154-2025SSL(A)



and 154-2025SSL(B), on behalf of Metro with AECOM Technical Services, Inc. and Woolpert, with a not to exceed value of \$310,000 per contract, \$620,000 in total.



**BOARD OF TRUSTEES  
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY  
RESOLUTION NO. 2026-61**

**APPROVAL OF CONTRACT NO 155-2025SSL POLICE SECURITY DETAIL**

**WHEREAS:**

1. The Southwest Ohio Regional Transit Authority (SORTA) has an agreement with the City of Cincinnati Police Department to provide additional Security Details at multiple locations to ensure the safety of our operators and riders.
2. The Cincinnati Police Department provides security details at key locations during peak ridership times throughout the year and for special events as required.
3. The Cincinnati Police Department provides sworn law enforcement officers authorized to enforce laws and maintain public safety.
4. SORTA staff recommends approval to execute Contract No. 155-2025SSL on behalf of Metro with RollKall Technologies, LLC., with a total not to exceed value of \$1,407,531.
5. The expenditure will be financed using local operating funds.

**THEREFORE, BE IT RESOLVED:**

6. The board authorizes the CEO/General Manager/Secretary-Treasurer or the Director of Procurement to execute Contract No. 155-2025SSL on behalf of Metro with RollKall Technologies, LLC., with a total not to exceed value of \$1,407,531.

\*\*\*\*\*

MOVED BY: Pete Metz SECOND BY: Chelsea Clark

**VOTE Aye:** Ms. Clark, Mr. Brice, Mr. Driehaus, Mr. Ethridge, Mr. Metz, Ms. Sheets and Mr. Smith

Nay: None

SECOND BY: Chelsea Clark

Nay. None

Abstain. None

Abstain: None

ABSENT AT  
THE TIME

**ABSENT AT  
THE TIME:** Ms. Amat, Mr. Gibson, Mr. Kelly, Ms. Moss, Ms. Smith and Ms. Taylor

PRESENT  
NON-VOTING MEMBERS: Greg Simpson

ABSENT NON-  
VOTING  
MEMBERS AT  
THE TIME: Jay Bedi and Trent Emeneker  
APPROVED: January 27, 2026



## BOARD OF TRUSTEES ACTION ITEM

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**DATE:** January 20<sup>th</sup>, 2026  
**FROM:** Jason Roe, Director of Procurement  
 Mike Weil, Sr. Director of Security  
**PROJECT NO.:** 155-2025SSL – Police Security Detail  
**REQUEST:** Contract Award

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### **BACKGROUND**

The Southwest Ohio Regional Transit Authority (SORTA) has an agreement with the City of Cincinnati Police Department to provide additional Security Details at multiple locations to ensure the safety of our operators and riders.

### **BUSINESS PURPOSE**

The Cincinnati Police Department provides security details at key locations during peak ridership times throughout the year and for special events as required. The Cincinnati Police Department provides sworn law enforcement officers authorized to enforce laws and maintain public safety. Officers are trained, certified, and equipped to handle crowd control, traffic management, and emergency response during events, which is a unique capability not available from private security firms. The Detail Coordination Squad (DCS) and Special Events Unit (SEU) specialize in coordinating law enforcement presence for large-scale or sensitive events, ensuring compliance with local ordinances and public safety standards.

### **PROJECT FINANCING**

The budget for this project is \$1,407,531 and will be financed using local operating funds.

The final contract(s) cost is \$1,407,531 and is flat to budget.

### **PROJECT PROCUREMENT**

The Cincinnati Police Department contracts a third-party vendor, RollKall Technologies, LLC, to ensures secure police officer detail scheduling, invoicing, and follow departmental protocols, which is critical for accountability and transparency. The nature of the work (public safety enforcement) cannot be contracted to non-law enforcement entities. No other source can legally perform these duties. As such, no competition occurred for this award.

### **SMALL BUSINESS ENGAGEMENT**

The award is a sole source award pursuant to Ohio Revised Code. No vendor diversity analysis or activity occurred.

**RECOMMENDED BOARD ACTION**

Staff recommends the Board of Trustees approve a resolution authorizing the CEO/General Manager/Secretary-Treasurer or the Director of Procurement to execute Contract No.155-2025SSL, on behalf of Metro with RollKall Technologies, LLC, with a not to exceed value of \$1,407,531.



**BOARD OF TRUSTEES  
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY  
RESOLUTION NO. 2026-62**

## APPROVAL OF 129-2025 DIESEL FUEL

WHEREAS:

1. The Southwest Ohio Regional Transit Authority (SORTA) operates more than 300 buses and 20 paratransit vehicles in revenue service.
2. The vehicles require diesel fuel and consume approximately 285,000 gallons per month.
3. SORTA requires a vendor to provide bulk deliveries of diesel fuel for our fixed-route and paratransit fleet.
4. SORTA staff recommends approval to execute Contract No. 129-2025, on behalf of Metro and Mansfield Oil Company of Gainesville, Inc., with a not to exceed value of \$7,051,928.
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 Director of Procurement to execute Contract No. 129-2025, on behalf of Metro and Mansfield Oil Company of Gainesville, Inc., with a not to exceed value of \$7,051,928.

MOVED BY: Pete Metz SECOND BY: Chelsea Clark

VOTE Aye: Ms. Clark, Mr. Brice, Mr. Driehaus, Mr. Ethridge, Mr. Metz, Ms. Sheets and Mr. Smith.

Nav: None

Abstain: None

## ENT AT

Abstain: None

## ABSENT AT

THE TIME. MS. Amat, Mr. Gibson, Mr. Kelly, Ms. Moss, Ms. Smith and Ms. Taylor

NON-VOTING  
MEMBERS:

ABSENT: N/A  
VOTING  
MEMBERS AT  
THE TIME: Jay Bedi and Trent Emeneker  
APPROVED: January 27, 2026



## BOARD OF TRUSTEES ACTION ITEM

**DATE:** January 20, 2026  
**FROM:** Jason Roe, Director of Procurement  
 Tony Balmert, Sr. Director of Maintenance Operations  
**PROJECT NO.:** 129-2025, Diesel Fuel  
**REQUEST:** Contract Award

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### **BACKGROUND**

The Southwest Ohio Regional Transit Authority (SORTA) operates more than 300 buses and 20 paratransit vehicles in revenue service that require diesel fuel, consuming approximately 285,000 gallons per month.

### **BUSINESS PURPOSE**

SORTA requires a vendor to provide bulk deliveries of diesel fuel for our fixed-route and paratransit fleet.

### **PROJECT FINANCING**

The budget for this project is \$7,051,928 and is included in the approved FY2026 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 projection of cost, \$7,051,928 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 or below the price per gallon at the time of delivery. The unit price (i.e., differential fee) for the project is \$-0.03 per gallon delivered.

### **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 12 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. 11 vendors submitted bids, 5 bids were deemed non-responsive. Below is a tabulated table of the responses:

		Mansfield Oil Company of Gainesville, Inc	Colonial Oil Industries, Inc.	Gresham Petroleum Company	Petroleum Traders Corporation	Heritage Petroleum, LLC	Ports Petroleum
Description	Unit of Measure	Unit Cost	Unit Cost	Unit Cost	Unit Cost	Unit Cost	Unit Cost
Queensgate Garage	\$ Diff per Gallon	(\$.03)	(\$.01)	\$.0053	\$.0171	\$.055	\$.0573
Bond Hill Garage	\$ Diff per Gallon	(\$.03)	(\$.01)	\$.0053	\$.0171	\$.055	\$.0598
Access	\$ Diff per Gallon	(\$.03)	(\$.01)	\$.0053	\$.0171	\$.055	\$.0598



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).

### **SMALL BUSINESS ENGAGEMENT**

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 Director of Procurement to execute Contract No.129-2025, on behalf of Metro with Mansfield Oil Company of Gainesville, Inc, with a not to exceed value of \$7,051,928.



**BOARD OF TRUSTEES  
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY  
RESOLUTION NO. 2026-63**

## APPROVAL OF 49-2025 CMAR PRECONSTRUCTION SERVICES

**WHEREAS:**

1. The Southwest Ohio Regional Transit Authority (SORTA), pursuant to the Reinventing Metro plan, is currently in the design phase of the Reading Road Corridor Bus Rapid Transit ("BRT") project which represents approximately \$120 million investment in BRT infrastructure in metropolitan Cincinnati, Ohio.
2. This project is funded, in part, through a Federal Transit Authority ("FTA") grant. The Metro BRT service will provide a high frequency, limited stop service that uses specialized vehicles on dedicated right of way to transport passengers along both corridors.
3. The goals of BRT include attracting new riders, improved transit speed, enhanced transit network, connectivity, equitable access to frequent services and economic development.
4. SORTA staff recommends approval to execute Contract No. 49-2025, on behalf of Metro and Herzog Contracting Corp., with a not to exceed value of \$5,125,303.
5. The expenditures have been budgeted with \$4.8 million in the FY2026 Capital budget with the remaining included in the 2027 capital plan.

**THEREFORE, BE IT RESOLVED:**

6. The Board authorizes the CEO/General Manager/ Secretary-Treasurer or the Director of Procurement to execute Contract No. 49-2025, on behalf of Metro and Herzog Contracting Corp., with a not to exceed value of \$5,125,303.

\*\*\*\*\*

MOVED BY: Pete Metz SECOND BY: Chelsea Clark

**VOTE Aye:** Ms. Clark, Mr. Brice, Mr. Driehaus, Mr. Ethridge, Mr. Metz, Ms. Sheets and Mr. Smith

Nay: None

SECOND BY: Chelsea Clark

**VOTE Aye:** Ms. Clark, Mr. Brice, Mr. Driehaus, Mr. Ethridge, Mr. Metz, Ms. Sheets and Mr. Smith

Nay: None

Abstain: None

**ABSENT AT  
THE TIME:** Ms. Amat, Mr. Gibson, Mr. Kelly, Ms. Moss, Ms. Smith and Ms. Taylor

PRESENT  
NON-VOTING MEMBERS:

ABSENT NON-  
VOTING  
MEMBERS AT  
THE TIME: Jay Bedi and Trent Emeneker  
APPROVED: January 27, 2026



## BOARD OF TRUSTEES ACTION ITEM

---

**DATE:** January 20, 2026  
**FROM:** Jason Roe, Director of Procurement  
 Sharyn LaCombe, Sr. Director of Bus Rapid Transit Planning  
**PROJECT NO.:** 49-2025  
**REQUEST:** Contract Award, CMAR Preconstruction Services

---

### **BACKGROUND**

The Southwest Ohio Regional Transit Authority (SORTA), pursuant to the Reinventing Metro plan, is currently in the design phase of the Reading Road Corridor Bus Rapid Transit ("BRT") project which represents approximately \$120 million investment in BRT infrastructure in metropolitan Cincinnati, Ohio. This project is funded, in part, through a Federal Transit Authority ("FTA") grant. The Metro BRT service will provide a high frequency, limited stop service that uses specialized vehicles on dedicated right of way to transport passengers along both corridors. The goals of BRT include attracting new riders, improved transit speed, enhanced transit network connectivity, equitable access to frequent services and economic development.

### **BUSINESS PURPOSE**

The Construction Manager at Risk (CMAR) is an alternative delivery method and an integrated team approach for construction projects that involves three major parties: the Owner (SORTA), a Designer (WSP), and a Construction Manager at Risk entity ("Contractor"). The Contractor's role is split into two phases: the Preconstruction Phase and the Construction Phase. During the Preconstruction Phase, the Contractor provides Preconstruction Work, including constructability reviews, phasing, pricing, scheduling, value engineering, and other ancillary construction planning advisory services. Should SORTA and the Contractor successfully negotiate and agree to a (i) Guaranteed Maximum Price ("GMP") for construction and (ii) construction schedule for the Project, SORTA and the Contractor execute a Construction Phase Amendment to the CMAR Contract, at which point the Contractor, acting as a general contractor, is responsible for construction of the project using a combination of its own forces and subcontractors to bring the project to completion.

Should SORTA and the Contractor fail to reach agreement on a price for construction, SORTA has the option to terminate the CMAR Contract without penalty or payment (except payment for Preconstruction Work) and procure the construction of the project by some other method.

### **PROJECT FINANCING**

The budget for the CMAR preconstruction services is \$6,644,103, of which \$4.8M is included in the approved FY2026 Capital budget. The remaining \$1,844,103 is included in the 2027 Capital Plan.

The contract is structured as cost plus fixed fee contract with negotiated fees for hourly rates, overhead percentage and profit percentage. Since the exact amount of effort required is unknown the contract value is based on negotiated assumptions. As such, the final project cost of \$5,125,303 is flat to budget.



## **PROJECT PROCUREMENT**

Procurement staff determined that the appropriate procurement method be a two-step selection process where firms are shortlisted based on their responses to a Request for Qualifications ("RFQ") and invited to respond to a Request for Proposal ("RFP").

Procurement hosted an outreach event at the Greater Cincinnati Red Cross and invited contractors known to have the capacity to deliver on the requirements of the contract in addition to those notified through Metro's e-procurement platform. Two proposers submitted proposals and were evaluated.

## **SMALL BUSINESS ENGAGEMENT**

On October 3rd, 2025, the Department of Transportation issued an Interim Final Rule that amends portions of DBE Circular 49 CFR Part 26. The Department of Transportation currently prohibits recipients of DOT funds from setting a contract goal until a re-evaluation of DBE vendors in the UCP directories are completed. As a result of this interim final rule, this project did not have a specific contract goal assigned. Bidders/proposers were strongly encouraged to make efforts to include small and disadvantaged businesses in the performance of this contract to maximize participation of certified small businesses as subcontractors, subconsultants, and suppliers.

## **RECOMMENDED BOARD ACTION**

Staff recommends the Board of Trustees approve a resolution authorizing the CEO/General Manager/Secretary-Treasurer or the Director of Procurement to execute Contract No. 49-2025, on behalf of Metro with Herzog Contracting Corp. with a not to exceed value of \$5,125,303.



BOARD OF TRUSTEES  
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY  
RESOLUTION NO. 2026-64

APPROVAL OF 130-2025 GASOLINE FUEL 2026

**WHEREAS:**

1. The Southwest Ohio Regional Transit Authority (SORTA) operates approximately 65 gasoline vehicles for MetroNow and paratransit revenue service.
2. The vehicles require gasoline fuel and consume approximately 30,000 gallons per month.
3. SORTA requires a vendor to provide bulk deliveries of gasoline fuel for our MetroNow and paratransit fleet.
4. SORTA staff recommends approval to execute Contract No. 130-2025, on behalf of Metro and Gresham Petroleum Company, with a not to exceed value of \$782,639.
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 Director of Procurement to execute Contract No. 130-2025, on behalf of Metro and Gresham Petroleum Company, with a not to exceed value of \$782,639.

\*\*\*\*\*

MOVED BY: Pete Metz SECOND BY: Chelsea Clark

**VOTE Aye:** Ms. Clark, Mr. Brice, Mr. Driehaus, Mr. Ethridge, Mr. Metz, Ms. Sheets and Mr. Smith

Nay: None

Abstain: None

## ABSENT AT

**ABSENT AT  
THE TIME:** Ms. Amat, Mr. Gibson, Mr. Kelly, Ms. Moss, Ms. Smith and Ms. Taylor

PRESENT  
NON-VOTING MEMBERS: Greg Simpson

ABSENT NON-  
VOTING  
MEMBERS AT  
THE TIME: Jay Bedi and Trent Emeneker  
APPROVED: January 27, 2026



## BOARD OF TRUSTEES ACTION ITEM

**DATE:** January 20, 2026  
**FROM:** Jason Roe, Director of Procurement  
 Tony Balmert, Sr. Director of Maintenance Operations  
**PROJECT NO.:** 130-2025, Gasoline Fuel 2026  
**REQUEST:** Contract Award

---

### **BACKGROUND**

The Southwest Ohio Regional Transit Authority (SORTA) operates approximately 65 gasoline vehicles for MetroNow and paratransit revenue service that require gasoline fuel, consuming approximately 30,000 gallons per month.

### **BUSINESS PURPOSE**

SORTA requires a vendor to provide bulk deliveries of gasoline fuel for our MetroNow and paratransit fleet.

### **PROJECT FINANCING**

The budget for this project is \$782,639 and is included in the approved FY2026 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 projection of cost, \$782,639 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 or below the price per gallon at the time of delivery. The unit price (i.e., differential fee) for the project is \$0.0216 per gallon delivered.

### **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 12 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. 10 vendors submitted bids, 4 bids were deemed non-responsive. Below is a tabulated table of the responses:

		Gresham Petroleum Company	Colonial Oil Industries, Inc.	Petroleum Traders Corporation	Heritage Petroleum, LLC	Mansfield Oil Company of Gainesville, Inc	Ports Petroleum
Description	Unit of Measure	Unit Cost	Unit Cost	Unit Cost	Unit Cost	Unit Cost	Unit Cost
20,000 - 30,000 gallons	\$ Diff per Gallon	\$0.0216	\$0.025	\$0.0402	\$0.045	\$0.0463	\$0.0662



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).

### **SMALL BUSINESS ENGAGEMENT**

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 Director of Procurement to execute Contract No.130-2025, on behalf of Metro with Gresham Petroleum Company, with a not to exceed value of \$782,639.



**BOARD OF TRUSTEES  
SOUTHWEST OHIO REGIONAL TRANSIT AUTHORITY  
RESOLUTION NO. 2026-65**

## APPROVAL OF CONTRACT NO 133-2025 TRANSIT BUS BRAKE KITS

**WHEREAS:**

1. The Southwest Ohio Regional Transit Authority (SORTA) operates approximately 300 buses in revenue service that require preventive, and routine maintenance repairs of the vehicle brake system.
2. Vehicle brake systems are an essential part of safe SORTA bus operation and are required to be in inventory for routine and preventive maintenance.
3. The contractor(s) shall supply and deliver to SORTA on an as needed basis, the brake kits or components listed within the scope of services.
4. SORTA staff recommends approval to execute Contract No. 133-2025 on behalf of Metro with The Aftermath Parts Co., Gillig, LLC., Muncie Transit Supply, Neopart Transit and TLG Peterbilt, with a combined not to exceed value of \$780,090.
5. The expenditure will be financed using local operating funds.

**THEREFORE, BE IT RESOLVED:**

6. The board authorizes the CEO/General Manager/Secretary-Treasurer or the Director of Procurement to execute Contract No. 133-2025 on behalf of Metro with The Aftermath Parts Co., Gillig, LLC., Muncie Transit Supply, Neopart Transit and TLG Peterbilt, with a combined not to exceed value of \$780,090.

MOVED BY: Pete Metz SECOND BY: Chelsea Clark

**VOTE Aye:** Ms. Clark, Mr. Brice, Mr. Driehaus, Mr. Ethridge, Mr. Metz, Ms. Sheets and Mr. Smith

Nay: None

SECOND BY: Chelsea Clark

Nay: None

Abstain: None

Abstain: Non

Abstain: None

## ABSENT AT

## SENT AT

**ABSENT AT  
THE TIME:** Ms. Amat, Mr. Gibson, Mr. Kelly, Ms. Moss, Ms. Smith and Ms. Taylor

PRESENT  
NON-VOTING MEMBERS: Greg Simpson

ABSENT NON-  
VOTING  
MEMBERS AT  
THE TIME: Jay Bedi and Trent Emeneker  
APPROVED: January 27, 2026



## BOARD OF TRUSTEES ACTION ITEM

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**DATE:** January 20, 2026  
**FROM:** Jason Roe, Director of Procurement  
 Jeff Mundstock, Director of Maintenance Operations  
**PROJECT NO.:** 133-2025, Transit Bus Brake Kits  
**REQUEST:** Contract Award

---

### **BACKGROUND**

The Southwest Ohio Regional Transit Authority (SORTA) operates approximately 300 buses in revenue service that require preventive, and routine maintenance repairs of the vehicle brake system.

### **BUSINESS PURPOSE**

Vehicle brake systems are an essential part of safe SORTA bus operation and are required to be in inventory for routine and preventative maintenance. The contractor(s) shall supply and deliver to SORTA, on an as needed basis, the brake kits or components listed within the scope of services.

### **PROJECT FINANCING**

The budget for this project is \$740,000 and is included in the approved FY2026 Operating budget.

The contract(s) are structured as an indefinite delivery / indefinite quantity ("IDIQ") with a minimum purchase quantity to be purchased. As such, the final projected cost, \$740,000 is flat to budget.

The contracted prices will be factored into the FY2027 Operating budget.

### **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. Procurement solicited for 2-year fixed price contracts. The awarded contracts will provide price stabilization for the next 24 months. Fixed item contracts will market variability increases and provide price confidence for maintenance budgeting.

Staff targeted 8 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. 11 vendors submitted bids, all were deemed responsive.



Below is the tabulated table of the lowest responses per item:

IFB 133-2025 Bid Results						
Line Item	Description	Vendor	Minimum Purchase Quantity	Unit of Measure	Low Bid Unit Cost	Bid Total (F*C)
340646	CALIPER ASSY, REAR DISC CS, FRONT DISC SS - Catalog # EX225H301XX000	Aftermarket	15	Each	\$1,039.00	\$15,585.00
340364	CALIPER ASSEMBLY, REAR DISC SS, FRONT DISC CS - Catalog # EX225H302XX000	Aftermarket	15	Each	\$1,039.00	\$15,585.00
334979	BRAKE KIT, FRONT (GILLIG LF) - Catalog # KIT17107	Gillig	140	Each	\$668.28	\$93,559.20
334980	BRAKE KIT, REAR (GILLIG LF) - Catalog # KIT17108	Gillig	220	Each	\$665.87	\$146,491.40
339148	ROTOR, DISC BRAKES (MERITOR GENUINE ONLY) - Catalog # 23123647002	Muncie	520	Each	\$190.85	\$99,242.00
5178	DRUM, REAR GILLIG LOW FLOOR (WEBB ONLY) - Catalog # WEBB 64115B	Muncie	220	Each	\$302.74	\$66,602.80
332856	DRUM, FRONT GILLIG 16.5 X 6" LOW FLOOR (WEBB ONLY) - Catalog # 65600B (WEBB)	Neopart	140	Each	\$209.22	\$29,290.80
339137	KIT, DISC PAD & SPRING (MERITOR GENUINE ONLY) - Catalog # KIT2252H2DD	TLG	1045	Each	\$257.97	\$269,578.65

## **SMALL BUSINESS ENGAGEMENT**

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 Director of Procurement to execute Contract No.130-2025(A-E), on behalf of Metro with The Aftermarket Parts Co, Gillig LLC, Muncie Transit Supply, Neopart Transit, and TLG Peterbilt, with a combined not to exceed value of \$780,090.

# Progress & Priorities

Spotlight on the top five

1 2

3 4 5

From **Andrew C. Aiello**, Metro CEO &  
General Manager/Secretary-Treasurer



January 2026

Happy New Year! This monthly report provides a high-level overview of several key initiatives currently being advanced by the Metro leadership team. The updates below reflect continued momentum and progress aligned with Metro's long-term priorities.

- Strategic Plan Update:** Thank you to the Board of Trustees for your continued engagement in the 2026 Strategic Plan Update. Over the past few months, in partnership with the Board and Metro's Senior Leadership Team, we have worked closely together through a comprehensive review of existing Conditions, a SWOT Analysis, updates to our Mission, Vision and Values, and the prioritization of strategic initiatives. We remain on track to present a draft Strategic Plan Update in February and look forward to the Board's feedback and discussion at that time.
- Federal Funding Levels:** On January 20th, the House and Senate Appropriations Committee Leaders released H.R. 7148, the *Consolidated Appropriations Act, 2026*, representing a bipartisan, bicameral agreement on Fiscal Year 2026 appropriations legislation. The Transportation, Housing and Urban Development (THUD) section provides the overwhelming majority of public transit investments authorized under the Infrastructure Investment and Jobs Act (IIJA). Overall, the legislation reflects stable and consistent federal funding levels for transit in 2026.
- Keep Cincinnati Beautiful – Adopt-A-Spot Expansion:** Metro has partnered with Keep Cincinnati Beautiful to expand the popular Adopt-A-Spot program to include bus stops throughout Hamilton County. Community groups, businesses, and volunteers may adopt a bus stop by committing to regular cleanups, light landscaping, and general upkeep. Keep Cincinnati Beautiful will provide training, supplies, and program coordination. This initiative supports cleaner, more welcoming transit environments while strengthening community partnerships.
- Data-Driven Safety Improvements:** Metro continues to leverage data to enhance system safety. Analysis by our Safety Team of fixed-route buses delivered in 2022 and later – equipped with additional eye-level rear brake lights – indicated a statistically lower incidence of being rear-ended when in operations. Based on these findings, the Metro team is retrofitting about 190 fixed-route buses with these additional eye-level rear brake lights. This low-cost investment is expected to further reduce accidents and improve safety in our community.
- Red Bike and Transit App Integration:** The Metro planning team has been collaborating with Red Bike to integrate bike-share functionality into the Transit App. This integration will allow riders to seamlessly plan trips using both bus and bike, enhancing first- and last-mile connectivity. This will also provide valuable usage data to help inform future planning and evaluation. The official launch is targeted for spring of 2026.

# Progress & Priorities

*Spotlight on the top five*

1

2

3

4

5

From **Andrew C. Aiello**, Metro CEO &  
General Manager/Secretary-Treasurer



All the best,

A handwritten signature in black ink that reads "Aiello".

Andy Aiello