



EMERYVILLE TRANSPORTATION MANAGEMENT ASSOCIATION

Chair

*Bobby Lee, At-Large
Residential Member*

Treasurer

*Geoffrey Sears
Wareham
Development*

Secretary

*Andrew Allen
At-Large Business
Member*

Vice Chair

*Peter Schreiber
Pixar*

Directors

*Colin Osborne
At-Large Business
Member*

*Andrea Kirkpatrick
Oxford Properties*

*Ally Fitzmaurice
Bay Center Investors, LLC*

*Laurie Berberich
SPU 2100 Powell LP.*

*Calvin Jordan,
At-Large Residential
Member*

*David Palomo,
Bay Street/CenterCal*

AGENDA

Board of Directors Meeting
January 21, 2025 @ 11:00 AM

1333 Park Avenue, Council Chambers, Emeryville, CA 94608
Hybrid Zoom [Link](#): Meeting ID: 846 6885 9348 - Passcode: 139888

1. Call to Order
2. Public Comment
3. Approval of the Minutes of the December 17, 2024 Board of Directors Meeting (Page 2)
4. Executive Directors Report
 - A. Operations Report (Page 5)
5. Business Items
 - A. Review and Consider approval of revised Amendment 2 to extent the fueling agreement with AC Transit through December 31, 2025 (Page 17)
 - B. Appoint Shuttle Operations and Maintenance RFP Sub-Committee
 - C. Review and Consider adoption of the 10-Year Strategic Plan (Page 19)
6. Confirm date of Next Meeting – February 18, 2025
7. Adjournment

EMERYVILLE TRANSPORTATION MANAGEMENT ASSOCIATION

ACTION SUMMARY MINUTES

Board of Directors Meeting

December 17, 2024

LOCATION: 1333 PARK AVENUE, GARDEN ROOM

EMERYVILLE, CA 94608

Hybrid Zoom Link: Meeting ID: 847 9813 7450

Passcode: 862653

Directors Present:

Bobby Lee, Chair
Peter Schreiber, Vice Chair
Geoffrey Sears, Treasurer
Colin Osbourne, Director
Laurie Berberich, Director
Ally Fitzmaurice, Director

Others Present:

David Mourra, Mayor of Emeryville
Daniel Oliver, ALTRANS
Janet Shipp, ALTRANS

1. Call to Order
Bobby Lee called the Board of Director's meeting to order at 11:01am
2. Public Comment: 11:01am
No comments
3. Approval of the Minutes of the November 19, 2024 Board of Directors Meeting: 11:02am
Geoff Sears motioned for approval of the Minutes of the November 19, 2024 Board of Directors Meeting. Laurie Berberich seconded the motion.

This item was approved by a unanimous vote.

Yes: 6

No: 0

Abstain: 0

4. Executive Directors Report: 11:03am
 - A. Operations Report
Daniel highlighted the ridership on the Operations Report. In November we had 40,171 passenger trips averaging 1,572. This is a reduction in ridership from last month primarily due to Thanksgiving and the reduced service the day after. On time performance is 89%. We are continuing to see high TripShot app usage.
 - B. 2025 Calendar of Actions Overview: 11:10am

Daniel updated the RFP timeline by pushing it back a month. This process will begin in January instead of February.

Mayor David Mourra attended the meeting and shared some of his ideas for the future in transportation for Emeryville and Emery Go Round, which can be implemented into the Strategic Plan. This item was moved up from the end of the agenda.

5. Business Items: 11:25am

- A. Review and Consider Approval of Amendment 2 to extend the fueling agreement with AC Transit through December 31, 2025

This will be the last Amendment and next year we will be negotiating a new contract. Bobby Lee motioned for approval of Amendment 2 to extend the fueling agreement with AC Transit through December 31, 2025. Peter Schreiber seconded the motion.

This item was approved by a unanimous vote.

Yes: 6

No: 0

Abstain: 0

- B. Review and Consider Approval of Amendment 8 to extend the Shuttle Operations Agreement with MV Transportation, Inc. through December 31, 2025: 11:32am

Daniel reviewed the MV price sheet. Daniel discussed it with the subcommittee and costs were reduced. In the fixed costs there is an 11% increase due to vehicle cleaning and maintenance, recruitment and overhead. For recruitment and overhead, the increase showed 6 new drivers were hired which required recruitment, drug testing and training. The variable cost was an 8% increase and overall there was a 9% increase in shuttle operations which is 1% more than what we budgeted for, but nothing beyond what can be handled. WBS saw an 11% increase, 8 to Go a 10% increase and The Emery Express an 11% increase. Daniel also reviewed the cleaning and how this is being addressed to be sure the shuttles are kept clean going forward.

Geoff Sears motioned for approval of Amendment 8 to extend the Shuttle Operations Agreement with MV Transportation, Inc. through December 31, 2025. Laurie Berberich seconded the motion.

This item was approved by a unanimous vote.

Yes: 6

No: 0

Abstain: 0

- C. Review and Consider Approval of Amendment 4 to the Transportation Agreement with Quarterra to extend the term of service for the Emery Express shuttle through December 31, 2025: 11:42am

Other than the Operations costs, the only changes for the Emery Express is a reduction in fuel costs, which is based on the actual 2024 costs to date and a reduction in operations oversight.

Colin Osbourne motioned for approval of Amendment 4 to the Transportation Agreement with Quatterra to extend the term of service for the Emery Express shuttle through December 31, 2025. Peter Schreiber seconded the motion.

This item was approved by a unanimous vote.

Yes: 6

No: 0

Abstain: 0

- D. Review and Consider Approval of Amendment 1 to the Transportation Agreement with West Berkeley Shuttle LLC to extend the term of service for the West Berkeley shuttle through December 31, 2025: 11:53am

The only changes are the operations costs, a slight reduction in operations oversight, based on the 2024 usage, and updated pricing for the real time tracking.

Bobby Less motioned for approval of Amendment 1 to the Transportation Agreement with West Berkeley Shuttle LLC to extend the term of service for the West Berkeley shuttle through December 31, 2025. Laurie Berberich seconded the motion. Geoff Sears abstained a Wareham is a partner in the West Berkeley Shuttle.

This item was approved by a unanimous vote.

Yes: 5

No: 0

Abstain: 1

- E. Update on the 2025-2035 Strategic Plan and Autonomous Vehicle Discussion with Mayor Mourra

This item was discussed earlier in the meeting after the Calendar Actions overview @ 11:12am

6. Confirm Date of Next Meeting
The meeting date was confirmed for January 21, 2025 @ 11am
7. Adjournment
The meeting adjourned at approx. 12:05pm



EMERYVILLE TRANSPORTATION MANAGEMENT ASSOCIATION



Emery Go-Round

Monthly Operations Report
December 2024

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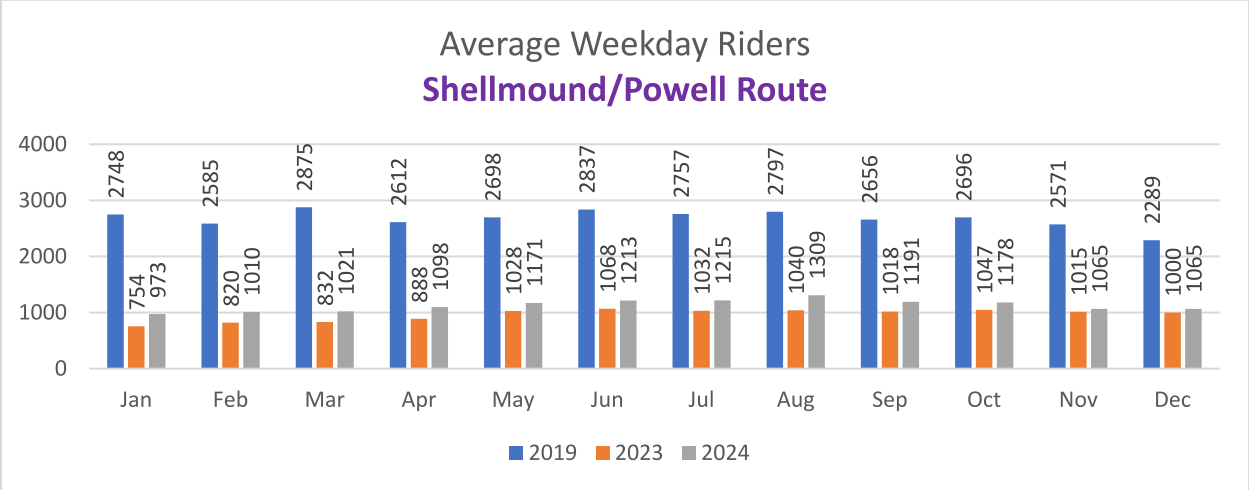
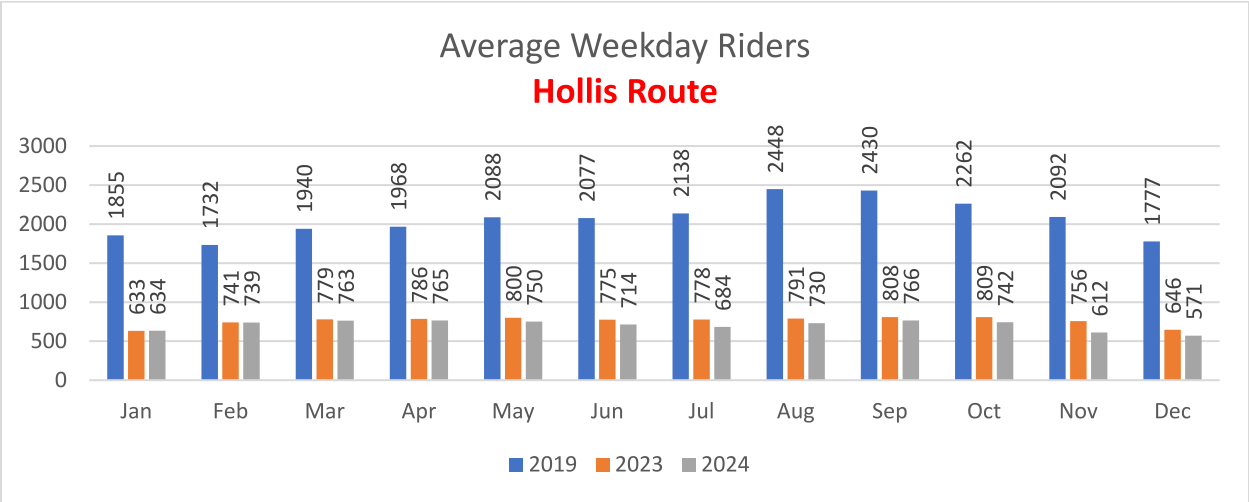
WEEKDAY RIDERSHIP														
	2024	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total to Date
Total Monthly Weekday Ridership		35,354	34,974	37,472	40,965	42,266	38,524	41,770	44,851	39,133	44,148	33,552	34,349	467,358
# of Operating Days		22	20	20	22	22	22	20	22	20	23	20	21	255
Average Daily Ridership		1,607	1,749	1,874	1,862	1,921	1,750	1,889	2,039	1,957	1,919	1,678	1,636	1,833
% Increase/Decrease from Prior Month		-2%	9%	2%	4%	3%	0%	-1%	7%	-4%	-2%	-13%	-2%	
% Increase/Decrease from Prior Year		16%	12%	11%	11%	5%	5%	2%	9%	7%	3%	-5%	-1%	
% of Pre COVID Baseline		35%	41%	37%	41%	40%	39%	39%	39%	39%	36%	40%	40%	
2019														
Total Monthly Ridership		101,269	82,033	101,123	100,741	105,288	98,279	107,689	115,375	101,706	114,041	93,248	85,381	1,206,173
# of Operating Days		22	19	21	22	22	20	20	22	20	23	20	21	254
Average Daily Ridership		4,603	4,318	4,815	4,579	4,786	4,914	4,885	5,244	5,085	4,958	4,662	4,066	4,749
WEEKEND RIDERSHIP														
	2024	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total to Date
Total Monthly Weekend Ridership		5,082	5,568	6,728	5,780	5,862	7,206	5,991	7,765	7,236	6,265	6,619	5,924	75,976
# of Operating Days		8	8	9	8	8	10	8	9	9	8	9	9	103
Average Daily Ridership		629	696	748	723	733	721	749	863	804	783	735	658	738
% Increase/Decrease from Prior Month		-15%	11%	7%	-3%	-1%	-4%	4%	15%	-7%	-3%	-6%	-11%	
% Increase/Decrease from Prior Year		20%	28%	23%	7%	7%	7%	6%	18%	12%	4%	0%	-11%	
% of Pre COVID Baseline		89%	69%	82%	82%	81%	69%	71%	69%	54%	68%	68%	72%	
COMBINED RIDERSHIP														
	2024	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total to Date
Total Monthly Ridership		40,386	40,542	44,200	46,745	48,128	45,730	47,761	52,616	46,369	50,413	40,171	40,273	543,334
# of Operating Days		30	28	30	30	30	30	30	31	29	31	29	30	358
Total Service Hours		2,781	2,556	2,713	2,781	2,781	2,634	2,761	2,826	2,589	2,893	2,601	2,555	32,489
Average Daily Ridership (Weighted)		1,516	1,642	1,673	1,756	1,811	1,777	1,792	1,917	1,827	1,818	1,572	1,530	1,518
Passengers Per Service Hour (Pax/SH)		15	16	16	17	17	17	17	19	18	17	15	16	17
Operations Cost		\$ 232,512.72	\$ 216,620.43	\$ 226,964.35	\$ 231,942.63	\$ 232,403.25	\$ 221,572.59	\$ 231,900.33	\$ 235,684.09	\$ 219,918.03	\$ 239,917.63	\$ 221,512.32	\$ 216,798.18	\$ 2,727,746.55
Cost Per Passenger Trip		\$ 5.76	\$ 5.34	\$ 5.13	\$ 4.96	\$ 4.83	\$ 4.85	\$ 4.86	\$ 4.48	\$ 4.74	\$ 4.76	\$ 5.51	\$ 5.38	\$ 5.02
% Increase/Decrease from Prior Month		5%	8%	2%	5%	3%	-2%	1%	2%	-5%	-0.5%	-14%	-3%	
% Increase/Decrease from Prior Year		16%	13%	10%	13%	5%	2%	5%	9%	7%	4%	-6%	0%	6%
% of Pre COVID Baseline (Total Ridership)		43%	49%	47%	49%	48%	49%	46%	47%	45%	46%	44%	49%	47%
% of Pre COVID Baseline (Pax/SH)		57%	64%	60%	65%	64%	62%	62%	62%	61%	61%	58%	65%	62%
2023														
Total Monthly Ridership		34,720	34,002	41,913	39,536	45,695	45,945	44,183	48,803	42,987	47,613	43,074	40,294	508,765
# of Operating Days		30	27	31	29	30	30	30	31	30	31	29	29	357
Total Service Hours		2,893	2,444	2,893	2,601	2,781	2,781	2,634	2,893.09	2,600.89	2,813.54	2,556.16	2,633.65	32,524
Average Daily Ridership		1,307	1,453	1,521	1,561	1,721	1,734	1,714	1,766	1,701	1,742	1,671	1,534	1,425
Passengers Per Service Hour (Pax/SH)		12	14	14	15	16	17	17	17	17	17	17	15	16
Cost Per Passenger Trip		\$ 6.16	\$ 5.49	\$ 5.10	\$ 4.96	\$ 4.53	\$ 4.51	\$ 4.48	\$ 4.38	\$ 4.56	\$ 4.39	\$ 4.49	\$ 4.92	\$ 4.78
2019														
Total Monthly Ridership		106,930	90,145	110,233	107,796	112,518	108,672	116,091	126,606	113,669	123,194	103,022	93,578	1,312,474
# of Operating Days		30	27	31	30	30	30	30	31	30	31	29	30	357
Total Service Hours		4,169	3,642	4,071	4,136	3,895	3,895	4,164	4,211	3,850	4,342	3,856	3,864	48,669
Average Daily Ridership		3,565	3,339	3,556	3,593	3,751	3,622	3,870	4,084	4,060	3,974	3,552	3,119	3,676
Passengers Per Service Hour (Pax/SH)		26	25	27	27	27	28	28	30	30	28	27	24	27
Cost Per Passenger Trip		\$ 1.79	\$ 1.91	\$ 1.69	\$ 1.71	\$ 1.69	\$ 1.66	\$ 1.65	\$ 1.54	\$ 1.59	\$ 1.62	\$ 1.72	\$ 1.87	\$ 1.70

Ridership Summary

In December 2024, the Emery Go-Round ridership decreased 3% from the previous month and maintained similar levels from the previous year. Total Monthly Ridership is 49% of the 2019 pre-pandemic total ridership baseline and 65% of the 2019 pre-pandemic passenger per service hour baseline.

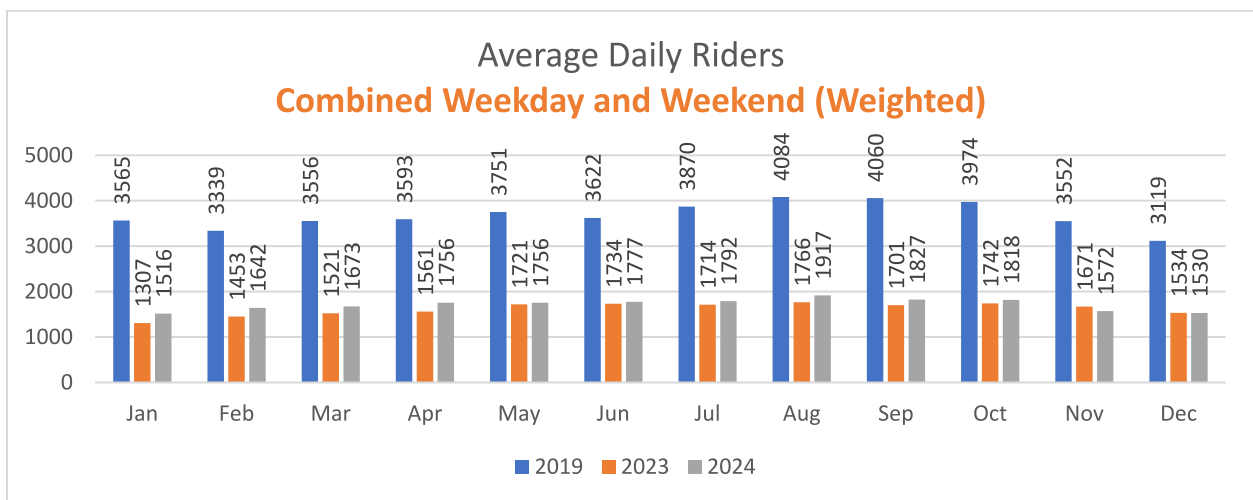
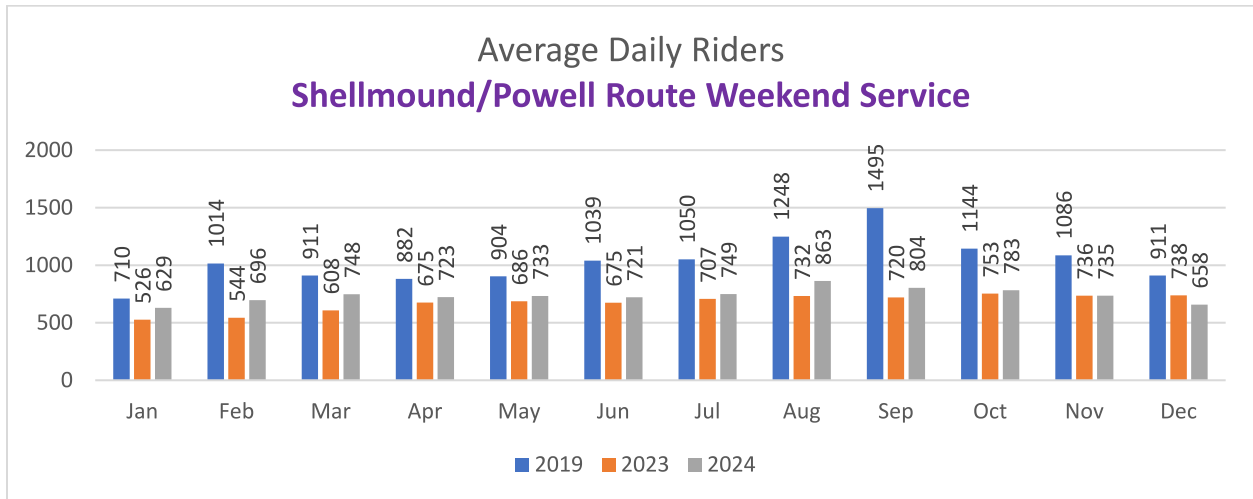
Weekday ridership in December 2024 peaked at 5:00 PM. Saturday ridership peaked at 3:30 PM and Sunday ridership peaked at 5:30 PM

Average Daily Ridership Comparisons (YTD)

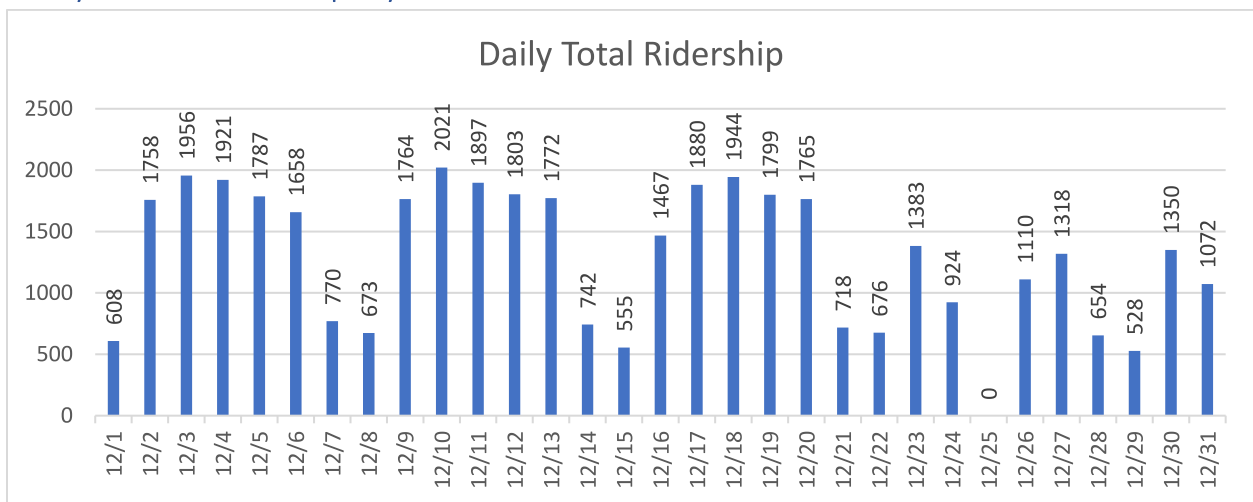


2019 Average Weekday Riders includes Standard and Commute services. Watergate Express is included in 2019 Shellmound/Powell.

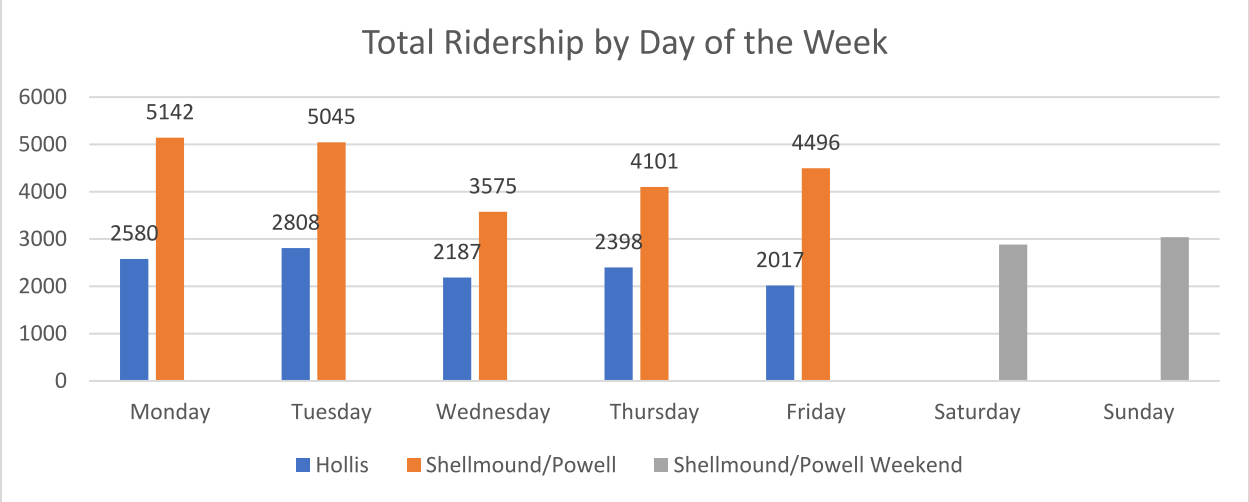
Average Daily Ridership Comparisons (YTD) (cont'd)



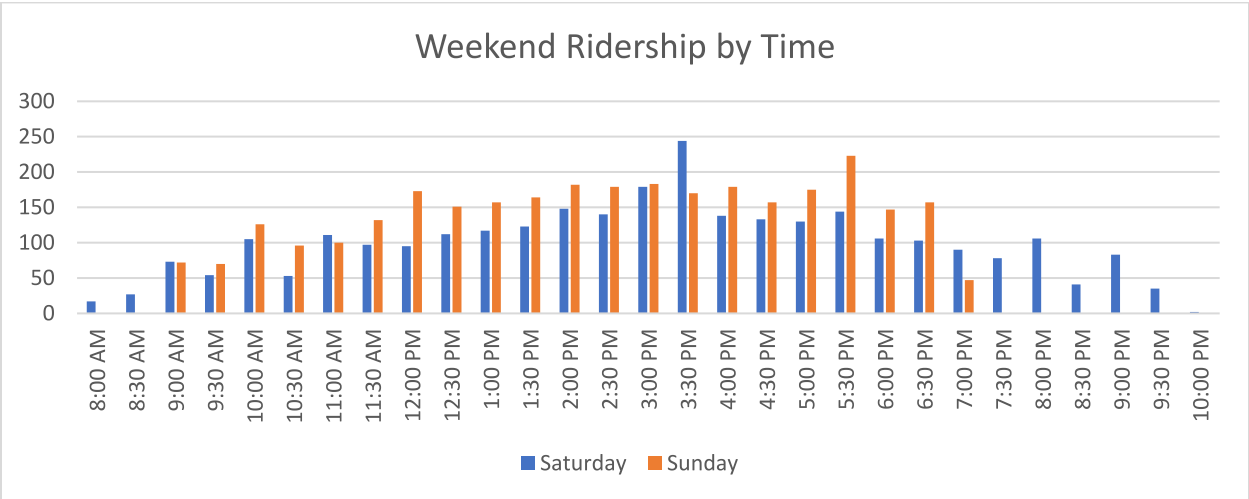
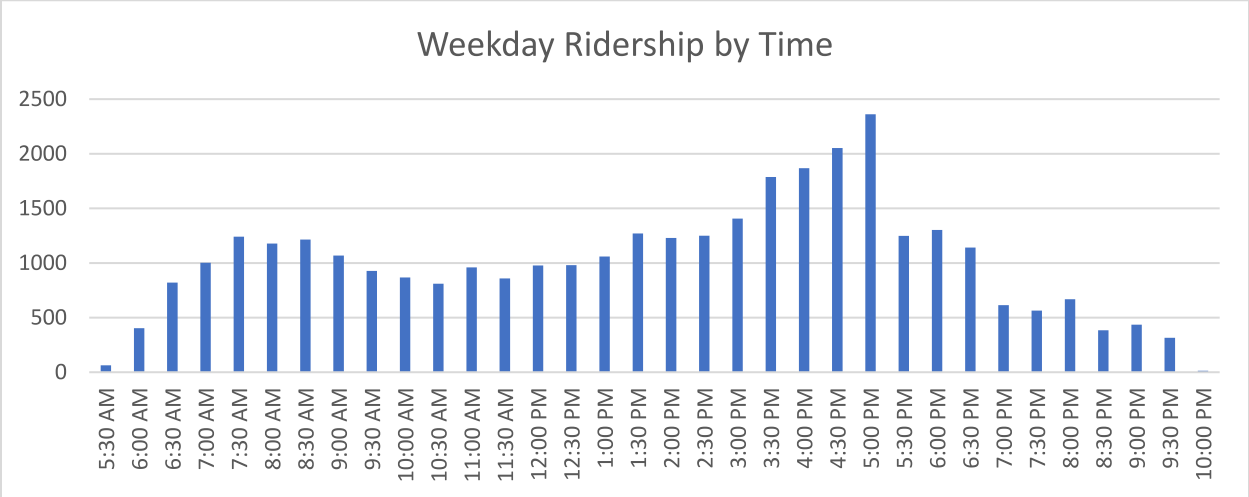
Daily Total Ridership by Date



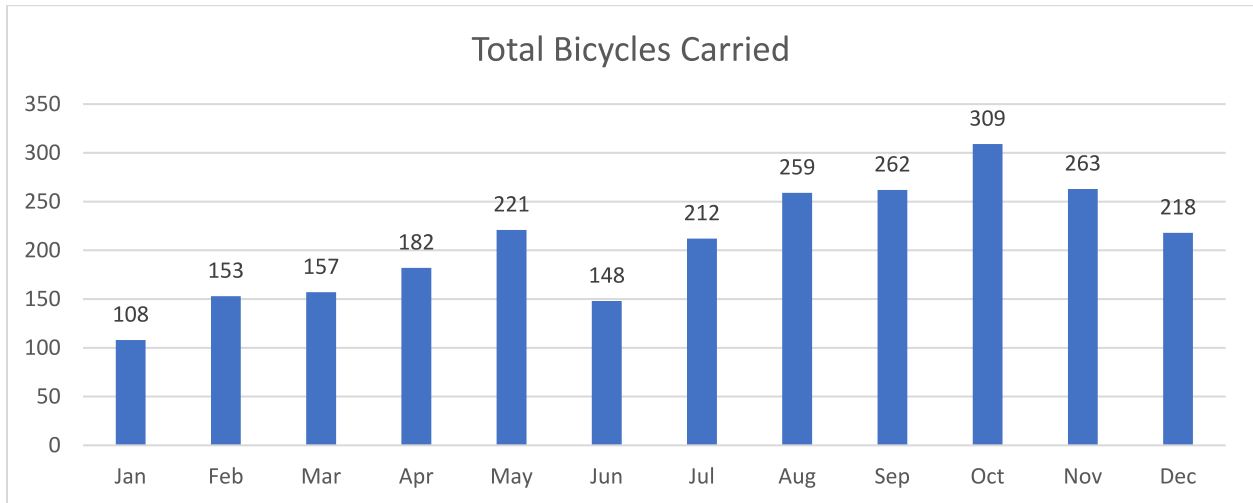
Monthly Total Ridership by Day of the Week



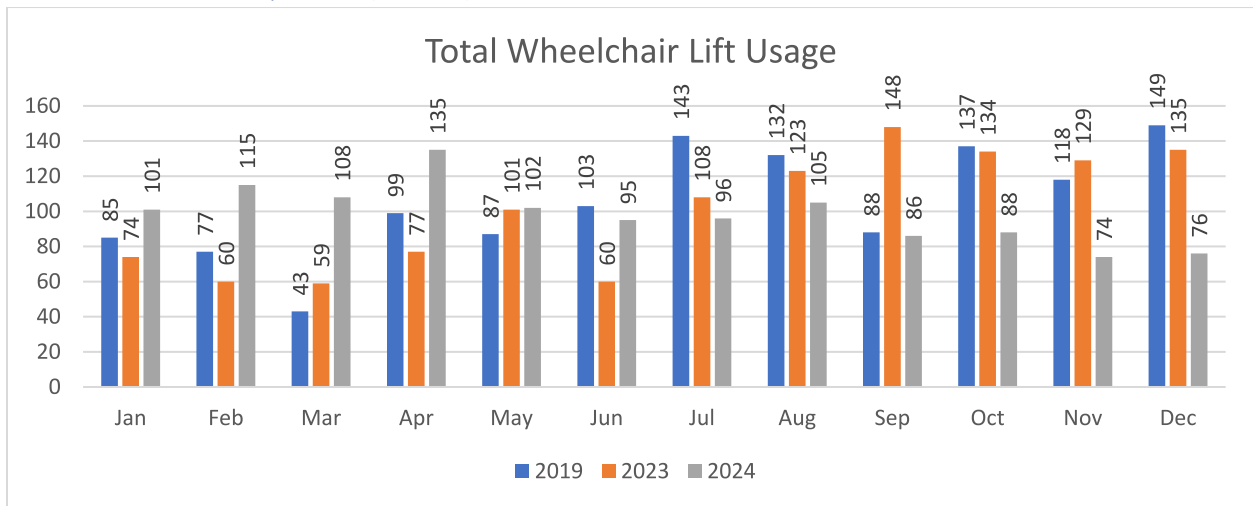
Monthly Total Ridership by Time



Additional Ridership Data



Additional Ridership Data (cont'd)



Monthly Total Use (Boarding & Alighting) by Stop

Hollis Weekday Service

Hollis	Boarding	Alighting	Total Use	% of Total Use
MacArthur BART Station	4646	4910	9556	40.0%
Berkeley Bowl SB	1146	1094	2240	9.4%
Hollis @ 59th NB	1389	183	1572	6.6%
Horton @ 59th (Amtrak) NB	267	1186	1453	6.1%
Park Ave @ San Pablo (IHOP) WB	722	723	1445	6.0%
Hollis @ 65th SB	1034	249	1283	5.4%
Hollis @ 65th NB	100	661	761	3.2%
Hollis @ 63rd SB	670	85	755	3.2%
Hollis @ 53rd SB	575	128	703	2.9%
Hollis @ 59th SB	165	458	623	2.6%
Hollis @ 53rd NB	193	369	562	2.4%
Park Ave @ Pixar EB	359	192	551	2.3%
Emery St @ 40th EB	197	341	538	2.3%
Stanford Ave @ Horton WB	55	449	504	2.1%
Park Ave @ Pixar WB	122	274	396	1.7%
Hollis @ 64th NB	18	347	365	1.5%
Hollis @ 45th SB	219	119	338	1.4%
Hollis @ 45th NB	113	144	257	1.1%
Total	11990	11912	23902	100.0%

Monthly Total Use (Boarding & Alighting) by Stop (cont'd)

Shellmound/Powell Weekday Service

Shellmound/Powell Weekday	Boarding	Alighting	Total Use	% of Total Use
MacArthur BART Station	6264	9396	15660	35.1%
Christie @ Trader Joe's SB	2243	579	2822	6.3%
40th @ San Pablo WB	1704	962	2666	6.0%
40th @ San Pablo EB	1444	821	2265	5.1%
Shellmound @ Marriott SB	2070	169	2239	5.0%
Shellmound @ Bay St (IKEA) NB	221	1969	2190	4.9%
Shellmound @ Christie NB	549	1366	1915	4.3%
Powell @ Police/Fire Station EB	1507	320	1827	4.1%
40th @ Horton EB	1122	671	1793	4.0%
40th @ Horton WB	683	995	1678	3.8%
40th @ Hollis WB	633	438	1071	2.4%
40th @ Emery EB	286	676	962	2.2%
Powell @ Watergate Market WB	235	707	942	2.1%
40th @ Emery WB	581	299	880	2.0%
Shellmound @ Public Market NB	324	538	862	1.9%
65th @ Shellmound	322	518	840	1.9%
The Towers	443	385	828	1.9%
Christie @ 64th SB	229	481	710	1.6%
40th @ Hollis EB	499	170	669	1.5%
Christie @ Public Market SB	434	234	668	1.5%
Powell @ The Marina	294	196	490	1.1%
Christie @ FedEx SB	135	147	282	0.6%
Powell @ Hilton Garden Inn WB	73	108	181	0.4%
Christie @ 65th SB	64	61	125	0.3%
Total	22359	22206	44565	100.0%

Monthly Total Use (Boarding & Alighting) by Stop (cont'd)

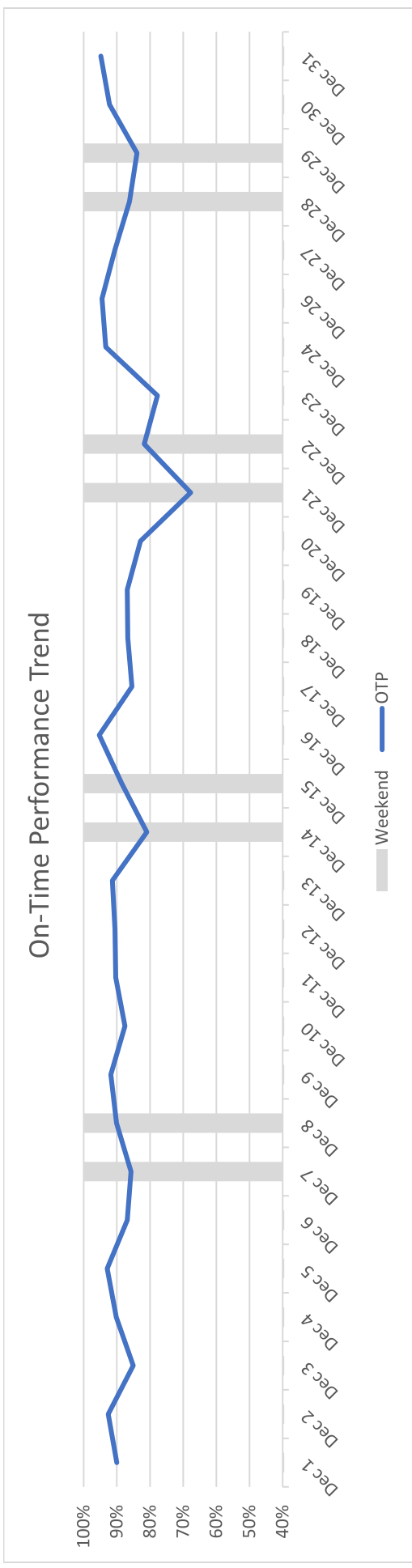
Shellmound/Powell Weekend Service

Shellmound/Powell Weekend	Boarding	Alighting	Total Use	% of Total Use
MacArthur BART Station	1675	1870	3545	30.0%
Christie @ Trader Joe's SB	702	187	889	7.5%
Shellmound @ Bay St (IKEA) NB	109	681	790	6.7%
Shellmound @ Marriott SB	662	87	749	6.3%
40th @ San Pablo WB	452	296	748	6.3%
40th @ San Pablo EB	303	347	650	5.5%
Shellmound @ Christie NB	162	482	644	5.4%
40th @ Horton EB	320	304	624	5.3%
40th @ Horton WB	208	282	490	4.1%
Powell @ Police/Fire Station EB	311	104	415	3.5%
65th @ Shellmound	107	213	320	2.7%
Shellmound @ Public Market NB	82	195	277	2.3%
40th @ Emery EB	72	197	269	2.3%
40th @ Hollis WB	148	116	264	2.2%
40th @ Emery WB	144	78	222	1.9%
Powell @ Watergate Market WB	54	161	215	1.8%
40th @ Hollis EB	134	50	184	1.6%
Christie @ 64th SB	86	80	166	1.4%
Powell @ The Marina	69	63	132	1.1%
Christie @ Public Market SB	63	18	81	0.7%
Powell @ Hilton Garden Inn WB	25	29	54	0.5%
Christie @ FedEx SB	16	31	47	0.4%
The Towers	11	23	34	0.3%
Christie @ 65th SB	9	8	17	0.1%
Total	5924	5902	11826	100.0%

On-Time Performance

On-Time Performance data is gathered from the TripShot app, which provides accurate GPS data for the shuttles and records the arrival and departure times for each of the timepoints along each route.

A shuttle is considered On-Time if it arrives up to 5 minutes after the scheduled time or departs no earlier than 1 minute before the scheduled time.



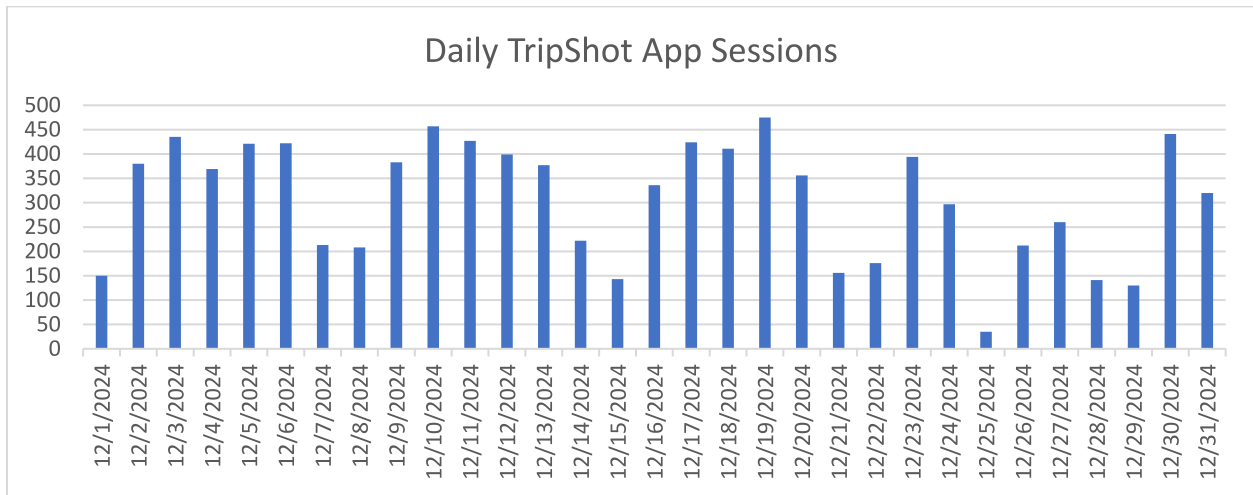
Route	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	26	27	28	29	30	31	Grand Total
Hollis		92%	84%	90%	91%	88%			96%	88%	91%	91%	95%			88%		91%	82%	88%				92%	96%	94%			97%	98%	92%
Shellmound/Powell		94%	86%	90%	95%	86%			88%	89%	90%	90%	88%			95%	81%	82%	82%	78%			63%	91%	93%	87%			87%	92%	87%
Shellmound/Powell Weekend	90%						86%	90%						81%	89%						68%	82%				86%				84%	84%
Grand Total	90%	93%	85%	90%	93%	87%	86%	90%	92%	88%	90%	91%	91%	81%	89%	95%	85%	87%	87%	83%	68%	82%	78%	93%	94%	86%	84%	92%	95%	88%	

TripShot

Utilization

The TripShot app does not require users to create accounts and the only data that is gathered is the IP address of the device, which changes based on the networks or cell towers that the device connects to. Because of this, it is not possible to track the number of TripShot app users, however, it is possible to track the number of app “sessions.” While this does not allow us to know how many people are using the app, it does tell us how often it is used.

Total Monthly App Sessions: 9,570



AMENDMENT NO. 2 TO THE CONTRACT

This Amendment No. 2 to the Contract (“Amendment No. 2”) is made and entered into as of *01 January 2025* (the “Effective Date”) by **ALAMEDA-CONTRA COSTA TRANSIT DISTRICT**, a rapid transit district established pursuant to California Public Utilities Code, Section 24501 et seq., having its principal place of business at 1600 Franklin Street, Oakland, California 94612 (hereinafter, “AC Transit” or the “District”) and the **EMERYVILLE TRANSPORTATION MANAGEMENT ASSOCIATION**, a non-profit Public Benefit Corporation, organized under the California Non-Profit Public Benefit Corporation Law, having its principal place of business at 3640 Mandela Parkway, Oakland, California 94608 (hereinafter, the “Corporation”), collectively referred to as the “Parties”, to amend the terms of the Contract dated *01 January 2021* (the “Contract”) as specified below.

WHEREAS, Corporation and the District entered into a Contract wherein District agreed to fuel and service the Emery-Go-Round shuttle service buses operated by Corporation; and

WHEREAS, the Parties previously modified the Contract to exercise the First Option Period, extending the Contract Term to *31 December 2024*; and

WHEREAS, the Term of the Contract is now scheduled to expire on *31 December 2024*, and the District has the option to further extend the Term of the Contract for an additional priced term of one (1) year for the second and final option period (the “Second Option Period”), as provided in the Contract; and

WHEREAS, the District desires to exercise the Second Option Period, and Contractor is agreeable to extension of the Term; and by this Amendment No. 2, Corporation and the District desire to set forth their agreements with respect thereto.

NOW THEREFORE, in consideration of the faithful performance of the terms, conditions, promises, and covenants contained in this Amendment No. 2 to the Contract, as amended to date, and the continuing provisions of the Contract, the Parties agree as follows:

1. **Definitions.** Capitalized terms used but not defined herein shall have the meanings ascribed to those terms in the Contract.
2. **Section 2. Contract Term.** The first paragraph of Section 2 (Contract Term) of the Contract is deleted in its entirety and replaced with the following:

“Services under this Contract shall commence on *01 January 2021* and continue until *31 December 2025*, which includes the First and Second Option Periods of *01 January 2024 to 31 December 2024* and *01 January 2025 to 31 December 2025*, respectively. Services under the Contract shall continue unless this Contract is terminated sooner pursuant to *Section 8-Termination* or extended by the Parties, as allowed for herein. Services shall be performed at the District’s direction and within the term set forth above hereto unless otherwise mutually agreed upon by the District and the Corporation.”

3. **Section 3. Payment.** Section 3 (Payment) of the Contract is deleted in its entirety and replaced with the following:

“As compensation for the Services provided by the District to Corporation, Corporation shall pay to District the sum of \$1.50 per gallon of DEF pumped. For diesel and unleaded fuel pumped, the cost shall be based on the current fair market

price. In addition, the District will charge Corporation a fuel surcharge of \$0.59 per gallon for each gallon of fuel (diesel, unleaded, and DEF) dispensed. The District and the Corporation also agree that, due to the volatility of the fuel market, AC Transit will adjust fuel and DEF pricing monthly during the Contract period. The District will notify Corporation, in writing, of any proposed changes to the pricing.

The District shall submit invoices, with a payment term of net thirty (30) calendar days, at the end of each month in which Services have been provided. Invoices should be sent to Daniel Oliver, Executive Director, via email to admin@emerygoround.com.”

On a semiannual basis, the parties will review compensation under this Agreement and negotiate adjustments, if appropriate, to compensate the District and/or the Corporation for any significant increases or decreases in the costs of any Services provided under the Contract.”

4. **Contract.** Except as set forth herein, all other terms of the Contract shall remain in full force and effect, unaltered and unchanged by this Amendment.
5. **Counterparts.** This Amendment may be executed in any number of counterparts, each of which shall be deemed to be one and the same instrument.

IN WITNESS WHEREOF, the Parties have duly executed this Amendment No. 2 as of the Effective Date.

EMERYVILLE TRANSPORTATION MANAGEMENT ASSOCIATION

By: _____
Bobby Lee
Board Chair

ALAMEDA-CONTRA COSTA TRANSIT DISTRICT:

By: _____
Kathleen Kelly
Interim General Manager

APPROVED AS TO FORM AND CONTENT:

By: _____
Aimee L. Steele
General Counsel



EMERYVILLE TRANSPORTATION MANAGEMENT ASSOCIATION

Shuttle Operations and Maintenance RFP Timeline

Item	Estimated Date
Begin Development of RFP	January 2025
Appoint Shuttle Operations and Maintenance RFP Committee	Tuesday, January 21, 2025
Sub-Committee: Development, Review, and Revision of RFP	January 21, 2025 - March 14, 2025
Board: Update and Discussion on RFP	Tuesday, February 18, 2025
Board: Update and Discussion on RFP	Tuesday, March 18, 2025
Sub-Committee: Final Review of RFP	April 7 - 11, 2025
Board: Review and Consider Approval to issue RFP for Shuttle Operations and Maintenance	Tuesday, April 15, 2025
Issue RFP	Monday, May 5, 2025
Deadline for Questions/Clarifications	Friday, June 6, 2025
Proposal Submission Deadline	Friday, June 27, 2025
Sub-Committee: Proposal Review, Interviews and Recommendation Selection	July 1, 2025 - August 8, 2025
Board: Review of Proposals and Contractor Selection	Tuesday, August 19, 2025
Appeals Process Deadline	Tuesday, September 2, 2025
Board: Review and Consider Approval to enter into agreement with Contractor Selection	Monday, September 8, 2025
Service Start Date	Thursday, January 1, 2026

Emeryville Transportation Management Association
Ten-Year Strategic Plan Strategic Plan (2025-2034)

PREPARED BY ALTRANS TMA, INC.



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History & Importance of a Strategic Plan

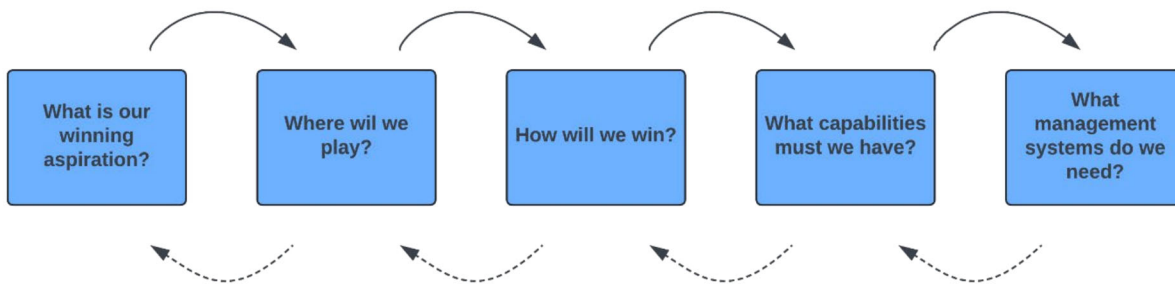
This is the first strategic plan that has been drafted during the decades-long history of the Emeryville TMA. Institutional history at ETMA, through past and current board members and staff, and their verbal and written documentation has served well the ETMA to this point. As we embark on the specific journey of attesting the financial and operational strategies to guide and facilitate ETMA into an even more successful organization, please keep in mind that this is the first iteration of the ETMA Strategic Plan; one in which will chart the framework and resiliency of the services and benefits we provide to the Emeryville community, and beyond.

Strategy Framework Overview

The strategy framework this plan is built from gets to the heart of strategy-making by primarily asking "where do we want to play, and how do we plan to win there" (WTP/HTW). This approach is designed to intentionally steer strategy making away from a "playing to play" approach, which tends only to reinforce existing activity. For example, the ETMA could pursue as strategy a 10% increase in ridership year-over-year. Such a goal seems sensible and perhaps connotes operational success, yet achieving it might come at a steep opportunity cost, a cost that can only be quantified after where-to-play and how-to-win choices have been established. By clearly staking out winning aspirations, and the where, why and how to achieve them, the ETMA will avoid only aiming for operational metrics. Instead, it will have crafted a winning strategy reflective of the dynamic playing field in which it exists.

The following diagram illustrates the iterative and self-reinforcing flow of the strategy decisions we will be making.

Figure 1: The Strategy Cascade



A Preface to Strategic Planning – The ETMA’s Foundational Documents

The following summaries are an overview intended to highlight the purview, purpose and latitude of the ETMA.

Articles of Incorporation

In crafting a vision for the ETMA, it’s important to have context of the stated purposes of the ETMA. Dated June 3, 1996, the Articles of Incorporation state:

“...(the ETMA’s) purposes are to mitigate traffic congestion and develop (a) transportation system and demand management strategies by coordinating the business community’s efforts and working cooperatively with local government to address common transportation concerns, improve accessibility and mobility, and provide transportation services.”

ByLaws

Expanding on the corporate charter, the original and amended versions of the Bylaws further delineate the ETMA’s purpose:

“...1) reduce traffic congestion, 2) reduce air pollution, 3) reduce commuting costs, 4) generate joint public/private sector approaches to solving transportation problems to/from the area served by the Corporation, and 5) create a central information service for ridesharing, public transportation and other transportation-related subjects.”

Established nearly three decades ago, these statements still provide the basis for the ETMA’s purpose and are reflected in the new Where to Play/How to Win choices.

Shuttle Bus Funding Agreement

This agreement between the ETMA and the City of Emeryville states the ETMA must provide shuttle services between commercial and residential sites in the City of Emeryville and the MacArthur BART Station in Oakland, in accordance with the "Service Parameters" attached as Exhibit A.

Exhibit A in the Shuttle Bus Funding Agreement 2017 notes:

- Days of service
- Authority on service planning (routing, stop locations) belongs to the TMA Board of Directors.
- Scheduled service times may vary by route
- Standard operating hours are from 5:45am to 10:30pm on weekdays, 8:30am to 10:30pm on Saturdays and 9:00am to 7:30pm on Sundays.
- The TMA Board may determine an alternative schedule to meet revised service demands and or budget constraints.

PBID Management Plan

The purpose of the Emeryville Citywide Property and Business Improvement District is to provide a long-term, stable and equitable means of funding the Emery Go-Round shuttle service.

Defining the Current Strategy and the Strategic Problem

The Current Strategy

The post-pandemic strategy of the ETMA has been to continue shuttle operations while monitoring and assessing potential service changes as needs arise. This strategy has been primarily reactive as the pandemic brought a lot of unknowns, making it difficult to plan too far into the future. After the fact, ridership recovery has been much slower than originally anticipated by management and the board.

The Strategic Problem

In a transit landscape changed by the Covid-19 pandemic, the ETMA’s core offering, the Emery Go-Round (EGR), saw a drastic decline in ridership. At the worst, ridership was down to 10% of pre-covid levels.

Figure 2: Ridership at Notable Benchmarks

Notable Benchmarks	Annual Ridership	
Highest	2014	1,679,857
Pre-COVID Baseline	2019	1,312,474
Lowest	2021	293,082
Prior Year	2023	508,765
Current Year (Projected)	2024	549,969

Although much of society has returned to pre-pandemic norms and levels, EGR ridership recovery has been unexpectedly slow, with projections for year-end 2024 just under 42% of the pre-covid baseline. Hopes of waiting out the pandemic to eventually resume operations at prior levels did not materialize. To put the problem in business terms, the ETMA is facing *declined end-customer value*: users of ETMA services are less enthusiastic about the offerings than they used to be. Correspondingly, the ETMA’s value proposition under the current strategy has diminished. The ETMA board has chosen to approach this strategic problem as an opportunity to craft a new, winning strategy, creating end-customer value where and how it is now needed.

Strategic Plan

The following pages detail a strategic plan which will be systematically developed, implemented and applied over the next 10 years. Namely, it is how the ETMA has determined to address its strategic problem. The plan isn’t merely prescriptive, but illustrative and consultative of options. Planning for a decade out needs built-in flexibility and mechanisms to adjust according to evolving environments and new data. Just as in football, where the quarterback is empowered to call an “option” to adjust away from a pre-determined play, this plan should be applied in a similar way, where the board and management can adjust to the live context of the field in which the ETMA operates.

Winning Aspiration

A winning aspiration is essential to strategic planning. Its purpose is multifold: creating a shared vision and expectations for the future and setting goals and direction that are more than just metrics.

Through numerous planning sessions regarding the strategic plan, the ETMA’s winning aspiration has been crafted as follows:

“Become the simplest way to get around Emeryville, attracting former and new passengers with a frictionless, community oriented, multimodal service.”

Where To Play

With a winning aspiration defined, the next step was to assess: Across the potential field available to us, where will we choose to play? Where to play possibilities were generated along four major categories (broken down in figures 3-6), resulting in a list of options aimed at exploring how the ETMA’s services might successfully expand by focusing on specific segments.

Although the items listed in the tables below might seem like the ETMA will be “playing” everywhere, keep in mind, not all segments will be served at the outset, nor will all product categories be implemented overnight. On-going surveying, data collection, and a set of concrete goals and metrics will assist the ETMA board in determining whether to continue investing in any particular option, divest into another, or operate multiple options in parallel.

Figure 3: Customer Segments ETMA Serves

Current Passengers	Existing ridership
Emeryville Residents	Owners
	Renters
Office Tenants	Employers
	Employees
Travelers	Tourists
	Business professionals
	Hotel occupants
Shoppers	Daily
	Weekenders
	Seasonal/Holiday
Non-Shuttle Users	Active transportation users

Figure 4: Distribution Channels

How we will get our services to customer segments:

Shuttle Vendor	Mid-tier offering reflected especially in vehicle interior, some noteworthy features and relatively distinct passenger experience compared with other public options
Rideshare Vendor	Uber, Lyft
Local Organizations	Hotels (via check in info, inserts, etc)
	Corporations (HR department, commuter benefit)
	Property Managers (tenant contacts, displays in common areas)
	Visitors Bureau (kiosks, handouts)
ETMA Management Team	Transit pass distribution, transit rewards app and user management
Bike Share Vendor	Bay Wheels
Scooter Share Vendor	Veo

Figure 5: Product Categories

What services we will provide:

Shuttle Service	PBID funded
	Conditionally mandated (e.g. the Emery Express)
	Elective (e.g. West Berkeley)
Non-Shuttle Modes	Tail-end ride hail
	Bike Share
	Scooter Share
TDM Elements	Rewards App
	Guaranteed Ride Home Program
Multi-modal subsidies	Subsidies for qualified demographic (Low income workers, low income households, students)

Figure 6: Geographic Areas Served

Routes	Hollis
	Shellmound
	Emery Express
	West Berkeley Shuttle
Stops	Existing
	Express peak service on highest capacity runs
	Newly Conditioned Developments
Ride-Hail	Within Emeryville city limits and pre-designated transit
Bike Share	Existing Docks
Scooter Share	Existing Inventory
Online	Tripshot/Transit rewards apps/loyalty programs

How To Win

In our chosen place to play, how will we choose to win there?

If up to this point, the ETMA's operations and strategy can be defined as "playing to play", then "playing to win" should look distinctly different. Even when at the operational level there are aspects of the status quo, such as the ETMA still providing shuttle service, defining how to win with shuttles, and various other offerings sets the ETMA on a new trajectory to restore and grow end-user value of its services. The following are the ETMA's "how to win" choices, expanded upon further in the "What Capabilities Are Necessary" section.

HTW 1 - Provide an offering distinct in its quality, comfort, and contribution to civic pride.

Currently, the core offering of the ETMA is the Emery Go-Round (EGR) shuttle service. 6 of 21 vehicles in the EGR fleet are due to be replaced in the next year. The timing works to make a notable change in the model of buses the ETMA acquires to align with this how to win choice. Not all future buses have to follow suit, but these upcoming replacement vehicles will serve well as a pilot for this HTW choice.

During board meeting conversations around the topic of fleet procurement strategy, a set of questions has often surfaced:

Over the next ten years, are we going to continue offering the same level of shuttle service, decrease service, and/or branch into non-shuttle offerings?

It's important to keep referring back to the winning aspiration, "Become the simplest way to get around Emeryville, attracting former and new passengers with a frictionless, community oriented, multimodal service." Starting off this strategic plan period at the current level of service will give us a baseline from which to measure our marketing and engagement effectiveness, and the adoption of non-shuttle offerings. Inherent in the spirit of this plan, the ETMA will continue to invest in whatever is achieving the winning aspiration and divest from what is not.

How do we know whether to invest in electric bus infrastructure if we don't know how many buses we will be providing in the future?

We won't/can't know. The only way to move forward here is to decide:

- a. Because we don't know, we won't pursue electrification.
- b. Because we don't know, we will make hedged, incremental changes and investments to our operations infrastructure.

Decision "b" aligns with the ETMA's winning aspiration, while "a" does not.

How do we know what size vehicles to purchase if we don't know what service we will offer in the future?

Similar to the question above, if the ETMA's winning aspiration is, "Become the simplest way to get around Emeryville, attracting former and new passengers with a frictionless, community oriented, multimodal service," then at least maintaining existing levels of shuttle service should be the basis of vehicle purchases. A reduction in shuttle service capacity or frequency would inhibit transportation in Emeryville, adding friction and decreasing simplicity.

There already is occupancy tracking to understand the capacity efficiency of our fleet. Prior to purchase of a shuttle bus, ridership analysis will show the sufficient size bus, taking into consideration trends in net ridership growth, the cost difference between various vehicle models, and the cost to move up to a larger bus due to capacity constraints.

In 2024, around 5% of EGR service was at or over capacity.

HTW 2 - Provide ubiquitous multi-modal availability.

The ETMA's articles of incorporation and bylaws task it to, in part, "improve accessibility and mobility, and provide transportation services," and "reduce traffic congestion...air pollution...commuting costs...". Historically, this has been carried out by providing shuttle service. With the changes in transit use brought about by COVID, expanded methods are needed to continue carrying out the ETMA's stated purposes. Bike share, scooter share, multi-modal subsidies for qualified individuals, and tail-end ride hail will supplement existing transit with diversified transportation methods and financial assistance.

HTW 3 - Create a presence of value-add in the community

The following are a few ways the ETMA will carry this out:

- a. Contributing to and/or lobbying for MacArthur BART clean up, and/or West Oakland and Berkeley stations.
- b. Improving quality of life in the communities served by reducing carbon emissions and noise pollution from gas/diesel engines.
- c. Undertake an aggressive marketing campaign to persistently inform all customer segments about the various benefits the ETMA makes available to them.
- d. Modern looking vehicles and livery which contribute to a sense of pride.
- e. Fostering a community that feels safer by providing early morning and late night ride-hail.

HTW 4 - Adhere to "differentiation" as our chosen sustainable competitive advantage

The EGR will stand out amongst other Bay Area transit services by providing a distinct transportation offering which has noteworthy features/comfort and a distinct passenger experience compared with other public options.

The ETMA will not seek, above all else, the lowest cost method of providing its services, but the method which has the best chance of achieving the winning aspiration. Of course, such decisions must be made within the financial and operational capabilities of the ETMA which is reflected in CAP-6 further on.

What Capabilities Are Necessary to build and maintain to win in our chosen manner?

CAP 1 - Scaling operating and administrative costs through acquisition and consolidation

Being in a transit-rich region, with multiple BART stations hemming in Emeryville, there is a chance of duplicative routes, or overlapping routes, to be consolidated into one. Acquisition of another area shuttle program and its revenue stream could be beneficial to the ETMA under the right conditions. Such an undertaking would have to strike the right balance of not displacing current passengers if any existing stops are removed, and not adding too much more time to the existing schedule when serving the newly incorporated ridership. Part of annual service planning (CAP 5) will incorporate a review of area shuttle routes which may be forming or are being discussed vis-à-vis the city development process in Emeryville, Oakland, and Berkeley.

Providing new stops prior to creating new routes for respective developments is also necessary to operate at scale. The Emery Express is a key example of a route which could instead be a stop on the existing Hollis route. With MacArthur station serving nearly the entire BART system, the non-stop trip to West Oakland BART for the relatively small ridership of the Emery Express should be considered for incorporation into the Hollis line in 2027 when it is due for renewal. Per the site's conditions of approval, provision of a community shuttle from the project site to the West Oakland BART station is only required for the first five years of operation. It's uncertain at this time what level of funding could be expected if the route were to convert into a stop.

Figure 7: 2024 Average Monthly Ridership

Route	Qty
Emery Go-Round (Hollis + SP)	40,000
Emery Express	900
Total Combined	40,900
Emery Express Contribution to Ridership	2.2%

CAP 2 – Marketing

Carry out an aggressive marketing campaign to key customer segments to promote and grow awareness of services. This doesn't have to be an overly complicated strategy, especially at the outset. For example, of the numerous hotels on the EGR route (Hilton Garden Inn, Hyatt House, Sonesta, Four Points, and Extended Stay America) only Hyatt House mentions EGR on their website. These kinds of basic optimizations to the visibility of ETMA's services are common sense, and likely free to accomplish. Updates such as these do not just benefit the ETMA, but make the hotels' offerings look more robust to potential occupants. Working with those listed in the distribution channels above, and communicating across the spectrum of business in Emeryville can achieve similar, easily captured results.

A more systematic, campaign-style marketing approach should also be developed utilizing a marketing coordinator who facilitates content creation, publishing, engagement and analytics.

Figure 8: Recommended Marketing and Engagement Elements

Recommended Marketing and Engagement Elements	(or Strategy? a plan of action or policy designed to achieve a major or overall aim)
Part-time marketing coordinator	Will carry out a systematic marketing campaign.
Online marketing tool/vendor	One example is TailWind, an online service which assists with the majority of content creation. Marketed as “The tool that feels like a marketing team.”
Annual off-board survey	Build a profile of who isn't using the service and why.
Focus groups	Hosted periodically by marketing coordinator to get a deeper look into our customer segments and how we can win with them.
Annual on-board survey	A standard, essential component of understanding our existing ridership makeup and how our service could be optimized.
Social media	Utilize various methods and channels to reach diverse customer segments.
Digital signage in office lobbies	Integrate with existing lobby signage or work with owners/property managers to install. Section VI of the city’s standard conditions of approval states, “Prior to the issuance of a building permit, the Community Development Director shall confirm that the final building plans for the project incorporate a transportation information display including Berkeley and Oakland biking and walking maps (which include Emeryville); BART, AMTRAK, AC Transit and Emery Go-Round route maps, schedules and fares; and NextBus, 511 and Zipcar contact information. The display shall be placed in a prominent location convenient to building occupants.”
Refreshed bus wrap/design/livery/logo	The style of the wrap (yellow bar with purple highlights) has been around since at least 2007. The last wrap that was done was in 2019 and cost about \$1000. However, based on current quotes, it will likely be closer to \$3-4k each. New wraps/styles can be phased in with new vehicle purchases.
Website redesign	A refreshed website to coordinate with any major EGR stylistic updates.

The current budget line item for marketing falls under Membership & Public Outreach, allotted \$10,000 annually. It’s recommended additional funds be allocated from the 2025 Pilot line item to support a marketing “pilot”, and a line for Marketing be permanently designated in future budgets. The dollar range to allocate to marketing varies, and is commonly derived from a percent of total revenue. Different sources have different strategy behind the amounts they budget. A short list of notable sources recommend the following:

- The Business Development Bank of Canada - For Business-to-Customer (B2C) companies...between 5 and 10% (of revenue). [A] good way of narrowing your target budget is to research what’s common for your industry and what your competitors are spending.¹

¹ [What is an average marketing budget for a small business? | BDC.ca](https://www.bdc.ca/en/articles-services/what-is-an-average-marketing-budget-for-a-small-business)

- Salesforce - On average, B2C brands that provide services spend 15% of their revenue on marketing.²
- The Young Entrepreneur Council - 5% to 10% to maintain current levels of growth...³

Even at the low end of these percentages (5%), accounting only for PBID revenue (\$4.7M), it equates to a marketing budget of \$230,000. The 2025 pilot fund of \$500,000 has the means to cover this, and it would come at the cost of funding other pilot programs. To get closer to an apples-to-apples comparison, if not in size, at least in terms of industry, in 2024 AC Transit spent 2% of their budget on marketing (\$11M out of a half-billion-dollar budget). To follow suit would set ETMA’s marketing budget closer to \$100,000. With the considerable amount of upstart which the ETMA’s marketing effort will require, a middle ground of 3% of total revenue (\$142,000) may be appropriate.

CAP 3 - Networking

The ETMA will begin networking routinely with other SF Bay Area TMA’s in order to learn best-practices, share information, ideas and where applicable, resources. ETMA’s management team, provided by ALTRANS TMA, Inc., can provide the facilitation between the current and newly forming TMA’s.

Besides ETMA, ALTRANS is currently providing executive leadership at Palo Alto TMA, San Leandro TMO and is in the process of creating the Peery Park TMA in Sunnyvale. ALTRANS has also been hired to research a new TMA for the City of Redwood City and have close networking connections at the Alameda TMA, West Alameda, Mission Bay, San Mateo Rail Corridor and Mountain View TMA.

In 2025, ALTRANS will invite and host leaders from each of these TMA’s, and volunteer members from Association of Commuter Transportation (ACT) TMA Group to a joint SF Bay Area TMA conference/meeting where we formally start sharing information, ideas and resources and determine the overall need for this supportive TMA and possible next steps.

CAP 4 - Non-shuttle program elements

Bay Wheels Bike Share

In April 2024, the MTC and Lyft partnered to expand the Bay Wheels bike-share to the East Bay. Emeryville is host to 12 docking stations throughout the city. The locations and capacity of each docking station were based on decisions by the City of Emeryville, with each dock averaging a labor and materials cost of \$40,000 – 45,000.

To use this service, the [prices range](#) from single rides at \$3.99, to the annual membership of \$150, which provides unlimited 45-minute rides on regular pedal bikes and e-bike rides for 15 cents per minute. If no pedal bikes are available, cyclists can check-out e-bikes for free. A Clipper card or the Lyft app is used to unlock and pay for a Bay Wheels bike. The bike docks are well dispersed around the city and have convenient connections at mass transit hubs. Their availability should be part of the ETMA’s marketing strategy. As well, providing access to the bikes via subsidies should be part of the ETMA’s move into non-shuttle offerings.

Notable Bay Wheels usage statistics from the month of October 2024:

- Of the 1,476 trips originating in Emeryville, 94 of the trips ended at the MacArthur BART station and 114 ended at the West Oakland BART station.

² [How to Create a Marketing Budget | Salesforce US](#)

³ [How Much Should You Spend On Marketing](#)

- Of the 1,567 trips ending in Emeryville, 127 of the trips originated at the MacArthur BART station and 84 originated at the West Oakland BART station.
- 513 trips both originated and ended in Emeryville.
- The average time spent on a Bay Wheels bike which started or ended in Emeryville was 17 minutes and 11 seconds.

The Bay Wheels use data warrants further analysis, and currently indicates some important trends about what bike share is being used for, and how it intersects with existing transit offerings:

- The bike share at 65th and Hollis has the highest usage, and the 65th and Hollis shuttle stop has the third highest ridership on the Hollis line. The most visited destination of these rides is to West Oakland BART, with Ashby BART not far behind.
- Beyond the bike share at 65th and Hollis having high use, the data indicates people are opting for bicycles even in the presence of transit.
- The use of bike share to reach BART stations *other than MacArthur* could indicate an opportunity to modify EGR service.
- There may not be sufficient understanding by residents and employees of the existing transit options which connect to BART. For example, due to the absence of the Emery Express on the EGR service map, it may not be clear the Hollis line can be used to connect with the Emery Express to reach West Oakland BART. If this is the case, it points to a marketing opportunity for the program.

Multi-Modal Pass Subsidies

a. Clipper Passes

- **Clipper Start Discount Fares:** Clipper START is a pilot program administered by the MTC to provide single-ride discounts to eligible riders. Participants receive a 50% discount on virtually all Bay Area transit services. Identifying how many EGR passengers may benefit from this subsidy will inform our marketing efforts and encourage further use of ETMA service. Program requirements: Income must be below 200% of federal poverty level based on the number of people in your household (1 person household max \$30,000 income, 2-person household \$40,000, 3 people \$51,000, 4 people \$62,000, etc.).
- **Clipper BayPass:** Clipper BayPass is a pilot program administered by the MTC to provide unlimited access to all Bay Area transit systems through a single, all-inclusive pass. The eligibility for the pilot is that the accepted applicants must purchase passes for all employees/persons in a defined group (e.g. all employees in the accounting department of “Company X”), with a minimum of 50. The passes cost approximately \$200/per person/year. While the ETMA would not fund these passes directly, the MTC allows for a single administrator to hold the contract for multiple businesses. If the ETMA were to enter into contract with multiple Emeryville-based businesses, it can serve as the sole applicant/administrator to the MTC, increasing its potential for acceptance.

b. ETMA Funded Discount Fares and Pre-Paid Services

Whereas the Clipper Start and BayPass programs are Bay Area wide services, the ETMA should consider providing a subsidy for residents and employees in Emeryville. This could take many forms and be arranged under various criteria, such as demographic (student, senior, etc.), benefit amounts, and offerings:

- Pre-loaded clipper card
- Annual membership to Bay Wheels or Veo E-Scooter
- Purchase and distribution of AC Transit's EasyPass fare discount program to groups of 100 people or more such as ETMA members, small businesses, employees and residents, etc.

Transit Rewards App

Partnership with and marketing of a transit rewards app will make the ETMA's offering more valuable to existing users and enticing for new ones. As well, apps such as Agilemile directly benefit the local community by directing the reward into foot traffic for local businesses. Agilemile tracks your trips and then gives discounts on goods and services in your area.

E-Scooter Share

Veo is the e-scooter share provider in Emeryville listed on the [city's website](#). Correspondingly, Veo's [website](#) lists Emeryville as one of its served locations, however, upon use of the app, there is no indication of any scooters being available within the city. An inquiry is out to the company to determine timelines for implementation and inventory availability. Once Veo, or a competing vendor becomes available in Emeryville, the marketing coordinator should work to publicize it along respective channels.

Guaranteed Ride Home Program

The Alameda County Transportation Commission provides [Guaranteed Ride Home](#) (GRH) free to people who work in Alameda County and register for the program: up to 10 trips home per year, reimbursing up to \$125/trip, with a \$600 cap per year. This program is marketed as "insurance for your commute" and with such a robust reimbursement amount and availability, could be the tipping point in someone's decision to begin using a non-SOV mode of transportation.

As the ETMA invests in social media and other forms of marketing, the availability and benefits of the GRH program are a low hanging opportunity in terms of content matter. Marketing channels directed towards employers and employees in Emeryville should make this benefit a cornerstone communication point.

Late Night Ride Hail

Included below is a short case study for how the ETMA may approach this new offering:

In 2022, San Jose State University (SJSU) launched a new transportation service for students through the ride-hail company Lyft, offering students an alternative to pre-existing shuttle services and inefficient police escort services. The [SJSU Lyft Evening Ride program](#) affords three subsidized rides per month. The covered portion is up to \$7 each trip and students are charged the difference for trips exceeding the subsidy. Hours of operation are Mon-Fri 7:30PM – 12:30AM, and must start or end in the coverage area (SJSU main campus). In October 2024, the program had 336 unique riders and 557 total rides.

As the ETMA considers offering a similar service in Emeryville, it's important to note the subsidy's effectiveness is relative to a few factors:

- For the SJSU program, the campus is guaranteed as the origin of the trip, so the distance to area transit hubs (thus potential cost) is a fairly known quantity. If the city limits of Emeryville were used for the ETMA’s ride hail program, the total trip cost would vary more.
- The Associated Students fund the SJSU program, so the funding for their ride hail subsidy competes heavily with other ASB fee allocations (services). Being able to allocate more than \$7 per trip may make the service more viable.
- The hours of operation span 25 hours per week. Providing fewer hours per week would allow a higher subsidy amount.
- The hours of operation are late in the day, making the program only viable to those enrolled in evening courses, or who live on campus. In a similar way, usefulness of an ETMA ride-hail program will be dependent on when it is offered and who is around to make use of it.
- The amount of people who have access to the SJSU program (enrolled students) is recorded as [37,500](#) and its recent use is close to 1% of that figure. As of 2022, the combined population and workforce in Emeryville was [21,577](#). This is important for the model below.

As shown in figure 9, If the ETMA were to expect a similar result of 1% use, the next step would be to select a budget amount which the board believes will generate significant enough value to the end user. As mentioned above, a higher subsidy amount may increase the expected use rate above 1%, and thus decrease the budgeted trips per month.

Figure 9: Budget and Subsidy Per User

Population + Workforce			
21,577			
Budget	Subsidy Per Trip	Trips per Month	Expected Use Rate (set to 1%)
\$20,000	\$7.72	216	1.00%
\$30,000	\$11.59	216	1.00%
\$40,000	\$15.45	216	1.00%

CAP 5 - Service Planning

Considering the City’s Active Transportation Plan (ATP)

The ATP is representative of a 10-year period of infrastructure improvements. Some of these improvements will provide greater access to the EGR, and it’s important to identify which ones do, and lobby for their priority within the CIPs budget allocation process. These improvements, discussed in ch.4, range from “spot improvements” to “major projects”.

Emeryville’s Climate Action Plan (CAP) 2.0 sets a goal of a 40% reduction in GHG emissions by 2040. One of the objectives to achieving that is “Reduce the carbon intensity of vehicles through cleaner fuels and electrification by 30%.” Considering the on-going conversation regarding the future of the ETMA’s fleet, a partial (30%) fleet transition by 2040 should be considered.

Programmatic recommendations for education and encouragement are summarized in ch.4, pg.60. The EGR should be an essential component of all active transportation education and encouragement done by the city. Working with city staff, the BPAC, and other groups will be important to ensure an EGR component is included in their programming. Targeted Outreach is also mentioned, p.61, which

requires a more nuanced approach. Outreach to non-English speaking groups, and the development of non-english EGR resources would be natural elements of targeted outreach.

On pp.63-64, the plan lightly touches on enhancing the City's standard conditions of approval (COA) for site development "to implement Employer-Based Encouragement Programs / Bicycle Friendly Business Programs". The ETMA Board may want to discuss how else to enhance the city's COA to further support transit sponsorship and participation.

The 40th Street Multimodal Project has the potential for significant positive impacts in the accessibility and efficiency of EGR service on and around 40th Street. Understanding the timeline of these improvements will inform service planning for the EGR. Also, any data gathered today surrounding EGR accessibility or service along 40th street, must be viewed in light of the fact that much will change there in the following years.

Near the end of Exhibit A, p.153, the plan notes the five-year CIP budget for ped/bike projects, a cycle which renews in 2025. It's in the interest of the ETMA to piggyback, however possible, on related surveying or studies done via this budget.

Service Schedule Alignment

A key aspect of facilitating a successful first/last mile transit program is ensuring that the shuttle aligns with the schedules of the neighboring/source agencies, such as BART and Amtrak. With BART trains arriving every 6-7 minutes and Amtrak trains arriving approximately every hour, Emery Go-Round's existing 15-minute headways on the current schedule allows passengers to board with minimal layover.

40th Street Multi-Modal/Emeryville Loop Projects

The key aspect of the 40th Street Multi-Modal and Emeryville Loop projects, as it pertains to Emery Go-Round, are the development and implementation of dedicated bus lanes. These lanes will provide reduced bus travel times during peak rush hours and improve transit connections to employment, services, and other regional transit.

System-wide Review

In the interest of optimizing shuttle operations, service planning reviews will occur annually to assess:

- System-wide stop usage review to zero-in on successes of highly used stops and areas for improvement on seldom used stops.
- Potential for moving or removing stops based on usage and stop-area changes such as shuttered businesses, re-zoning or re-purposing of a building, etc.
- Where redundancies can be eliminated, such as stop 4, Hollis and 45th NB. This is the least used stop on the route and is a 4-minute direct line-of-sight walk to stop 5. With heavy industry lining the span of stop 3 to stop 5, and stop 4 heading away from BART during that NB segment of the route, a closer look should be taken at whether to keep this stop operational.
- Where the passenger experience can be improved such as working toward the creation of a waiting area at MacArthur BART where passengers can wait inside the station and watch a real-time arrival screen instead of waiting outside the station at the curb.
- Exploring limited or express "out-and-back" service for certain peak commute hour trips. Similar to mass transit, these can be run in parallel with standard (local) service.
- Potential of seasonal or holiday routes to serve a needed park-and-ride function, and also market the ETMA's programs to non-users.

- Review of area shuttle routes which may be forming or are being discussed vis-à-vis the city development process in Emeryville, Oakland, and Berkeley.

Fleet Replacement Decisions

The fleet replacement schedule that follows, and the two corresponding capacity utilization graphs provide essential reference points regarding service planning for existing routes and pilot programs.

Some takeaways and assumptions from the data:

- Around 95% of service is under the 32-passenger capacity.
- Medium-duty (MD) buses with less seating can be utilized for much of the existing service. We currently operate all heavy-duty (HD) 32 passenger buses.
- Future bus purchases will cost less than anticipated if the board opts for MD instead of HD.
- A small surplus of MD buses could provide the needed seats per hour to run express/high frequency service during peak hours. A surplus of HD buses would cost much more without delivering greater results.
- Sprinter transit vans or similar with a customizable seating layout could be a more cost and operationally efficient vehicle for early/late service.
- The ETMA won't be locked into a lower capacity vehicle option. Only a handful of vehicles are replaced each year, so, as the need comes about, the ETMA will have the opportunity to purchase HD buses in subsequent years.

Figure 10: Planned Retirement Year of Fleet Vehicles

Note: Darker red indicates comparatively higher mileage. Related, 8 of 21 vehicles are past their planned retirement year.

Bus No.	Model Year	Make/Model	Mileage Ending 2024	2024 Service Mileage to Date*	Planned Retirement Year
683	2013	INTERNATIONAL UC	189005	0	2020
207	2014	INTERNATIONAL 3200	142019	83	2022
208	2014	INTERNATIONAL 3200	138622	0	2022
215	2015	INTERNATIONAL 3200	117662	2	2023
216	2015	INTERNATIONAL 3200	133519	6225	2023
920	2016	INTERNATIONAL 4300	182289	14406	2024
921	2016	INTERNATIONAL 4300	148941	15364	2024
922	2016	INTERNATIONAL 4300	166599	7770	2024
649	2016	INTERNATIONAL 4300	135012	15960	2025
650	2016	INTERNATIONAL 4300	135057	16468	2025
651	2016	INTERNATIONAL 4300	162023	18383	2025
696	2017	IC CORPORATION RC505	152169	17557	2025
697	2017	IC CORPORATION RC505	152169	11917	2026
698	2017	IC CORPORATION RC505	127644	20211	2026
8698	2018	INTERNATIONAL 4300	134993	17916	2026
8699	2018	INTERNATIONAL 4300	142124	22073	2027
8700	2018	INTERNATIONAL 4300	118816	17622	2027
8701	2018	INTERNATIONAL 4300	110684	15209	2027
751	2019	INTERNATIONAL PC505	89268	3764	2028
752	2019	INTERNATIONAL PC505	91097	18072	2028
753	2019	INTERNATIONAL PC505	80804	19744	2028

Figure 11: Shuttle Capacity Utilization, % of Trips

This chart indicates how full buses are on average.

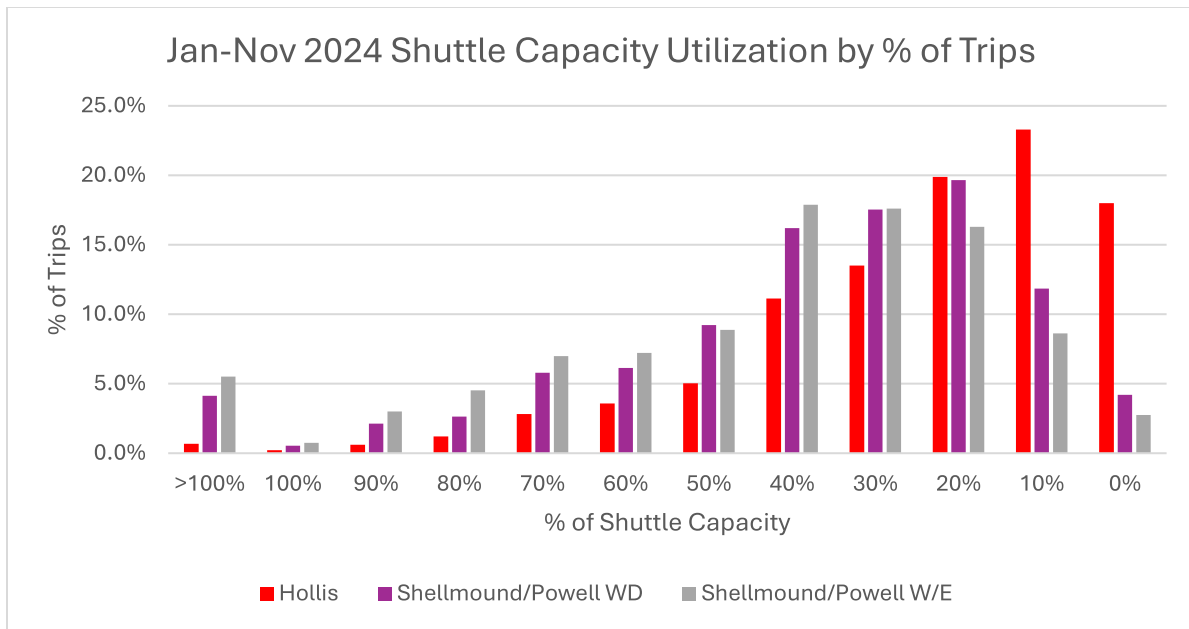
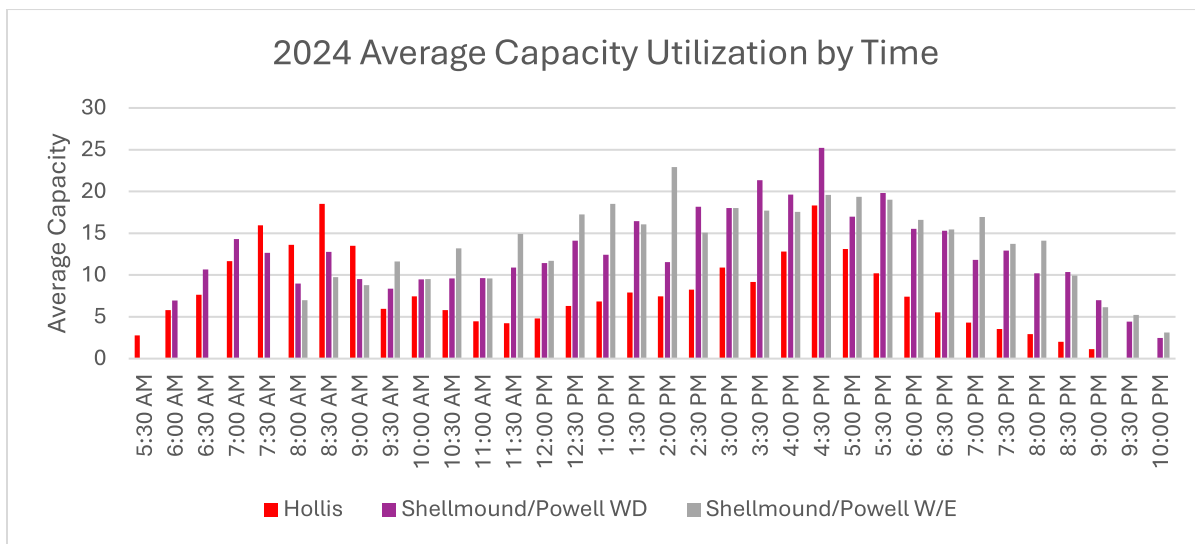


Figure 12: Average Shuttle Utilization Capacity

This chart indicates how full busses are during 30 minute segments of service.



Express/High Frequency Service

Keeping in mind the Fleet Replacement section just prior to this one, there are two pilot service options to consider:

- Express – A direct, point-to-point or limited stop service from highly utilized stop(s) to BART. Only benefits peak hour ridership at specific stops and shortens trip time depending on how many stops are served.
- High Frequency – Decreased time between vehicle arrivals (from 15 minutes to, for example, 7 minutes), decreasing passenger wait times by 50%. Benefits entire ridership equally.

Either pilot would add an expense of around \$70,000 per year for 4 extra hours per day (based on 2025 pricing).

Both options line up with the winning aspiration: “Become the simplest way to get around Emeryville, attracting former and new passengers with a frictionless, community oriented, multimodal service.”

Fleet Automation

The title of a Bloomberg article from October 2022, *Even After \$100 Billion, Self-Driving Cars Are Going Nowhere*, belies the potential autonomous vehicles (AVs) have, albeit in certain contexts. Making robot cars that can drive more safely than people is immensely challenging because self-driving software systems simply lack humans' ability to predict and assess risk quickly enough, especially when encountering the unexpected, known as "edge cases." When it became clear that the era of robotaxis was still distant, investors in 2021 shifted instead to self-driving truck companies that promised a faster route to market by hauling freight autonomously - arguing it would be easier to develop AVs to operate on highways at high speed without pedestrians.

When and how the ETMA will be able to utilize AVs depends on how much industry is willing to invest to bring the technology to a viable level. When Ford Motor Co and Volkswagen AG pulled the plug on self-driving unit Argo AI in November, Ford CEO Jim Farley said a profitable robotaxi business was still many years away. In stark contrast, rival General Motors Co burned through nearly \$2 billion in 2022 on its robotaxi unit Cruise, and said it anticipates spending even more in 2023.

Are there any companies soliciting cities as a testing ground? What is the process to become a testing ground for a given autonomous vehicle vendor?

As AV technology improves, there may be more opportunity for an ETMA route to become a testing ground. May Mobility is known for its autonomous shuttles used in urban environments. The company focuses on providing transportation solutions in cities with a focus on microtransit and mobility-as-a-service. They may be a potential partner in making AV service a reality for the ETMA.

Zoox is a local example of AV in the Bay Area. Where does Zoox operate?

A June 2024 Newsweek article notes Zoox started operating an autonomous taxi service between two buildings (1 mile apart) in Foster City, CA, in 2023. Their robotaxi operates in the SF Bay Area, Seattle, Las Vegas, and will be operating soon (if it isn't already) in commercial districts of Austin and Miami. It's noteworthy to mention Amazon purchased Zoox for \$1.3 billion in 2020, a sign of Zoox's potential to grow.

How many autonomous vehicles are on the road?

Current Figures: There are approximately 26,560 autonomous vehicles on the road globally in 2024.

US Projections: In the US, sales of autonomous light vehicles are forecasted to reach about 230,000 autonomous mobility-as-a-service units by 2034, suggesting a market share of less than 1.5% per year.

Global Testing: Over 1,400 self-driving cars are currently in testing.

Do AVs save the operator money in the long term?

Yes, because of the labor savings from not needing a driver. This is the main reason private investors have sunk over \$100 billion into autonomous vehicles. Source: [Even After \\$100 Billion, Self-Driving Cars Are Going Nowhere - Bloomberg](#) (2022 article).

What are some notable geographies where AV is working?

San Francisco, Mountain View, Palo Alto, Phoenix, Las Vegas, Austin, Miami

Notable AV Vendors

- May Mobility is known for its autonomous shuttles used in urban environments.
- Nuro is increasing the number of AVs in Mountain View and Palo Alto.
- Waymo is part of Alphabet (Google is parent company), operating in Phoenix, LA and SF.
- Tesla focuses on robotaxis
- Cruise is General Motors' AV technology company
- Aurora's Aurora Driver system is designed to be integrated into a variety of vehicles, from passenger cars to trucks, with the goal of achieving Level 4 autonomy.⁴
- Optimus Ride develops self-driving shuttles for use in specific locations, such as campuses, retirement communities, and urban developments. Its focus is on short, contained routes, which helps streamline the autonomous driving process.
- Motional, a joint venture between Aptiv and Hyundai, is a prominent name in autonomous vehicle companies in the USA. They provide autonomous ride-hailing services through its partnership with Lyft in Las Vegas.

⁴ **Level 4** automated cars are highly automated, self-driving, and able to handle most normal driving conditions. If the car is in a situation where the automated system cannot drive (like extreme weather), it will implement safety measures such as pulling over and stopping, rather than requiring the human driver to take over. Source: <https://www.epa.gov/greenvehicles/self-driving-vehicles>

CAP 6 - Finances

10-Year Cash Flow Projection

Constructing a 10-year cash flow projection for the ETMA was challenging due to the numerous changes that may occur during that period. Aspirations to receive millions of dollars of grant funding, fleet replacement, major infrastructure improvements, and the PBID renewal exemplify how the next ten years are a moving target as it concerns budgeting. The major financial and operational junctures impacting the 10-year projections are summarized in the following table.

Figure 13: Financial and Operational Considerations

Juncture	Considerations	Budgetary Assumptions
2030 PBID Renewal	Without the renewal being approved by voters, the primary funding source for the ETMA will not exist. The renewal language will also impact the ETMA's latitude in expanding its services beyond transit	The PBID will be renewed for another 10-year period with an expanded purview.
Fleet Electrification	At the end of 2024, Caltrans enacted a policy banning the storage/placement of electric vehicles in their facilities which are under freeways. There are allowances within the policy, however, as of January 2025, Caltrans has been unresponsive to what those allowances are.	The ETMA will be allowed to store e-vehicles in the existing yard.
Fleet Replacement	All 21 vehicles will be replaced within the 10-year plan period. Half will be electric, and half carbon-based fuel.	Grant funding supports the purchase of electric vehicles. PBID funding supports the purchase of carbon vehicles.
Electric Infrastructure	All electric infrastructure work and equipment will be completed and installed at the same time to reduce potential for redundant costs and capture the maximum grant revenue available, while it is available.	All grant revenues and PG&E assistance will be available in 2026.
Grant Revenues	Availability of grants for the ETMA's fleet and infrastructure development are based on whether there is funding for those grant programs by regional, state and federal authorities. Whether funding is available is generally known on a year-by-year basis. If long-term planning is dependent on grant revenues, it has to be done with the acknowledgement that consistent grant funding is a best-case scenario, not a foregone conclusion.	The budget staggers vehicle replacement over the 10-year period to allow flexibility regarding available grant funding.

Increase non-PBID revenue sources

The following were identified as grant sources appropriate for the ETMA to apply for.

Figure 14: Vehicle Grant Funding Sources

Vehicle Grants			
Source	Amount	Criteria	Notes
California Hybrid and Zero-Emission Bus Voucher Incentive Project (HVIP)	\$85-120k per vehicle	ETMA domiciles its fleet and has one stop in an area that is low income and disadvantaged, West Oakland.	This is aimed at fleets ready to scrap diesel buses that have reached the end of their life span. Funding has not been announced yet for 2025.
Commercial Clean Vehicle Tax Credit	\$40,000 per vehicle	Businesses and tax-exempt organizations that buy a qualified commercial clean vehicle may qualify for a clean vehicle tax credit of up to \$40,000 under Internal Revenue Code (IRC) 45W.	None.
PG&E EV Fleet Program	\$9,000 per vehicle	Transit buses and Class 8 vehicles.	Through the EV Fleet Program, PG&E will construct, own and maintain all electrical infrastructure up to the customer's meter. Fleet operators will design, build, own, operate, and maintain the electrical infrastructure from the customer meter to the EV charger. In select instances, PG&E may also cover this portion of the work.
BAAQMD Heavy Duty Vehicle Replacement – Carl Moyer Fund and TFCA	Unstated	For vehicle replacement. A...transit bus domiciled in, with at least one stop in, West Oakland...designated as disadvantaged or low-income communities.	Applicants must apply via BAAQMD to be screened and routed to the respective funding partner.
FTA Low or No Emissions Grant Program (Low-No)	Up to 85% of the total transit bus cost	Purchasing or leasing low- or no-emission buses	Applicants can submit individually or as part of a consolidated proposal by the California DOT.

Figure 15: Electric Infrastructure Grants Opportunities

Infrastructure Grants			
Source	Amount	Criteria	Notes
PG&E EV Fleet Program	\$42,000 per charger	Applicant eligibility hinges on the applicant acquiring and deploying a minimum of two medium- or heavy-duty electric fleet vehicles by 2024.	Offers competitive incentives to facilitate the installation of EVSE for medium- and heavy-duty vehicle fleets. PG&E offers dedicated electrical infrastructure design and construction services and reduced costs for electrical infrastructure work. Closing date 12/31/2024
EnergyIZE – Jump Start	Up to \$750,000 per project.	EV Jump Start is focused on equity-qualified projects. The application process is competitive, and applications are scored on criteria demonstrating project readiness, cost effectiveness, and community benefit.	Reimbursement style grants to infrastructure projects in California that deploy ZEV charging/refueling in support of Medium-Duty and Heavy-Duty (MDHD) commercial fleets.
EnergyIZE – Fast Track	Up to \$750,000 per project.	The EV Fast Track Lane is designed for projects that are ready for infrastructure deployment.	Reimbursement-style funding grants to projects that deploy zero-emission vehicle (ZEV) infrastructure charging and refueling in support of medium- and heavy-duty (MHD) fleets.
Clean Bus Planning Awards	CBPA is not an incentive program, and fleets do not receive direct funding—rather, selected applicants will be allocated technical assistance resources by NREL.	Fleets domiciled or operated in a disadvantaged community, as designated in the Climate and Economic Justice Screening Tool (CEJST) . According to this screen, West Oakland BART qualifies, while MacArthur does not.	CBPA program reduces barriers to zero-emission bus deployment by providing school and transit bus fleets with free technical assistance to develop comprehensive and customized fleet electrification transition.
FTA Low or No Emissions Grant Program (Low-No)	Up to 90% of the total charging infrastructure and installation costs	Acquisition, Construction, and purchasing/leasing of required charging infrastructure and facilities.	Applicants can submit individually or as part of a consolidated proposal by the California DOT.

Fee-for-service

Research similar TMA's and identify their fee-for-service offerings and their revenue generation and if they could be applicable to ETMA. Fee-for-service offerings include:

- Establishment by the city that the ETMA will manage all conditioned transit services.
- Offer stand-alone services to developers building in Emeryville developing TDM Plans and the implementation of city-approved TDM programs including the management and/or monitoring of said TDM programs.
- Offer the City of Emeryville to be the proxy TDM Program manager in which ETMA staff will provide peer-review for developer TDM Plans, monitoring and verifying enforcement on private development/projects. Note that if ETMA provided this on-going and sub-contracting TDM service to the city, ETMA could not individually serve developers noted directly above due to a potential conflict of interest.

Investment as a long-term revenue source

Before proposing any long-term use of the investment funds the board may utilize, it is important to summarize the few steps taken to this point:

- In May 2023, the Board approved opening a Certificate of Deposit (CD) account with \$138,878 earmarked for an improvement project to be discussed at a later time.
- In September 2023, the board approved a Financial Investment Plan to invest \$5,500,000 of the ETMA's savings into three CD Accounts with varying maturity dates. Upon the maturity of each account, a recommendation on whether to reinvest has been brought to the board for approval.
- Between the four accounts, there has been \$202,584 in interest growth as of Nov 2024.

As fiduciaries, the board had (and still has) a responsibility to allocate the principal and interest of these funds, and did so, shown in the 2023 annual financial audit, excerpted here below:

Figure 16: Text from audit

NOTE 8 – DESIGNATED NET ASSETS WITHOUT DONOR RESTRICTIONS

Certain amounts of net assets without donor restrictions, have been designated by the Board of Directors as follows:

Designation	Balance December 31, 2022	Increase/ (Decrease)	Balance December 31, 2023
Non-PBID Activities	\$138,855	\$2,669	\$141,524
Operating Reserve	741,414	32,586	774,000
Facility/Equipment Reserve	3,064,919	958,025	4,022,944
Totals	\$3,945,188	\$993,280	\$4,938,468

In the months following, a staff report memo was published, dated May 21, 2024, subject: Capital Expenditure Reserves and Fleet Plan. It covers in further detail what these funds could be used for, discussing capital expenditures and upcoming fleet replacement.

Since the annual PBID revenue is sufficient to maintain current operations, the board should leave the funds invested as long as operationally practical. The principal is poised to earn over \$2,400,000.00 of interest over the next ten years.

A few expected reasons to divest the funds will be to:

- Pay cash to purchase a vehicle, avoiding finance charges which would cost more than earned investment interest.
- Provide funds to purchase more vehicles in a year than anticipated.
- Make improvements to the bus yard infrastructure.
- Fund pilot projects not supported by the PBID revenues, and new non-shuttle initiatives listed in the strategic plan.

What Management Systems Are Necessary to build and maintain the key capabilities?

a. Governance

Figure 17: PBID Representation

Board of Directors	Definition
Corporate Members	6 persons or entities who own commercial property in Emeryville and who pay the largest amount of fees and dues.
Business Members	2 elected directors, representing those persons or entities who own commercial property or operate a business in the City, but do not qualify as Corporate, Employer, or Residential members
Class A Residential Members	Not reserved a seat on the board.
Class B Residential Members	2 directors designated by City Council to represent the interest of residential property owners
Employer Members	1 elected director, representing those 5 employers with the highest number of employees
Required Board Positions	Chair, Treasurer, Secretary, Vice Chair
Bylaws	Rules and regulations, adopted and amended by the board.

b. Key Vendors

Figure 18: Current and Potential Vendors

Current Vendors	Service Provided
AC Transit	Fueling Agreement
ALTRANS TMA, Inc.	Executive Director, Management Team
CalTrans	Bus Yard Lease
Hanson Bridgett	General Counsel
John Tounger	CPA, Bookkeeping
MV Transportation	Operations and Maintenance
TripShot	Real-Time Tracking
Potential Vendors	
Marketing Coordinator	Carry out a detailed marketing plan and strategy
Electric Charger Technician	On call and periodic maintenance of charging units
Ride Hail Partner	Tail end ride hail

c. Funding agreement with the city

The funding agreement is active for the next six years, ending on December 31, 2030. It provides for:

- Operation of the shuttle service
- PBID assessment collection from the county
- Use of the PBID funds

- Required annual reporting submissions to the City.
- TMA Governance
- Operations and Marketing

The agreement does not affect the manner in which the TMA may expend non-PBID funds. This is notable as the TMA has significant aims to generate non-PBID revenue via grant funding.

d. Caltrans Lease

It is important to understand what ETMA is beholden to as it relates to the ability to install EV charging infrastructure or storing EV vehicles there. Section 5.9 of the lease agreement gives Caltrans a considerable amount of latitude in imposing ad-hoc clauses which it deems needed for public safety and the safety of their assets.

5.9 Landlord's Rules and Regulations

Tenant shall faithfully observe and comply with the rules and regulations that Landlord shall from time to time promulgate for the protection of the transportation facility and the safety of the traveling public. Landlord reserves the right from time to time to make reasonable modifications to said rules and regulations. The additions and modifications to those rules and regulations shall be binding upon Tenant upon delivery of a copy of them to Tenant.

In line with 5.9, Caltrans has recently issued a restriction on storing EV fleet vehicles on their property (see appendix). As of January 2025, the ETMA management team has reached out to Caltrans three times, finally receiving a response to discuss the restriction and any potential waivers.

e. TDM Management as city agent

The ETMA will continue to gauge city interest in allowing ETMA to serve as an agency for transit and TDM services for Emeryville at large. The ETMA will pursue this and work towards win/win solutions where the ETMA is able to scale its services and simultaneously effect a more efficient and robust multi-modal transportation environment for those in Emeryville.

f. PBID Management Plan with expanded purview

Per section 7.3 of the PBID Management Plan, notable "powers and responsibilities for the TMA" are as follows:

- Review improvements, services, and activities provided and establish priorities for the upcoming Fiscal Year
- Implement the improvements, services, and activities specified in the Management District Plan by determining levels of improvements, services, and activities

The extant management plan language gives the TMA authority to implement improvements, services, and activities, but this all seems to be in reference only to the provision of a shuttle service. Adding language to the next iteration of the management plan regarding the TMA's expansion into multi-modal and transit products-based approach is essential.

g. Tail End Ride Hail System

ETMA's management team will need to set up an agreement with Uber/Lyft to:

- Define the rules and terms of use
- Subsidy amount per person per period of time
- Set geofence boundaries to define the service area
- Set up the payment/reimbursement/voucher method and related user dashboard

Internally, the TMA will need:

- Program info on its website
- An application process
- Pre-requisites (if desired). For example, the user must have a Clipper Card which they use to apply with the cards serial number. This way ETMA management can look up the applicant's Clipper activity to see if those using the ride-hail program are using transit at all. This is a desirable feature if the ETMA were to expand ride hail to, not only be a tail-end service, but a day-long service to incentivize transit use.

h. Contingency Planning

Extreme events, such as the Covid pandemic, can create catastrophic upsets in transit use. Therefore, having at least a general idea of how the ETMA would respond in case of another extreme event is critical to resiliently confronting the unexpected. Planning for every potentiality is not a good use of the ETMA's resources, especially when there are salient threats, such as BART's projected funding shortfall, which is a clear case for realistic contingency planning.

Bart.gov – "Like other transit systems across the country, BART has been fortunate to receive nearly \$2 billion in federal, state, and regional emergency assistance since the start of the pandemic to keep trains running and improve service and cleanliness, but this funding will be fully used up by spring 2026. BART is facing a \$35-million operating deficit in FY26 and \$385 million in FY27, then an annual \$300M to \$400M structural deficit."

By the end of 2025, ETMA management should have developed a board approved contingency plan regarding cuts to BART service in 2026 and beyond.

Starting in 2026, contingency plan development should focus on a handful of different extreme scenarios, as directed by the board.

Goals and Metrics

Operations

Engagement Survey

- Who is using the service and when
- Feedback on the timing and schedule of fixed route service
- Demand for current and alternative schedules/routes such as an express line.
- Awareness of ETMA's non-fixed route options
- Population sufficiently values non-fixed route options.

Ridership Tracking

- Growth of ridership per year

Marketing

- Cost per new trips per marketing channel
- Growth due to marketing activity

Sustainability

Financial

- Cost per passenger trip
- Cost of ride hail compared to cost per fixed route trip
- Passenger trips during tail end ride hail hours
- As a percent, costs are not growing faster than expenses

Environmental

- Carbon emission reduction to 30% by December 2040
- Electric ready for 30% of fleet by December 2035

Annual stakeholder engagement scores

- Members (Residential and Office Tenants)
- City Council and City Manager
- Vendor management and drivers

Make Transit Options Frictionless

- Quantity and value of transit passes distributed
- Multi-modal utilization

Where to Start, and Where to Go After That

Quick Wins - The following are achievable and/or can be started in 2025.

- 2025 Annual Ridership Survey
- Marketing
 - Rebranding
 - Rewrapping Shuttles
 - Social Media Kickstart
 - Consistency with branding across all channels (city, offices, retail, etc.)
- New Vehicle Purchases
- Implementing route augmentations such as high frequency service, or reimplementing the pre-covid service.
- Applying for grants
- Contingency planning for BART reduction in service
- Improving the passenger experience at MacArthur

Long Term

- 2030 PBID renewal will confirm the TMA's expansion of services, or restrict it to current operations. As well, it will renew the main funding source for the EGR.
- Investment fund utilization should be monitored and managed at least on a quarterly basis based on risk and yield.
- The ETMA's participation as a testing ground or live operating ground for autonomous vehicle service.
- Quarterra is not conditionally obligated to fund the Emery Express service after June 2027. The ETMA will need to decide whether to seek funding to continue the route, end the route, or merge the stop into existing service.
- Engagement with the city to modify their standard Conditions of Approval to make the ETMA the agency for transit-based conditions.

Appendix

Taking the CAP 6 junctures into consideration, a 10-year forecast was developed. The forecast will assist management and the board in determining annual PBID rates, and planning the timing of major purchases and improvements. Notes on specific budget items, mainly their assumed annual rate increase, precede the forecast here.

Figure 19: Forecast Rates, Notes and Assumptions

Budget Item	Annual Increase (%)	Notes
PBID Revenue	4.15%	This rate was calculated as sufficient to keep revenues in line with expense.
City of Emeryville - General Benefit Contribution	12.29%	This rate was determined in the 2015 Engineer's Report as the general benefit related to Benefit to Unassessable Property within the Emery Go-Round Service Area, and Benefit to Public at Large.
ETMA Direct Billed Revenue	4.15%	Mirrors the PBID rate.
Emery Express	-	Assumes Quatterra stops operating the Emery Express after their initial 5-year commitment (2022-2027)
Misc. Revenue	-	Assumes investment interest rates experience a slow trend downward from 4% to 2%.
EGR Operations	8.00%	-
EGR Communications	3.00%	-
EGR Bus Leases/Purchases	-	Lease or purchase of 10 diesel and 11 electric. In 2032 expenses decrease significantly as a result of paying off all vehicles.
Reimbursable Program Costs	8.00%	-
Professional Services	5.00%	-
Occupancy (Utilities, security, facilities, etc)	5.00%	-
TMA Insurance	5.00%	-

Budget Item	Annual Increase (%)	Notes
Pilot Express Service	8.00%	This increases at the same rate as standard shuttle operations. The forecast currently assumes four more hours per day of service, regardless of the service configuration (rapid/limited stop, door-to-door express, etc.)
Operating Reserves	-	<p>Minimum 15% of annual operating expenses (adopted).</p> <p>Non-PBID Activities – the TMA maintains a balance of funds from activities prior to formation of the PBID. On 12/31/2016 this amount was \$138,509. The Board of Directors will authorize the expenditure of reserves as part of the annual budget setting process. The Board of Directors must approve use of reserves outside the authorized amount. These financial reserves may be used to fund unanticipated expenses during the year, however, they must be replenished as part of the following year's budget. Use of the Non PBID Activities reserve requires approval of the Board of Directors.</p> <p>From time to time the TMA Board may wish to designate new or change existing reserve funds. Changes to reserve requirements shall be made by a resolution of the Board of Directors"</p> <p>Section 1.B. of the Policy Manual Approved April 2017</p>

Budget	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast
2025	2026	2027	2028	2029	2030	2031	2032	2033	2034		

REVENUES

PBID Revenue

PBID Revenue	4,746,070	4,943,032	5,148,168	5,361,817	5,584,332	5,816,082	6,057,449	6,308,833	6,570,650	6,843,332
District Related Costs	(105,183)	(108,532)	(112,019)	(115,651)	(119,434)	(123,373)	(127,477)	(131,750)	(136,201)	(140,837)
Net PBID	4,640,887	4,834,500	5,036,149	5,246,166	5,464,898	5,692,709	5,929,973	6,177,083	6,434,449	6,702,495

Non-PBID Revenue

City of Emeryville - General Benefit Contribution	639,966	914,020	1,117,323	1,032,459	1,076,699	1,077,484	1,097,508	907,281	967,488	1,032,226
ETMA Direct Billed Revenue	120,277	125,269	130,468	135,882	141,521	147,394	153,511	159,882	166,517	173,427
8 to Go Revenue	164,599	177,767	191,988	207,348	223,935	241,850	261,198	282,094	304,662	329,035
WBS Revenue	388,228	419,286	452,829	489,056	528,180	570,434	616,069	665,355	718,583	776,070
Emery Express Revenue	315,930	341,205	92,125	-	-	-	-	-	-	-
Misc. Revenue (Interest income, investments, etc.)	199,774	207,765	213,998	218,278	222,643	227,096	231,638	236,271	240,996	245,816
Grant Funding	-	-	-	-	-	-	-	-	-	-
Infrastructure	-	1,490,940	-	-	-	-	-	-	-	-
Vehicle (State)	-	-	151,500	151,500	151,500	151,500	151,500	151,500	151,500	151,500
Vehicle (Federal)	-	-	2,550,000	1,700,000	1,700,000	1,700,000	1,700,000	-	-	-
Subtotal Non-PBID Revenues	1,828,775	3,676,252	4,900,232	3,934,522	4,044,479	4,115,760	4,211,424	2,402,382	2,549,746	2,708,074
TOTAL REVENUE	6,469,662	8,510,752	9,936,381	9,180,688	9,509,377	9,808,468	10,141,397	8,579,466	8,984,195	9,410,569

EXPENDITURES

Direct Costs

EGR Operations	2,959,344	3,196,091	3,451,779	3,727,921	4,026,154	4,348,247	4,696,107	5,071,795	5,477,539	5,915,742
EGR Maintenance	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
EGR Fuel	-	-	-	-	-	-	-	-	-	-
Diesel	216,730	216,730	196,089	175,448	154,807	134,166	113,525	103,205	103,205	103,205
Electric	-	-	13,714	27,429	41,143	54,857	68,571	75,429	75,429	75,429
EGR Communications (Radios, Phones, TripShot)	117,274	117,274	120,793	124,416	128,149	131,993	135,953	140,032	144,233	148,560
EGR Misc. Operations Expenses	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
Electric Infrastructure & Equipment	-	1,656,600	-	-	-	-	-	-	-	-
EGR Bus Leases/Purchases	-	-	-	-	-	-	-	-	-	-
Diesel	381,000	635,000	635,000	635,000	635,000	254,000	-	-	-	-
Electric	-	-	3,000,000	2,000,000	2,000,000	2,000,000	2,000,000	-	-	-

	Budget	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast
	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	
Subtotal Direct Costs	3,903,348	5,931,696	7,527,374	6,800,214	7,095,253	7,033,264	7,124,156	5,500,460	5,910,405	6,352,935	

Reimbursable Program Costs

8 to Go Operations	164,599	177,767	191,988	207,348	223,935	241,850	261,198	282,094	304,662	329,035
West Berkeley Shuttle Operations	337,590	364,597	393,765	425,266	459,287	496,030	535,712	578,569	624,855	674,843
Emerg Express Operations	263,275	284,337	153,542	-	-	-	-	-	-	-
Subtotal Reimbursable Program Costs	765,464	826,701	739,295	632,613	683,222	737,880	796,911	860,663	929,517	1,003,878

Indirect Costs

Professional Services	505,879	531,173	557,732	585,618	614,899	645,644	677,926	711,823	747,414	784,785
Occupancy (Utilities, security, facilities, etc)	431,937	453,533	476,210	500,021	525,022	551,273	578,836	607,778	638,167	670,075
TMA Insurance	62,000	65,100	68,355	71,773	75,361	79,129	83,086	87,240	91,602	96,182
Conferences, Meetings, Office Expenses	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
Membership & Public Outreach	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
Pilot Projects & Research	500,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000
Tail-End Ride Hail	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000
Multi-modal Subsidies	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000
Express Service	70,000	75,600	81,648	88,180	95,234	102,853	111,081	119,968	129,565	139,930
Marketing	142,000	100,000	100,000	75,000	75,000	75,000	75,000	75,000	75,000	75,000
Subtotal Indirect Costs	1,791,816	1,505,406	1,563,945	1,600,591	1,665,516	1,733,899	1,805,930	1,881,809	1,961,748	2,045,973
Contingency	-	-	-	-	-	-	-	-	-	-
TOTAL ETMA BUDGETED EXPENSES	6,188,628	8,263,803	9,830,614	9,033,419	9,443,992	9,505,043	9,726,997	8,242,932	8,801,670	9,402,785

Beginning Cash	5,820,537	6,101,571	6,348,520	6,454,286	6,601,555	6,666,940	6,970,365	7,384,765	7,721,298	7,903,824
Net Operating Income (Total Rev - Total Exp)	281,034	246,949	105,766	147,269	65,385	303,425	414,400	336,533	182,525	7,784
Ending Cash	6,101,571	6,348,520	6,454,286	6,601,555	6,666,940	6,970,365	7,384,765	7,721,298	7,903,824	7,911,607
15% Operating Reserve	928,294	1,239,570	1,474,592	1,355,013	1,416,599	1,425,756	1,459,050	1,236,440	1,320,250	1,410,418
Est. Avail. Cash Balance	5,173,277	5,108,949	4,979,694	5,246,542	5,250,341	5,544,608	5,925,716	6,484,859	6,583,573	6,501,190