



**TO:** BCRTA Board of Trustees  
**FROM:** Meagan Varney, Procurement & Compliance Specialist  
**RE:** *Action Item 2023-10-02: 2023-047 Chestnut Street Multimodal Station*

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October 13<sup>th</sup>, 2023

**STRATEGIC PLAN GOAL / OBJECTIVE**

Developing Multimodal Infrastructure

**RECOMMENDATION**

Adoption of a resolution authorizing the Executive Director on behalf of BCRTA to execute a construction contract with **Graybach, LLC** for an amount not to exceed \$24,484,454.

**FINANCIAL CONSIDERATIONS**

- This is a single prime contract for construction and project coordination services, with a total expenditure not to exceed \$24,284,454 (2.5% contingency) or \$26,061,365.00 (10% contingency).
- These expenditures will be funded with a variety of discretionary and formula funds totaling approximately \$22,504,873.00, \$1,600,000 in funds committed by Miami University, and \$2,263,535 in local funds provided by BCRTA.

**BUSINESS PURPOSE**

To construct a multi-modal transportation center at Chestnut Fields in Oxford, Ohio on Miami University's campus. This facility will provide a one-stop transfer location for BCRTA's services in Oxford as well as connections to Middletown and Hamilton and is designed as a community gathering space for intermodal trips by foot, bike, scooter, and bus. Eventually the facility will also serve intermodal trips by train sharing common space and a walking path with the proposed City of Oxford Amtrak train station due to be built in 2026.

**PROCUREMENT CONSIDERATIONS**

Procurement Summary factors considered; based on Richard L. Bowen & Associates scope review with Graybach, LLC and information provided by references, they have the capacity to perform these contracts, are responsive and are recommended for award.

**LEGAL CONSIDERATIONS**

- Section 306.43 of the Ohio Revised Code authorizes BCRTA to contract for the provision of goods and services.
- Sections 9.33 through 9.332 of the Ohio Revised Code authorize BCRTA to contract with construction managers.

## BCRTA Resolution No. 23-10-02

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### **Authorizing the Butler County Regional Transit Authority (BCRTA) Executive Director to Execute a Contract for Construction and Project Coordination Services for Chestnut Street Multimodal Station.**

**Whereas**, on March 2, 2023 BCRTA solicited for bids for construction of Chestnut Street Multimodal Station and requested that interested bidders submit a Base Bid Price for a single prime construction contract and additional pricing for a Vehicle Wash Bay with Rainwater Harvesting; and

**Whereas** on April 18, 2023 BCRTA received two (2) Bids from Brumbaugh Construction, Inc. and Monarch Construction Company, both of which were deemed outside the acceptable estimate range; and

**Whereas**, after the bids were determined to be outside of the acceptable estimate range, BCRTA declined to award and decided to re-solicit for Bids; and

**Whereas** BCRTA, in conjunction with Richard L. Bowen and Associates, conducted value engineering on the design documents and removed a number of items from the project in an effort to reduce the overall costs; and

**Whereas** on August 9, 2023, BCRTA used the revised design documents to re-solicit for Bids for the project and requested that interested bidders submit a Base Bid Price for a single prime construction contract and Soil Fill Allowance, as well as additional pricing for the optional alternates of a Vehicle Wash Bay/Rainwater Harvesting Building without equipment, Fuel Canopy and Additional Painting; and

**Whereas** on October 2, 2023 BCRTA received three (3) responsive Bids from Ferguson Construction, Graybach LLC and Monarch Construction Company; and

**Whereas** BCRTA and Richard L. Bowen and Associates determined that Graybach LLC was the lowest responsive, responsible bidder; and

**Whereas** the construction of this project is contingent upon the execution of a ground lease with the Miami University Board of Trustees for the project site; and

**Whereas** adoption of this resolution was recommended by the Butler County Regional Transit Authority Board of Trustees at the regular monthly meeting on October 18, 2023.

**NOW, THEREFORE, BE IT RESOLVED by the Board of Trustees for the Butler County Regional Transit Authority:**

SECTION 1: The BCRTA Board of Trustees hereby authorizes the BCRTA Executive Director to execute a single prime contract between BCRTA and Graybach LLC for the provision of construction services and project coordination for the duration of construction of the Chestnut Street Multimodal Station in the amount of twenty-three million six hundred and ninety-two thousand one hundred and fifty dollars (\$23,692,150.00) plus an additional 2.5% contingency for an amount not to exceed twenty-four million, two hundred and eighty-four thousand, four-hundred and fifty-four dollars (\$24,284,454) without additional board approval, subject to legal review and execution of a ground lease with the Miami University Board of Trustees.

SECTION 2: All prior legislation, or any parts thereof, which is/are inconsistent with this Resolution is/are hereby repealed as to the inconsistent part thereof.

SECTION 3: It is hereby found and determined that all formal actions of this Board concerning and relating to the adoption of this Resolution were adopted in an open meeting of the Board, and that all deliberations of this Board and any of its committees that resulted in such formal actions were in meeting open to the public, in compliance with all legal requirements of the laws of the State of Ohio.

Adopted:



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Chris Lawson  
Board President



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Matthew Dutkevicz  
Executive Director



RLB#13405  
**BCRTA CHESTNUT STREET  
MULTIMODAL STATION**  
97 W. CHESTNUT STREET  
OXFORD, OHIO 45056

CONTACT:  
**MATTHEW DUTKEVICZ**  
EXECUTIVE DIRECTOR  
BUTLER COUNTY REGIONAL TRANSIT AUTHORITY  
3045 MOSER COURT  
HAMILTON, OH 45011

October 10, 2023

**RE: New BCRTA Chestnut Street Multimodal Station  
Recommendation of Prime Contractor**

Dear Director Dutkevicz,

Please consider this correspondence as our formal recommendation to award the Prime Contract to **Graybach, LLC** for the New BCRTA Chestnut Street Multimodal Station project.

The total contract amount recommended above is composed of the following:

Base Bid Package	\$ 21,449,000.00
Alternate #1 – Vehicle Wash Building	\$ 1,740,000.00
Alternate #2 – Fuel Canopy	\$ 344,000.00
Alternate #3 – Painting	\$ 34,150.00
<u>Soil Fill Allowance</u>	<u>\$ 125,000.00</u>
<b>Total Contract Value</b>	<b>\$ 23,692,150.00</b>

Our recommendation is based on the following:

1. Three (3) bids were received on Monday, October 2, 2023, for the Bid Package. Of the bids received, Graybach, LLC submitted the lowest Base Bid amount. The next lowest bidder's proposed Base Bid amount exceeded Graybach's bid by \$847,000.00.
2. Graybach's bid submission included all required documents.
3. Graybach's Base Bid amount is within 2% over the published estimate (\$21,400,000.00) for Bid Package.
4. Graybach's submitted bid for Alternate #1 – Vehicle Wash Building was within 6% over the published estimate (\$1,650,000.00).
5. Graybach's submitted bid for Alternate #2 – Fuel Canopy was 14% over the published estimate (\$300,000.00).
6. Graybach's submitted bid for Alternate #3 – Painting was less than half the published estimate (\$72,000.00)

7. On Friday, October 5, 2023, Bowen Project Manager, Ken Emling, completed a scope review with representatives from Graybach, LLC. Other Bowen representatives included Justin Brevick and (Project Architect), Julia Weiss (Project Designer). Project Engineering representatives included John Bayer (Bayer Becker, Civil Engineering), Lauren Mehall (Bayer Becker, Landscaping), Kwamena Panford (Urban, Mechanical), Darren Guo (Urban, Electrical), and Ed Godorov (Urban, Plumbing). Graybach's representatives included Nathan Williams, Project Estimator/Manager, Pete Subach, Sr. Project Manager, and Jason Boerger, Project Manager. Documentation from the Bowen team is attached.
8. During the scope review, Graybach, LLC demonstrated a clear understanding of the requirements of this project and alternates. They verbally acknowledged that they received the full set of bid documents (plans, specs, and addenda), including the proposed construction schedule, and took no exceptions.
9. Bowen requested and Graybach provided 3 references. Julia Weiss reached out to these references on October 9, 2023, and talked to (1), Charlie Jahnigen from SHP Architects. Mr. Jahnigen was the architect for a \$27 million, fast-tracked project on an occupied site for which Graybach was the General Contractor. He stated that:
  - a. Graybach met all schedule milestones.
  - b. Graybach knows the subcontractor market well for the area.
  - c. Graybach is a good team to work with and has a good workflow using Procore.

If you should have any questions regarding the enclosed information, please do not hesitate to call.

Sincerely,

RICHARD L. BOWEN + ASSOCIATES INC.



Kenneth J. Emling, RA, NCARB  
Director of Public Architecture

cc:



## SCOPE REVIEW – APPARENT LOW BID

PROJECT: BCRTA Chestnut Street Multimodal Station  
JOB NO: 13405  
DATE: October 6, 2023  
TO: Matthew Dutkevicz, Executive Director, BCRTA  
FROM: Ken Emling, AIA, Director of Public Architecture, Bowen  
RE: **Apparent Low Bid Scope Review – Graybach, LLC**

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The following questions were reviewed with Graybach, LLC (apparent low bidder) for the BCRTA Chestnut Street Multimodal Station project construction contract:

1. Did you read and review all the contract documents (drawings and specifications), and is your bid inclusive of all the items contained within these documents?

**Response:** YES

2. Do you have any questions or concerns about anything in the documents?

**Response:** Points raised by Graybach and clarified by Bowen

- a) Bid Q&A items from the early 2023 bid have been incorporated into the base bid scope, and the previous bid is not to be considered in this bid scope
- b) The answer to the structural microsilicate bid question will be clarified in the conformed set
- c) As of 10/6/23, the final decisions on Owner accepted Alternate scope is forthcoming. BCRTA is crunching numbers and would like to accept all. Bowen will issue a Conformed Set following this decision. Set will have clouds removed and accepted alternates finalized/ irrelevant details removed.

3. Have you completed projects of similar size and scope in the last 5-10 years?

**Response:** YES. Example is a \$35 million school project last year. Graybach does roughly \$60 million/ year in single prime contracts.

*Bowen requested a sample project list and 2-3 reference contacts to review for due diligence.*

4. Have you worked on single-prime projects in the past?

**Response:** YES, Average 15 projects of similar size and scope per year, between \$50-65 million total.

5. Is your company in litigation for any project at this time, for any reason? If yes, please explain.

**Response:** NO

6. Has your company been removed from any projects within the past 10 years, or had any major issues that the Owner should be aware of? If so, please explain.

**Response:** NO

7. Have you reviewed the Work identified as "by others" and understand the coordination required?

**Response:** YES. Graybach will submit an RFI to clarify the slab at the overhead door openings in Wash Bay building Alternate to coordinate with precast panel scope.

8. There is no designated Owner's Representative for BCRTA. Do you have any questions or concerns coordinating with the Architect (Bowen) directly?

**Response:** NO. The understanding is that Bowen will be the contact for RFIs, Submittals, etc.

9. We anticipate approval of the contract at the October 18<sup>th</sup> BCRTA Board meeting. Will you confirm the commitment to hold the bid and furnish a 100% Performance and Payment Bond as specified within 10 days after a written Notice of Award?

**Response:** YES. Bowen noted that the land agreement with the University is being coordinated. There will be a preconstruction meeting, and it is anticipated that by early December the contractor will be able to mobilize on the site.

10. Please confirm that you can complete the work by the dates provided in the Bid Documents

**Response:** YES. Bowen clarified that completion dates will be coordinated with the actual start date, but the duration would remain consistent.

11. Please confirm that you will submit a construction schedule with included interim milestones prior to the start of construction.

**Response:** YES.

12. Please confirm that you will submit a submittal schedule within 7-10 days of the Notice to Proceed.

**Response:** YES.

13. Please confirm that you have read, understand, and agree to the Federal Transit Administration requirements.

**Response:** YES.

14. Does your bid consider the "Build America, Buy America" requirements?

**Response:** YES. Additional costs were incorporated into the bid. Documentation for this requirement will be provided in submittals for relevant materials.

15. Please confirm that you understand the Lobbying Restrictions Certification.

**Response:** YES.

16. Please confirm that you understand the Government-Wide Debarment and Suspension Criteria Certification.

**Response:** YES.

17. Do you accept the drug testing requirement as set forth in the vendor forms and certifications?

**Response:** YES.

18. Do you accept that Newforma Project Center is to be used as the submittal service per the Project Manual?

**Response:** YES. Graybach is familiar with Newforma, using it on other projects. Procore is their primary file sharing platform.

19. Do you understand the reporting requirements for meetings, RFIs, submittal schedule, and submittal requirements?

**Response:** YES. These will be run through Procore.

20. Do you acknowledge the Substitution request process as outlined in the Project Manual, noting that all substitution requests must be received within 15 days of the contract signing?

**Response:** YES. Graybach noted that the hollow core plank roof over the cylinder storage (Area C) will be included as solid precast in their Precast submittal.

Bowen noted that substitutions will be considered later for discontinued items, long lead times, or for other obstacles presented.

21. Is there anything that appears to be an obstacle to meeting the schedule?

**Response:** NO. The precast panels from High Concrete are projected to be on site 05/2024. This is a heavy coordination item and critical path, but the Graybach will schedule accordingly.



*Bowen noted that the project has been awarded partial permit and Bowen will close out remaining ODIC items.*

22. Do you have any questions regarding the critical path scheduling requirements as mentioned in the front end documents?

**Response:** *No exceptions.*

23. Do you intend on having a full-time Superintendent on site?

**Response:** *YES.*

24. Will your superintendent be performing work, or primarily just supervising?

**Response:** *Supervising.*

25. Will you be self-performing any of the work?

**Response:** *Safety barricades, door installation, site furnishings, FRP, miscellaneous minor items.*

26. If no to the previous question, if you are to have contracted sub-contractors onsite, how will the oversight of the sub-contractors be handled?

**Response:** *PM and site super will be on site for oversight. Graybach will conduct pre-installation meetings and weekly sub-contractor meetings, tracking through Procore. Subs could be pulled into OAC meetings for specific points of discussion.*

27. Will you have a Project Manager available for weekly site meetings?

**Response:** *YES, Jason Boerger.*

28. Please confirm that you will run a weekly Owner/Architect/Contractor construction meeting, and that you will distribute an agenda and issue minutes for each meeting.

**Response:** *YES, meeting agendas and minutes will be issued through Procore.*

29. Will you have an office trailer? Will you develop/provide a construction site plan?

**Response:** *YES, YES*

30. Do you have any questions regarding temporary facilities (locations, size, type, etc.)?

**Response:** *NO. Project sign will require a native format file.*

*Graybach requested the project plan DWGs for the coordination. These will be provided after the conformed set and will require a release form to be executed.*

31. Have you covered general labor for routine and final cleaning?

**Response:** YES.

32. Have you included dumpsters for site trash?

**Response:** YES.

33. Have you included all construction fencing?

**Response:** YES.

34. Have you included all items for the project alternates and allowances including the Wash building, fueling canopy, painting, and soils?

**Response:** YES. Bowen confirmed all alternates and allowances will be awarded with the project contract, not later.

35. Does your bid include all the delegated design items and submittals including fire suppression, lightening protection, curtain wall design, cold formed metal framing, and fueling canopy?

**Response:** YES.

36. Is there anything in your bid that was an open question and requires more detail before finalizing installation?

**Response:** Interior bollards are specified to be poured with the grade beams, this is a constructability conflict with the precast panel installation. Bowen confirmed that this should be submitted early as an RFI

*Other items as noted above.*

37. Are there any aspects of the architectural systems that appear to be an obstacle to construction?

**Response:** Not currently.

38. Have you included project closeout materials such as O&M Manuals, training, and as-built mark-ups?

**Response:** YES. Bowen confirmed that a video recording of the training is required as well.

39. Do you have any questions regarding closing documents or record documents?

**Response:** *Not currently.*

40. Have you visited the site to familiarize yourself with the existing conditions?

**Response:** *YES.*

41. Do you have any concerns about the existing conditions?

**Response:** *No critical items. Plan on reviewing the site construction plan with Bowen and BCRTA, including the temporary drive and existing/temporary fueling.*

42. Have you reviewed the geotechnical report and understand the Engineer's recommendations?

**Response:** *YES, acknowledging the higher unit cost of soils based on the phasing of cut/construction.*

43. Have you included BUSTR requirements in your bid to remove the existing fuel tanks?

**Response:** *YES.*

44. Have you reviewed the intended access to the adjacent University of Miami sites through the construction site, and do you have a plan in place to coordinate access with the City and the University?

**Response:** *YES. Graybach will contact both the City and the University to coordinate access and early coordination of underground utilities (specifically sanitary).*

45. Have you reviewed the environmental report provided in Addendum 6?

**Response:** *YES.*

46. Are there any project materials that you have concern about long lead times, that would affect the ability to complete the project by the date specified in the Bid Documents?

**Response:** *Graybach will provide early submittals for the following:*

- a) switchboard and automatic transfer switch have a long lead time, also acknowledging the need for electrical study and approval of HVAC equipment and loads.*
- b) Precast panels.*

47. A signed copy of this document will be attached to Bowen's bid recommendation letter. Are you accepting of that?

**Response:** *YES.*

## **CIVIL**

1. Do you have a complete understanding of the sewer scope of work?

**Response:** YES, with noted access coordination.

## **LANDSCAPING**

1. Did you include the landscaping maintenance items specified and documentation of the handoff to the Owner?

**Response:** YES.

2. Did you account for temporary seeding, protection, and stabilization measures if the schedule extends longer than anticipated?

**Response:** YES, temp seeding of disturbed areas is also generally included.

## **STRUCTURAL**

1. Have you included all items for the structural systems shown in the plans and specifications?

**Response:** YES.

2. Is there any aspect of the structural system that appears to be an obstacle to construction?

**Response:** NO but note the phasing of the grade beam/ bollard installation previously mentioned.

3. Have you included all cranes, hoists, trucks, lifts, and any other equipment required to perform the work in your bid?

**Response:** YES.

4. Has the contractor reviewed all footing/precast wall base details?

**Response:** YES.

5. Has the contractor reviewed all beam-to-beam and beam-to-column moment connections?

**Response:** YES.

**MEPT**

1. Do you have any potential lead time issues with the equipment?

**Response:** Long lead times/ early submittal for switchboard noted above. HVAC equipment have long lead times but are expected to fit within the assumed timeline.

2. Have you included after hours or weekend work for final utility connections?

**Response:** YES.

3. Did you include Schedule 40 piping for all fire sprinkler piping?

**Response:** YES.

4. Can you confirm that all the scheduled HVAC equipment is what was priced?

**Response:** YES.

5. Does your bid include everything for complete, code-compliant working systems for Mechanical, Electrical, Plumbing, and Technology?

**Response:** YES.

6. Does your bid include the lighting package as specified?

**Response:** YES

7. Does your bid include all of the IT systems shown on drawing E9 2 other than Cameras and access controls which will be provided under a separate contract?

**Response:** YES. Robinson Communications (the University's vendor) is the anticipated sub under electrical to provide coordination of network switches.

8. Does your bid include data cabling to the camera and access control locations?

**Response:** YES.

9. What type of data cabling was included in the bid?

**Response:** Provided per plans and specs. No exclusions at this time, they will pull the cable.

**ARCHITECTURAL**

1. Do you have any concerns with any materials, products, or details?

**Response:** NO.

2. Does your bid include all monument signs?

**Response:** YES.

3. Does your bid include the fabrication of custom tube steel mounting arms for the bus information integral display signs?

**Response:** YES.

4. Does your bid include the linear felt baffles in the Concourse, vendor lobby, and break area?

**Response:** YES.

5. Does your bid include the dimensional letter signage in the Concourse?

**Response:** YES.

6. Does your bid include the electrified frosted glass at the Concourse transaction window?

**Response:** YES.

7. Does your bid include the precast panels as designed? Do you have any concerns conducting a final coordination of MEP penetrations?

**Response:** YES, as designed with High Concrete. No concerns- Graybach will provide mockup for precast panels to review colors, finishes, etc. (location for mock-up TBD on site or at fabricator). Penetrations under 10" will be field drilled, over 10" will be coordinated.

8. Does your bid include the linear metal exterior soffit material?

**Response:** YES.

9. Does your bid include the phenolic panel, interior and exterior locations? Do you have any concerns regarding the attachment details (vertical and horizontal)?

**Response:** YES, not at this time.

10. Has the contractor reviewed the design intent for knock-out panels in the linear metal soffit for future pantograph scope?

**Response: YES.**

11. Does your bid include the ACM fascia as detailed on the canopy?

**Response: YES.**

12. Does your bid include the cast stone panels at the entry towers and cast stone windowsills?

**Response: YES.**

13. Does your bid include the exterior face brick veneer where indicated on the drawings?

**Response: YES.**

14. Does your bid take into consideration the brick return at face brick locations?

**Response: YES.**

15. Does your bid include the interior wood veneer, acoustical panel, and tile in the concourse areas ?

**Response: YES.**

16. Does your bid include the TPO roofing assembly and accessories as specified?

**Response: YES.**

17. Does your bid include the prefabricated metal awnings as specified?

**Response: YES.**

18. Does your bid include the curtainwall scope as specified?

**Response: YES.**

19. Does your bid include thermal break coating at all structural beam penetrations through the exterior envelope?

**Response: YES.**

20. Has the contractor reviewed all the waterproofing and air/vapor barrier conditions and connections?

**Response:** YES.

21. Has the contractor reviewed the delegated design of cold form kickers at the parapet and the associated boot/ roof penetration details?

**Response:** YES.

**BIDDER'S QUESTIONS**

1. Who should be the contact person to email past projects and references?

**Response:** Email to Ken Emling (kemling@riba.com), Justin Brevick (jbrevick@riba.com), Julia Weiss (jweiss@riba.com).

2. Review allowances – only soils.

Architect:		10/10/23
	_____	_____
	Ken Emling, AIA, Director of Public Architecture, Bowen	Date
Contractor:	 PETE SUBACH, MEMBER	10-9-23
	_____	_____
	Name/Title	Date



**BCRTA Resolution No: 23-11-01**

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**Adoption of the FY2024 Accrual Operating Budget for the Butler County Regional Transit Authority (BCRTA).**

**Whereas**, the FY2023 appropriations for the Butler County Regional Transit Authority (BCRTA) will expire on December 31, 2023; and

**Whereas**, it is the desire of the BCRTA to appropriate the following funds to provide for the operating expenses of the agency during FY2024:

FY2024 Accrual Budget Summary (details contained in attached Exhibit):

Revenues:	\$10,378,519
Expenses:	\$10,047,752

**Now therefore be it resolved that the BCRTA Board of Trustees hereby authorizes the adoption of the attached FY2024 Accrual Operating Budget.**

Approved: November 15, 2023

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BCRTA Board President  
Chris Lawson

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BCRTA Executive Director  
Matthew M. Dutkevicz

**2024 Proposed Operating Budget**

Draft - Subject to Board Approval

	<b>2023</b>	<b>2024</b>		<b>2023</b>	<b>2024</b>
	<b>Current</b>	<b>Proposed</b>		<b>Projected</b>	<b>Tax</b>
	<b>Budget</b>	<b>Budget</b>			<b>Budget</b>
<b>Revenues</b>					
Passenger Fares	\$ 121,125	72,000	Better payment options with Via, increased # of drivers to meet demand	56,196	123,548
Contract Fares	310,000	303,000	BCVSC contract	255,306	316,200
Partnership Transit Rev.-COM	1,236,000	2,654,868	COM Funding for Regional Routes and all ADA & DR Service with BCRTA Drivers, updated rate, less match provided by BCRTA	1,088,566	1,435,667
Transit Development Rev.-MU	2,447,312	2,944,679	MU at normal service level with increase to hourly rate	2,660,114	2,496,258
Management Services	274,714	296,688	CPI increase to monthly rate, no match provided by BCRTA	137,357	280,207
Other Services	-	71,240	Maintenance on MCI buses for COM.	-	-
Interest & Other	134,390	264,180	Interest income, scrap sales, refunds, bus sales, etc.	267,105	137,078
Agency Funding	90,000	47,598	Support from CDBG, TABC 5310	149,529	91,800
State Funding	284,000	-	No state operating funds	270,960	289,680
Federal Funding	5,874,868	3,724,266	Assumes 50% and 80% 5307 Operating, ADA funds, PM & MM funds	4,177,635	4,872,924
Park-n-Ride Program	300,000	-	None - COM starts CR in January 2024	519,744	-
In-Kind Items	-	-		-	-
<b>Total Revenues</b>	<b>\$ 11,072,409</b>	<b>10,378,519</b>		<b>9,582,513</b>	<b>10,043,362</b>
<b>Expenses</b>					
Wages	\$ 3,872,323	4,632,394	Salary Study wage adjustments for full year, Annual increases, New Positions filled	3,779,356	4,002,086
Fringes	1,821,597	2,880,435	Full time benefits, plus PERS, Medicare, WC, & PTO	2,128,155	1,890,453
Services	697,788	744,398	Mkting, Legal, IT Services, Pressure washing, other prof. services	658,064	556,744
Materials & Supplies	964,250	1,155,956	SAAS fees, Fuel Costs and RV Parts at Moderate Rates	982,633	983,535
Utilities	90,320	115,000	Communication Costs w/ wifi on MCI buses (cost passed to COM)	83,022	92,126
Insurance	304,175	345,368	OTR coverage and hardening market driving cost up, Health Pool Admin Costs	345,368	310,259
Taxes	-	-	None Planned	-	-
Purchased Transportation	300,000	-	None - COM starts CR in January 2024	519,744	-
Misc. Items	130,254	124,200	Staff training/travel, Advertising, Membership fees	120,294	183,859
Leases & Rentals	-	-	None Planned	-	-
Contingency	50,000	50,000	Contingency	15,000	50,000
<b>Total Expenses</b>	<b>8,230,707</b>	<b>10,047,752</b>		<b>8,631,635</b>	<b>8,069,062</b>
<b>Gain/Loss before Depr, NP &amp; OPEB Exp</b>	<b>2,841,702</b>	<b>330,767</b>	To cover Local share of Depreciation, Net Pension & OPEB Expenses	<b>950,878</b>	<b>1,974,300</b>
BCRTA share of Depreciation	290,662	288,000	BCRTA share of Depr = approx \$24K/mo.	288,000	288,000
Est. Net Pension & OPEB Exp. (Income)	(711,318)	-	Estimated Net Pension & OPEB Expense (Income)	-	-
<b>Gain/Loss</b>	<b>\$ 3,262,358</b>	<b>\$ 42,767</b>		<b>\$ 950,878</b>	<b>\$ 1,686,300</b>

**BCRTA Resolution No. 23-11-02**

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**Authorization of FY2024 Appropriations and Acceptance of the Butler County Regional Transit Authority (BCRTA) Fiscal Officer’s Certification of Funds and Estimation of Revenues.**

**Whereas**, the FY2023 appropriations for the Butler County Regional Transit Authority (BCRTA) will expire on December 31, 2023, and

**Whereas**, on November 15, 2023 the BCRTA Board of Trustees adopted a FY 2024 Accrual Operating Budget; and

**Whereas**, additional appropriations to include FY2023 carryforward items and FY2024 capital expenditures must likewise be adopted by the BCRTA Board of Trustees; and

**Whereas**, the BCRTA Board of Trustees authorizes the following fiscal year appropriations and accepts the fiscal officer certification of funds and estimation of revenues as follows:

FY2024 Funds & Appropriations

Projected Cash Balance 1-1-2024	\$ 7,243,156
Estimated Revenues	\$ 40,385,631
Authorized Appropriations	\$ 43,553,419
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Projected Year-End Funds	\$ 4,075,367

**Now therefore, be it resolved:**

That the BCRTA Board of Trustees hereby authorizes the above FY2024 appropriations and accepts the fiscal officer’s certification of funds and estimation of revenues. Furthermore, the BCRTA Secretary/Treasurer is authorized to do all things necessary to enact this resolution.

Approved: November 15, 2023

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Board President  
Chris Lawson

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Executive Director  
Matthew Dutkevicz

Butler County Regional Transit Authority (BCRTA)

I, Delene Weidner, Fiscal Officer of the BCRTA, hereby certify the following:

**Estimated Cash Balances as of 1-1-24 (General Transit Fund)**

On Deposit - Checking	39,184.85
On Deposit - Savings I	60,076.61
On Deposit - Savings II	2,205,779.70
On Deposit - STAR Ohio	4,937,114.91
BCRTA Petty Cash Fund	1,000.00
	<hr/>
	7,243,156.07

**Estimated Revenues for FY2024 (General Transit Fund)**

BCRTA - FY24 Receivables	255,000.00
	<hr/>
	255,000.00
FY2024 Operations	
Passenger Fares	72,000.00
Contract Revenues	303,000.00
Partnership Transit Revenues	2,654,868.00
Transit Development Program	2,944,679.00
Sale of Services	296,688.00
Park-n-Ride Program	-
Federal Operating Funds	3,724,266.00
State Operating Funds	-
Agency Operating Funds	47,598.00
Other Revenues	335,420.00
	10,378,519.00
Federal Capital Grant Funds	27,278,376.00
State Capital Grant/Other Funds	2,473,736.00
	29,752,112.00
<b>Total Funds Available</b>	47,628,787.07

**Anticipated Appropriations for FY2024 (General Transit Fund)**

BCRTA - FY24 Payables	255,000.00
	<hr/>
	255,000.00
FY2024 Operations	
Wages	4,632,393.96
Fringes	2,880,435.21
Services	744,398.00
Materials & Supplies	1,155,956.48
Utilities	115,000.00
Insurance	345,368.11
Taxes & Fees	-
Purchased Transportation	-
Misc. Items	124,200.00
Leases & Rentals	-
Contingency	50,000.00
	10,047,751.76
FY2024 Capital Items	
Revenue Vehicles & Related Items	2,780,873.00
Transit Centers & Facility Improvements	30,052,394.50
Equipment, Technology, Amenities & Other	417,400.00
	<hr/>
	33,250,667.50
Total Appropriations	43,553,419.26
<b>Projected Funds Available 12-31-24</b>	4,075,367.81

## BCRTA Resolution No. 23-11-03

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### Confirmation of Board Policy 6-02 Investments

**Whereas,** BCRTA is a Regional Transit Authority created by resolution of the Commissioners of Butler County, Ohio pursuant to Chapter 306 et seq. of the Ohio Revised Code; and

**Whereas,** the BCRTA is governed by a Board of Trustees that serve as trustees of BCRTA assets; and

**Whereas,** on March 18, 2009 the Board adopted Board Policy 6-02 Investments; and

**Whereas,** the policy includes a requirement for an annual Board review as part of the budget process.

**Now therefore be it resolved that the BCRTA Board of Trustees hereby confirms Board Policy 6-02 Investments.**

Furthermore, the BCRTA Board of Trustees authorizes the Executive Director to take actions necessary to assure organizational compliance with the terms of this policy.

Approved: November 15, 2023

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Board President  
Chris Lawson

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Executive Director  
Matthew M. Dutkevicz

# BCRTA POLICY AND PROCEDURE MANUAL

## 6-02 Investments

*Effective Date: 03-18-09*

*Review Dates: 10-20-10; 11-16-11; 11-14-12; 11-20-13; 11-19-14; 11-18-15; 11-16-2016; 05-17-2017; 11-15-2017; 11-14-2018; 11-20-2019; 11-18-2020; 11-17-2021; 11-16-2022*

The BCRTA Board of Trustees shall ensure that all agency funds are invested in a manner consistent with applicable local, state, and federal laws. In doing such they will also ensure that adequate funds are available to meet short-term and long-term obligations as follows:

- All agency funds will be kept on deposit with financial institutions that are experienced in handling “public funds”.
- Funds shall be maintained in checking or short-term savings accounts equal to at least an amount to cover ninety days of approved operating/capital expenditures.
- Excess funds will be invested in instruments considered “low risk” such as money market savings accounts (or similar) and certificates of deposit. Any other types of investments will require prior approval of the Board of Trustees.
- The Board shall from time to time as required by local, state, and federal grantors, set aside and obligate any funds required to match grants from these agencies.

This policy will be reviewed annually by the Board of Trustees as part of the budget process.

## BCRTA Resolution No. 23-11-04

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### Confirmation of Board Policy 6-08 Reserves

**Whereas**, BCRTA is a Regional Transit Authority created by resolution of the Commissioners of Butler County, Ohio pursuant to Chapter 306 et seq. of the Ohio Revised Code; and

**Whereas**, the BCRTA is governed by a Board of Trustees that serve as trustees of BCRTA assets; and

**Whereas**, on October 20, 2010 the Board adopted Board Policy 6-08 Reserves; and

**Whereas**, on November 14, 2012 and June 18, 2014 the Board amended Board Policy 6-08 Reserves; and

**Whereas**, the policy includes a requirement for an annual Board review as part of the budget process.

**Now therefore be it resolved that the BCRTA Board of Trustees hereby confirms Board Policy 6-08 Reserves.**

Furthermore, the BCRTA Board of Trustees authorizes the Executive Director to take actions necessary to assure organizational compliance with the terms of this policy.

Approved: November 15, 2023

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Board President  
Chris Lawson

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Executive Director  
Matthew M. Dutkevicz

# BCRTA POLICY AND PROCEDURE MANUAL

## 6-08 Reserves

**Effective Date: 10-20-10**  
**Review Dates: 11-16-11;**  
**11-20-13; 11-19-14;**  
**11-18-15; 11-16-16; 05-17-2017; 11-15-2017;**  
**11-14-2018; 11-20-2019; 11-18-2020; 11-17-2021; 11-16-2022.**  
**Revision Dates: 11-14-12; 6-18-14**

The BCRTA Board of Trustees shall ensure that a portion of agency “cash and cash equal” funds are “reserved” or set aside to properly reflect future obligations. In doing such they will ensure that adequate funds are available to meet short-term and long-term obligations as follows:

- Funds will be “reserved” to meet the current outstanding local share match requirements of all open grant contracts net of anticipated matching funds. This will ensure the agency can meet all current grant obligations. These funds will be known as “Local Share Grant Obligations”
- Funds will be “reserved” to meet 2 months (or 60 days) of average current budgeted operating expenses (less any “non-cash” items such as the SORTA park-n-ride costs). This will ensure the agency can meet routine cash flow needs. These funds will be known as “Working Capital Funds”
- Funds will be “reserved” to meet the local share cash requirements of projected fleet and other capital replacements over a five year planning window. This will ensure vehicles and other assets are replaced on a regular basis. These funds will be known as “Capital Replacement Funds”
- Funds will be “reserved” to cover any long term debt. This will ensure that the agency has the required funds on hand to cover long term debt should any be issued based on market conditions and Board authorization. These funds will be known as “Debt Retirement Funds”.
- Funds will be “reserved” to cover unknown or unforeseen items in an amount established by the Board of Trustees at their discretion. These funds will be known as “Contingency Funds”.

The “reserves” will be calculated monthly (standard fiscal calendar) and reflected on the agency financial statements. Policy will be reviewed annually by the Board of Trustees as part of the budget process.

Funds available (or “cash and cash equal”) is defined as: cash on deposit, accounts receivable, and any other receivables which can be converted to cash less any payables or other short term obligations.



# METRIC DASHBOARD

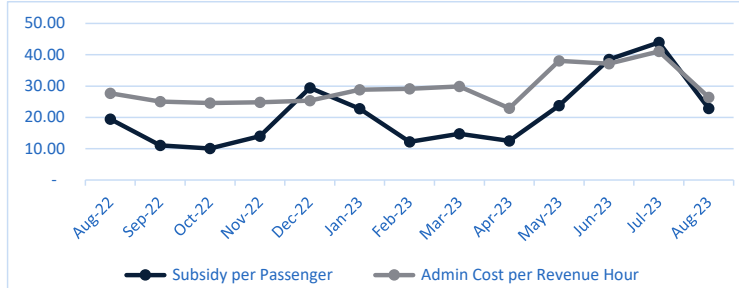
## August 2023

### Leveraging Competitive Funding & Partnerships

Average Fleet Age

# 5.53

Since Last Month	0.03	0.54%
Since Last Year	0.76	13.74%



### Enhancing Connectivity

BCRTA Transit App Users

# 4,633

Since Last Month	2,686	57.98%
Since Last Year	(12)	-0.26%

BGO App Rides/Total BGO Rides

# 28.40%

Since Last Month	7.76%	27.32%
Since Last Year	23.09%	81.30%

BCRTA Transit App Downloads

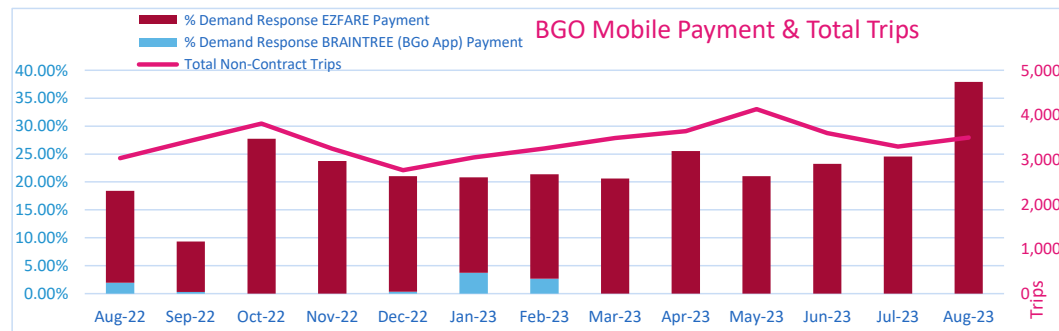
# 1,219

Since Last Month	731	59.97%
Since Last Year	(421)	-34.54%

BGO App Downloads

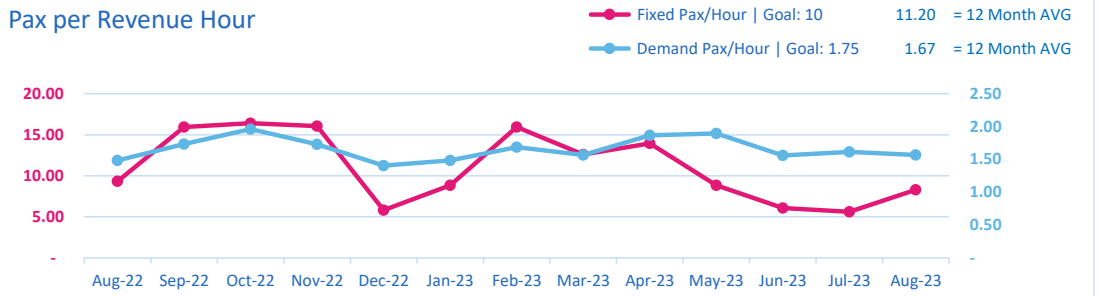
# 692

Since Last Month	493	71.24%
Since Last Year	359	51.88%

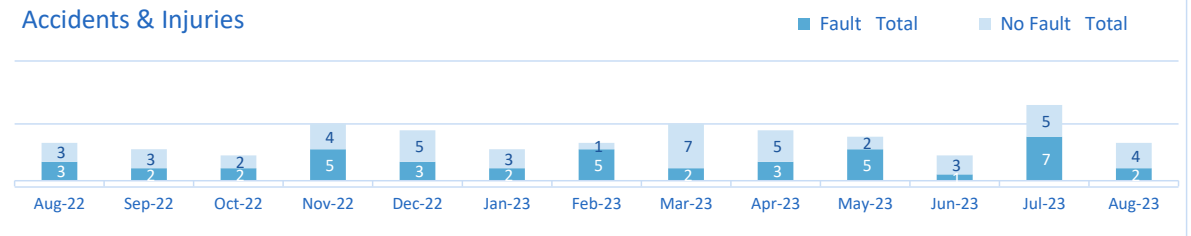


### Improving Mobility & Eliminating Barriers

Pax per Revenue Hour



Accidents & Injuries



Target Operator Staffing

# 67%

Since Last Month	-12.37%
Since Last Year	2.52%
12 Month Average	75.45%
GOAL	100.00%

Denials & Refusals/Total BGO

# 41.93%

Since Last Month	15.07%
Since Last Year	31.80%
12 Month Average	16.21%
GOAL	0.00%

### Supporting Employers

42X Park & Ride Total Trips

# 3,214

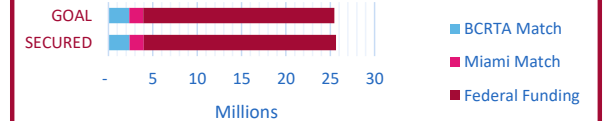
Since Last Month	659	21%
Since Last Year	1,753	55%

BGO Employment Trips

# 1,897

Since Last Month	75	3.95%
Since Last Year	178	9.38%

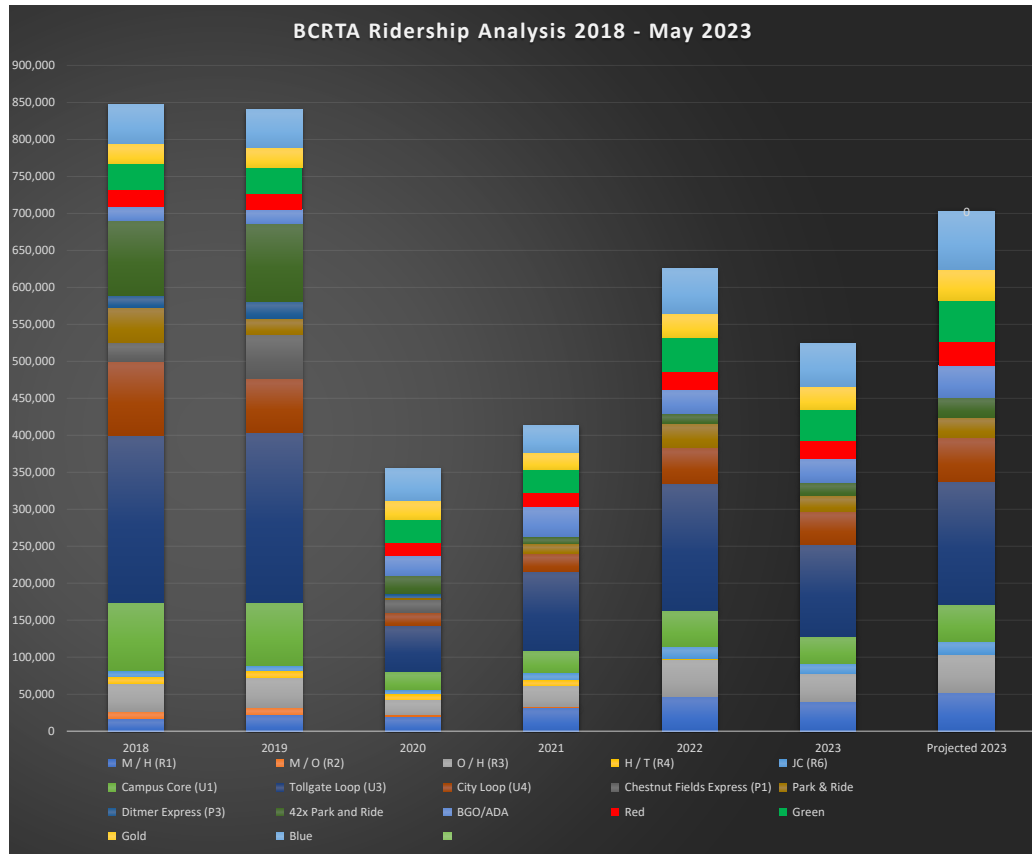
### Developing Multimodal Infrastructure



Days Until Chestnut Fields Completed

# 639

	2018	2019	2020	2021	2022	2023 Projected 2023	Projected 2023 vs. 2019 Ridership	
M / H (R1)	17,144	22,029	19,969	31,625	46,540	39,656	52,875	↑ 240%
M / O (R2)	10,175	10,359	2,445	1,787	234	0	0	↓ 0%
O / H (R3)	37,215	39,672	20,269	27,929	49,967	37,961	50,615	↑ 128%
H / T (R4)	9,279	9,613	7,852	8,770	1,226	0	0	↓ 0%
JC (R6)	7,794	7,361	6,281	8,784	16,393	13,839	18,452	↑ 251%
Campus Core (U1)	92,983	84,708	24,099	30,487	49,035	37,072	49,429	↑ 58%
Tollgate Loop (U3)	224,855	230,330	61,696	106,509	171,768	124,508	166,011	↑ 72%
City Loop (U4)	100,178	72,343	17,433	24,245	47,909	44,460	59,280	↑ 82%
Chestnut Fields Express (P1)	25,580	59,277	17,457	-	-	0	0	↓ 0%
Park & Ride	48,049	21,701	3,171	13,708	32,698	21,102	28,136	↑ 130%
Ditmer Express (P3)	15,497	23,444	5,661	-	-	0	0	↓ 0%
42x Park and Ride	101,752	104,989	24,583	9,821	13,981	17,952	26,928	↑ 26%
BGO/ADA	17,915	19,621	26,540	39,166	32,465	32,087	42,783	↑ 218%
Red	22,905	21,182	17,690	19,971	23,845	23,769	31,692	↑ 150%
Green	35,811	35,346	31,047	31,258	46,073	41,964	55,952	↑ 158%
Gold	26,703	26,644	25,146	22,899	32,267	31,839	42,452	↑ 159%
Blue	53,411	51,995	44,014	36,593	61,377	58,543	78,057	↑ 150%
<b>TOTAL</b>	<b>847,246</b>	<b>840,614</b>	<b>355,353</b>	<b>413,552</b>	<b>625,778</b>	<b>524,752</b>	<b>699,669</b>	<b>↓ 83%</b>



# Director's Notes – October 2023

## A. Staffing & Facility

### 1. Staffing

BCRTA is currently seeking to fill the following positions:

Facilities Technician I	Location: Hamilton, OH Department: Maintenance Type: Part Time to Full Time
Facilities Technician II	Location: Hamilton, OH Department: Maintenance Type: Part Time
Commuter Coach Driver - CDL	Location: Hamilton, OH Department: Operations Type: Part Time to Full Time
Operations Street Supervisor	Location: Hamilton, OH Department: Operations Type: Full Time
Operations Trainer	Location: Hamilton, OH Department: Operations Type: Full Time
Vehicle Operator - Fixed Route/CDL	Location: Hamilton, OH Department: Operations Type: Full Time
Vehicle Operator - No CDL	Location: Hamilton, OH Department: Operations Type: Full Time

Operator staffing is still barely keeping pace with attrition. The HR team will present wage benchmarking data at the October Board meeting.

A biweekly email digest of open positions is available. Please contact Mary Jane Leveline, BCRTA Talent & Benefits Manager ([levelinem@butlercountyrta.com](mailto:levelinem@butlercountyrta.com)) if you would like to be added to the mailing list.

## B. Planning

### 1. Strategic Plan

Staff has continued to work with C Robinson & Associates over the past few months to refine the plan for public consumption and to create work tasks that we believe align with the board's vision. Those documents are included in this packet for review and discussion at the October board meeting. Staff are planning to finalize a document for adoption at the November 2023 meeting.

### 2. Warren County Transit Service

BCRTA submitted a bid to operate WCTS on September 1. BCRTA was not successful. Staff will follow-up for a debrief on the selected bid and explore future potential partnerships.

### 3. Commuter Service

BCRTA is now receiving delivery of the commuter buses that will be used to bring Cincinnati commuter service in house late this year. Staff have received 5 of 8 vehicles.

## Director's Notes – October 2023



Training is currently underway, and service will begin in January 2024. Branding of the service was completed in late summer and the Communications and Outreach team is now working with the marketing agency to begin rollout and awareness campaigns. [Cincylinkbus.com](http://Cincylinkbus.com) went live October 6. Final schedule information should be available in late November following completion of time trials.

#### 4. Chestnut Street Multimodal Station

Bids for construction of the Chestnut Street Multimodal Station came in under estimates on October 2. Staff will recommend an award at the October meeting.

Due to the complex nature of the project, there will be an Executive Committee meeting on October 13<sup>th</sup> to walk through the finer details of the ground lease and construction contract. BCRTA and Miami are still putting finishing touches on the lease document, but the current draft has been shared as part of the committee and board packets. Staff will share updates as they become available. BCRTA staff will request authority to execute the lease at the October 18 meeting so that Miami University may consider the lease at their next Board of Trustees meeting to permit construction to begin in late December/early January.

Trustees with questions or concerns are encouraged to attend the 10/13 committee meeting to address clarifications and seek additional information from staff.

### C. Funding & Discretionary Grant Availability

#### 1. Ohio Workforce Mobility Grant

The Workforce Mobility Partnership Program was first established in Section 755.20 of Ohio House Bill 23. Through this act, \$15 million is made available each State Fiscal Year for 2024-2025 to support projects in the rural and urban areas of Ohio that easily and efficiently transport resident workforce members to economically significant employment centers or to places of employment outside of their resident community.

## Director’s Notes – October 2023

Although the program description leans into supporting operations and service, BCRTA staff have identified program rules that better position applications for capital resources. And, given that a portion of BCRTA’s revenue vehicle parking deficit is due to the implementation of CincyLink, staff believe this program may be a good candidate to fund the expansion of the Moser Court parking area. Staff intend to apply this month. Awards should be due in December.

### 2. 2023 Areas of Persistent Poverty (AOPP/HDC)

BCRTA and City of Oxford were successful in obtaining \$150K to study bike/trail/pedestrian infrastructure related to transit within the City of Oxford. Oxford will provide the match and act as a subrecipient to BCRTA. The project should begin in early 2024.

### 3. 2023 LoNo

Staff identified an opportunity to join NEORide and ODOT to apply for small alternative fuel buses and infrastructure as part of the 2023 NOFA for the competitive 5339 LoNo program. The application submitted specifically focuses on LOW emission technology that can support the range of BCRTA small buses (200+ mi per day).

NEORide, ODOT, BCRTA and the partners were successful in obtaining an award for the “OH-ZERO” grant request. BCRTA will receive funding for 5 propane-fueled LTV’s and associated fueling infrastructure for the Moser Court facility.

## D. On the Horizon ...

### 1. 30<sup>th</sup> Anniversary

BCRTA will celebrate its 30<sup>th</sup> anniversary in 2024. Staff are beginning to create plans for a year-long recognition and celebration with scattered events and promotions.

### 2. Triennial Review

BCRTA will receive a regular Triennial Review from the Federal Transit Administration in 2024. A desk review and document request is expected in late 2023.

### 3. Chestnut Fields Groundbreaking

Due to the timing of lease execution and Miami University’s Board meeting schedule, BCRTA expects a ground-breaking event to take place in December or January, later than originally contemplated. Stay tuned for details.

## E. Upcoming Procurements >\$25,000

Item	Procuring Agency	Estimated Spend	Estimated Term	Reason for Purchase
Procurement, Maintenance, and Finance Software Integrated Solution – Phase II	BCRTA	150k	5	New
Parking Lot Construction	BCRTA	3M	Task	New

## Director's Notes – October 2023

Tires (large bus)	BCRTA	TBD	1	New
Chestnut Fields Construction	BCRTA	24.3M	Task	New
Chestnut Fields FF&E	BCRTA	250K	Task	New
Onboard Tablets (81)	BCRTA	110K	Task	Scheduled Replacement
PC Workstations & Peripherals (37)	BCRTA	75K	Task	Scheduled Replacement
BCRTA & MTS Integrated Access Control & Security (Moser, MTS, Chestnut)	BCRTA & MTS	300K	5	New and Replacement

# Director's Notes – October 2023

## Strategic Vision 2025

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As Ohio's public transit innovator, BCRTA provides smart mobility options and infrastructure that seamlessly connect people to employers, educational, healthcare, and recreational destinations.

Leverage competitive federal funding and forge mutually beneficial partnerships with organizations, including incubators, chambers, universities, start-ups, economic development bodies, and planning professionals.

- ~~Expand participation in NeoRide as appropriate to address needs and improve grant funding~~
- ~~Sustain Miami University relationship, plan for future – 2023 contract in negotiation~~
- ~~Retain BCVSC and BCDD contracts~~
- Leverage MTS transit plan and maintain relationship with City of Middletown
- Improve DBE access
- *Keep finger on pulse of autonomous tech – applying for SMART 2023*
- ~~Examine Cincinnati commuter service for ways to reduce cost (42X)~~

Enhance connectivity with constituents by leading in the implementation of new transit tech (onboard Wi-Fi tools).

- *Test and expand onboard WIFI where possible – will implement on new commuter service*
- ~~Implement onboard validation for EZfare~~
- ~~Expand BGO app service~~
- ~~Launch new & updated website~~
- *Expand use of real-time info signs and kiosks – budgeted for 2023*

Improve mobility access and eliminate barriers to ridership, especially for riders who may be elderly or have disabilities.

- ~~Reduce DR fares to \$5.00~~
- *Make peak BGO service available*
- *Hire operators to address demand*
- ~~Relocate customer service closer to riders~~
- *Pursue payment options for unbanked*
- ~~Consider free fixed route fares~~

Support employers with effective workforce transportation in at least 75% of Butler County's densest corridors.

- ~~Evaluate existing R routes for effectiveness and reallocate to improved frequency or BGO as necessary – SRPS Study delivery Q1 2023~~
- *Solicit BGO services in employer-dense areas.*
- ~~Evaluate options for Spooky Nook connectivity – SRPS Study delivery Q1 2023~~
- Address Butler/Warren connection in Monroe

Develop multimodal infrastructure and wayfinding to create seamless user experiences.

- *Accelerate completion/progress for Oxford Multimodal facility*
- Improve Hamilton/Warren County connectivity for fixed route and ADA
- ~~Eliminate paper transfers~~
- Address Transit Center convenience and utility (Hamilton, Oxford, Middletown)
- *Improve regional connections with commuter service, rail, interurban bus, rideshare, bikeshare, scooters*



# Butler County Regional Transit Authority

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**Strategic Plan  
2023 - 2026**



# Letter from the Board President

As President of the Board of Trustees for the Butler County Regional Transit Authority (BCRTA), I am pleased to convey my committed support for the 2024-2026 Strategic Plan. Over the past decade, our agency has experienced significant growth and overcome numerous challenges, and our dedication to delivering exceptional transit services to the residents of Butler County has never been stronger. The development and finalization of the BCRTA Strategic Plan is critical to carving out our future and both timely and essential to best serving our Butler County citizens.

This plan symbolizes more than just a roadmap for our future; it encapsulates our commitment to ensuring that BCRTA remains at the forefront of regional mobility, serving not just Butler County but expanding services to connect with the wider region.

The weight of our decisions, deliberations, and actions cannot be understated. As guardians of the public trust and as stewards of BCRTA's mission, we have been entrusted with the significant responsibility of steering our organization into the future. Our role is pivotal in making BCRTA a beacon of progress, innovation, and community partnership.

The impact we are poised to make on Butler County and the surrounding areas is monumental. Every strategy we enact, every policy we formulate, will reverberate across communities, shaping lives, influencing economies, and molding the future of transit in our region.

Lastly, I want to express my unwavering belief in our capacity to lead BCRTA into a prosperous future. With our strategic plan as our compass and our shared dedication as our fuel, we will continue to serve our community with excellence.

Together, let's craft a legacy of which we can be proud!



**Christopher Lawson**



# Letter from the Executive Director

The future of transit in Butler County is at an exciting juncture. Over the last decade, our team has taken Butler County Regional Transit Authority (BCRTA) from fragmented, on-demand service to incorporate county-wide service, regional connections, and lower fares. We have replaced our aging fleet, negotiated two long-term operations contracts with Miami University, implemented countywide curb-to-curb service and significantly grown our ridership. We have set ourselves apart as Ohio's first zero-fare fixed route transit system.

Through collaboration with our local and regional colleagues, we are moving Butler County RTA forward by providing mobile app payment and scheduling for the BGo Dial-A-Ride service and the implementation of regional mobile ticketing with Metro in Cincinnati and Transit Authority of Northern Kentucky (TANK).

As we continue to navigate an evolving landscape, our strategic vision becomes even more critical. This strategic plan for 2024-2026 is a testament to BCRTA's commitment to community engagement, economic growth, environmental stewardship, and the advancement of our region's mobility ecosystem.

The Leadership Team and Board thoroughly reviewed our past accomplishments, current state and future aspiration to provide the Butler County region with the transit solutions needed to drive economic development, provide regional connectivity and deliver access for all. This detailed work produced a set of goals accompanied by a meticulous timeline, offering clarity on our plan's ambitious outlook.

This strategic plan, formulated after extensive deliberation and consultation, offers a holistic view of our aspirations, strategies, and the road ahead.

As we embark on this journey, we invite you to join us in making BCRTA a beacon of excellence in the world of public transit.



**Matthew Dutkevich**



# Introduction

The Butler County Regional Transit Authority (BCRTA) Board of Trustees along with the Executive Leadership Team recognizes that the evolution occurring in the industry will require an innovative shift in direction. Through work with local and regional partners, three key studies were completed during the first half of 2023: (1) Alternative Fuel Strategy Zero Emission Vehicle Transition Plan, (2) Regional Transit Gap Analysis Plan and the (3) BCRTA Transit Plan. These studies are the foundation that have shaped this Strategic Plan.

With the overarching objective of fortifying transportation accessibility and championing community connectivity, a significant responsibility rested upon the leadership team's shoulders. To effectively navigate this complex terrain and ensure a roadmap that resonated with the aspirations of Butler County and its surrounding geography, the Board and Executive Team engaged C Robinson Associates, a firm familiar with the transit industry and the Ohio Region to facilitate the development of the Butler County Regional Transit Authority 2024-2026 Strategic Plan.

The work began with collectively recognizing the need to dive deep into the organization's ethos, operational modalities, and future aspirations. Through a site visit, tour of the transit network, and a series of intensive interviews with Board members and the BCRTA Leadership team, the foundational groundwork for this project was laid. These interactions were not just perfunctory consultations; they were sessions of introspection, exploration, and vision crafting.

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The clear intent was to develop a new Strategic Plan for the Butler County Regional Transit Authority. A plan that would not just be a document but a living testament to BCRTA's commitment to enhancing transportation options, supporting economic dynamism, forging local partnerships, and providing an unparalleled transit experience.

The methodology chosen for this endeavor was as meticulous as it was expansive. Breaking down the process into three principal phases ensured clarity and systematic progress. The Development Phase saw rigorous data collection, review of financial structures, discussions, and agenda-setting. These efforts culminated in The Collaboration Phase, where the real magic happened. Team building exercises strengthened internal bonds, visioning sessions provided direction, and a comprehensive Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis spotlighted BCRTA's stability, readiness, and vulnerabilities.

The visioning component of the strategic work session was particularly enlightening. It challenged the team to dream big, look beyond the immediate horizon, and imagine a future where BCRTA wasn't just a transit authority, but a cornerstone of community development and innovation. Meanwhile, the SWOT analysis wasn't just about identifying areas of improvement but about celebrating successes and learning from challenges.

In essence, this Strategic Planning process with full engagement by both the BCRTA Board of Trustees and Executive Leadership Team maintaining a clear focus on fiscal responsibility, was a renewed commitment to a vision – one that propels BCRTA to new heights while always keeping its community at the core of every decision.

As this strategic roadmap unfolds, Butler County and its residents can look forward to a transit future that's efficient, innovative, and deeply interconnected.



# About Us

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*Butler County Regional Transit Authority: Bridging Gaps, Building Connections*

In the southwestern part of Ohio lies the Butler County Regional Transit Authority (BCRTA), an embodiment of the county's commitment to enhancing its residents' quality of life and driving economic prosperity. Established in 1994 by the visionary Butler County Commissioners, the BCRTA stands as a testament to the belief that transportation is not merely about moving from one place to another: it's about creating opportunities, building connections, and fostering community growth.

Derived from the Ohio Revised Code, Chapter 306, the creation of BCRTA was more than an administrative decision; it was a strategic move aimed at weaving a coordinated transportation program that resonated with the needs and aspirations of every Butler County resident. Governed by a dedicated nine-member Board of Trustees, appointed with care and foresight by the Butler County Commissioners, BCRTA's mission has always been clear and unwavering: to be the linchpin that supports Butler County's quality of life and economic vitality through innovative and accessible public transportation solutions.

The Butler County Regional Transit Authority (BCRTA) stands as an integral political subdivision of the State of Ohio, having been organized as a Regional Transit Authority under Ohio code in 1994. This establishment represents a crucial step in providing comprehensive and accessible public transportation services to the communities within and surrounding Butler County, Ohio.

## **Our Scope:**

BCRTA actively serves numerous areas within and around Butler County, Ohio, including prominent locations such as Hamilton, Middletown, Fairfield, West Chester, Oxford, and Miami University. As the designated recipient for Federal Transit Funds, we channel essential financial resources towards ensuring expansive, efficient, and reliable public transportation services for these communities. Our extensive operations highlight our commitment to fostering connectivity and accessibility for all residents and visitors.



## **Our Mission:**

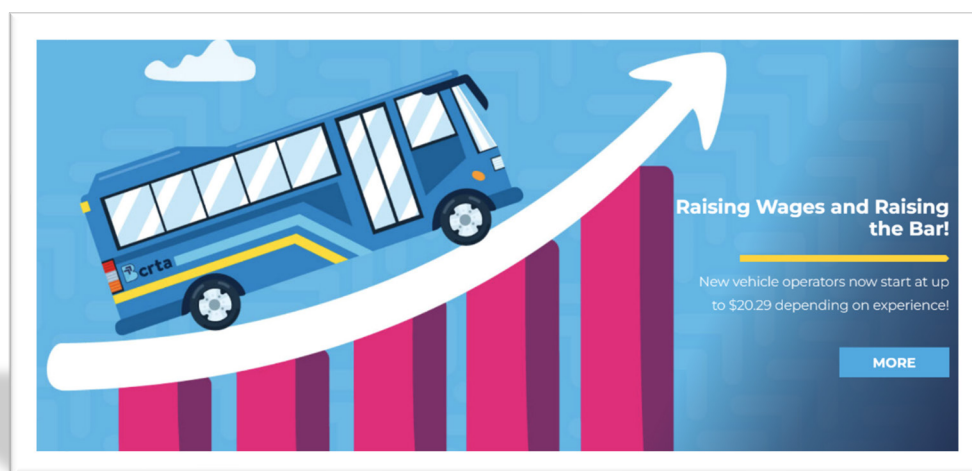
BCRTA's mission is to support Butler County's quality of life and economic development through public transportation solutions.

BCRTA is steadfast in its dedication to enhancing Butler County's quality of life and bolstering economic development. We achieve this through the provision of robust public transportation solutions, effectively connecting people with opportunities, services, and community hubs across the county. Our operations reflect our unwavering commitment to the community, contributing significantly to the region's growth, sustainability, and overall livability.

## **Our Approach:**

Effective and objective facilitation forms the cornerstone of our operations at BCRTA. Our systematic approach focuses on the identification and prioritization of critical issues and priorities, ensuring alignment with our overarching mission. By continuously engaging with community stakeholders, local authorities, and passengers, we remain attuned to the evolving needs and expectations within our communities. This dynamic and responsive approach allows BCRTA to deliver exceptional public transportation services, fostering enhanced mobility, accessibility, and satisfaction for all.

In essence, the Butler County Regional Transit Authority is more than a transit agency; it's a catalyst for change, a beacon of hope, and a partner in progress. With every route we chart and every journey we facilitate, BCRTA reaffirms its commitment to the residents of Butler County, ensuring that every individual, irrespective of their background or needs, can move forward, both literally and metaphorically.



# Organizational Chart





# Services/Metrics

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# Pioneering The Future

## Goal Area #1: Increase Education & Advocacy

Central to BCRTA's growth is its commitment to enhance community knowledge and involvement with the aim of amplifying the environmental, fiscal, and economic impact of transit. BCRTA will underscore its efficiency in transit service delivery. Resources will be identified and allocated for marketing and communications, including the potential hiring of staff or collaboration with external agencies. The advocacy campaign will synergize with Miami University's Mobility Options and the 30th Anniversary Program for Summer 2024. An advocacy campaign telling the BCRTA story will be in full swing, emphasizing quality of life and fiscal transit impacts. BCRTA leadership will also champion their initiatives with elected officials at the same timeframe. Moreover, BCRTA aims to elevate community engagement activities, targeting attendance growth at community events. BCRTA's Executive Management and Board will craft a message around the transit industry's fiscal challenges to educate key stakeholders.

## Goal Area #2: Revenue Enhancements “Butler County Moves”

BCRTA's leadership is poised to explore revenue avenues like long-term dedicated funding to improve and maintain stable, future transit funding. Lessons from other successful models will guide our strategy. The creation of different scenarios evaluating the impact of potential long-term dedicated funding will be developed. Key decisions, like gaining the nod from county commissioners and support from the community will be a part of the process. Strategic partnerships will be vital, targeting local businesses and emphasizing benefits for historically underserved areas, including West Chester and Liberty Townships. Feasibility: Insights from Goal Area #1 will pave the way for BCRTA's efforts in this area. Without new revenue streams, BCRTA will face operational challenges.

# Pioneering The Future

## Goal Area #3: Entrepreneurial Disruptive Technology

BCRTA recognizes the revolutionary role of disruptive technologies in shaping entrepreneurial landscapes. Through partnerships with Entrepreneurial Centers and incubators, collaboration with academic institutions, and support for startups, BCRTA aims to foster innovation. Efforts will also involve procuring funds, engaging in tech-validation partnerships, and establishing a hub for mobility tech advancements.

## Goal Area #4: Leverage Regional Partners

BCRTA will seek to identify collaborations with neighboring transit agencies that result in positive outcomes for all involved. Strategies will focus on providing border-agnostic transportation to individuals across cities, county lines, and the region. BCRTA will share its expertise and capacity to improve experiences for all.



# Pioneering The Future

## Goal Area #5: Workforce Development

BCRTA will have a refined workforce strategy, encapsulating a spectrum of five generations. Emphasis will be on attracting talent, with a salary study and benefits evaluation. BCRTA will also foster connections with vocational schools and use Workforce Investment Act funds for employment avenues. BCRTA will seek opportunities and funding to provide workforce training and leadership opportunities in new and emerging technologies with direct benefits to the public transit industry, BCRTA, and its peers.

## Goal Area #6: Market Responsiveness

BCRTA aims to increase market responsiveness. Service scenarios will be developed to meet diverse needs. Partnerships with transit alliances like Uber and Lyft will be explored, ensuring a comprehensive approach to transportation. BCRTA will engage directly with the community to identify needs and service gaps and propose right-size solutions such as new routes, mobility on demand, micro mobility, and other new and emerging solutions.





# Peripheral Awareness

## **BCRTA's strategic roadmap is mindful of potential external challenges:**

- Economic downturns may influence transit demand and funding availability.
- Changing mobility preferences with more personal and green transit options.
- Regulatory changes may impact BCRTA's operational dynamics.
- Public perception: Any negative sentiment could affect ridership and support.
- Technological disruption could revolutionize the transit landscape.
- Staff retention in an increasingly competitive job market.
- The current fiscal cliff with the expiration of CARES Act funding.

The daily lives of our community members stand at the forefront of BCRTA's decisions and actions. Understanding the significant impact that BCRTA can have on enhancing the quality of life for our community is paramount. Our services don't just provide transit; they elevate everyday experiences, bridge gaps, and foster connectivity. Imagine a day where our community members are hindered in their daily activities due to a decrease in services or less efficient transit options. That's what's at stake.

If BCRTA chooses not to progress and evolve, we will not merely be standing still; we risk losing our current efficiency and relevance. Maintaining the status quo is not an option. Our commitment is to ensure that our community's aspirations are deeply intertwined with our vision for a progressive transit future.

The BCRTA Board of Trustees and the Executive Leadership Team have always come together in a spirit of collaboration, working tirelessly to sculpt a future that mirrors the needs and aspirations of Butler County's community. Their combined expertise and vision are not just about discussions and plans; it's about real-life implications for our community members.

Our foundational interactions weren't just corporate exercises. They were sincere attempts to understand our community's heartbeat. We didn't just exchange information; we explored, introspected, and crafted a vision. Through these deep dives into BCRTA's ethos and goals, we've set the groundwork for transformative changes that promise a brighter transit future.

As we progress, this partnership's evolution will be synonymous with ensuring that our community thrives. Our expansive and visionary roadmap demands meticulous attention, with each task reflecting our overarching vision. We're fully committed to aligning our strategies with the dynamic needs of transit operations and, most importantly, the needs of our community.

The role of C Robinson Associates extends beyond just planning; they will be instrumental in helping BCRTA navigate the challenges of execution. Their expertise will be pivotal in ensuring that each strategic task is not only feasible but also anchored in best practices, innovation, and operational excellence. Together with the BCRTA Executive Team and staff, they will ensure that the strategic plan is more than just a document; it becomes a living, breathing entity guiding BCRTA's actions every day.

In conclusion, the renewed commitment to a shared vision has set BCRTA on an exhilarating path towards unprecedented growth and community engagement. With a meticulous roadmap in hand, the BCRTA is not just poised for transformation; it's ready to redefine the very essence of transit in Butler County. As the chapters of this partnership unfold, residents of Butler County can anticipate a transit authority that's not just about conveyance, but about connecting lives, fostering community growth, and driving innovation for a brighter, more accessible tomorrow.





Robinson Associates, Inc.  
*Driving Exceptional Results*

Outline number	Name
<b>1</b>	<b>Increase Education &amp; Advocacy</b>
1.1	2022 Annual Report (Q4 2023)
1.2	2023 Annual Report (Q4 2024)
1.3	<b>Develop Education &amp; Advocacy Material</b>
1.3.1	Determine the communication for each area/community/rider demographic
1.3.2	Define rider demographic vs non-rider demographic
1.3.3	Coffee and Conversations events
1.4	<b>Miami University Program</b>
1.4.1	Mobility Options
1.4.2	Social Media Marketing
1.4.3	Annual bus wrap with MU
1.4.4	Explore additional MU contacts (Employee engagement/education)
1.4.5	Raising student orientation profile
1.4.6	Engaging the Parking & Transportation Advisory Council
1.5	<b>Merchandise</b>
1.5.1	Create and sell BCRTA merchandise
1.5.2	Visitor center & Rider merchandise
1.5.3	Storefront store
1.5.4	Create online store
1.6	<b>30th Anniversary Program (August 25th)</b>
1.6.1	Anniversary logo
1.6.2	Identify and secure sponsors (engage business community)
1.6.3	Once a month anniversary event
1.6.4	Advertising promotion of businesses
1.6.5	Bus wrap (not full) / anniversary bus
1.6.6	Anniversary event
1.6.7	Determine anniversary give-away
1.7	<b>Develop the BCRTA Story</b>
1.7.1	Environmental Impact
1.7.2	Fiscal Impact
1.7.3	Collaborating Strategically (Voice at the bigger table)
1.7.4	Meeting with Elected Officials
1.7.5	<b>Dedicated Resources for Marketing &amp; Communication</b>
1.8	<b>Community Engagement</b>
1.8.1	Community Advocates/Advisory Committee
1.8.2	Chamber Presentation
1.8.3	Oxford engagement (for general public)
1.8.4	Canned speaker bureau (Rotary Meeting(s), etc.)
1.8.5	Add community engagement as a yearly goal for leadership
1.8.6	Track number of engagement per month
1.8.7	State of the Authority
1.8.8	Identify events (stand alone)
1.8.9	Prepare event give-away ideas

Outline number	Name
<b>2</b>	<b>Revenue Enhancements "Butler County Moves"</b>
2.1	Funding education campaign tour
2.2	Stage 1 - elected officials support
2.3	Stage 2 - community education
2.4	Leverage unused/untapped/lapsing local transit funds
2.5	1st Attempt for Long-term dedicated funding
2.6	2nd Attempt for Long-term dedicated funding
2.7	Develop unfunded service scenarios
2.8	Investigate funding model and other communities success stories
2.9	<b>Develop Strategic Partnerships</b>
2.9.1	Business Partnerships
2.9.2	Community Partnerships
2.10	<b>Explore Service Options</b>
2.10.1	Develop good, better, best scenarios
2.10.2	Community Survey
2.10.3	West Chester
2.10.4	Liberty Township
2.10.5	Gap study on unmet needs
2.11.6	Kimley Short Range Plan Suggestions
<b>3</b>	<b>Disruptive Technology (Entrepreneurial)</b>
3.1	<b>Entrepreneurial Initiative</b>
3.1.1	Work with Entrepreneurial Centers, Incubators, Colleges/Universities
3.1.2	Work with small businesses and Entrepreneurs to advance economic development for the future
3.2	<b>Innovation Reputation (recruitment)</b>
3.3	<b>Funding (ex. CVG Application for NASA Grant)</b>
3.4	<b>Get BCRTA on the map</b>
3.5	<b>Engagement</b>
3.5.1	Testing Partners
3.5.2	IT Partners
3.6	<b>Advanced mobility hub(s)</b>
3.7	<b>Partners and other revenue generation opportunities</b>
<b>4</b>	<b>Leverage Regional Partners</b>
4.1	<b>Features</b>
4.1.2	Identify types of features to display/communicate
4.1.3	Utilize other Transit Agencies to identify "win-win" scenarios
4.1.4	Commitment Campaign (support transit window stickers/pledge)
4.1.5	Engage Business Supporters
4.1.6	Bus wraps
4.2	<b>Public Partner Engagements</b>
4.2.1	Clermont County
4.2.2	Warren County
4.2.3	Workforce Investment Board
4.2.4	NEORide

Outline number	Name
<b>5</b>	<b>Workforce Development (Recruitment, Training, &amp; Retention)</b>
5.1	Better understand the 4 generation in the workforce
5.2	Investing in recruitment/employment advertizing
5.3	Determine how to motivate people to work here
5.4	Onboarding within the department and with a mentor (post training)
5.5	Internal promotion pathways
5.6	Structure organization for consistent supervisor relationships
5.7	Create onboarding schedules so all leaders can participate
5.8	Staff training for internal customer service (mentor/ambassador training)
5.9	Driver coordination (contracted vs. general)
5.10	<b>Expand training capacity</b>
5.11	<b>Operator Training Program</b>
5.11.1	Update program for prior operators (create options)
5.12	<b>Salary study</b>
5.12.1	Benefits
5.12.2	Emotional pull - 1 video/quarter
5.12.3	Market review
5.12.4	BCRTA Value
5.12.5	Review 2nd chance program
5.13	<b>Differentiate our recruiting techniques/strategy</b>
5.13.1	Utilize lessons learned from the 4 generations research
5.13.2	Scarlet Oaks
5.13.3	Great Oaks
5.13.4	Butler Tech
5.13.5	High school
5.13.6	ESL
5.13.7	Existing transit operators
5.13.8	Retirees
5.13.9	Veterans
5.13.10	Vocational/Technical schools (maintenance)
5.13.11	Review operator recruitment criteria (CDL truck vs CDL bus)
5.14	<b>Workforce Investment Act money</b>
5.14.1	Employment results
5.14.2	Link with local program to ensure we are a resource
5.14.3	Measure Quality Levels
5.15	<b>Engage in DEI commitment and activities</b>
<b>6</b>	<b>Market Responsiveness</b>
6.1	<b>Develop good, better, best scenarios</b>
6.2	<b>Connections</b>
6.2.1	Connecting with other transit system(s)
6.2.2	Connecting with other modes of transportation
6.3	<b>Differentiate our service delivery strategy by mode and geography</b>
6.3.1	Eastside of Miami River
6.3.2	Amazon Business Center
6.3.3	Westchester
6.3.4	Liberty Township
6.3.5	Other businesses
6.3.6	Where employees reside
6.3.7	Gap study on unmet needs
6.3.8	Kimley Short Range Plan Suggestions
6.3.9	Infrastructure









# 1-BCRTA Board Packet 10-18-2023 Part 3

Final Audit Report

2023-10-23

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