

**MEMPHIS AREA TRANSIT AUTHORITY**  
**Regular Meeting Agenda**  
**Friday, December 13, 2024**  
**12:00 PM**



Memphis Area Transit Authority  
One Commerce Square  
40 S Main St  
Memphis, TN 38103  
Memphis Area Transit Authority  
One Commerce Square

Brandon Arrindell  
Cynthia Bailey  
Sandi Klink  
Brian Marflak

**Committee of the Whole**  
Emily Greer, Chair

Jackson McNeil  
Anna McQuiston  
Dana Pointer  
Maya Siggers

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- I. Call to Order Emily Greer
  
  - II. Board Roll Call Annie Givens
  
  - III. Interim CEO Presentation Bacarra Mauldin
    - Interim CEO Presentation **CEO**  
**12-13-24**
  
    - Attachments:** bacarra 12-13-24
  
    - The Rider's Way **Riders Way**  
**12-13-24**
  
    - Attachments:** MATA GO901- The Rider's Way- Plan
  
    - Appendix One **Apendix 1**  
**12-13-24**
  
    - Attachments:** MATA Appendix 12-2024 LR
  
  - IV. New Business Emily Greer
  
  - V. Adjournment Emily Greer

The Next Regular Meeting of the:

MATA Board of Commissioners will be:

Tuesday, December 17, 2024

3:30pm

at

Memphis Area Transit Authority

One Commerce Square – 40 S. Main Street

Memphis, TN 38103

The Next Committee of the Whole/Sub Committee Meetings will be:

Friday, December 13, 2024

1:00pm Finance and Audit Committee

2:00pm Transit Service Planning and Rider Experience Committee

3:00pm Business Operations and Metrics Committee

4:00pm Executive Committee

at

Memphis Area Transit Authority

One Commerce Square – 40 S. Main Street

Memphis, TN 38103



**MEMPHIS AREA TRANSIT AUTHORITY**

**Committee of the Whole**

40 South Main Street,  
Memphis, TN 38103  
Bacarra Mauldin, Interim  
CEO  
[www.matatransit.com](http://www.matatransit.com)

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**RESOLUTION NO. CEO 12-13-24**

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# The Riders Way

**BACARRA MAULDIN**

Interim Chief Executive Officer  
Memphis Area Transit Authority

 MATA

 GO901



**December 13, 2024**

# Bacarra Mauldin

## Interim Chief Executive Officer

### MATA Leadership since 2021

#### Industry Advocate

- American Public Transit Association (APTA) - Board of Directors
- American Public Transportation Foundation (APTF) - Trustee
- Tennessee Public Transit Association (TPTA)
- Conference of Minority Transit Officials (COMTO)
- Women in Transportation Symposium (WTS)

#### Community Advocate

- Southwest Community College Foundation - Board of Trustees
- Memphis Symphony Orchestra Circle of Friends
- Junior League Memphis – Community Advisory Board
- Leadership Memphis Class of 2023
- Delta Sigma Theta Sorority, Inc. - Memphis Alumnae Chapter



# Chief of Staff

July 2021 to January 2023

- Marketing
- Internal Communications
- External Communications
- Employee Engagement
- External Affairs



# Deputy CEO

January 2023 – February 1, 2024

## Oversight

- General Agency Oversight
- Marketing
- Internal Communications
- External Communications
- Employee Engagement
- External Affairs
- Unofficially took on operations





**“The single most important ingredient in the recipe for success is transparency because transparency builds trust.”**

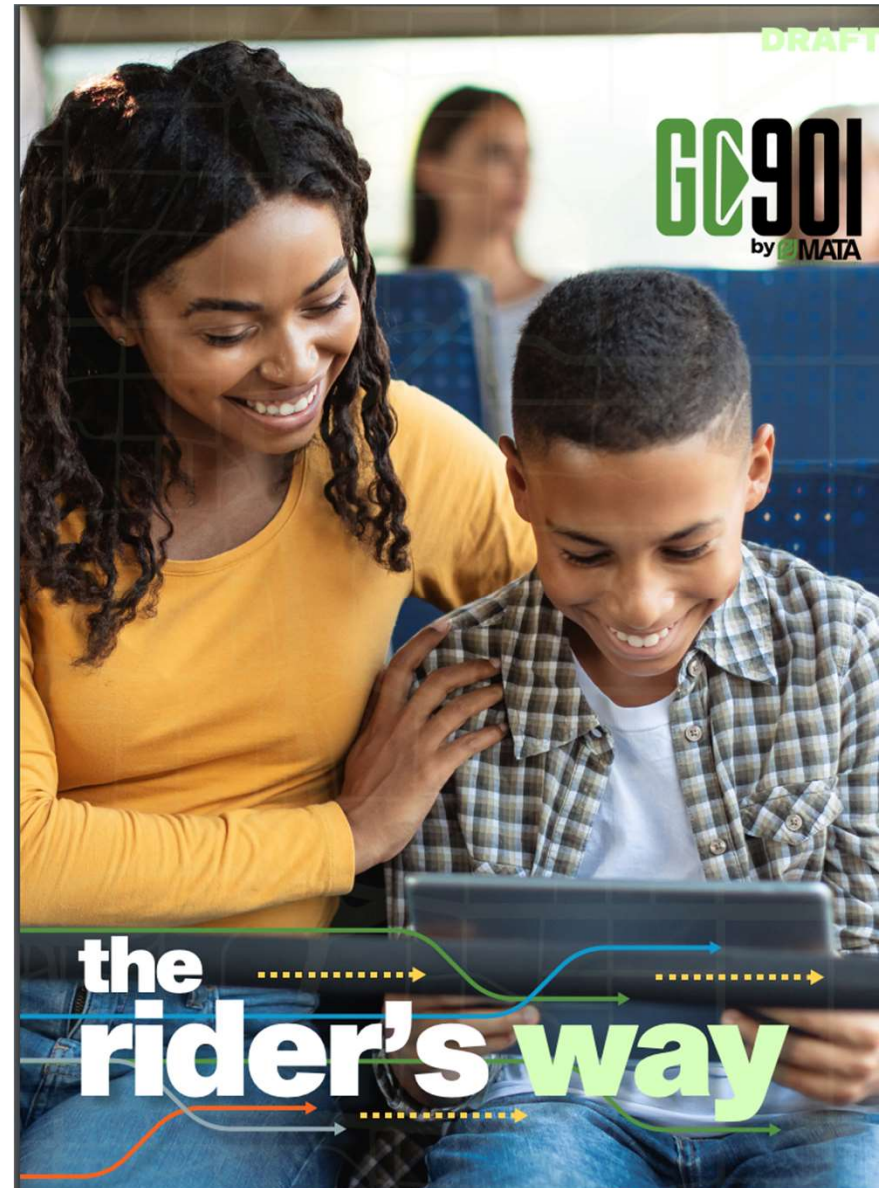
**-Denise Morrison**





# The Path Forward to Success

- Stabilize MATA Finances
- Operate Safely, Dependably and Efficiently
- Rethink how we do things at MATA
- Communicate Clearly and Consistently
- The Definition of Success



# Yesterday's MATA

BEFORE the service update pause

**55 Buses & 23 Routes**

**280 Square Miles**

**3,621 Bus Stops**

**3 On-Demand Zones**

## Outcomes:

Too much coverage area

Aging fleet

Too few buses

# Today's MATA

AFTER the service update pause

**67 Buses & 23 Routes**

**280 Square Miles**

**3,621 Bus Stops**

**3 On-Demand Zones**

## Outcomes:

Slowly improving service area coverage

More time for maintenance is still needed

# Optimal Footprint

**80 Buses & 23 Routes**

**280 Square Miles**

**3,621 Bus Stops**

**3 On-Demand Zones**

## Outcomes:

Effectively covering the service area

More time for maintenance

Efficient service provision

February 1, 2024

- 27 Triennial Findings
- Unclear Picture of Agency Finances
- No CFO
- No COO
- Brand New CSSO
- Not enough buses available for morning pull out
- Limited Cash Flow
- New Mayor and City Council

# Stabilize MATA Finances

- Policy
- Processes
- Partnerships
- Key Actions





**“You must gain control  
over your money or the  
lack of it will forever  
control you.”**

**-Dave Ramsey**

# Operate Safely, Dependably and Efficiently

- Safety
- Fixed Route
- MATAPlus
- Trolley
- Maintenance





## Fixed route bus OTP Goals

— Current Avg 59%

↑ Year 1 Avg 75%

↑ Year 2 Avg 85%



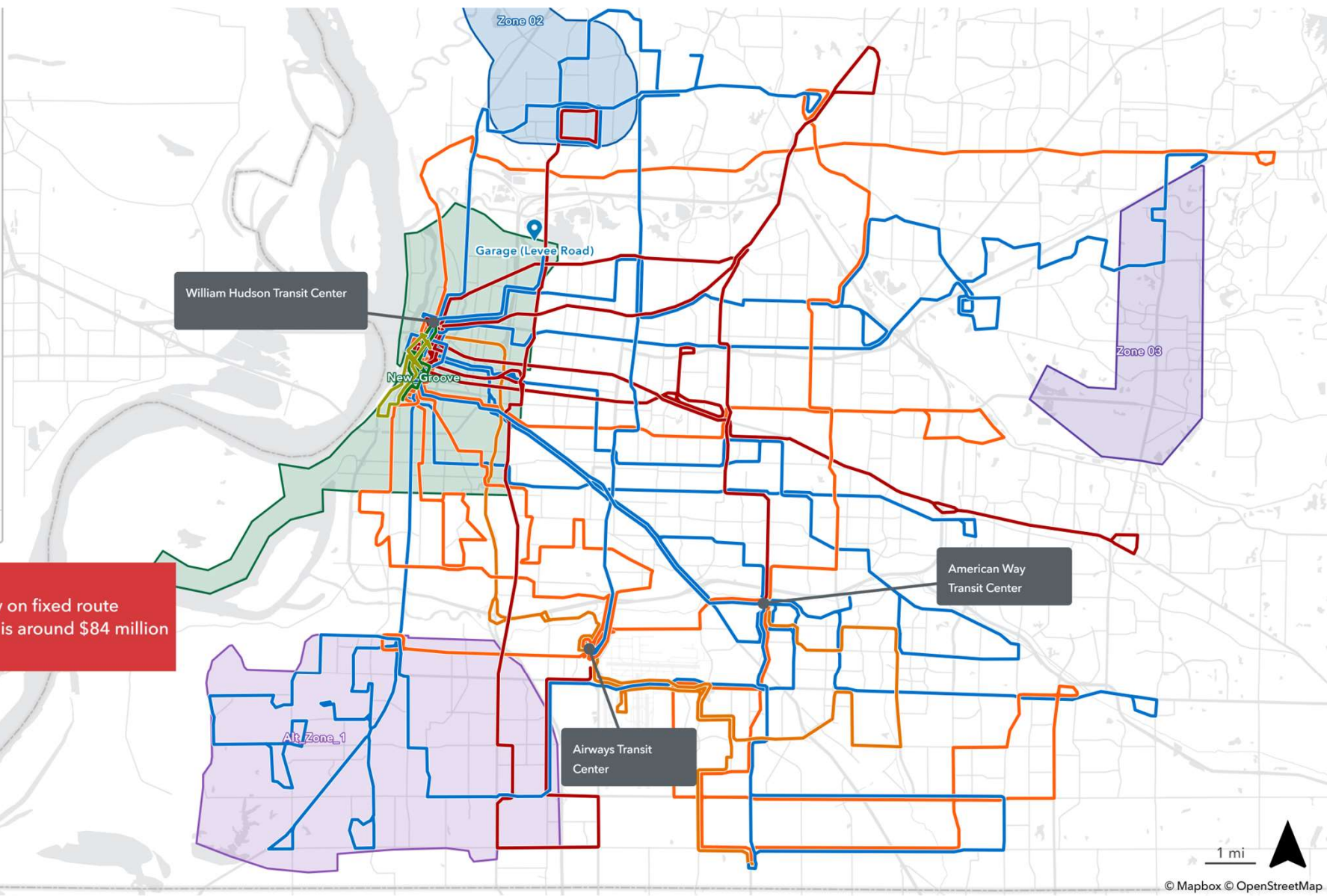
# Rethink How we do things at MATA

- Operations Management
- Strategic Plan
- Capital Projects
- Leadership Team Restructure
- Union Relations
- Employee Engagement



- 11 Frayser
  - 12 Mallory
  - 16 Southeast Circulator
  - 19 Vollintine
  - 28 Airport
  - 30 Brooks
  - 32 Hollywood & Hawkins Mill
  - 34 Central & Walnut Grove
  - 36 Lamar
  - 37 Perkins
  - 39 South Third
  - 40 Stage and Lauderdale
  - 42 Crosstown
  - 50 Poplar
  - 52 Jackson
  - 53 Summer
  - 57 Park
  - 69 Winchester
  - 100 Trolley Main Line
  - 101 Trolley Riverfront Line
  - 102 Trolley Madison Line
- Point layer 1

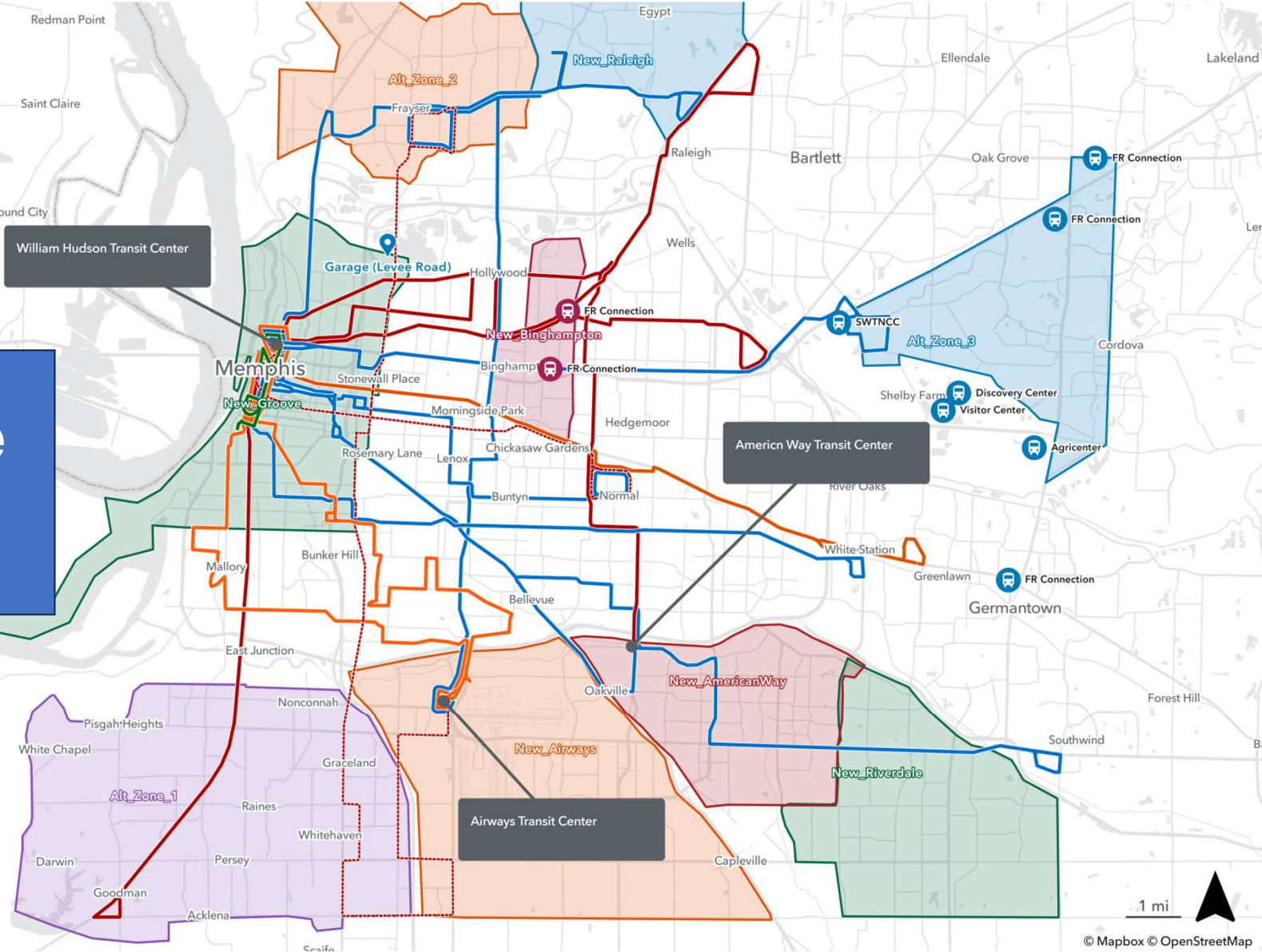
1) Everyday Service  
 2) 30 to 120 min frequency on fixed route  
 3) Current service: Budget is around \$84 million  
 4) Headcount: 512





- 11 Frayser
  - 12 Mallory
  - 19 Vollintine
  - 32 Hollywood & Hawkins Mill
  - 36 Lamar
  - 39 South Third
  - 42 Crosstown (Future BRT)
  - 50 Poplar
  - 52 Jackson
  - 53 Summer
  - 57 Park
  - 100 Trolley Main Line
- 📍 Point layer 1

# Reimagine Transit!



# Communicate

- Listen to stakeholders
- Improve comm channels
- Leverage expertise
- Improve Technology





## External Outreach

- ➔ **MATA Community Advisory Committee**
- ➔ **Quarterly Rider Meetings**
- ➔ **Ongoing Partnerships**



# The Definition of Success

- Key Performance Indicators
- Metrics
- Evaluations
- Surveys





*"We are here to  
answer all of your  
questions"*

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**Bacarra S. Mauldin**  
Interim Chief Executive Officer  
Memphis Area Transit Authority  
[bsmauldin@Matatransit.com](mailto:bsmauldin@Matatransit.com)



*Bacarra Sanderson Mauldin*



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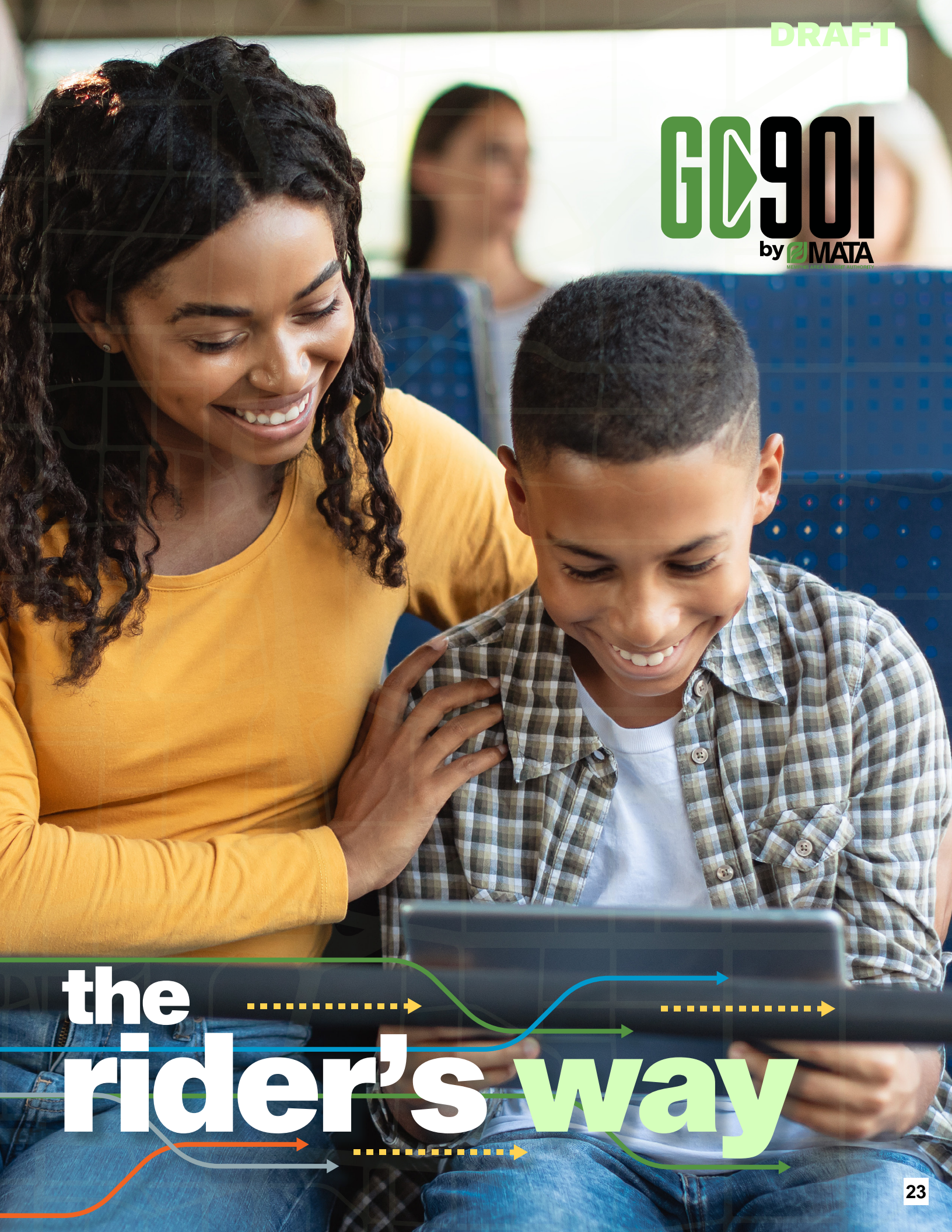
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**RESOLUTION NO. Riders Way 12-13-24**

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DRAFT

**GO901**  
by **MATA**  
Metropolitan Atlanta Rapid Transit Authority



the  
 **rider's way**

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*Year 1*
- 33 **Conclusion**

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**rider's way**



## MATA Board of Commissioners,

In the 1960's we stood as a country divided as racism, classism and segregation were the orders of the day – especially in the South – but not exclusively. It was during this time that public transportation systems across the country quietly yet systematically fueled the economies of many cities across the nation by getting people to work and putting people to work. This is why the civil rights leaders at that time in my home state of Alabama decided to target the public transportation systems to get the nation's attention. It worked and led to a movement that was felt nationwide and forever changed public transit and our country for the better. Unfortunately, our country is in a period of eerily familiar racial tension that is complicated and exacerbated by other factors such as poverty and politics.

As leaders in the public transportation industry, we can define the value proposition for an investment and, in some cases, a lifeline, for public transportation. In these times of division and distraction, our industry delivers day in and out as the great equalizer. By definition, "equity" refers to being "fair and impartial" or more commonly thought of as "leveling the playing field." These definitions are at the core of what transit means to our country. When designed and utilized properly, transit is literally a "vehicle" to opportunities and well-being for all who live, work and play in communities, both urban and rural, across this country. There are numerous examples of how public transportation serves as a great equalizer. It is the means for a student in an underserved urban community to connect to and attend the best school in their city that happens to be across town. It is the lifeline for a health-challenged person in rural America needing lifesaving healthcare in a nearby town. It is a bridge to nourishment in food deserts and a transporter to opportunity for workers and consumers in our nation's commerce system. That is why it is imperative that the country's public transit agencies embrace all means of achieving equality – racial, economic and environmental.

As a young parent, I found myself in the midst of a domestic situation with my now ex-husband. I had to catch a bus daily at 5 a.m. to get my daughter to daycare and myself to a clerical job. Public transportation was my lifeline and the key to my ultimate independence. Honestly, I didn't know or care to know about the transit agency's budget or optional challenges. I just needed the bus to show up for me every day. At MATA, we serve thousands of riders who need and expect us to show up for them daily. In recent years, that has been a challenge. Now is the time to fix it. Fueled by the urgency of now, this plan will outline the path forward with the riders as a central focus on how we deliver our service. We will emerge better on the other side of this crisis and do it – "The Riders Way."

Respectfully Submitted,



**Bacarra S. Mauldin**

**Interim Chief Executive Officer**

# National Landscape

Public transit agencies provide an essential service by connecting people to places and possibilities. They also build thriving communities, create jobs, ease traffic congestion, and promote a cleaner environment. Public transportation spurs local and national economies.

The COVID-19 pandemic led to unprecedented ridership and fare revenue decreases, prompting emergency federal funding in 2020-2021. This helped public transit agencies avoid major service cuts and layoffs. While ridership levels have since recovered to more than 70 percent of pre-pandemic levels nationwide in 2024, those levels vary vastly by agency.

Transit agencies have also faced escalating operating costs without the full return of pre-pandemic fare revenues, presenting a looming operating budget shortfall or "Fiscal cliff." The APTA Policy Committee reports that one-half of public transit agencies, including 71 percent of large transit agencies, will face this issue in the next five years.



## *Solutions sought by transit agencies nationally:*

- Seeking new revenue sources (e.g., state or local dedicated funding)
- Reducing transit costs
- Reserved service reductions
- Fare increases

## *Expected new costs in the next five years:*

- Transitioning transit fleets to low- or no-emission vehicles
- Retraining and/or recruiting maintenance personnel
- Building new maintenance infrastructure
- Ongoing post-pandemic safety concerns, technological advancements, and a competitive labor market.

Every \$1 billion invested in public transportation supports and creates more than 50,000 jobs. Every \$10 million in capital investment in public transportation yields \$30 million in increased business sales.

# the rider's way

# Local Landscape

Like transit agencies nationwide, the post-COVID environment has changed how Memphians live, work, play, and move around the Mid-South. Low ridership and increased business costs further exacerbate the challenges facing MATA, which serves a high-poverty community where efficient and effective public transportation is critical for economic equity.

Two large historical barriers to MATA's success are its unclear organizational structure and funding model. It is unclear whether MATA is a division of the City of Memphis or a stand-alone organization. Getting clarity in this area determines the path forward to organizational stability. MATA does not appear to have bond-issuing or taxing authority (see ordinance in the appendix).

## ***MATA's current funding comes from:***

- City of Memphis (fluctuates)
- Shelby County (minimal)
- State of Tennessee (minimal)
- Federal Government (fluctuates)
- Fares and advertising (minimal)



If MATA is, in fact, an independent agency, then adjustments in policy and authority are needed for the agency to sustain itself long-term.

If MATA is part of the city, we must rely on Mayor Paul Young's desire to have Memphis win! MATA must win back its customers, employees, stakeholders, and the community's confidence and support.



# History of MATA

The Memphis Area Transit Authority (MATA) is the public transportation provider for Memphis, Tennessee. It is one of the largest transit providers in Tennessee, transporting customers throughout the City of Memphis and parts of Shelby County. In December 1960, the stakeholders of the privately-owned Memphis

Transit Co (MTC), successor to the Memphis Street Railway Company, voted to sell the system to the City of Memphis due to high operating losses. The following month, the City issued bonds to complete the acquisition and purchase 40 buses for the newly formed Memphis Transit Authority (MTA). A city ordinance established MATA on May 13, 1975.



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# Mission

*We Connect  
People to Places*



# Vision

*MATA employees are committed to service excellence, creating an exceptional customer experience and inspiring the community to invest in our success.*

## Leadership Mantras

- 1** Maximum efficiency and demonstrated fiscal responsibility.
- 2** An unyielding commitment to safety and an agency safety culture.
- 3** Seamless integration of improvements that do not disrupt service.
- 4** Carefully thought-out decisions that minimize risk and exposure.
- 5** Silos are counter-productive and a threat to success.

## Definition of Success

- 1** Safe Operations – Safe, reliable, and connected mobility.
- 2** Customer Satisfaction – Increased base of transit-dependent and choice riders.
- 3** Employees are proud to be a part of the MATA Family.
- 4** Community Value – Transit is an active part of each component by invitation.
- 5** Financial Sustainability – Maintaining a Balanced Budget.

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# Optimal Footprint

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Effectively covering the service area  
More time for maintenance  
Efficient service provision

# Top 10 CEO/Leadership Opportunities



- 1** Engage and involve the MATA Board.
- 2** Continue to engage Mayor Young to understand his vision and the role transit plays.
- 3** Continue to engage the Memphis City Council and Shelby County Commission.
- 4** Engage the MATA Team and improve the agency culture.
- 5** Determine the optimal level of daily service.
- 6** Continue to develop a fleet replacement plan.
- 7** Recruit and retain key staff.
- 8** Maintain current fleet.
- 9** Build bridges and mend fences with local, County, State and Federal Officials.
- 10** Develop a coordinated and funded response to the Blue Oval Transportation study.

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## The Path Forward to Success

# Stabilize MATA Finances

We will stabilize the agency’s finances by finding efficiencies, reducing unnecessary spending, and ensuring proper accounting processes and controls are in place. We will also increase revenue by seeking grants and private funds, boosting advertising income, and engaging municipalities. This direction is necessary to regain public trust and create an agency that is an excellent steward of public funds. We will accomplish this through policy, internal processes, review and controls, and partnerships.

## Policy

Leveraging city, county, state and federal funding to meet the current agency needs.

- We are working with the Shelby County Delegation of the General Assembly to champion inclusion in the Governor’s budget. This current request is \$20 Million for the next three years.
- The Federal Transit Administration (FTA) has brought to our attention the State’s ability to flex Federal Highway funds for Transit operation. This was recently done in the State of Pennsylvania for the Philadelphia system (SEPTA) last month as they faced a triple-digit budget deficit and were facing massive layoffs and budget cuts. See the article in the Appendix.
- Continue to work closely with the City of Memphis.
- Move forward with the Pension Board-approved early retirement offering starting February 1s

## Processes

Ensuring that proper processes and controls are in place to ensure transparency, fiscal responsibility and accountability for budget management and spending of public funds.

- Maintain a balanced budget.
- Continue the recruitment for a permanent CFO and Grant Administrator. See JDs in the Appendix. Our recruitment team is targeting other transit finance, municipal and other public administration finance professionals.

- Continue the onboarding of the Internal Auditor. (See the Internal Auditor 90-Day success plan in the Appendix)
- Work with JS Held to create the FY26 budget in the spring of 2025 and submit it for Board approval in May 2025.
- Continue the Expense Reduction Measures put in place on July 1, 2024. (See the memo in the Appendix)
- Reorganize the Finance/HR/Grants/Procurement Departments to allow the proper segregation of duties and proper process flow.
- Provide greater support to the Grants team to create a better process flow for submissions and drawdowns.

## Partnerships

Working with funding partners on all levels (local, state, federal) to close budget gap. There are other opportunities to “Think outside the bus” and partner with community organizations and the public-at-large to generate additional funding.

- Continue to work on the relationship with the City of Memphis. Request additional funding to support the preferred alternative service model.
- Outreach to Shelby County to make the case for additional funding.
- Outreach to TDOT regarding the availability of operating assistance funds.
- Ensure that National Transit Database submissions are timely and accurate. This impacts the availability of federal operating assistance.
- Develop a partnership with the Memphis Chamber to launch the “Buy the Bus Project” and for Trolley Naming Rights Opportunities. This relationship is also useful in leveraging the help of TDOT.
- Develop a Community Foundation partnership to launch “The gift of a lift” crowdfunding project.

# Key Actions

## Budget Management

**Objective:** Develop a finance team prepared to lead the agency through the budget cycle.

- **Strategy:** Hire a well-qualified Chief Financial Officer, Grant Administrator and Internal Auditor to round out our Finance and Compliance Departments. See the job descriptions in the Appendix.
- **Key Result:** Continuous monitoring and quality assurance during each annual budget cycle. Increased cash flow due to a balanced cycle of draws and submissions.
- **Timeline:** Recruitment started in November 2024 and is ongoing.

**Objective:** Develop a budget that realistically addresses the needs and core functions of each department within the agency. To effectively manage a budget, it must realistically provide for what the agency is charged to do.

- **Strategy:** Budget discussions should occur early in the fiscal year, with each chief and division leader discussing the division/department goals and deliverables.
- **Key Result:** An informed and realistic budget that will be easier to manage.
- **Timeline:** Implemented in September 2024 and ongoing.

**Objective:** Develop a budget management process that is a shared responsibility across the agency.

- **Strategy:** The CFO meets with each chief and reviews the corresponding budget for each division. The CFO will have a monthly budget review meeting to discuss variances. Strategies for realignment are also suggested. If the divisional budget of more than \$25,000.00 is out of line, then the divisional budget is escalated to the CEO. At that point the discussion is on corrective action (including disciplinary action if warranted) and a need for a budget amendment at the mid-year Board Budget review.
- **Key result:** Greater overall control of the budget. More oversight over budget expenditures. Monthly reporting on budget status which identifies and explains key variances to both department heads and Board to provide visibility and oversight to the agency's financial situation".
- **Timeline:** Implemented in August 2024 and ongoing.

**Objective:** Create an annual budget management process incorporating Board review and governance.

- **Strategy:** Holding an annual mid-year budget review session each January. This will allow the Board to see how the agency is performing budget-wise and provide an opportunity to make mid-year budget revisions based on expense and revenue performance.
- **Key Result:** Provides more Board engagement and oversight of the budget process.
- **Timeline:** January 2025

# Key Actions

## Revenue Sustainability and Growth

**Objective:** Identify a dedicated funding stream that would allow the agency a greater opportunity to plan and expand.

- **Strategy:** Engage community groups in dialogue. Get Local, state and national advocacy groups engaged.
- **Key Result:** A ballot initiative is commenced and approved or a recurring funding allocation through an existing tax stream.
- **Timeline:** 1 to 3 years

**Objective:** Secure an increased multi-year commitment of operating and capital funding from the Memphis City Council and Shelby County Commission.

- **Strategy:** Engage the members of both bodies in dialogue. Invite them to tour the agency and the transit centers to “touch and see” the impact of their transit decisions.
- **Key Result:** All city and county leaders are invested in the future of public transportation on behalf of riders.
- **Timeline:** 1 to 3 years

**Objective:** Lock in service contracts from local business/manufacturing companies. (i.e. Fed Ex, Ford/Blue Oval, XIA Supercomputer, Amazon, etc.).

- **Strategy:** Engage the businesses that we know in the past or currently have offered supplemental transportation services.
- **Key Result:** An additional stream of revenue for the agency. Diverse streams of revenue are a sign of financial stability.
- **Timeline:** 1 to 3 years

**Objective:** Create more transit-oriented development opportunities that bring value to the community while providing revenue to the MATA.

- **Strategy:** Engage the members of both bodies in dialogue. Invite them to tour the agency and the transit centers to “touch and see” the impact of their transit decisions.
- **Key Result:** More community understanding and ideation regarding the future of transit
- **Timeline:** 1 to 3 years

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rider's way

# Key Actions

## Expense Management Considerations

**Objective:** Realize savings through the liquidation of excess real estate holdings.

- **Strategy:** Sell the property at the corner of Watkins and Levee Road (across from the current operations center).
- **Key Results:** Additional funding that can be used for operations and payables.
- **Timeline:** 6 months – the building needs to be cleared of aged files and other MATA belongings
  - **Cost considerations:**
    - Hauling and Shredding service
    - Revenue generated is based on the property appraisal and final sale.

**Objective:** Realize savings through renegotiation or termination of lease for the 13th floor of the One Commerce Square Building.

- **Strategy:** Authorize MATA General Counsel to begin negotiations with CBRE.
- **Key Results:** A reduction of payables of about \$500K or more, depending on the success of the negotiation.
- **Timeline:** In progress - the outcome within 90 days.
  - **Cost Considerations:**
    - Cost to move and possibly store furnishings.

**Objective:** Realize cost savings through the termination or renegotiation of current contracts.

- **Strategy:** Review, renegotiate or terminate current contracts.
- **Key Results:** To date, the agency has saved

approximately \$900K. Anticipates that number will grow to more than two million dollars within the next year.

- Cancelled technology contract in June, resulting in \$500K in savings for the agency.
- Reduced scope for public affairs contract in August, resulting in \$50K in savings for the agency.
- Reduced scope for marketing and communications engagement in July resulted in \$50K in savings for the agency.
- Renegotiated fuel contracts that resulted in better payment terms and savings of approximately \$50K for the agency.
- **Timeline:** Ongoing

**Objective:** Establish salary caps for top administrative positions.

- **Strategy:** Cap the salary of the Executive Leadership Team at \$150K and Directors at \$120K
- **Key Results:** Savings of \$500K.
- **Timeline:** February 1, 2025 (Under review by MTM Attorney)

**Objective:** Strengthen processes for overtime management

- **Strategy:** Implement a cap on the number of hours that any one employee can work
- **Key Results:** A reduction in overtime wages based on a wider distribution of overtime hours beyond the higher-paid operators.
- **Timeline:** Under review by the MTM Attorney – immediately upon legal sign-off and labor union buy-in.

# Key Actions

## Compliance (Triennial reviews, Corrective Action Plans and Audits)

**Objective:** Establish better quality assurance regarding agency policies and procedures.

- **Strategy:** Hired an internal auditor (Job Description provided)
- **Key Result:** the ability to course correct staff regarding internal practices prior to an audit or review finding.
- **Timeline:** Completed and ongoing.

**Objective:** Ensure systemwide understanding of each agency role as it relates to compliance.

- **Strategy:** Bi-weekly Meetings with a subset of your Triennial Working Group to allow for enhanced inter/ intra departmental communication on upcoming purchasing requirements, issues, and concerns. Mandatory attendance from the following departments:
  - Procurement
  - DBE
  - Grants
  - Finance
  - Capital Planning
- **Key Result:** Better compliance
- **Timeline:** Implemented and ongoing.



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**rider's way**

# Operate Safely, Dependably and Efficiently

Since February 2024, there has been a necessary shift “back to basics.” We have been aggressively working to optimize our operations for maximum efficiency and service equity. We can eventually match our services with riders’ needs by being more strategic and innovative offerings and funding solutions. This includes investing in our workforce by ensuring they have the proper tools and empowering them to contribute to MATA’s success.

## Safety

Former FTA Administrator Nuria Fernandez always refers to transit safety as “Our North Star.” Everything we do at MATA is done with the safety of our riders, employees, and the general public in mind. Through our policies, practices and procedures, we will ensure that safety standards are incorporated into everyday operations to create a reinvigorated safety culture. Key focus area include:

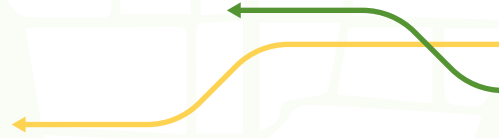
- A greater focus on Crime Prevention System Wide.
- More collaboration between Safety and Training.
- Updated and continuous de-escalation training.
- Work towards stronger partnerships with local law enforcement.
- Stronger partnerships with local mental health collaborative.
- Private Security alternatives/compliments.
- Create a transit station ambassadors program.



## Key Actions

**Objective:** Demonstrate a Positive Safety Culture, Internally and Externally

- **Strategies:** Holding internal sessions to communicate expectations and provide opportunities for employees to suggest ways to improve. Post timely results.
- **Key Result:** Fewer preventable accidents and worker’s compensation claims. The workforce will know the agency cares about their safety and well-being.
- **Timeline:** Currently being put into place.



## Fixed Route Bus Operations

To say that MATA needs to improve its service and riders' experience is, unfortunately, an understatement. Our team has spent hours talking to riders at our various transit centers. The riders have spoken. They want fixed route bus service that they can depend on. The route service schedule is a contract with the public that has not been kept for many years. The time is now to do more and do better. Service will improve through a one-year, three-phased process:

- **Phase 1 – (February 2025)** Right-size the service to align with the available fleet. Suspend the lowest-performing routes until alternative equipment and additional operators can be brought on board.
- **Phase 2 – (August 2025)** Expand the on-demand zones to cover the areas with less density that are not covered by fixed route service. Each on-demand zone will have a “Mobility Hub” where the rider can connect to a fixed route bus service.
- **Phase 3 - (November 2025)** The arrival of 10 electric buses and 10 Ford Transit vehicles (funding permitting) will allow MATA operations to reroute existing buses to increase frequency to 30 minutes system-wide and 15 minutes during peak hours on the top five routes. The suspended routes are reintroduced using smaller Ford Transit vehicles operating with 30-minute headways.

### Proposed service hours:

**Monday - Saturday**  
**5am - 7pm**

Exceptions: Routes 50, 36, 42, 52 and 8 will run until midnight in phases 2 & 3

**Sunday Service**  
**6am - 6pm**

All Phases

## Key Actions

**Objective:** Minimize missed trips due to lack of operator coverage.

- **Strategy:** Adjust operator schedules in the run-cut process to create the necessary shifts to meet short-term needs and alleviate excessive overtime.
- **Key Result:** Fewer missed trips. Increased on-time performance.
- **Timeline:** Implemented and ongoing.

**Objective:** Establish better bus visibility and tracking for increased customer support

- **Strategy:** Utilizing street supervisors and operations leaders to focus on operator pullout cadence. (Project Great Start)
- **Key Result:** Increased on-time performance and better results for customers on MATATracker.
- **Timeline:** Implemented and ongoing.

**Objective:** Increase service quality through Operator retraining.

- **Strategy:** Bringing in a former Chick-fil-A customer service trainer to train our operators and all frontline employees.
- **Cost:** \$45K

• **Key Result:** A better overall customer experience.

• **Timeline:** February 2025.

**Objective:** Increase service quality through Operator retraining.

- **Strategy:** Implement a required annual de-escalation training course.
- **Cost:** \$20K
- **Key Result:** Fewer incidents of operator altercations and better customer experience.
- **Timeline:** March 2025.

**Objective:** Develop a deeper understanding of post-pandemic transit needs in the Greater Memphis area.

- **Strategies** Conduct an origin and destination study. Continue to work with major employers and social service organizations to determine whether slight shifts in zones, routes or schedules would benefit current or potential employees/customers.
- **Key Result:** A clearer future transit needs to align with community shifts and agency resources.
- **Timeline:** 6 Months





## MATA Plus

MATA's shared ride paratransit service is oversubscribed based on the current number of available vehicles (61). To increase capacity and elevate our riders' experience, the following key actions are planned:

### Key Actions

The boundaries of MATAplus, as they are today, will be maintained through each phase of system development for minimal disruption to our current riders.

- **Timeline:** February 2025 & ongoing

Order a total of 20 Ford Transit Vehicles (10 vans to replace the oldest vehicles in the fleet and 10 vans to expand capacity)

- **Timeline:** Phase 2 (August 2025)

Promote the use of on-demand services as an alternative. (READY and Groove on Demand - both services feature ADA Accessible vehicles. READY's fleet, operated by MATA, is 100% ADA accessible).

- **Timeline:** Implemented and ongoing.

Increase partnership and engagement activities with local organizations that support the needs of persons with disabilities.

- **Timeline:** Immediately

Create and develop an accessibility center in partnership with a local organization where persons with disabilities can attend classes and learn how to use fixed route services to move around the region. (See Las Vegas RTC as a model)

- **Timeline:** 1 to 2 years

## On-Demand

On-Demand (also known as micro-transit) has shown itself to be a very successful and widely used mode of mobility. It is a tool that bridges the mobility gaps in our region in less densely populated areas to fixed route services. We are currently facing longer wait times than desired due to its popularity. To increase capacity and elevate our riders' experience, the following key actions are planned:

### Key Actions

Launch the new Go901 App allowing fare collection for READY by MATA. It will also unify the platform in which to access all MATA services.

- **Timeline:** February 2025

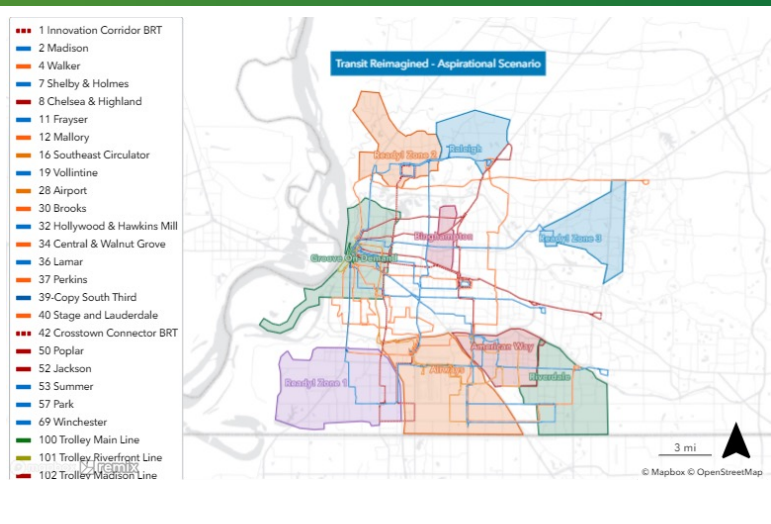
The collective of Groove on-demand partners, including MATA, have applied for a grant to fund this service's expansion.

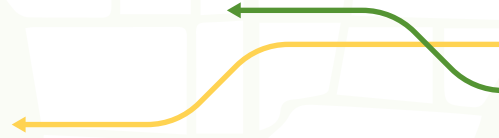
- **Timeline:** Results due in the Spring 2025

Purchase 30 Ford Transit Vehicles (if funding is available) to expand READY on-demand zones.

- **Timeline:** August 2025.

Here is an example of an on-demand zone expansion:





## Trolley

The trolley service suspension in August of 2024 always had the riders' safety in mind, followed by the desire to bring them back in a bigger and better way. Only the Main Street Line service was being offered when the service was operational. Since the start of the suspension, riders, the business community, and tourism partners have all strongly voiced the importance of the trolley's return.

### Key Actions to Returning the Trolleys into Service

TDOT (Tennessee Department of Transportation) has recommended separating the Trolley Safety Plan from the agency safety plan for the purpose of FTA review.

- **Timeline:** The staff will complete the update and present it to the Board in January 2025.

Leadership is working with TDOT to secure funding for trolley brake installation.

- **Timeline:** Complete
- **Cost to MATA:** \$0

Trolleys purchased from the trolley system in Charlotte, NC will be tested on the Main Street Line to ensure they don't damage the cobblestone pavers.

- **Timeline:** January 2025.

Trolley upgrades occur, including the back-up brake installation.

- **Timeline:** February - June, 2025
- **Cost:** \$1.2 Million
- **Cost to MATA:** \$0



The Board of Commissioners will be updated on progress on a monthly basis at the regular Board meeting or in the event of a critical milestone.

## Trolley Sustainability

It is not enough to get the trolleys up and operational. With the riders and the impact of the trolley system regionally, it's time to think BIG when it comes to operating this service better. The following strategies are recommended to bring back and sustain the trolley system for years to come:

- Create a nonprofit subsidiary of MATA for the trolley system – “Memphis Trolley.” This will separate the operating budget and allow for dedicated funding.
- Seek dedicated funding streams from tourism, convention centers and the business community.
- Implement a naming rights program that allows organizations/businesses to name a trolley. The trolley will be outfitted with that company's branding for an entire year. (Similar programs are active in Cincinnati and Kansas City.)
- Implement a naming rights program that allows organizations/businesses to name a trolley stop. The stop will be outfitted with that company's branding for an entire year.
- Support the creation of a Trolley Community Advisory Council of business to foster goodwill for the trolley system and weigh in on development activities.
- Support the creation of the “Friends of the Trolley” group to foster goodwill for the trolley system and promote philanthropic efforts to support the system.

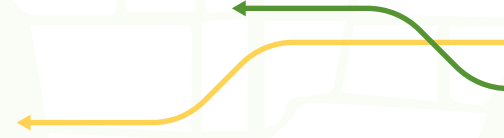
## Maintenance

Most folks in transit would agree that the maintenance department is the “Achilles heel” of any transit system. This is exacerbated by the shortage of qualified mechanics and workers. The systems in the newer fleet require a different and more computer-centric skillset than the basic diesel mechanics of yesterday. MATA, like agencies across the nation, has had its share of challenges in this area.

Ordering buses was not a priority for several years. As a result, today’s fleet is full of older buses that require extensive maintenance work. However, since February of 2024, MATA has worked extensively to fill the voids in this area and remains committed to bringing more fleet online as resources are received. To increase capacity and output and elevate our riders’ experience, the following key actions are planned:

- Prioritize ordering buses/fleet in each years’ CIP request of the City of Memphis.
- Prioritize partnership with TCAT to attract qualified mechanics.
- Work with Southwest Community College to design a custom course offering to create an employment pipeline for MATA.





# Rethink how we do things at MATA

In November 2024, the Memphis Flyer featured an article on MATA entitled “Business Unusual.” This is a call to action to think differently about public transportation in the Greater Memphis region. It’s time to do things differently. The riders have spoken, and MATA is ready to respond. Above all, we will reimagine transit in the Mid-south, daring everyone to rethink what a WIN looks like for mobility in the greater Memphis region. Prior to 2024, decision-making took place in a vacuum –with little or no input from staff. Planning drove operational decisions without baseline consideration. This is why MATA’s fixed route service level required almost 80 buses, although the agency has not operated at that level in years. To right this ship, the agency must have innovative thinking with the following priority target areas:

## Operations Management

RATP Dev currently has a management contract with MATA. The current structure of this engagement provides little or no operational leadership or oversight. Transitioning this engagement to an operations agreement will allow MATA to better leverage RATPDev resources in managing and delivering service on both the bus and trolley divisions. In March of 2024, RATPDev was asked to do an operational assessment of interim leadership. Recommendations were not implemented at that time due to a lack of funding. See the letter detailing ongoing follow-up and interest in a proposal to renegotiate this engagement in the Appendix. This will assist MATA with ensuring that service improves to meet customer expectations.

### Additional Key Actions - Customer Service Goals (On Time Performance & Other Rider metrics)

**Objective:** Reposition Service Delivery as a Key Focus Area

- **Strategy:** Confirm baselines and annual goals for each key metric.
  - Key metrics should be a daily focal point for all Employees.
  - Progress will be celebrated.
  - A baseline customer service survey will be conducted to identify key focus areas (Incorporate Metrics) and implement campaigns/initiatives to improve performance.

- **Key Result:** Enhanced accountability and improved focus and performance.
- **Timeline:** Immediately

**Objective:** Enhance the Customer Service Skills of all Frontline Employees

- **Strategy:** Provide mandatory customer service training, including empathy and de-escalation tips and techniques
- **Key Result:** Improved customer satisfaction
- **Timeline:** 90 Days

## Strategic Plan

In 2023, the MATA Board engaged the firm on InfaStrategies to lead the development of a strategic plan for the agency. Work has been underway but was temporarily paused pending onboarding the new MATA Board. As the agency finds its way the development of a regional strategic plan will serve as a roadmap for development.



## Capital Projects

MATA's limited financial and operational bandwidth requires that leadership take a step back and reevaluate the value and sustainability of these prior commitments. Staff has the following recommendations for the remaining major capital projects:

- Innovation Corridor BRT (East/West) – The project as originally scoped required funding from a BUILD grant of \$24,555,000.00 and a Capital Improvement Grant in the amount of \$74,295,599.00 plus local match from the City of Memphis and the State of Tennessee. The project scope will be adjusted to “BRT-Light” (BRTL), which can be funded under the existing BUILD grant. BRTL is a higher-frequency fixed route service without signaling technology and dedicated lanes. In addition, MATA would petition FTA for the ability to purchase diesel/electric hybrid buses, which have lower initial infrastructure costs with the remaining bus funding allocated within this project. These buses would operate on Route 1 Union, which is the future BRT line. MATA would withdraw from consideration for the pending CIG grant. The City of Memphis is holding approximately \$16 Million as matching funds. MATA would request that these funds be reallocated, allowing the agency to purchase the fleet needed for phases 2 and 3 of its operational rollouts. This shift in scope will allow the BRTL to be operational by 2027 instead of the 2032 projection.
- Bus Electrification Project – After the arrival of the last 10 buses funded by the non-transferable CMAQ program. MATA will pause its bus electrification efforts indefinitely.
- Crosstown Connector BRT (North/South) - This project is funded through a \$25,000,000.00 RAISE Grant. MATA will see approval to change this project’s scope to BRT-Light (BRTL). The funded buses will be requested as diesel/ electric hybrids, just as they are in the Innovation corridor. The purchased buses will be utilized on Route 42. This change in scope will move up the roll-out to late 2027/early 2028.
- New Operations and Maintenance Facility – This project is being funded by a \$54 Million Dollar FTA Bus and Bus Facilities Grant (5339). MATA will request a scope change to allow for a smaller facility that will service a fleet of 50 diesel/electric hybrid buses. The design of these vehicles is not ideal for our current facility due to the high-profile top load battery pack and the incline to the current facility due to the settlement of the ground. The scope will confine the project to the funds that we have available currently.

### Additional Key Actions -Capital Projects and Procurement

**Objective:** Better internal understanding of our capital improvement plans and capital projects.

- **Strategy:** Initiate quarterly grant updates during the Chief’s meetings.
- **Key Result:** No lapsing grant funds. Ability to make better decisions regarding the direction of projects. Little or no setback in times of staff transition.
- **Timeline:** Ongoing. This was implemented in 2024.

**Objective:** Enhanced inter & intra-departmental communication regarding procurement and its requirements.

- **Strategy:** MATA Contract Administrators will attend each Department’s staff meeting quarterly for relationship building, better service to output units, and to project future workload for the procurement department.
- **Key Result:** Compliance with the FTA policies.
- **Timeline:** Ongoing. This was implemented in 2024.

**Objective:** Establish a well-versed and trained procurement team.

- **Strategy:** Invest in knowledge-based training for procurement staff.
- **Key Result:** Few or no triennial findings in this area. Better utilization of agency policies.
- **Timeline:** Ongoing. This was implemented in 2024.

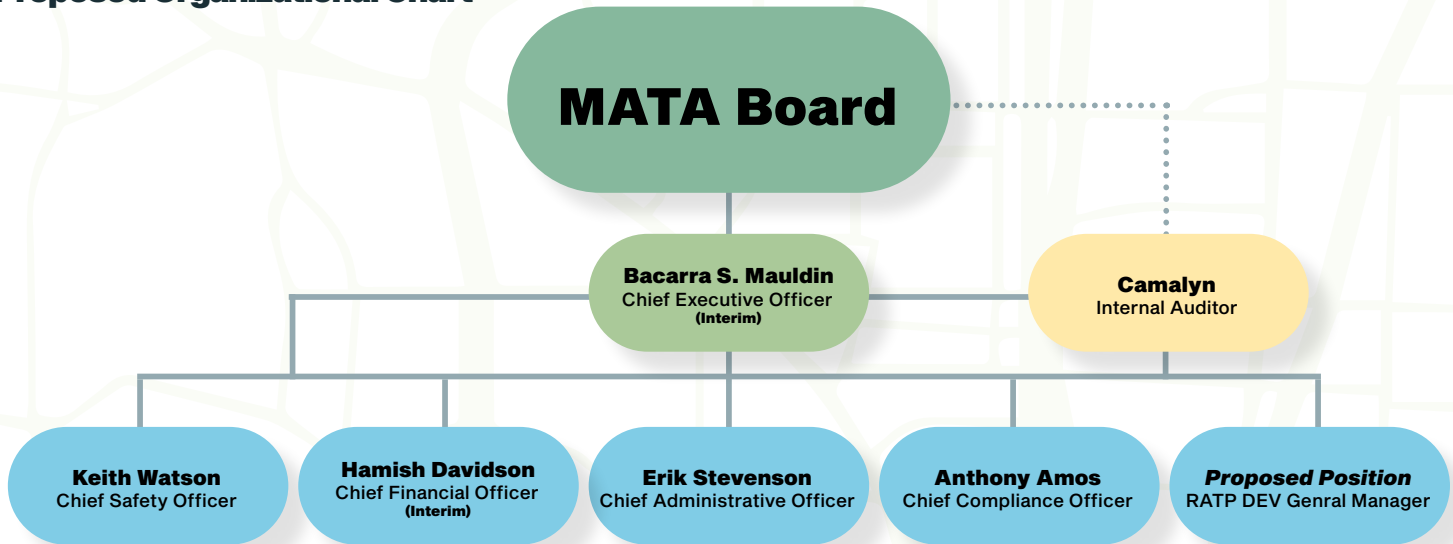
**Objective:** Develop new procurement summary and close out processes

- **Strategy:** Require specific documentation on the why, what, when, and how related to any procurement containing federal funds and/or any MATA purchase at the formal threshold level of \$2,500.00 or above.
- **Key Result:** All FTA-required documentation is captured and filed on purchases made with Federal Funds.
- **Timeline:** New policy was presented to the Board in July. It will be reintroduced in January 2025.

## Leadership Team Restructure

The impending retirement of long-term Executive Personnel and the possibility of having RATPDev lead operations presents the perfect opportunity to reduce and restructure the Executive Leadership team. Below is the proposed new structure:

### Proposed Organizational Chart



The proposed restructuring eliminates three (3) executive-level positions. This restructuring will save the agency \$500K annually. The former Chief Operating Officer position would be a high-level RATPDev official and included in their contracted amount. The trolley division would also be under RATP Dev’s management. The Chief Development Officer role will be downgraded to a director-level position. The following executive leaders would remain:

- **Chief Administrative Officer** – Oversees all administrative functions of the agency. This includes human resources, communications, IT, and customer service.
- **Chief Financial Officer** - Oversees the finance division, including payables, payroll, pension, and grants. MATA is actively recruiting a permanent replacement for the interim CFO.
- **Chief Safety Officer** – Although RATPDev is offering to supplement this function, the responsibility assigned by FTA is non-delegated; therefore, it is in the agency’s best interest that this function be managed in-house.
- **Chief Compliance Officer** – Oversees the federally regulated compliance departments such as EEO, procurement, ADA and Title VI. FTA compliance dictates that these functions must report to the CEO. In January of this year, MATA received 27. Triennial review findings. Under this current leadership team, those findings have been reduced to only one remaining finding.
- **Internal Auditor** – A best practice recommendation by the FTA in response to the triennial review of corrective actions. This function reports to both the CEO and Board Chair.

## Union Relations

Journey to a well-run transit agency is not just for agency leadership alone. A healthy relationship with its organized labor is key. There will be monthly joint leadership meetings between agency leaders and union leaders.

- **Timeline:** Implemented in 2024 and ongoing.
- There will also be a joint retreat of the agency and union leaders in the spring of 2025.

## Employee Engagement

Involving the workforce in the evolution of MATA is critical for success. The following committees and task forces have been or are being created. Employees will be selected for each group, which will include both union and administrative employees.

- Safety Committee
- Compliance Committee
- Operational Excellence Taskforce
- Customer Experience Taskforce
- **Timeline:** January 2025.

### Additional Key Actions Talent Management, Retention and Succession Planning

**Objective:** Nurturing and Developing Employees from Recruitment and Retirement

- **Strategy:** Retool and Develop the Training Department.
- **Key Result:** Operators and Mechanics will be better prepared to do their jobs.
- **Timeline:** One year
- **Strategy:** Create a continuous rotation of training on various job-related functions.
- **Key Results:** Operators and Mechanics will be better prepared to do their jobs.
- **Timeline:** Six Months
- **Strategies:** Provide career path counseling and regular job evaluations.
- **Key Results:** Employees will be encouraged to view their work as building a career instead of working a job.
- **Timeline:** Within the next 90 days.
- **Strategies:** Establish middle management meetings.
- **Key Results:** Developing middle management is key to growing and solidifying that bench and being prepared to assume higher levels of leadership and career ladders. Processes and information flow through the agency better. Managers are better equipped to in turn, develop their subordinates.
- **Timeline:** Currently ongoing. This was implemented in 2024.

## Other Key Target Areas

In order to increase capacity and elevate our riders' experience, the following additional key actions are in place/planned:

### Technology

Currently MATA is overrun with technology solutions that do not adequately meet the needs of the agency nor enhance the customer experience.

- **Strategy:** Perform a technology audit and assessment to find workflow and service efficiencies.
- **Key Results:** Duplication will be eliminated and cost savings realized.
- **Timeline:** The audit will take approximately 6 months to one year.

### Empowering Better Board Governance

The newly appointed MATA Board is engaged and thirsty for as much information as possible to make the decisions that are in the Riders' best interest.

**Objective:** Create increase Board understanding of procurement dos and don'ts

- **Strategy:** Board training on procurement – generally and MATA-specific.
- **Key Results:** No missteps regarding procurements that could ultimately cost the agency money or be rendered non-compliant by FTA or worse.
- **Timeline:** Next Board retreat

**Objective:** Increase the Board understanding of who the agency is doing business with.

- **Strategies:**
  - Initiate a Board Procurement Report-Out outlining the following listings:
    - All procurements over \$25,000 made during the preceding month, which did not require Board approval.
    - All emergency procurements should have an explanation of why it was an emergency.
    - All Amendments and Change Orders exceeding \$25,000.
    - All Sole Source Procurements with the basis and rationale.
- **Key Results:** Board understanding of who the agency is doing business with.
- **Timeline:** Immediately.

**Objective:** Establish better understanding by the Board and Stakeholders of our capital improvement plans.

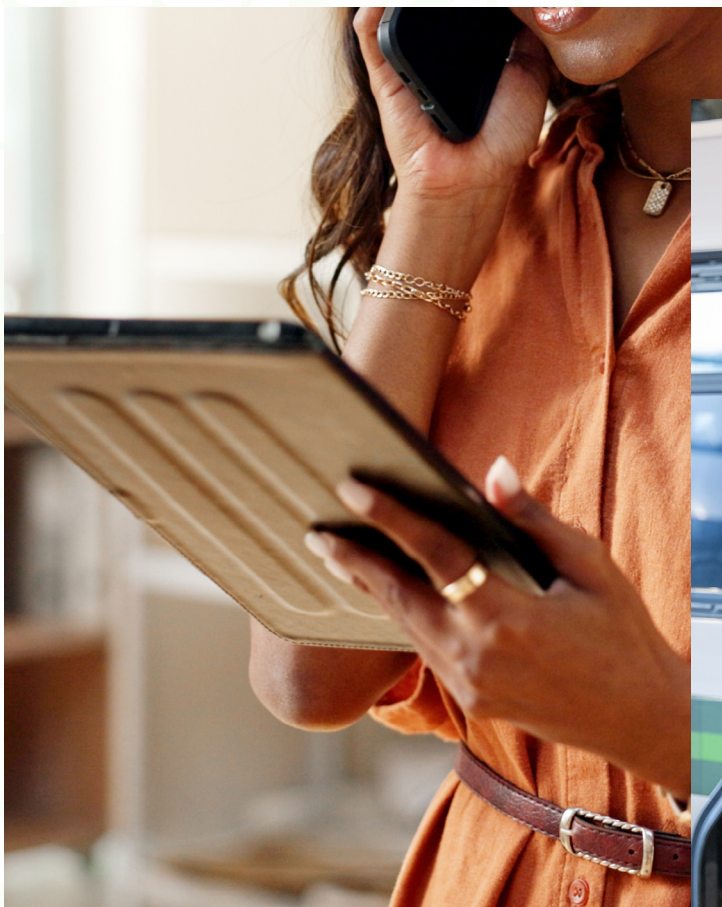
- **Strategy:** Develop a 3-to-5-year Capital Projects Plan and Budget. This is a document that takes what we currently do a few steps further.
- **Key Results:** More investment based on a clearer direction. Ability to make better decisions regarding the direction of projects. Little or no setback in times of staff transition.
- **Timeline:** Ongoing. This was implemented in 2024.



# Communicate Clearly and Consistently

Our communication will be consistent, transparent, and timely. We will elevate our communication strategies and channels and incorporate the use of community messengers and influencers to assist us in reaching all audiences. Our goal is to increase internal morale and instill external trust in our services.

We will engage our community by building bridges with new partners and mending fences that reestablish rapport with our long-standing partners. This work includes internal engagement to show our commitment to our MATA family. See the full communication plan in the Appendix KQ Communications and the MATA Communication & Engagement team created.





# The Definition of Success Key Performance Indicators Year 1

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# MATA will Stabilize its Finances in One Budget Year

To stabilize its finances, MATA will monitor the following KPIs that provide actionable insights into revenue generation, cost management, and operational efficiency.

## Key Performance Indicators (KPIs):

### Operating Cost per Revenue Mile

**Goal:** Year-over-year reduction or alignment with benchmarks for similarly situated transit agencies (benchmark must be established).

- **Description:** Measures the cost incurred for each mile of revenue service provided. This helps to assess operational efficiency.
- **Cadence:** Monthly
- **Strategy:** Quantify expenditures to draft monthly reports and determine necessary action for positive adjustments.
- **Owner(s):** Chief Financial Officer (CFO) and Chief Operating Officer (C)

### Monthly Statement of Net Position

**Goal:** End the fiscal year with a positive net position and reduce overdue accounts payable by 20% by the end of the fiscal year.

- **Description:** A financial report that shows an organization's current financial health by detailing the difference between its total assets and liabilities at a specific point in time.
- **Cadence:** Monthly
- **Strategy:** Analyze and report monthly to ensure consistent improvement in financial health metrics and actively renegotiating payments terms with past due vendors.
- **Owner(s):** CFO and COO/RATP Dev General Manger (RDGM)

### Rolling Five-Week Cash Flow Forecast

**Goal:** Improved cashflow management resulting in a 5% increase by the end of the fiscal year.

- **Description:** Measures the ratio of available cash or liquid assets to short-term liabilities. Ensures sufficient liquidity to meet financial obligations.
- **Cadence:** Weekly
- **Strategy:** Maintain a forecast to manage liquidity and address short-term financial requirements proactively.
- **Owner(s):** CFO and Finance Manager

### Grant Utilization Rate

**Goal:** 95-100% utilization of available grant funds.

- **Description:** Percentage of available grant funding utilized within the specified timeline. Ensures that MATA is fully leveraging federal, state, and local funding opportunities.
- **Cadence:** Quarterly
- **Strategy:** Quarterly Impact Report: Continuous review and adjustments to timely meet progress indicators for each grant as articulated by the assigned project manager.
- **Owner(s):** CAO, CFO, Director of Grants

### Overtime Hours as a Percentage of Total Hours Worked

**Goal:** Reduce overtime hours to less than 10% of total hours worked annually.

- **Description:** Tracks the proportion of the total employee hours that are overtime. High percentages may indicate inefficiencies in staffing or scheduling.
- **Cadence:** Monthly
- **Strategy:** Review scheduling, absenteeism, and staffing data in correlation to actual overtime hours worked to identify inefficiencies and implement solutions.
- **Owner(s):** CAO, COO/RDGM, Director of Human Resources

### Public Engagement ROI (Revenue from Partnerships/Advocacy Efforts)

**Goal:** Achieve a 10% annual increase in revenue from external partnerships.

- **Description:** Measure revenue generated from public-private partnerships, sponsorships, and advocacy initiatives relative to costs.
- **Cadence:** Quarterly
- **Strategy:** Create an annual advocacy and legislative agenda to implement an aggressive public-private partnership campaign with quarterly review of goals to achieve progress.
- **Owner(s):** CAO, Director of Planning, Dean & Associates

# MATA will Operate Safely, Dependably, and Efficiently

Service will be designed to meet rider needs through consistent monitoring of the following KPIs and actionable strategies.

## Key Performance Indicators (KPIs):

### Ridership Trends

**Goal:** Achieve a 3% annual increase in ridership, adjusted for post-service change recovery.

- **Description:** Tracks monthly ridership compared to previous periods based upon percentage of total possible riders to actual. Indicates effectiveness of service offerings and marketing efforts.
- **Cadence:** Monthly
- **Strategy:** Analyze trends in overall ridership by route and mode. Disaggregate data by marketing strategy and customer feedback.
- **Owner(s):** Director of Planning and Director of Communications

### Safety Priority Impact

**Goal:** Year-over-year reduction in safety-related financial losses

- **Description:** Tracks costs associated with safety incidents, including worker’s compensation, legal liabilities, and insurance claims.
- **Cadence:** Quarterly
- **Owner(s):** Chief Safety Officer (CSO), Chief Administrative Officer (CAO), CFO, General Counsel
- **Strategy:** Analyze impacts of unpreventable accidents, preventable accidents, and safety trends identified in claims reports and safety audits to improve service and reduce liability.

### Mean Distance Between Failures (MDBF)

**Goal:** Year-over-year increase in MDBF, with a goal of meeting or exceeding industry benchmarks.

- **Description:** Measures the average distance traveled by vehicles between mechanical failures that result in service interruptions. This is a critical indicator of fleet reliability and maintenance effectiveness.
- **Cadence:** Monthly
- **Owner(s):** COO/RDGM and Maintenance Supervisors
- **Strategy:** Analyze MDBF to quickly deploy maintenance and implement preventive measures to improve service delivery.

### On-Time Preventive Maintenance Compliance

**Goal:** Achieve 100% compliance with preventive maintenance schedules.

- **Description:** Tracks the percentage of preventive maintenance (PM) activities completed on time as per the maintenance schedule. Directly correlates with reliability and MDBF.
- **Cadence:** Monthly
- **Owner(s):** COO/RDGM and Maintenance Supervisors

### Fleet Modernization Progress

**Goal:** Meet fleet replacement schedules with a focus on achieving a 10% annual reduction in vehicle failures

- **Description:** Monitors the percentage of fleet upgraded or replaced with newer, more reliable models as part of the capital improvement plan.
- **Cadence:** Quarterly
- **Owner(s):** CEO, COO/RDGM, Director of Planning
- **Strategy:** Review replacement schedules to optimize resources and make efficient allocations that reduce vehicle failures.

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# MATA will Re-Envision How We Do Business

Responding to customer feedback and employee perception and productivity is critical to forming actionable for organizational success. MATA can foster stronger relationships with employees, riders, and the broader Memphis community while demonstrating accountability and commitment to its mission.

## Key Performance Indicators (KPIs):

### Customer Complaints per 10,000 Passenger Trips

**Goal:** Reduce complaints by 5-10% annually through improved reliability and communication.

- **Description:** Measure the number of customer complaints related to service disruptions, vehicle breakdowns, ADA accommodations, or other reliability issues. This KPI reflects public perception of service quality
- **Cadence:** Monthly
- **Owner(s):** CCO/RDGM, Director of Customer Service
- **Strategy:** Analyze data and track average resolution time to reduce percentage year-over-year.

### Employee Engagement Survey Score

**Goal:** Achieve a 5% - 10% improvement in engagement scores year-over-year.

- **Description:** Measure overall employee engagement through periodic surveys assessing job satisfaction, motivation, and alignment with organizational goals.
- **Cadence:** Semi-Annual
- **Owner(s):** HR Director, Internal Communications Director, CAO
- **Strategy:** Utilize surveys to determine employee needs and identify opportunities to enhance workplace culture and increase employee productivity.

### Employee Engagement in Maintenance and Compliance Training Programs

**Goal:** 90% participation in scheduled training sessions.

- **Description:** Tracks participation and comprehension rates in maintenance and compliance training programs and workshops aimed at improving technical skills and efficiency.
- **Cadence:** Quarterly
- **Owner(s):** CAO, Chief Compliance Officer (CCO), Director of Human Resources
- **Strategy:** Provide a comprehensive training program to ensure the technical capacity of employees and improve staff depth of knowledge in industry-related regulations and requirements.

### Standardized Employee Evaluations

**Goal:** To develop a standardized employee evaluation process to support consistent, fair, and transparent performance assessments across the organization.

- **Description:** Charge a cross-functional team to develop and/or procure a reliable evaluation program to include the following:
  - Evaluation Completion Rate Monitoring
  - Measurement in Evaluation Consistency Scoring Across Departments
  - Manager Training
  - Measurement in Feedback Delivery
- **Cadence:** Semi-Annual
- **Owner(s):** CAO, HR Director, Department Managers
- **Strategy:** Design or procure a comprehensive employee evaluation program to inform department strategy and support employee needs.



# MATA will Communicate Clearly and consistently

For MATA, clear, timely, and consistent communication with stakeholders is essential to building trust, enhancing transparency, and driving customer satisfaction. Monitoring (KPIs) in communications allows MATA to assess its outreach efforts' effectiveness, identify improvement areas, and ensure that messaging aligns with organizational goals and community expectations.

## Key Performance Indicators (KPIs):

### Stakeholder Communication Effectiveness

**Goal:** Increase stakeholder satisfaction scores in surveys and engagement metrics.

- **Description:** Assess the frequency and quality of communication with internal and external stakeholders about service reliability, maintenance improvements, and strategic initiatives.
- **Cadence:** Quarterly
- **Owner(s):** CEO, CAO, KQ Communications, Director of Communications
- **Strategy:** Implement engagement activities and surveys to obtain actionable customer service, employee engagement, stakeholder perception, and rider satisfaction data.

### Other Goals and Metrics taken from the MATA Communications Plan

#### Social Media Usage

**Goal:** Increase social media followers across all platforms by 10% by July 1, 2025.

- **Strategy:** We will analyze monthly social media usage on all platforms to ensure customer and community outreach.
- **Cadence:** Monthly
- **Owner(s):** KQ Communications

#### Media Tonicity

**Goal:** Improve media tonality to 75 positive/neutral by July 1, 2025

- **Strategy:** We will work to ensure fair and balanced coverage through transparent and proactive media outreach.
- **Cadence:** Monthly
- **Owner(s):** KQ Communications

#### MATAtacker Usage

**Goal:** A 5% increase in MATAtacker use by July 1, 2025.

- **Strategy:** Maintain a monthly report of site usage.
- **Cadence:** Monthly
- **Owner(s):** CAO, Director of Communications, Director of IT

#### Campaign Awareness

**Goal:** That 50% of riders are aware of "The Riders Way" campaign by July 1, 2025

- **Strategy:** Customer and stakeholder surveys.
- **Cadence:** Quarterly
- **Owner(s):** KQ Communications & Director of Communications

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# Conclusion

A winning agency strategy includes a committed and engaged Board front and center, with the CEO pushing a collaborative vision. Similar to the biblical reference, without that vision, MATA, too, will perish. Therefore, it will be paramount for the board to select a visionary CEO. We are committed to this process to ensure the development and execution of an effective plan.

My commitment to the Board as a strategic governance partner is unwavering, with shared accountability and success at the core of our collaboration. Together, we will position MATA as a model agency and a trusted mobility partner characterized by open and transparent leadership, a customer-centric focus, enhanced regional connectivity, and a world-class rider experience. Let's embark on this journey to transform transit in the Mid-South.

This moment will require MATA leadership to "Do what is right, not what is easy." A plaque with this saying is currently in my office and reminds me of the difficult choices that are simply part of the job. We cannot do this alone, and it will not be easy. We need new collaborations with diverse sectors, organizations, and communities across the region focused on access to health and well-being, connections to jobs and economic prosperity, and equity for everyone. This shared vision includes the promotion of transit-oriented development, which can be the fuel that drives the increase of the Memphis tax base and sets us up to be viewed as a larger, thriving urban corridor.

With your support, I can serve the Greater Memphis region with the level of distinction that they need and deserve. I stand ready to take my interim leadership to the next level. I have 360-degree experience: leading in municipal administration, serving as a transit Board member, working at a transit agency, leading three different agencies, and, of course, working at MATA for the last three years. Lastly, my national portfolio and network are substantial and far-reaching, which is what is needed to bring in proven strategies and resources that are critical for this agency's success.

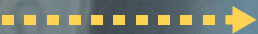
While the past few months haven't been easy, I've more than proven that I am the most qualified candidate ready to lead the agency at this unprecedented time and redirect it to "The Riders' Way." **Please see letters of support from national transit agency leaders, as well as local community and business leaders and my resume in the Appendix.**



DRAFT

# GO901

by  MATA  
MEMPHIS AREA TRANSIT AUTHORITY







**MEMPHIS AREA TRANSIT AUTHORITY**

**Committee of the Whole**

40 South Main Street,  
Memphis, TN 38103  
Bacarra Mauldin, Interim  
CEO  
[www.matatransit.com](http://www.matatransit.com)

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**RESOLUTION NO. Appendix 1 12-13-24**

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# Appendix One



the  
**rider's way**



Ms. Bacarra S. Mauldin  
Interim Chief Executive Officer  
Memphis Area Transit Authority  
40 S. Main St. Suite 1200  
Memphis, TN 38103

November 26, 2024

Dear Ms. Mauldin,

In February 2024, at your request, RATP Dev conducted an on-site assessment of Memphis Area Transit Authority (MATA) operations. A copy of the system assessment is attached.

As noted in my March 26, 2024, letter, The assessment provides observations and recommendations in the following areas:

- **Operations**

The lack of buses to meet daily service requirements has eroded public confidence in the transit service. Short term strategies to place additional buses into service through a planned service growth can help rebuild confidence.

- **Maintenance**

The poor condition of the MATA fleet is the single most serious problem. MATA acquired 29 buses from Tucson as a short-term measure to augment the MATA fleet. To build a sustainable system in the long term and major fleet replacement program will be necessary. In the interim, a focus on maintenance department performance coupled with a program to refurbish existing MATA buses will be key activity requiring a commitment of resources.

- **Safety and Training**

Safety culture is not evident throughout the organization and training activities are not coordinated. The recent addition of the Chief Safety and Security Officer presents an opportunity to build a coordinated safety and training program.

As a committed partner of MATA, RATP Dev has consistently worked with you and the MATA team to ensure that we have adequate resources and expertise to support the agency's goal and vision. Some of the efforts include:

- Provided executive leadership with Brendan Mathews

- Coordinated efforts to transfer 29 buses from Tucson, one of RATP Dev's existing customers, to MATA
- Provided professional / technical support in grants administration
- Recommended a new contract structure to upgrade the level of expertise of the professional staff provided by RATP Dev.

With the appointment of the new board, you have asked RATP Dev to consider an expanded role in the future operation and development of MATA. In April 2024 we had discussions with our about restructuring the contract to include a COO as the RATP Dev professional staff. The current contract structure could not accommodate the higher compensation.

Understanding your interest in expanding the RATP Dev role in management and oversight of MATA, RATP Dev will develop recommendations for your consideration. The recommendations will include:

- New staffing both in terms of level and areas of functionality.
- Review and update the system assessment to reflect progress as needed.
- Contract language to facilitate effective oversight and management of daily operations.
- Appropriate contract cost adjustments to ensure qualified personnel.

I anticipate RATP Dev can have recommendations for your consideration in early January 2025.

I am pleased to have the opportunity to work with you to develop and evaluate options to move forward.

Respectfully,

Steve Spade  
Director of Operations  
Mgmt. Contracts/Streetcar  
**RATP Dev USA**



## **MATA System Assessment**

**March 2024**

MATA has experienced serious service delivery challenges. While MATA is aware of many of the issues driving the current service deficiencies the RATP Dev team was tasked to provide an independent assessment of issues and to suggest short, medium, and long-term opportunities to improve system performance and reliability. Short-term objectives were identified as actions that could provide immediate results within 30 days, medium term could provide operational improvements within 30 to 90 days and long-term programs for sustained improvement.

### **Departmental Observations:**

#### **Safety Culture**

- There does not appear to be a strong safety culture in operations or maintenance.
- The safety and training departments are independent with little communication or collaboration.
- The recent hiring of a new Chief Safety and Security Officer provides MATA the opportunity to combine the Safety and Training departments under one executive and build continuity and community between the intertwined disciplines.

#### **Safety**

- The Safety Team does not appear to be proactive or reactive to their risk or recent incidents: For example, recently a battery fell from a fabricated pushcart and injured an employee's foot. No action was taken to mitigate further circumstances, and the in-house fabricated cart remains in service.
- The Safety Team mentioned that the air circulation systems have not been operational for quite some time, however, the painting area remains operational. The team was unsure of any previous air quality testing or if the ventilation system was active and it did not appear that any respirators were being worn or located in the vicinity. This is a significant Industrial Hygiene (IH) concern for employees working in this area.

- General Housekeeping of both the body shop and the vehicle maintenance area were average.
- The understaffing of the safety team paired with the operator training being conducted by inexperienced individuals reflected in the responses we received when talking to operators.

## **Training**

- Training Department Representatives (Thomas and Fred) communicated that the training department began 3 years ago, referring to this department as "new" despite the fact it's existed for 3 years with minimal progressive improvements. The training and safety departments are separate and there appears to be limited communication.
- The training team is partnered with an outside contracted educator with no specific transit industry experience.
- Integrating the safety and training department could make a potential improvement in terms of accident mitigation and improvement. Integration would also benefit the creation of a more effective curriculum for new operators and retraining existing operators.
- Operator training consists of two weeks of training, details limited as to what that training includes, followed by 4 weeks of being "mentored". Interviews with operators suggested that trainers are inexperienced, some only recently possessing a license to operate a bus.
- The training department does not have an internal feedback system for trainers to determine if trainers are effectively training new operators.
- The training department does not track the trainer's performance. Trainers are resistant to discussing changes in the training program.
- Operators interviewed made mention of many new operators leaving shortly after training because the training did not prepare them for what they would experience as an operator.

## **Operations**

- The lack of buses for daily service has a direct impact on the ability to meet daily service requirements and has caused public concern about service reliability. is the primary and immediate concern. As a result of this equipment deficiency:
- MATA has only 54 buses available to meet a 76-bus pullout.
- With no spares, buses must remain in service all day, leaving limited time to perform PM inspections and basic repairs.
- Bus scheduling and frequency has been reduced to provide limited service on each route based on vehicle availability.

- The lack of vehicles causes Operators to wait out the time on their shift because they had no vehicle to drive.
- There is a high volume of public complaints about reliability. This has partially been mitigated by the recent schedule revisions.
- The system is using Navineo CAD/AVL from EQUANS (sold by ENGIE to Bouygues group in Oct 2022), but training and support has been inadequate. Staff are learning the system on their own.
- S OmniAlert- is used for notifications to operations staff and customers about route/schedule changes and detours. The system has been well received.
- Trackit Transit software is used for accident reporting, which is compliant with SMS and PTASP requirements.  
Operations staff appear to be inexperienced and have had minimal industry specific training. This leads to weak leadership and team ineffectiveness.

## **Maintenance**

MATA has a fleet of 105 fixed route buses and 76 paratransit vehicles. Maintenance only has 54 buses available to make a 74-bus pullout. In addition to the large number of down vehicles the maintenance department is challenged by the lack of a clear plan to meet operational goals in the short term and prioritization of workloads with available manpower (open positions and absenteeism). Although MATA has recently updated the Bus Fleet Management Plan, that plan does address the short-term needs of the maintenance department to meet service obligations. Below are recommendations for immediate actions focused on fleet maintenance and the maintenance department to quickly bring some stability to fleet availability.

### **Recommended Immediate Maintenance Actions:**

- Continue to pursue buses from Tucson and develop a servicing plan.
  - Identify IT hardware needed for equipping fleet and begin procuring.
  - Identify workforce to provide necessary maintenance.
  - Identify timeline to in service and train on the equipment to minimize time from arrival to in-service.
- Schedule adjustments: Move staff to appropriate shifts to meet short-term needs. Adjusting schedules need to be coordinated with CBA language and clearly explained to employees who may resist change to get their buy in.
- Maximize external resources in the short-term including local repair facilities and traveling fleet mechanic services until the shop is fully staffed and trained.
- Management Schedules: Having the maintenance management staff be more involved in the night shift. Having key management staff present on all shifts at least

a couple of days a week will ensure that scheduled work is completed and improve coordination.

- Roll out: Management observations of roll out are also important to identify causes of shortages and identify and correct issues such as rejection of buses by operators and other unidentified causes.
- DVI Process review: The DVI process should be a key element to the mx process to identify defects and improve the relationship between the shop and operations.
- Operators spend at least one day in the shop during initial/refresher training to observe a PMI from start to finish, and/or what happens when they report a defect on the DVIR. Good opportunity for the technician to emphasize why it's important to complete the DVIR properly (e.g. neat, legible, accurate, no scribbling or ranting, describe the problem rather than trying to diagnose it).
- Road Calls: A review of road call causes and procedures can produce some basic changes in maintenance operations.
- Parts and Purchasing: Evaluate the parts and supplies processes within the organization to ensure that parts are available, and that the lack parts is not a primary reason for bus operational shortages.
- Parts room staffing should be available on all mechanic shifts, ensuring that parts availability does not impact repair activities.
- Regen Diesel Buses: Maintenance staff indicated that one major issue in the operation is the older diesel engines are oil burners and are prematurely clogging up DPF's as well as the extended idle operations that diesel bus fleets experience. Forcing buses into static degeneration (using Insite software) on a scheduled basis is a part of the solution to the derating problems.
- Operational/Maintenance meetings: Schedule regular weekly meetings to discuss operational issues. Communications will improve the working relationship between the departments to collectively identify and solve these issues. Communications could also focus on the customer impact to emphasize the importance of customer service.
- Down List Evaluations: Analyze the scheduling work within maintenance related to priorities to meet pull out and operational needs, parts availability, ease of repairs, labor availability etc., all need to be evaluated and amended, if applicable.
- PMI Audit: Improve review of work performed on PMI inspection and monitor rework and road calls of buses. The effectiveness of the process should be measured by the need to shop equipment prior to the next scheduled service interval.





## MATA Maintenance Short-Term Summary of Activities

### Timeline and Estimated Resources

The acquisition of buses from Tucson and operational changes in maintenance are only short-term fixes.

MATA's has an adopted fleet replacement schedule defined in the current "Bus Fleet Management Plan". This plan, when executed, will build a dependable fleet but will require long lead times for bus procurement and delivery.

RAPT Dev's maintenance consultant has reviewed the current maintenance operations and recommends the following medium and long-term maintenance actions should be considered. The chart below outlines key activities, timelines, and associated costs. Many of the immediate actions are not the largest drivers of additional cost., Bringing the existing fleet to a state of good repair and activation of buses from Tucson will be key activities to support operation of a reliable service until fleet replacements start to arrive. RATP Dev can work with MATA to refine scope of work and provide project management of these programs.

Task	Deliverable	Timeline	Price
1	<b>100% Fleet Inspection and Records Audit</b> <ul style="list-style-type: none"> <li>Full vehicle inspection for entire fleet</li> <li>Records audit to verify recent PMI work.</li> <li>Fix all Out of Service items (where parts are available)</li> </ul> Expected to take 10-15 days	30-45 days from notice to proceed	\$153,600
2	<b>100% sample of all fluids</b> <ul style="list-style-type: none"> <li>Includes engine, fuel, differential, transmission oils.</li> <li>Using MATA's current vendor</li> </ul> Analyze findings and build into the plan for repair/replacement	30-45 days from notice to proceed	\$36,000
3	<b>Dedicated Mx Project Management – Year 1</b> <ul style="list-style-type: none"> <li>Creation of the repair plan, based on the findings from fleet inspection and fluid sampling.</li> <li>Management of the repair plan, including establishing the repair team, ensuring availability of space, parts and equipment for the work, and management of the work</li> </ul>	Immediately from notice to proceed and for duration of one year.	\$244,800* (\$61,200 / month for months 1-4)

	<ul style="list-style-type: none"> <li>Improvements to the procurement process</li> <li>Hiring and training of technicians</li> <li>Continued fluid management program.</li> </ul>		
<b>4a</b>	<b>Upgrades to existing FR fleet, Year 1 - parts</b> <ul style="list-style-type: none"> <li>Major component upgrades to approximately 40 FR buses</li> <li>Engines, transmissions, miscellaneous other parts</li> </ul>	Duration of one year, commencing 30 days from approval of repair plan	Depends on results of fleet inspection but given the size and condition of fleet.
<b>4b</b>	<b>Upgrades to existing FR fleet, Year 1 – labor</b> <ul style="list-style-type: none"> <li>Labor to perform major upgrades to approx. 40 vehicles over one year.</li> </ul>	Duration of one year, commencing 30 days from approval of repair plan	

<b>5</b>	<b>FMC Project Management – Month 5+</b> <ul style="list-style-type: none"> <li>Continued management of major repairs, moving to a more predictive basis</li> <li>Implement a range of measures to increase productivity and efficiency in the shop.</li> <li>PMI quality control program</li> <li>Expand the use of CMMS input to increase uptime.</li> <li>Introduce monthly reporting / auditing standards.</li> <li>Manage retirement of aged vehicles as new vehicles enter service.</li> <li>Final review of all control measures</li> </ul> <p>FMC management time will move to more predictive repairs and establishing quality controls in Year 2</p>	Duration of Year 2, or as agreed.	\$27,600* per month.
<b>6a</b>	<b>Upgrades to existing FR fleet, Year 2 - parts</b> <ul style="list-style-type: none"> <li>Major component upgrades to approximately 24 FR buses</li> <li>Engines, transmissions, miscellaneous other parts</li> </ul>	Year 2, first six months	Expecting additional mid-life overhaul work, cost depending on maintenance needs.
<b>6b</b>	<b>Upgrades to existing FR fleet, Year 2 – labor</b> <ul style="list-style-type: none"> <li>Labor to perform major upgrades to approx. 24 vehicles over one year.</li> </ul>	Year 2, first six months	
<b>7</b>	<b>Long term Maintenance and Overhaul Plan</b> <ul style="list-style-type: none"> <li>Provide a full plan for the maintenance operation going forward</li> </ul>	Year 2	\$60,000



# INTERNAL AUDITOR

## 90-DAY SUCCESS PLAN



Submitted by: Camalyn S. Turner, Esq.  
901-722-7156  
cturner@matatransit.com

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## ABOUT THE ROLE

The Internal Auditor will engage in collaborative efforts to assess and evaluate organizational activities, ensuring the reliability and integrity of information, adherence to policies, plans, procedures, laws, and regulations. This role is crucial for safeguarding assets, optimizing resource utilization, achieving established goals and management objectives, and ensuring the adequacy of internal controls. The auditor is responsible for conducting management reviews and facilitating corrective actions aimed at enhancing the productivity of the Authority, while also assisting managers in maintaining ongoing compliance.

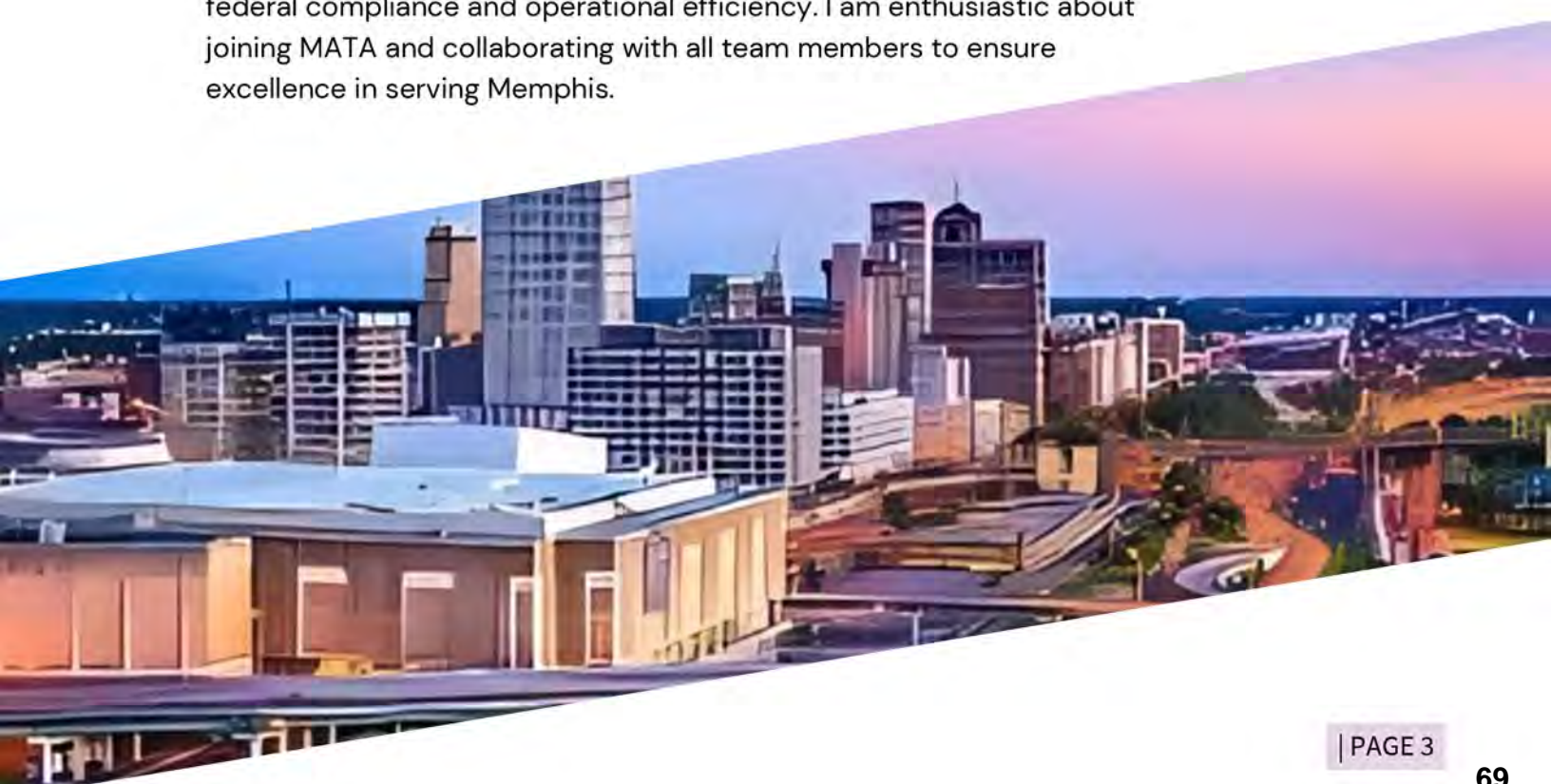
## ABOUT THE AUDITOR

I take pleasure in discovering solutions and fostering growth by structuring various levels of organization, creating well-defined systems, and establishing cohesive frameworks that empower teams, eliminate obstacles, and promote continuous leadership development. As an attorney, I worked alongside state and local government entities to advance programs, implement initiatives, and form impactful coalitions for optimal success.

As an executive leader, I championed strategies to achieve mission-critical outcomes, resulting in significant improvements in state and federal compliance and operational efficiency. I am enthusiastic about joining MATA and collaborating with all team members to ensure excellence in serving Memphis.



Camalyn S. Turner, Esq.  
Internal Auditor



# SCOPE



Orientation  
&  
Assessment



Initial Risk  
Assessment  
&  
Strategic Audit  
Planning



Initial Audits  
&  
Corrective Action  
Plans

## Guardrails

This plan will be reviewed and adjusted regularly, allowing the internal auditor to expand her focus as initial deficiencies are addressed and to maintain alignment with MATA's long-term strategic goals.

# MILESTONES

### Establish Partnership & Assess Needs

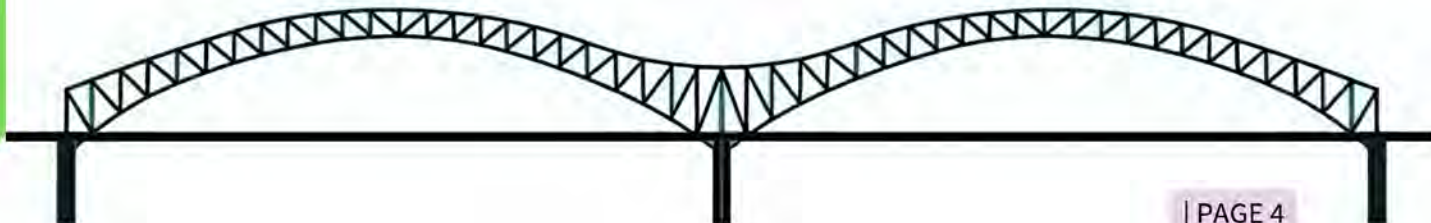
Solidifying the auditor as a trusted partner empowers staff to collaborate openly, fostering a culture of shared success. Conducting a needs assessment will ensure diverse perspectives are included and leveraged.

### Activate Compliance Committee

Activating a cross-functional team enhances ability to establish effective internal controls, strengthen compliance practice, and build a culture of shared accountability.

### Launch Corrective Action Plans

Implementing cohesive corrective actions is a key component for resolving issues effectively, preventing future problems, and enhancing organizational performance.



# OBJECTIVE

To establish a foundation of trust, transparency, and accountability for MATA by effectively addressing identified deficiencies, meeting regulatory compliance standards, and aligning internal audit functions with public transit best practices.

## GOALS



**Define Clear Risk Mitigation Strategies:** A detailed explanation of MATA’s highest risk areas with an actionable risk mitigation plan.



**Establish Internal Audit Procedures:** Initial audits completed in high-risk areas with corrective actions in progress or completed.



**Increase Regulatory Compliance Progress:** Measurable steps toward compliance with FTA , TDOT, and MATA policies.



**Improve Financial Controls:** Identified cost-saving opportunities and implemented initial improvements for financial efficiency.



**Rebuild Stakeholder Trust:** Enhanced internal and external communication, including clear, transparent reporting of MATA’s efforts to address service quality and financial accountability.



## PHASE 1: ORIENTATION AND ASSESSMENT (DAYS 1-30)

### 1. Onboarding and Knowledge Development

**Meet with Key Stakeholders:** Engage in introductory meetings with key personnel, including MATA leadership, department heads, board members, and external auditors, to gain insights into expectations, recent challenges, and ongoing initiatives.

**Understand Industry Standards:** Complete training on public transit operations, focusing on Federal Transit Administration (FTA) and Tennessee Department of Transportation (TDOT) requirements, including specific regulations and compliance areas relevant to MATA's operations.

**Review Recent Audit and Status Report Findings:** Thoroughly analyze recent reports, including all documented deficiencies, corrective actions, and timelines for compliance.

**Understand Budget and Financial Challenges:** Gain familiarity with MATA's financial standing, implications of recent service modifications, and potential cost-control and revenue-generation strategies.

### 2. Internal Document Review and Process Familiarization

**Evaluate Current Policies and Procedures:** Review existing internal governance and audit processes, documentation standards, risk management policies, and compliance reporting methods.

**Study Recent Audits and Financial Reports:** Familiarize with previous internal and external audit reports, focusing on findings, recommendations, and areas of improvement.

**Map Out Key Federal and State Requirements:** Identify and catalog FTA and TDOT requirements to prioritize high-risk compliance areas for immediate action.

### 3. Review Public Transit Best Practices

Participate in industry webinars, courses, or conferences to understand national standards for public transit internal auditing, especially those recommended by the Institute of Internal Auditors (IIA) and the American Public Transportation Association (APTA).





## PHASE 2: INITIAL RISK ASSESSMENT AND STRATEGIC AUDIT PLAN (DAYS 31-60)

### 1. Conduct an Initial Risk Assessment

**Identify High-Risk Areas:** Based on the FTA audit findings, status reports, recent budget constraints, and public trust issues, identify and prioritize high-risk areas for MATA, including financial controls, safety protocols, regulatory compliance, and operational efficiency.

**Engage with Department Heads:** Collaborate with department leaders to understand department-specific challenges, priorities, and any perceived areas of vulnerability.

**Develop Risk Mitigation Strategy:** Draft a preliminary risk mitigation plan targeting critical compliance, financial, and operational deficiencies highlighted in prior audits.

### 2. Define Initial Audit Priorities

**Focus on FTA and TDOT Compliance:** Based on the risk assessment, create a compliance audit schedule that addresses urgent areas required by FTA and TDOT regulations.

**Budget and Expenditure Controls:** Begin audits on areas linked to budget shortfall, focusing on cost-control measures, procurement processes, and potential financial inefficiencies.

**Internal Controls over Public Funds:** Audit processes related to handling public funds, grant management, and financial transparency to help restore public trust.

### 3. Develop Audit Procedures and Tools

**Establish Reporting and Tracking Tools:** Implement tools to track corrective actions, audit recommendations, and ongoing compliance status for all departments.

**Design Communication Channels:** Create a streamlined process for regularly updating MATA leadership, the Board, and relevant stakeholders on internal controls, audit progress, major findings, and corrective action updates.

**Build Templates for Compliance Reporting:** Develop templates for standardized reports that can be used to communicate audit findings effectively to the Board, FTA, and the public.



## PHASE 3: INITIAL AUDITS AND CORRECTIVE ACTIONS (DAYS 61-90)

### 1. Execute Targeted Audits

**High-Priority Deficiency Audit:** Conduct audits in areas where FTA deficiencies were reported and strategic advisory reports indicated need for immediate action for compliance improvements and mitigating ongoing gaps.

**Financial and Operational Audits:** Perform detailed audits on MATA's most impacted departments and services, particularly those affected by recent cuts, to identify cost-saving measures without compromising service quality.

**Public Trust and Transparency Audits:** Begin evaluating MATA's communication and public engagement efforts to identify ways to improve transparency and trust with Memphis residents.

### 2. Develop Corrective Action Plans

**Work with Departments on Deficiency Remediation:** Collaborate with MATA departments to implement corrective actions for audit findings and ensure steps are in place to prevent recurrence.

**Institute Regular Compliance Checks:** Implement a system of continuous, smaller-scale compliance checks for ongoing compliance, ensuring rapid identification of issues.

### 3. Engage with the Public

**Public Reporting and Transparency Initiative:** Develop a plan for quarterly public audit updates, outlining recent audit findings, actions taken, and improvements made to address public trust issues.

**Public Feedback Collection Mechanism:** Establish a mechanism for public feedback regarding audit reports and corrective actions to maintain transparency and demonstrate MATA's commitment to improvement.



# INITIAL OBSERVATIONS & RECOMMENDATIONS

The following recommendations are based on preliminary research and observations and may require revision upon further investigation. Observations with an asteriks have also been identified for review by associated departments.

Observation	Recommendation	Rationale
Internal Auditor is direct report to Chief Compliance Officer who manages departments subject of audit.	Dual structure to report administratively to the CEO and functionally (dotted line) to the CEO and the Internal Audit Committee.	Dual reporting is a common practice to support independence and objectivity of the internal audit function.
*Policies outdated, fragmented, not easily accessible.	Establish cross-functional team to lead policy modernization. Provide updated policies and procedures in a single digital repository as well as in print.	A dedicated team can establish processes for policy updates to ensure procedural continuity. Group diversity increases likelihood of policy validity. Digital library supports accessibility and increases likelihood of compliance.
*Outdated Covid & Vaccination Policy.	Review policy to comply with government reporting requirements and current company sick leave procedures.	Providing accurate information will support employee decision making and prevent potential grievances due to misalignment in policy and actual practice.
Infrequent horizontal meeting structure.	Schedule reoccurring expanded leadership meetings at conducive intervals to support initiative implementation and reporting.	Expanded leadership meetings emphasize initiative importance, increases comprehension, and allows leadership to assess broad goals, while elevating diverse voices and feedback.
Outdated organization structure information and updates on website.	Update Service Links and News and Events sections.	The public often perceives outdated information negatively which impacts company credibility and reputation.



Observation	Recommendation	Rationale
Former CEO Signature on EEO Policy Statement.	Include updated form with current CEO signature in onboarding documents.	CEO signature establishes the administration's commitment to enforcing policy and safeguarding employees.
Former CEO Signature on Workplace Violence Program (last updated in 2018).	<ol style="list-style-type: none"> <li>1. Review plan for current year.</li> <li>2. Update form with current CEO signature.</li> </ol>	CEO signature establishes the administration's commitment to enforcing policy and safeguarding employees.
*Chief meeting efficiency can be improved by establishing meeting norms and protocols.	<ol style="list-style-type: none"> <li>1. Create standing agenda to include: <ul style="list-style-type: none"> <li>• Review of prior week's action items</li> <li>• New topics for discussion, decision, feedback</li> <li>• Board/Committee item review</li> </ul> </li> <li>2. Create process for Chiefs to add presentations/ project updates to the agenda.</li> <li>3. Establish time for Chiefs to submit requests.</li> <li>4. *Establish standard time for meetings.</li> <li>5. Establish time for approved agenda to be shared with Chiefs prior to meeting.</li> </ol>	Protocols will enhance meeting efficiency and impact by defining success criteria for participation and supporting timely response and completion of necessary actions.
Establish a strategic approach to encourage compliance when corrective actions are not implemented.	<ol style="list-style-type: none"> <li>1. Provide Corrective Action Plan</li> <li>2. Identify and Understand Reason for Non-compliance.</li> <li>3. Inform Higher Management.</li> <li>4. Attempt to Intervene and Request Revised Timeline and Commitment</li> <li>5. Plan follow-up Audit</li> <li>6. Escalate to Higher Management.</li> </ol>	Communicating a structured approach at the outset reinforces the importance of compliance and addresses potential roadblocks.

1. **AMENDMENT NO.:** 0001

**EFFECTIVE DATE:** See No. 13 below

2. **AMENDMENT OF AGREEMENT NO.:** FAIN Number: 1125-2021-9 TN-2022-023-00

3. **ISSUED BY:**  
Federal Transit Administration, Region IV  
230 Peachtree Street, NW, Suite 1400  
Atlanta, GA 30303

4. **NAME AND ADDRESS OF RECIPIENT:**  
Memphis Area Transit Authority  
One Commerce Square  
40 South Main Street, Memphis, TN 38103

5. **ACCOUNTING AND APPROPRIATION DATA (if required):** See Below

6. **DOLLAR AMOUNT OF AMENDMENT:** \$5,800,000

7. **DESCRIPTION OF AMENDMENT:**

This amendment is issued to: a) replace Paragraph 2.3 Federal Award and Federal Obligation; b) replace Paragraph 3.3 Project’s Estimated Budget; c) update Attachment A – Statement of Work, d) update Attachment B – Estimated Project Budget; and e) replace paragraph and update Attachment D – Material Changes from Application.

The Agreement is amended as follows (refer to page 2):

8. **NAME AND TITLE OF SIGNER**


9. **NAME OF AGREEMENT OFFICER**

Gary Rosenfeld, Chief Executive Officer

Yvette G. Taylor, PhD, Regional Administrator

10. **RECIPIENT**

11. **FEDERAL TRANSIT ADMINISTRATION**

  
\_\_\_\_\_  
(Signature of MATA)

  
\_\_\_\_\_  
(Signature of Agreement Officer)

12. **DATE SIGNED:** August 31, 2022

13. **DATE SIGNED:** August 31, 2022

a) Page 2, ARTICLE 2. APPLICATION, PROJECT AND AWARD, Paragraph 2.3 Federal Award and Federal Obligation, delete and replace with the following:

**2.3 Federal Award and Federal Obligation.**

The USDOT hereby awards a BUILD Grant to the Recipient in the amount of \$17,800,000 and obligates that amount for the budget period.

b) Page 3, Article 3, SUMMARY AWARD INFORMATION, Paragraph 3.3 Project’s Estimated Budget, delete and replace with the following:

<b>Eligible Project Costs</b>	
BUILD Grant Amount:	\$17,800,000
Other Federal Funds:	\$0
State Funds:	\$0
Local Funds:	\$6,755,000
Other Funds:	\$0
<b>Total Eligible Project Cost:</b>	<b>\$24,555,000</b>

c) Page 5, ATTACHMENT A STATEMENT OF WORK, delete and replace with the following:

The key investments and project components include the implementation of a new branded high-capacity 8-mile Bus Rapid Transit (BRT) line with 10-minute headways during peak periods. Fares for the system will be consistent with MATA’s current fare policy. New fare technology, including the use of mobile apps for fare payment and off-board fare collection at transit stations will be utilized to speed up boarding and improve travel times. The project will provide the purchase and implementation of an Automatic Transportation Management System, the purchase of 14 new 40-foot long all-electric BRT vehicles with two-door boarding, the purchase of electric charging equipment, and the purchase and implementation of new Ticket Vending Machines.

The new BRT vehicles are planned include WIFI as well as other smart technology, such as automated vehicle location (AVL), automated passenger counters (APC), automated voice announcement (AVA), security cameras, C-V2X communications devices, vehicle health monitoring, collision avoidance systems, and predictive maintenance technology. The Automated Traffic Management System will provide real-time collection of operational data, automatic notifications of signal malfunctions, transit signal priority, and adaptive signal control, where appropriate.

MATA is working with the University of Memphis to connect the BRT line to the University of Memphis campus. MATA and the University of Memphis have identified an alignment that will connect to future parking facilities and to the University of Memphis on-campus shuttle.

d) Page 7, **ATTACHMENT B ESTIMATED PROJECT BUDGET**, section 2- Cost Classification table, delete and replace with the following:

**2. Cost Classification Table**

Note: Costs are shown in Year of Expenditure dollars, whereas the costs in the application are in 2019 dollars.

<b>Cost Classification</b>	<b>Total Costs</b>	<b>Non-BUILD Previously Incurred Costs</b>	<b>Eligible Costs</b>
Architectural and engineering fees	80,000		<b>80,000</b>
Project inspection fees	120,000		<b>120,000</b>
Site work	500,000		<b>500,000</b>
Equipment	22,150,000		<b>22,150,000</b>
Contingency	1,705,000		<b>1,705,000</b>
<b>Project Total</b>	<b>24,555,000</b>		<b>24,555,000</b>

e) Pages 10-11, **ATTACHMENT D, MATERIAL CHANGES FROM THE APPLICATION**, delete and replace with the following:

**Scope:** The scope has changed to consist of the procurement and implementation of 14 battery electric buses (BEB), purchase and installation of electric vehicle charging equipment, procurement and installation of Ticket Vending Machines (TVM), and purchase and implementation of the Automated Traffic Management System (ATMS). The remaining elements of the Memphis Innovation Corridor BRT project that were identified in the Application to be constructed, but may be included in other projects using other funding sources include: resurfacing and striping for the creation of the transit-only lanes on Second Street and B. B. King Boulevard in Downtown and conversion of Union Avenue from a six-lane typical section to a five-lane typical section, installation of bioswales in planting areas in Downtown, construction of curb extensions in Downtown, upgrades to the traffic signal communications system, traffic signal modifications, installation of LED street lights, and right-of-way acquisition. A portion of the resurfacing and restriping of Union Avenue to convert it from six lanes to five lanes has already been completed by the Tennessee Department of Transportation (TDOT) and the remaining portion of Union Avenue is scheduled to be modified by TDOT as part of a future resurfacing program. The City of Memphis will replace all of the streetlights in the City with LED luminaires, including the streetlights along this corridor, using other funding sources. The other items will be funded with other federal and non-federal funding. Some of the other items, such as the level boarding platforms and traffic signal modifications, were indicated in the Application to be funded with other federal funding sources.

**Schedule:** The Application indicated that revenue service would begin in January 2026. The current schedule would have revenue services beginning in May 2027, a delay of sixteen months. This delay was caused by the need to make changes to the BUILD project scope to make it independent from other projects using other federal funding sources.

**Budget:** The total BUILD project budget is less than the budget submitted with the application. The BUILD Funds amount has been changed in the table below from the amount in the Application to match the amount of the award. The non-federal funds have been adjusted accordingly to maintain the same amount of local funding. The budget shown in the “Section 3.3 and Attachment B” column in the table below provides the budget in Year of Expenditure dollars, and is based on an Opinion of Probable Construction Cost developed from the 100% plans.

On August 9, 2022, the U.S. Department of Transportation awarded an additional amount of \$5,800,000 for the project as part of the BUILD 2019 Reallocation process. These funds will be used to address the increasing cost of electric buses.

The table below provides a summary comparison of the project budget.

Fund Source	Application		Section 3.3 and Attachment B	
	\$	%	\$	%
Total Project Cost	21,024,066	100%	24,555,000	100%
Non-BUILD Previously Incurred Cost				
Federal Funds				
Non-Federal Funds				
Total Eligible Project Cost	<b>21,024,066</b>	<b>100%</b>	24,555,000	<b>100%</b>
BUILD Funds	14,300,000	68%	17,800,000	72%
Other Federal Funds	0	0%	0	0%
Non-Federal Funds	6,724,066	32%	6,755,000	28%

*Except as noted herein, all terms and conditions remain unchanged and in full force and effect.*

**END OF AMENDMENT**



# GO901

by  **MATA**  
MEMPHIS AREA TRANSIT AUTHORITY

## Communications Plan 2024

presented by



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## SUMMARY

The Memphis Area Transit Authority has undergone decades of increased cost of doing business, decreased ridership, and flat funding. They are now at a crossroads of identifying dedicated funding sources or drastically reducing their service offerings to riders.

This presents a challenge of transparently communicating the current status while aspirationally positioning what the organization could become. That, while managing the limited resources and communication channels that are currently functional within the organization.

KQ, which has been in a support role with MATA for years, is now positioned to strategically guide the organization's communication and engagement efforts in collaboration with MATA's internal team. This presents an opportunity to redefine MATA's brand image.



## DISCOVERY

To fully understand the state of the organization and its vision for the future, we conducted a discovery interview with Interim CEO Bacarra Mauldin. The feedback shared is summarized below.

### Big Picture / Organizational Goals

MATA is at a pivotal stage, emphasizing the need for a consistent and visionary approach to guide changes. The interim leadership aims to serve as a stabilizing force and a forward-thinking architect of organizational evolution. Communications are expected to play a critical role in addressing perception issues, shaping internal and external narratives, and fostering stakeholder trust.

- **Key Insights:**

- MATA faces significant perception challenges, often linked to public misunderstanding of its complexities.
- Messaging must navigate the fine line between explanation and perceived excuses.
- Proactive storytelling and community partnerships are essential to reshape public opinion.

### Communication Challenges and Opportunities

- **Challenges:**

- Combatting oversimplified public perceptions of transit operations.
- Balancing transparency with strategic messaging to avoid misinterpretation.
- Elevating positive stories to regional/national attention despite local challenges.

- **Opportunities:**

- Expanding partnerships (e.g., FedEx, St. Jude, Grizzlies, Chamber of Memphis).
- Telling a proactive story to demonstrate MATA's professionalism and strategic vision.
- Prioritizing inclusive communication, particularly for non-English speaking audiences.
- Strengthening internal messaging to foster employee engagement and value.

## DISCOVERY CONTINUED

### MATA Experience Goals

- **Rider Experience:** Dependable, community-centric, responsive, and friendly service.
- **Employee Experience:** Valued and supported, with clear and consistent communication.
- **Future Vision:** An innovative, next-generation transit experience supported by strong partnerships and sustainable funding.

### Advocacy and Funding

- Dedicated funding is a top priority, but the approach must remain subtle, focusing on weaving advocacy into broader messaging.
- Partnerships, particularly with the Chamber of Memphis, are critical to advancing funding goals and ensuring economic return on investment.

### PR and Media Strategy

- **Content Priorities:**
  - Stories highlighting MATA's strategic plans and operational successes.
  - Positive narratives to support recruitment efforts and counter negative perceptions.
- **Channel Effectiveness:**
  - Strength: Community engagement, media, and social channels.
  - Weakness: Website usability requires modernization.



## DISCOVERY CONTINUED

### Design and Creative Direction

- **Website Goals:**
  - Create a user-friendly, innovative platform tailored to current rider needs.
  - Inspired by the Birmingham transit website, focusing on next-generation design and functionality.
  - The MATA comm team pointed to Indianapolis, Charlotte, and LA websites as exemplary sites.
- **Branding:**
  - Open to exploring new directions that reflect a modern, inclusive transit organization.
- **Success Metrics:**
  - Improved public perception and rider engagement.
  - Positive feedback from stakeholders on accessibility and messaging.

### Key Dates and Rollouts

- **Transit Equity Day** (early February): Shift focus from grievances to actionable solutions.
- **Community Engagement:** Strengthen connections with groups like MICAH and city council to align with broader civic priorities.



## SURVEY

To better understand the communication gaps and preferences of riders, we surveyed riders online and at the transit centers. Survey results are outlined below.

**Number of respondents:** 291  
**Online:** 103      **In-person:** 188

Survey responses were collected in person at the American Way, Airways and Hudson Transit Centers between October 23 and November 7.

For more detailed responses, click [here](#).

1. Where do you go for MATA news? N = 286
  - a. Facebook 24%
  - b. MATA website 37%
  - c. Flyer or information on buses 7%
  - d. Flyers or information at terminals or bus stops 7%
  - e. Ask another rider 10%
  - f. Other 15%
    - i. News mentioned in 37% of free responses

media  
News<sup>TV</sup>  
channel MATA

## SURVEY CONTINUED

2. How do you prefer to receive MATA news? Pick your top two. N = 287

- |  |     |
|--|-----|
| a. Facebook  | 33% |
| b. MATA website                                    | 37% |
| c. Omnilert  | 5%  |
| d. MATA Tracker                                    | 22% |
| e. GO901 App                                       | 23% |
| f. Ready!  | 5%  |
| g. Flyer or information on buses                   | 10% |
| h. Flyers or information at terminals or bus stops | 11% |
| i. Talking to a MATA employee                      | 14% |
| j. Other   | 14% |
| i. News was mentioned by 28% of respondents        |     |

# News <sup>TV</sup> media

3. Have you used the MATA tracker in the last 6 months? N = 289

- |                                     |     |
|-------------------------------------|-----|
| a. Yes                              | 55% |
| b. No                               | 30% |
| c. I've never used the MATA tracker | 13% |
| d. I'm not sure                     | 2%  |

4. Which MATA app do you use? N = 284

- |                           |     |
|---------------------------|-----|
| a. GO901                  | 54% |
| b. Ready!                 | 13% |
| c. I don't use a MATA app | 40% |

5. Where do you go to check for service interruptions and/or bus arrivals? N = 269

- |                                      |     |
|--------------------------------------|-----|
| a. MATA Tracker                      | 44% |
| b. Call MATA's Customer Service line | 58% |
| c. GO901 App                         | 27% |



## SURVEY CONTINUED

6. How likely are you to attend an event where MATA representatives will be present to receive community feedback? N = 285

- |                    |     |
|--------------------|-----|
| a. Very likely     | 40% |
| b. Likely          | 21% |
| c. Somewhat likely | 19% |
| d. Unlikely        | 10% |
| e. Very unlikely   | 10% |

7. When was the last time you used MATA services? N = 284

- |                                     |     |
|-------------------------------------|-----|
| a. Today                            | 56% |
| b. This week                        | 12% |
| c. This month                       | 9%  |
| d. This year                        | 12% |
| e. Other                            | 11% |
| i. 17% of respondents said everyday |     |

Mata service  
used Last year ago Never  
trolley Everyday

8. What service did you use? N =280

- |  |     |
|--|-----|
| a. Bus   | 86% |
| b. Ready!  | 7%  |
| c. MATA Plus                                     | 7%  |
| d. Other   | 8%  |
| i. Trolley was mentioned in 46% of the responses |     |
| ii. Groove On Demand                             |     |
| iii. Bus & MATA Plus                             |     |





## SURVEY CONTINUED

### Focus Group

During survey gathering at the Transit locations, the team also recruited focus group participants. Approximately 30 people registered for the focus group on October 29, 2024, from 5:30-6:30 pm, but **six participants actually attended, as some noted difficulty in navigating the transit system for a timely arrival to the focus group location.** All participants were compensated for their time.

The focus group, composed of riders who rely daily on MATA, was meant to gauge rider preferences regarding using and communicating with MATA, as well as questions surrounding branding and engagement.

### *Overall sentiments*

The majority of participants expressed significant frustrations, primarily surrounding the recent and proposed service cuts. Every participant relies on MATA services, mainly the bus, to get around Memphis. Participants noted that when the cuts were originally proposed, they attended the community meetings and worried about the effect the changes would have on their daily travels.

Participants also pointed to customer service as a major growth area, noting drivers who pass riders at stops and have “nasty attitudes.” One rider remarked that they’re treated like “we’re nothing.” Most participants urged MATA to have customer-facing staff to receive additional training in customer service and more consistency in information sharing, saying answers to questions often vary between staff members.

### *Communication perceptions*

When it comes to communication, there are two major issues: information is failing to reach riders and riders lack trust in the information shared. One glaring example surrounded service cuts. Most of the riders said they were unaware that the service adjustments had been paused on November 3, the date of the scheduled cuts. Another example involved the new board announcement, riders felt they found out long after others.



## SURVEY CONTINUED

Bus schedules and arrival times are among the main communication challenges participants hope the organization solves. As an example, one rider shared that MATA tickets promote buses running until 2 a.m., even though that late schedule was dissolved years ago. And as for the bus tracker that is meant to provide real-time information on the status of each bus, participants call center attendants often don't know where buses are because bus trackers are turned off.

As for communication channels that share a lot of information, participants noted they were unaware of many of them, including MATA's social media pages.

### ***Communication preferences***

In an effort to increase trust, riders expressed an interest in meeting and seeing board members and MATA leadership at the transit centers and leading public meetings.

Strong opinions were not provided regarding on-bus advertising. However, the following recommendations were made:

- Create flyers with QR codes linking to FB and IG accounts promoted at transit centers and buses.
- Create MATA tickets with updated schedules.
- Send proactive information about holiday service times.
- Plan engagement events with the Interim CEO and new Board of Commissioners.
- Increase internal advertising: use bus scrolls and internal space to advertise information pertinent to riders.
- Create infographics or videos about how decisions get made

# SOCIAL MEDIA AUDIT

We conducted an audit of MATA social media platforms to evaluate their performance over the last year. Below are a few key highlights:

- Posts offering a “face” to the organization, ie: providing a human feel/element to the page generated significantly more engagement, views and shares.
- Announcements on Facebook about route shifts and service updates result in a considerable amount of time resonated with audiences.
- Instagram Reels and videos, even if videos with text announcements gathered substantial reach and engagement
- Engagement spikes when posts offer transparency and updates about shifts and changes within the company.
- Posts that perform exceptionally well on LinkedIn often feature visible leadership, showcase the faces of the organization, provide transparent updates, and include tags of other organizations.

Overall, MATA’s audience values authentic, transparent, and human-centric content across social media platforms.

## MATA Social Media Analytics

Followers - Year over Year

Platform	October 2023	October 2024	Percentage Change
Facebook	3,704	4,044	9.17%
Instagram	530	596	12.96%
LinkedIn	1,035	1,351	30.53%
Twitter	1,829	2,127	16.29%






## SOCIAL MEDIA AUDIT CONTINUED

### Facebook

#### Memphis Area Transit Authority

- 3,781 Likes 4044 Followers
- Average Engagement - 8.67
- Average Reach per post - 814
- Impressions: 443.93K
  - Organic impressions - 438001
  - Paid Impressions - 5931

Top posts in the last 90 days:

 <p>Memphis Area Transit Authority Published by Metricool October 24 at 11:02 AM ·</p> <p>We're listening. We're working endlessly to bring the trolleys back. #RideMATA #GO901 #MemphisTrolley #memphistransit #memphis</p> <p>"We recognize the community's eagerness about the trolleys' return, and we are listening. By law, we must submit a 160-day notice to the federal government before resuming services. I will propose a plan to the MATA Board soon for their return in Spring/Summer 2025." — Bacarra Mauldin, Interim CEO, Memphis Area Transit Authority</p> <p>See insights and ads <a href="#">Boost post</a></p> <p>32 comments 10 shares</p>	 <p>Memphis Area Transit Authority Published by Metricool October 15 ·</p> <p>Introducing the Memphis Area Transit Authority's newest Board Members. These individuals bring a wealth of experience across industries that will help shape the future of public transportation in Memphis. Please join us in welcoming: -Brandon Arrindale, Senior Analyst &amp; Principal, Southeastern Asset Management -Cynthia Bailey, Member, Memphis Bus Riders Union -Emily Greer, CEO, Greer Leadership Solutions, LLC... <a href="#">See more</a></p> <p>See insights and ads <a href="#">Boost post</a></p> <p>16 comments 7 shares</p>	 <p>Memphis Area Transit Authority Published by Metricool August 18 ·</p> <p><b>**Important Trolley Safety Announcement:</b> Safety is always top priority for our passengers. As we continue a thorough investigation on a recent brake issue and in alignment with a request from TDOT, effective immediately, we will be suspending our trolley service.</p> <p>As part of our ongoing commitment to safety, the trolleys will remain offline until further notice.</p> <p>Groove on Demand will still be available for travel around the downtown area. ... <a href="#">See more</a></p> <p>See insights and ads <a href="#">Boost post</a></p> <p>30 Reactions   24 Comments   3,566 Impressions   8.03% Engagement</p>
<p>55 Reactions   37 Comments   2,770 Impressions   15.45% Engagement</p>	<p>54 Reactions   24 Comments   3,566 Impressions   8.03% Engagement</p>	<p>30 Reactions   24 Comments   3,566 Impressions   8.03% Engagement</p>

## SOCIAL MEDIA AUDIT CONTINUED

Instagram




@ridemata

**Bio:** No bio

Page Follows: 596 followers

Average Daily Likes: 1.98

Top performing posts in the last 90 days:

 <p><b>Important Trolley Safety Announcement</b></p> <p>Safety is always top priority for our passengers. As we continue a thorough investigation on a recent brake issue and in alignment with a request from TDOT, we will be suspending our trolley service starting this Sunday as part of our ongoing commitment to safety.</p> <p><b>**Groove on Demand**</b> service will continue to operate and provide coverage throughout the Downtown area.</p> <p>ridemata **Important Trolley Safety Announcement: Safety is always top priority for our passengers... more</p>	 <p><b>we're LISTENING</b></p> <p>The MATA Board of Commissioners has voted to <b>pause the previously approved service updates until February 3, 2025.</b></p> <p>Our Interim CEO is hopeful that the additional time will allow our organization to identify a more sustainable, long-term solution.</p> <p>ridemata We're Listening. We're committed to working alongside our city ... more</p>	 <p>We're listening. We're working endlessly to bring the trolleys back ... more</p> <p>ridemata We're listening. We're working endlessly to bring the trolleys back ... more</p>
<p>17 Interactions   607 Impressions   568 Reach</p>	<p>27 Interactions   540 Impressions   445 Reach</p>	<p>26 Interactions   383 Impressions   363 Reach</p>

## SOCIAL MEDIA AUDIT CONTINUED

### LinkedIn

Followers: 1,351

Analytics over the last year:

- 1139 Reactions
- 116 Comments
- 14 Reposts
- 25,396 Impressions

Top performing posts in the last 90 days:

**Memphis Area Transit Authority** 1,351 followers  
3w · 🌐

Introducing the Memphis Area Transit Authority's newest Board Members. These individuals bring a wealth of experience across industries that will help shape the future of public transportation in Memphis. Please join us in welcoming:

- Brandon Arrindale, Senior Analyst & Principal, Southeastern Asset Management
- Cynthia Bailey, Member, Memphis Bus Riders Union
- Emily Greer, CEO, Greer Leadership Solutions, LLC
- Sandi Klink, Former Executive Director, Memphis Center for Independent Living
- Brian Marflak, VP of Global Planning, Engineering, Research, & Technology, FedEx
- Jackson McNeil, Transportation and Mobility Director, Innovate Memphis
- Anna McQuiston, Executive Director, MidSouth Development District
- Dana Painter, CEO, Preserver Partners
- Maya Siggers, Associate General Counsel, Edward Jones

 **Welcome to Our New Board Members**



👍 93 12 comments · 6 reposts

93 Reactions | 12 Comments | 2,362 Impressions | 9.3% Engagement

**Memphis Area Transit Authority** 1,351 followers  
4w · 🌐

We're listening. We're working endlessly to bring the trolleys back.

#RideMATA #GO901 #MemphisTrolley #memphistransit #memphis



*"We recognize the community's eagerness about the trolleys' return, and we are listening. By law, we must submit a 160-day notice to the federal government before resuming services. I will propose a plan to the MATA Board soon for their return in Spring/Summer 2025."*

— Bacarra Mauldin, Interim CEO, Memphis Area Transit Authority


👍 30 3 comments

30 Reactions | 3 Comments | 886 Impressions | 9.1% Engagement

**Memphis Area Transit Authority** 1,351 followers  
3w · 🌐


In a spirit of collaboration, MATA's interim CEO, Bacarra Mauldin, joined community leaders and professionals from across Memphis and the Mid-South at the *Memphis Business Journal* "Advancing Memphis" event series to explore innovative strategies for empowering our community and driving the city forward. Of course, that includes improving transit!

#AdvancingMemphis #Leadership #MATA



👍 25

Reactions



👍 Like 💬 Comment 🔄 Repost ➦ Send

25 Reactions | 0 Comments | 523 Impressions | 21.2% Engagement




## SOCIAL MEDIA AUDIT CONTINUED

### Twitter

Bio: Service alerts, news and events from the public transportation provider of Memphis and surrounding areas

- Followers: 2,153
- Following: 354
- Engagement:

Top performing posts in the last 90 days:

 <p>Today, our new Board of Commissioners were officially sworn in by @mayorpaulyoung. They are ready to lead MATA into a new era of public transit innovation and service for our city. #RideMATA #choose901 @CityOfMemphis</p> <p>3:38 PM · Oct 22, 2024 · 1,469 Views</p>	 <p>Introducing the Memphis Area Transit Authority's newest Board Members. These individuals bring a wealth of experience across industries that will help shape the future of public transportation in Memphis. Please join us in welcoming:</p> <ul style="list-style-type: none"> <li>-Brandon Arrindale, Senior Analyst &amp; Principal, Southeastern Asset Management</li> <li>-Cynthia Bailey, Member, Memphis Bus Riders Union</li> <li>-Emily Greer, CEO, Greer Leadership Solutions, LLC</li> <li>-Sandi Klink, Former Executive Director, Memphis Center for Independent Living</li> <li>-Brian Marflak, VP of Global Planning, Engineering, Research, &amp; Technology, FedEx</li> <li>-Jackson McNeil, Transportation and Mobility Director, Innovate Memphis</li> <li>-Anna McQuiston, Executive Director, MidSouth Development District</li> <li>Dana Pointer, CEO, Preserver Partners</li> <li>Maya Siggers, Associate General Counsel, Edward Jones</li> </ul> <p>3:30 PM · Oct 15, 2024 · 958 Views</p>	 <p>Tonight's Transforming Transit Meeting is canceled due to the remnants of the tropical storm. The safety and well-being of our community members are our top priority, and we believe this decision is in the best interest of all involved. Please join us for our next meeting held Monday, September 16th at Mt. Vernon Baptist Church at 6PM.</p> <p>1:15 PM · Sep 12, 2024 · 672 Views</p>
<p>1,469 Impressions   1 Reposts   0 Likes</p>	<p>958 Impressions   0 Reposts   1 Likes</p>	<p>673 Impressions   2 Reposts   1 Like</p>



## SOCIAL MEDIA AUDIT CONTINUED

We also looked at social media analytics of five transit agencies from TransPro report based on similar ridership and service area (Sq.Miles)

Organization	Facebook	Instagram	Twitter	Youtube	LinkedIn
<a href="#">Birmingham-Jefferson County Transit Authority</a>	<p><u>Followers:</u> 2.9K <u>Likes:</u> 2.4K</p> <p>Video posts outnumber picture posts. Branding is consistent and cohesive across posts. Branding colors are contrasting and engaging. Lots of posts and reposts promoting community engagement events. They live stream board meetings. Halloween themed event for staff &amp; riders</p> <p>Breast Cancer Awareness talk for staff</p>	<p><u>Followers:</u> 596</p>	<p><u>Followers:</u> 498</p> <p>Is following (746) more people than follow account Not as updated as Facebook; the last post is from September 4, 2024</p>	<p><u>Subscribers:</u> 22</p> <p>Videos: 23</p> <p>The last video was posted 6 years ago</p>	



## SOCIAL MEDIA AUDIT CONTINUED

Organization	Facebook	Instagram	Twitter	Youtube	LinkedIn
<a href="#">EMBARK</a> (Oklahoma City)	<p><b>Followers:</b> 7K <b>Likes:</b> 6.3K</p> <p>Don't post videos, but posts have decent engagement. Branding is consistent across posts but branding is monochrome and boring</p>	<p><b>Followers:</b> 2,118 711 posts; use Reels but the last one was posted Mar 18, 2024. Not as many posts as FB because FB reposts more, but IG account is tagged in recent posts from community events they participated in</p>	<p><b>Followers:</b> 4,138 Posts match up with Facebook's; there is less engagement</p>	<p><b>Subscribers:</b> 285 Videos: 168 Last post from 5 months ago seems to be part of previous campaign about public transit safety; videos are in English &amp; Spanish</p>	<p><b>Followers:</b> 643 Last post is from 9 months ago. Branding is not consistently used throughout.</p>
<a href="#">Greensboro Transit Authority</a>	<p><b>Followers:</b> 248 Post frequently. Branding is not consistent. There are frequent posts about rider notifications and they use the same grainy gray or orange photo. Posts promote community events, GOTV, and service updates</p>	<p><b>Followers:</b> 443 Like FB, branding is not cohesive or consistent. Reels is used sporadically</p>	<p><b>Followers:</b> 2,112 Same posts as Facebook and Instagram</p>	<p><b>Subscribers:</b> 109 Last video is from 10/30/24</p>	



## SOCIAL MEDIA AUDIT CONTINUED

Organization	Facebook	Instagram	Twitter	Youtube	LinkedIn
<a href="#">TARC</a> (Louisville, KY)	<b>Followers:</b> 8K Post 2-3 per week. Branding consists of placing logo on each image posted. Video is sparse. Post board meeting live streams, service updates, surveys, not a lot of community engagement events	<b>Followers:</b> 1,615 Posts are consistent like the ones on FB. Tagged posts are from community events. Videos seem more frequently posted than on FB	<b>Followers:</b> 4,280 Posts are the same as FB and IG. Account engages with other public orgs. Like Jefferson County School System	<b>Followers:</b> 2K Last post is from 4 weeks ago; posts get decent engagement. They had a video campaign 4+ months ago	<b>Subscribers:</b> 402 Last video is from 2 months ago. Had two recent video campaigns (Save a Seat 2024 & Behind the Bus), where they talked to TARC staff about their contributions to the organization
<a href="#">Rock Region Metropolitan Transit Authority</a>	<b>Followers:</b> 2.1K Posts every day, sometimes multiple times a day. Mostly post about service changes, hiring, and free rides on voting day. The most liked post in the past month was about their employee appreciation ceremony.	<b>Followers:</b> 0 This account matches the FB handle but it has no posts or followers	<b>Followers:</b> 1,667 Same posts as FB, just less engagement	<b>Followers:</b> 512 Last post is from 6 months ago, the previous to that post is from 3 years ago.	<b>Subscribers:</b> 30 Only 3 videos uploaded and the last one is from 3 years ago

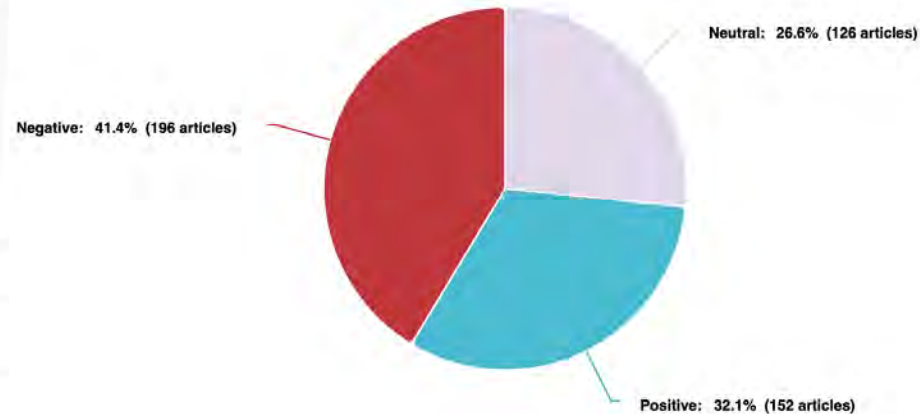




## MEDIA REPORT

### MATANewYear - Sentiment

11/17/2023 - 11/13/2024



### Summary Paragraph

This section highlights the importance of monitoring and responding to media trends among peer agencies to understand how transit organizations balance challenges with opportunities. By analyzing tonality, framing, and media coverage across agencies, MATA can identify strategic approaches to shift public perception from solely reacting to changes to positioning as a proactive, community-centered transit authority.

### Comparative Media Analysis with Other Transit Agencies

A comparative media analysis reveals that MATA's media coverage primarily focuses on **service cuts and funding challenges**, similar to other transit agencies of comparable size. For instance:

- MATA: Coverage in Memphis highlights budget cuts, changes to routes, and layoffs, drawing both community criticism and calls for increased state and city funding.
- Nashville's WeGo Public Transit: Coverage centers on service improvements,

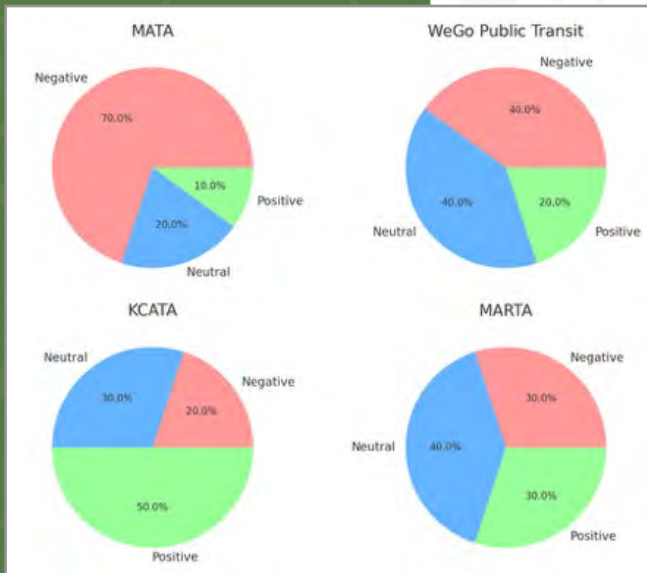
## MEDIA REPORT CONTINUED

funding initiatives, and community engagement efforts. While facing similar funding challenges, WeGo's narratives are often more solution-focused.

- Kansas City Area Transportation Authority (KCATA): Media attention focuses on its zero-fare transit initiative and its role in economic mobility, which has generated positive media sentiment despite its financial sustainability concerns.
- Atlanta's MARTA: While larger in scope, MARTA balances coverage of infrastructure investments with stories on service disruptions, keeping a balance between forward-looking initiatives and current challenges.

This analysis shows that while MARTA's media tonality skews negatively due to the nature of current changes, similar agencies are finding ways to maintain more balanced or positive narratives through proactive storytelling.

### Tonality Comparisons



**MATA:** Predominantly negative coverage (70%), with some neutral (20%) and minimal positive coverage (10%).

**WeGo Public Transit:** Balanced tone with 40% negative, 40% neutral, and 20% positive coverage.

**KCATA:** Positive tone dominates at 50%, with neutral at 30% and negative at 20%.

**MARTA:** Equal distribution among negative (30%), neutral (40%), and positive (30%) coverage.



## MEDIA REPORT CONTINUED

- **MATA:** Media coverage is predominantly reactive, driven by the recent budget cuts and service changes. Stories are often framed around community dissatisfaction and operational hurdles, leading to a negative tonality.
- **WeGo Public Transit:** Maintains a more neutral tone, with coverage equally emphasizing challenges and long-term plans like infrastructure investments and partnerships with local governments.
- **KCATA:** Coverage skews positive due to the innovative zero-fare initiative, but concerns about its sustainability add nuance to the narrative.
- **MARTA:** Balances critical coverage of service disruptions with positive stories on technology upgrades and urban mobility programs.

Context: Media tonality often reflects public sentiment but can be influenced by proactive narratives. **For MATA, reframing stories around community benefits, long-term planning, and collaborative solutions can shift perceptions.**

### Top Three MATA Stories That Received the Most Reach in 2024

1. “MATA Announces Major Route Changes Due to Budget Cuts”

#### NEWS

# MATA cutting bus routes, making fare adjustments

by: [Raven Moore](#)

Posted: Sep 24, 2024 / 07:15 PM CDT

Updated: Sep 24, 2024 / 10:17 PM CDT



## MEDIA REPORT CONTINUED

2. "Memphis City Council Debates Increased Funding for Public Transit"

ECONOMIC JUSTICE   GOVERNMENT   WORKERS

# MATA officials spent years asking for more funding

*Deficits, fee requests and public pleas all failed*

by **Katherine Burgess**  
September 30, 2024

3. "MATA CEO Bacarra Mauldin Speaks on the Future of Transit in Memphis"

FOX 13   WEATHER   NEWS   YOUR MONEY   FOX13 INVESTIGATES   YOUR HEALTH   CONTAMINATED COMMUNITY   FOX13 FAMILY FOCUS   Watch Live

## MATA's interim CEO discusses layoffs, bus route eliminations, firing from previous role

Kate Bieri, FOX13 Memphis   Aug 26, 2024

These stories indicate the high level of public interest in MATA's funding and operational strategies, offering an opportunity to drive conversations with transparency and solutions-oriented messaging.



## GOAL

Establish MATA as a reliable transportation choice for Midsoutherners.

## KEY MESSAGES

- Today's Memphis Area Transit Authority is heading the Rider's Way with service and information.
- At today's MATA, we understand that the right way to run public transit is the Rider's Way.
- To provide The Rider's Way service at MATA, we are adding fleet, customer-focused staff and customer service training.
- Our long-term aim is dedicated public funding, but we'll proudly accept short-term support from those committed to Memphis riders. Recurring donations can be made via the Community Foundation at [Matatransit.com](http://Matatransit.com), click The Rider's Way link.
- Yesterday's MATA wasn't successfully serving riders. Today's MATA is heading the Rider's Way. Tomorrow's MATA can be even better with community support.



# STRATEGIES AND TACTICS

Objective 1: Increase followers across all platforms by 10% by July 1, 2025

Objective 2: Improve media tonality to 75 positive/neutral by July 1, 2025

Objective 3: 5% increase in matatracker use by July 1, 2025

Objective 4: 50% of riders aware of “The Riders Way” campaign by July 1, 2025

Objective 5: 5% increase staff morale

Strategy	Tactics	Resp. Party	Objective
<b>Position critical MATA news closer to riders</b>	Create digital service schedules available by QR codes: QR code posters, bus monitors, Spanish version, etc.	KQ design MATA produce	2, 4
	Monthly printed schedules for riders 65 & older	MATA	2, 4
	Bus ads with news and updates	KQ design MATA produce	2, 4
	Bus audio clips Videos with no sound	TBD	1, 2, 3, 4
	Place bus arrival times on bus monitors	KQ design MATA produce	2, 3, 4
	Post MATATracker promotions - on the bus ads, BUS WRAPS, transit monitors, banners in every transit center	KQ design MATA produce	2, 3, 4
	Ominalert		
	Email alerts using email new rider addresses		
	Post social media handles on monitors and all promotional materials	All	1, 2, 3, 4

## STRATEGIES AND TACTICS CONTINUED

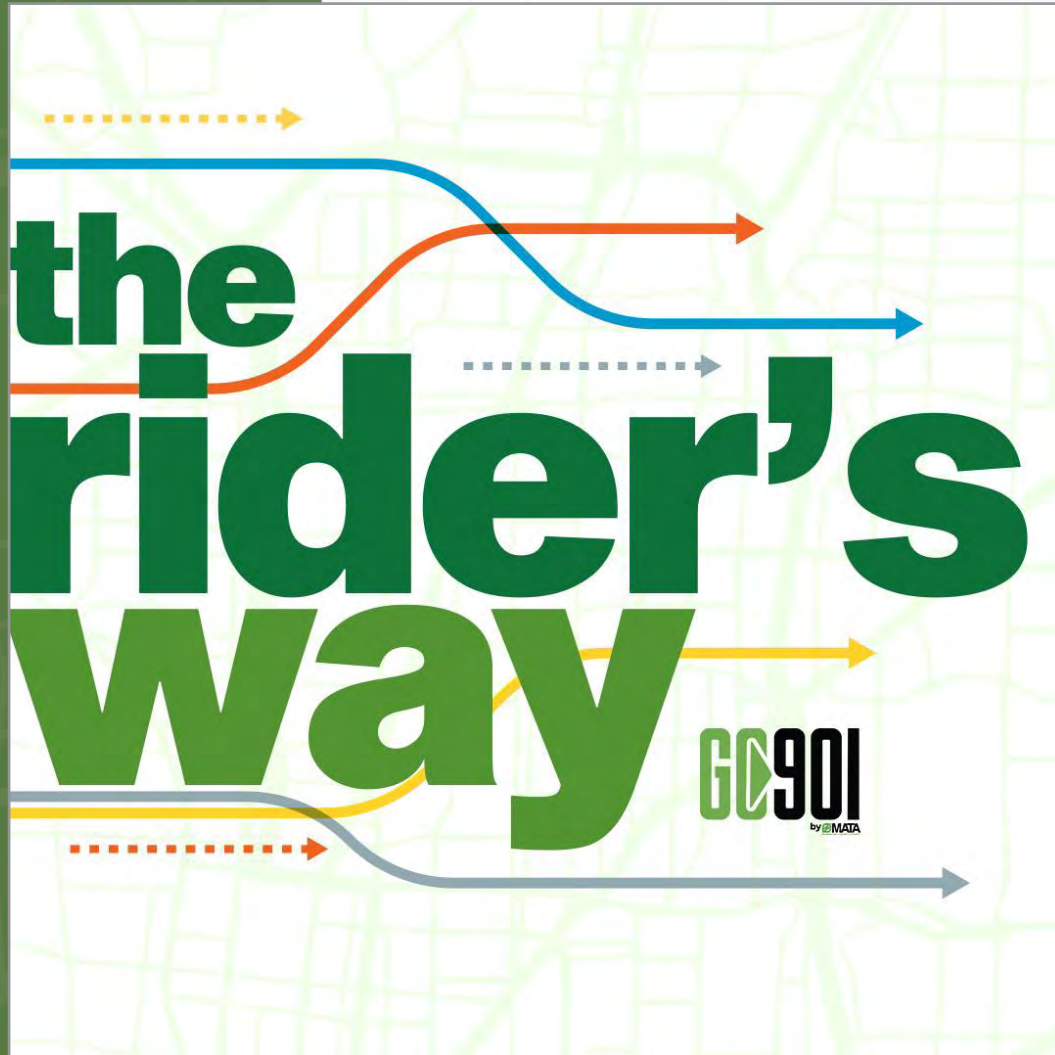
Strategy	Tactics	Resp. Party	Objective
<b>Utilize partnerships &amp; opportunities for MATA leadership to increase rider engagement</b>	CEO & Board Member Pop-ups	KQ schedule MATA & KQ manage	2, 4
	Specialty Days - Rosa Parks Day, Transit Equity Day, Holiday Cheer	KQ/MATA	2, 4
	Monthly rider lunch & learns	MATA	2, 4
	Goodwill giveaways	KQ	2, 4
<b>Refocus MATA's efforts on the rider experience through "The Rider's Way" campaign</b>	Social media rider campaign	KQ	1, 2, 4
	Monthly newsletter with rider highlight stories	KQ	1, 2, 4
	Customer Service Light Duty workers – give them Riders' Way Worker t-shirts?	MATA	
	Pitch riders' stories to media (e.g., long-time riders, new riders, student riders, business riders, etc.)	KQ	1, 2, 4
	Brand materials & outreach with the tagline	KQ	1, 2, 4
	Donor campaign via Community Foundation (need an initial, big dollar donor) <ul style="list-style-type: none"> <li>Establish with community foundation</li> <li>Digital toolkit for community partners</li> <li>One day kick-off fundraising Digi-thon live from a MATA bus</li> </ul>	KQ & MATA	1, 2, 4

## STRATEGIES AND TACTICS CONTINUED

Strategy	Tactics	Resp. Party	Objective
<b>Elevate MATA's positive transformation story to the national level to attract investment and interest</b>	Pitch MATA transformation Stories	KQ	2, 5
	Create an editorial calendar	KQ	2
	Create a new database of transit industry reporters	KQ	2
	Employee / Day in the life stories	MATA (identify) KQ (pitch)	2
	DRAFT and place op-eds advocating for transit	KQ	2, 4, 5
<b>Educate the public about the inner workings of MATA/public transit</b>	Behind-the-scenes videos on social	MATA	1, 2, 4, 5
	A day in the life of videos... (e.g. Mechanic, operator, customer service call rep, etc.)	MATA	1, 2, 4, 5
	Process video showing how to check MATA tracker	KQ	1, 2, 3, 4
	Develop a digital toolkit for partners	KQ	1, 2, 3, 4
	State of MATA (annual in June in prep for the new fiscal year) —could be virtual as a cost saver	MATA	1, 2, 4, 5
	Share comparative information regarding bus prices, funding, etc.	KQ	1, 2, 4
	Monthly tours of MATA operations	MATA	1, 2, 3, 4, 5

## STRATEGIES AND TACTICS CONTINUED

Strategy	Tactics	Resp. Party	Objective
<b>Establish social media channels as a communication source for MATA news/updates</b>	Add social media handles to all correspondence	KQ	1
	Include a pop-up box on the website to encourage social media follows	KQ	1
	Monthly social media follow day where new followers could win prizes	KQ	1, 5
<b>Build employee morale through recognition opportunities</b>	Wheel life Hero	MATA	1, 2, 5
	Service Superstars	MATA	1, 2, 3, 5
	Newsletter highlight stories	MATA	5
<b>Streamline the flow of communication among staff for increased trust and efficiencies</b>	Create comm protocols across the organization	KQ & MATA	1, 2, 4, 5
	Development of a crisis communication plan	KQ & MATA	1, 2, 4





1370 Levee Road | Memphis, TN 38108 | 901.772.7100 | [www.matatransit.com](http://www.matatransit.com)

# Appendix Two



the  
**rider's way**



## Memphis Area Transit Authority 180-Day Strategic Vision

# Appendix



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- A** Letters of Recommendation
- B** Timeline
- C** Ordinances
- D** Job Descriptions
- E** Service Scenarios
- F** Cost Saving Memo – July 1, 2024



# Appendix A

Letters of Recommendation

July 2, 2024

Board of Directors Memphis Area Transit Authority (MATA)  
1370 Levee Road  
Memphis, TN 38108

Dear Members of the MATA Board of Commissioners:

It is my distinct pleasure to offer my support and endorsement of Baccara Sanderson Mauldin as you consider her for the permanent position of CEO of the Memphis Area Transit Authority (MATA). I first met Bacarra when we both served on the Executive Committee of the Board of Directors of the American Public Transportation Association (APTA). She is an inspirational leader and I have always admired her determination, resilience, empathy and grace.

As a transportation professional, Bacarra understands the impact that transit has on the local economy, job creation, educational opportunities and enhanced quality of life. Her extensive career spans diverse transportation modes, providing her with a solid foundation of knowledge and experience to address MATA's operational issues.

Bacarra has held positions of leadership and gained an appreciation and understanding for the political environment surrounding securing funding for public transit operations and capital improvements at the national and local levels. Over the years, she has built strong relationships with industry leaders, local and state decisionmakers and the federal government. As the former Administrator for the Federal Transit Administration (FTA), I can personally attest to Bacarra's active involvement in efforts to sustain and expand federal funding for transit, championing the reauthorization of its programs and educating others on its significance to the nation's mobility network.

In summary, Bacarra S. Mauldin is highly qualified to be the next CEO of MATA and under her leadership, MATA will continue to thrive with the expansion of safe, reliable, and efficient transit services to all the people of Memphis.

Sincerely,

  
Nuria I. Fernandez

June 30, 2024

Board of Directors,

Please accept this letter as my unvarnished support for Ms. Bacarra Sanderson Mauldin for the role of Memphis Area Transit Authority's Chief Executive Officer. I am honored to support her.

I have known Ms. Sanderson Mauldin throughout my transit career, and when I was a Planning Director, and she a Board Member. I considered her a steady voice with a measured presence, and someone to look up to. You can imagine my surprise when, years later, I discovered that Ms. Sanderson Mauldin and I were of an age; however, she had been so active in transit for so long that I found this hard to believe.

Ms. Sanderson Mauldin has the unique perspective of a Board Member, transit CEO, Chief of Staff, Deputy CEO, and now Interim CEO. Her experience stretches across numerous agencies and roles, all of which provide vital insight to the future for our industry. Her unique perspective is not replicated by virtually anyone else in a leadership position today. Ms. Sanderson Mauldin has also held these roles before, during, and after the pandemic, all of which contribute to her perspective.

Most critically at this juncture for our industry and for all our agencies, we need strong principled leadership. Ms. Sanderson Mauldin weathered the storm leaving Savannah, Georgia, where she held to ethical principles and motivated her staff in the face of strong opposition. I do not know that many of us would have been so true to our principles, and I do not know if anyone else would have been able to hold her head high and land in a new position in a new state and do so successfully.

Her principles and values are above reproach, she is empathetic in all she does, she provides strategic advice and leadership in these uncertain times, and she is building the next generation of leaders. I cannot think of anyone more qualified to serve as a Chief Executive Officer. I recommend your most favorable consideration.

Sincerely,



Katharine Kelleman  
Chief Executive Officer



## City of Savannah - City Council

**Detric Leggett**  
Alderman, District 2

March 22, 2021

To Whom it May Concern:

I serve as an Alderman for the 2nd District in the City of Savannah as well as on the Chatham Area Transit (CAT) Board of Directors. It is with great pleasure that I write this letter of recommendation on behalf of Bacarra Mauldin. We hired her in June 2020, during the COVID-19 pandemic and economic downturn to bring positive change to CAT, an organization that has suffered greatly due to the malfeasance of prior executives and Board members. In seven short months, Ms. Mauldin showed strong leadership and great ability as she made great strides to stabilize CAT during unstable times. Some of her accomplishments during her tenure included:

- Leading the agency into the "black" from a period of financial turmoil. This included more detailed and transparent financial reporting and internal measures to manage the budget. As a result of her efforts, CAT is poised to end the fiscal year on solid financial footing.
- She strengthened CAT's brand in the community through partnerships with community organizations, such as neighborhood associations, the Chamber of Commerce and the Tourism Leadership Council.
- She worked with elected officials at all levels (federal, state and local) and put together a legislative agenda that was supported and adopted by the Chamber of Commerce for the first time ever.

As the chair of the organizational audit and performance subcommittee, which is responsible for the CEO performance and evaluations, I found her performance to be stellar. From her hire last June to her departure in January, I was impressed by her strong work ethic and commitment to this community. As you may know, Ms. Mauldin was terminated in January by the Board of Directors for "No Cause." This was an action that was not supported by me, two other board colleagues, the local business community, the local tourism industry and the community overall. Why? Because she did nothing wrong and in fact, served with great honor and integrity. Our city and community are changed as a result of Ms. Mauldin's service. Within a short time, she managed to make a huge impression on many employees, riders and community leaders for the better.

As an elected official, I understand the importance of safe, reliable and efficient public transportation in our city. I have heard from many constituents about the need for better transportation in Savannah and how they believed Ms. Mauldin was laying the groundwork for a better transit system. She is a strong leader with vision, ability and integrity that I highly recommend. Just as Ms. Mauldin made a positive difference at CAT, I believe that any organization that she joins will thrive. Please feel free to contact me if you would like to discuss this recommendation further.

Sincerely,

**FIRST BAPTIST  
CHURCH BROAD**  
*"The Broad Memphis"*

☎ 901.323.2429  
✉ [Info@thebroadmemphis.org](mailto:Info@thebroadmemphis.org)  
📍 2835 Broad Ave Memphis, TN 38112

Memphis Area Transit Authority

*Dear Chairman Board Commissioner Fulton,*

Three short days after her arrival, I met Baccara Sanderson Mauldin in her new capacity as Chief of Staff for MATA. Since that day, I have made numerous recommendations and introductions of Bacarra to the business community among colleagues and peers. Bacarra is a highly esteemed professional who shows care and concern for the city of Memphis, its people, and its economy. She understands how public transportation works, how it benefits the lives of people and how it connects people to business. From meeting, observing, and researching much about her remarkable achievements, "advocate" was the word used to describe Bacarra and I strongly agree. In an online article about Sanderson Mauldin, I read that making a difference in the lives of others is something that she has always been about. Advocacy has been a part of every job that she has worked. Mauldin said of herself, "Advocacy is in my blood," "From my early days as a community worker and community leader, to my days at the city, to my days on the national scene, both through the Urban League and for transit, I am an advocate. Advocacy is who I am."

Because of MATA's role in our city we need leaders, executives, and team members there who care not just for the business and the dollars that it brings. We need leaders, executives, and team members there who care also for the people that MATA was created to serve and positively impact; Baccara Sanderson Mauldin is exemplary of this.

I am confident without reservation that Bacarra Sanderson Mauldin would be an excellent fit for the position of CEO of MATA. Please feel free to contact me at (901) 323-2429 or at [pastorkeith@thebroadmemphis.org](mailto:pastorkeith@thebroadmemphis.org) if you have any questions.

*Sincerely,*



**Dr. Keith Norman**  
Senior Servant Leader



*First Baptist  
Church-Broad*  
[www.fbcbread.org](http://www.fbcbread.org)



**American  
Public Transportation  
Association**

July 1, 2024

**EXECUTIVE COMMITTEE**

CHAIR

Michele Wong Krause

VICE CHAIR

MJ Maynard

SECRETARY-TREASURER

Jeffrey Wharton

IMMEDIATE PAST CHAIR

Dorval R. Carter, Jr.

Jose Bustamante

Francis "Buddy" Coleman

Jim Derwinski

Charles DiMaggio

Dawn Distler

Denise Figueroa

Sharon Fleming

Gary S. Giovanetti

Carolyn Gonot

Beth Holbrook

Bacarra Mauldin

Allan Pollock

Naomi Renek

Leslie S. Richards

Erin Rogers

Rita A. Scott

Kimberly Slaughter

Doug Tisdale

Matthew O. Tucker

Jannet Walker-Ford

Evalynn "Eve" Williams

Sincerely, Dear MATA Board of Commissioners,

I am writing to you today to provide my support and endorsement for Bacarra Sanderson Maudlin as your permanent CEO of Memphis Area Transit Authority. I have worked with Bacarra for several years in her role both as an At Large member of the APTA Board of Directors and through her tenure on the APTA Executive Committee. She has been a valuable contributor to our Board, has been very involved in matters that affect the transportation sector, and has demonstrated through her energy, efforts, and dedication that she understands the impact and value of public transportation.

Bacarra is very prepared for this position. Her career encompasses diverse transportation modes which gives her a solid foundation of the operational issues at MATA. She has been in leadership roles in the industry that have given her an understanding of the political environment that transit faces on the national and local level. As APTA's Vice Chair of the RCA Council (Research, Communications and Advocacy), she has been engaged in the industry's efforts to sustain and expand federal funding for public transportation. This Council is the driving force behind the messaging that we use as an association to educate our government partners as well as the community of why transit funding is a critical part of our infrastructure. She has been involved in our legislative efforts, advocating for policies that ensure equitable, future-forward, accessible transportation solutions.

Bacarra has also developed strong relationships within our organization and in the industry. Her knowledge of transit, and what she brings as a leader will be beneficial to efforts to advance and improve transportation in the Memphis area.

Sincerely,

Paul P. Skoutelas  
President and CEO

**PRESIDENT AND CEO**

Paul P. Skoutelas

1300 I Street NW  
Suite 1200 East  
Washington, DC 20005  
p: (202) 496-4800  
f: (202) 496-4324



July 2, 2024

Memphis Area Transit Authority  
Board of Commissioners  
One Commerce Square Building  
40 South Main Street  
Memphis, TN 38103

Board of Commissioners:

As you convene to consider Mrs. Mauldin's role at the Memphis Area Transit Authority (MATA), I pledge the support of the National Transit Institute (NTI) as a committed training partner with MATA under her leadership.

NTI, funded by the Federal Transit Administration, was established in the Intermodal Surface Transportation Efficiency Act of 1991 to develop, promote, and deliver training and education programs for the public transit industry. NTI delivers in-person courses, across the country, to transit professionals on a range of topics including: procurement, financial management, asset management, service planning, and environmental justice.

MATA will serve as a training host agency where courses, taught by NTI expert trainers, will be delivered in new, state of the art, MATA training rooms. Through these courses, MATA staff will be educated, trained, and re-trained to enhance agency efficiency and productivity but to, ultimately, better serve the over 700,000 residents of Greater Memphis with world class public transportation.

Mrs. Mauldin is highly-respected, nationally, as an innovative and bold thought leader and a thorough and thoughtful industry policy shaper. MATA will be well-served by her strength, humility, and spirit of servant leadership.

Sincerely,

A handwritten signature in black ink that reads "Billy Terry". The signature is written in a cursive, slightly slanted style.

Billy Terry  
Executive Director  
National Transit Institute





## GREATER MEMPHIS CHAMBER

July 1, 2024

MATA Board Commissioners,

As the CEO of the Greater Memphis Chamber, I'm keenly aware of the critical importance of an efficient public transportation system in our city's economic growth. Without it, we will continue to lack equitable access to high-quality jobs for all Memphians and limit the quality of life for those seeking a more walkable community. Those issues also decrease our city's chances of attracting new businesses and corporations. This underscores the urgency of supporting Bacarra Mauldin's efforts to lead the Memphis Area Transit Authority (MATA).

As a long-time Memphis resident, I have watched MATA struggle to gain financial footing or develop the infrastructure necessary to support our community as transportation needs change and business costs increase. However, since working with Ms. Mauldin, I feel confident that, if given the opportunity, she can live up to her promise of Transforming Transit in the Mid-South.

During her time in the Deputy role, she displayed sound judgment, introduced innovative ideas and intentionally worked to keep our business community informed of their progress. Now, as interim, she has leveraged local, regional and national resources and partnerships that have already proven effective in moving us further. Most impressively, she worked with her team to independently access and then transparently share the difficult news of the true status of the organization. Challenges that are unknown or unnoticed cannot be overcome.

Through conversations with Ms. Mauldin and others in the transit industry, I've learned of her accomplishments in turning other agencies around and being an industry leader who advises nationally. At this critical juncture, we need a knowledgeable and innovative leader who operates with integrity, is already familiar with transit challenges and solutions here and elsewhere and is connected to our community. Ms. Mauldin also understands the critical role that transit plays in workforce development, both benefitting the employer and the employee who depend on innovative and effective transit solutions. I strongly believe that we have found that leader in Ms. Mauldin.

Please feel free to contact me if you have any questions about this recommendation.

Sincerely,

Ted Townsend  
President & CEO  
Greater Memphis Chamber



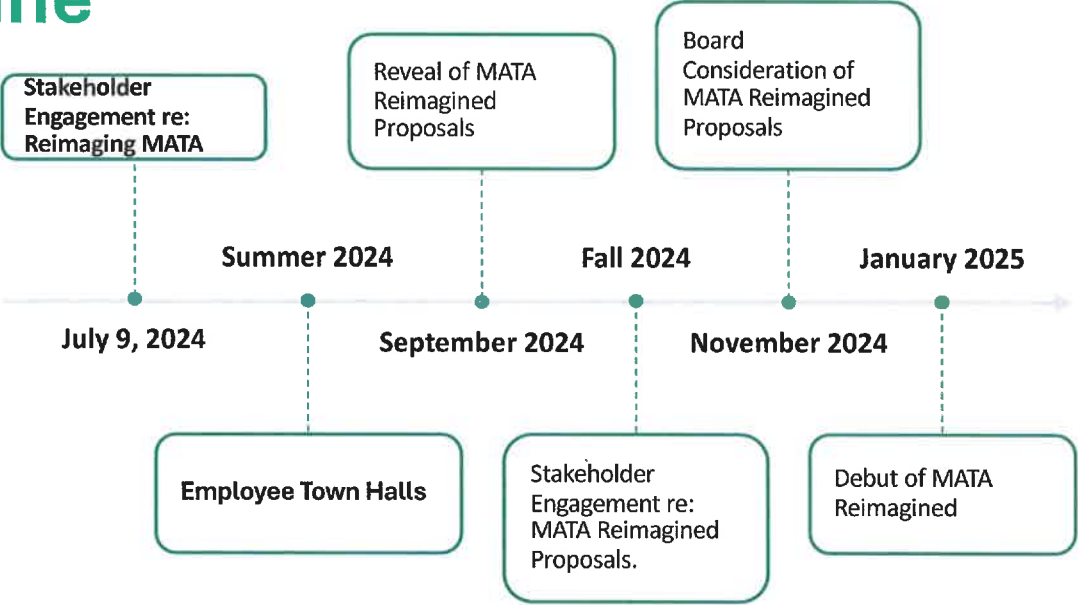
# Appendix B

## Timeline

# BOLD Steps Take Time!



## Proposed Route Optimization Timeline





# Appendix C

Ordinances

## CHAPTER 2-56. MEMPHIS AREA TRANSIT AUTHORITY<sup>1</sup>

### Sections:

#### **Sec. 2-56-1. Election and terms of members; filling of vacancies; composition; qualifications.**

The initial members of the Memphis Area Transit Authority shall be the members of the newly dissolved Memphis Transit Authority whose terms of office have not expired and who shall serve for a term designated by the mayor and approved by the council. The transit authority board shall consist of nine members, who shall be nominated by the mayor and approved by the council for terms of three years. In the event a vacancy occurs by death, resignation or removal among such transit authority board members, a successor shall be appointed in like manner only to fill the unexpired term of such member. All members shall serve until their successors are nominated and qualified.

(Code 1967, § 2-279; Code 1985, § 2-336; Ord. No. 2252, § 2, 5-13-1975; Ord. No. 4786, § 1, 8-1-2000)

#### **Sec. 2-56-2. Selection and terms of chairperson and vice-chairperson.**

The mayor shall designate one of the members of such authority board as chairperson. The term of the chairperson shall be two years and he or she may succeed himself or herself upon proper designation by the mayor. The members of the transit authority board shall elect one of their number as vice-chairperson, who shall hold office for a period of one year. The vice-chairperson shall act as chairperson in the event of the death, removal, resignation, absence or other inability of the chairperson to serve as such. Terms shall commence on July 1; provided that, the chairperson and vice-chairperson shall continue to serve until his or her successor is designated or elected, respectively.

(Code 1967, § 2-280; Code 1985, § 2-337; Ord. No. 2252, § 3, 5-13-1975)

#### **Sec. 2-56-3. Special meetings; quorum.**

The transit authority board shall hold not less than ten regular meetings each calendar year, no more than 60 calendar days intervening between any two such meetings, Saturdays, Sundays and legal holidays excepted, the time and place of such meetings to be fixed by the transit authority board or the chairperson and made public as required by applicable law. The transit authority board shall hold such regular meetings as may be necessary for the transaction of the business of the transit authority. Special meetings may be called by the chairperson, by a majority of the authority board or by the mayor. A majority of the authority board shall constitute a quorum for the transaction of business at any regular or special meeting. Notice of any special meeting may be waived, either before or after the holding thereof; and personal attendance at any special meeting shall constitute a waiver of notice by the members present; and absence of any member from the city shall dispense with the necessity of giving such member any notice of any special meeting.

(Code 1967, § 2-281; Code 1985, § 2-338; Ord. No. 2252, § 4, 5-13-1975)

State law reference(s)—Open meetings act, T.C.A. § 8-44-101 et seq.

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<sup>1</sup>State law reference(s)—Transit authorities, T.C.A. § 7-56-101 et seq.

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**Sec. 2-56-4. General powers; members.**

The members of the transit authority board shall have authority to supervise the operation of the transit system. The board shall have authority to contract with a private management firm to manage and operate such transit system as set forth in section 2-56-5, or to employ its own personnel to manage and operate such transit system, and further to employ such personnel as it from time to time deems necessary or appropriate to carry out its purposes.

(Code 1967, § 2-282; Code 1985, § 2-339; Ord. No. 2252, § 5, 5-13-1975)

**Sec. 2-56-5. Management company authorization.**

The transit authority board shall have the authority to hire or contract with a management company or a general manager to operate such transportation system.

(Code 1967, § 2-283; Code 1985, § 2-340; Ord. No. 2252, § 6, 5-13-1975)

**Sec. 2-56-6. Employment of other subordinate officers and employees.**

The transit authority board shall be authorized to employ such other superintendents, engineers, assistants, consultants and other subordinate officers and employees as may be necessary for efficient operation of the transit authority, who shall hold office at the will and pleasure of the transit authority board.

(Code 1967, § 2-284; Code 1985, § 2-341; Ord. No. 2252, § 7, 5-13-1975)

**Sec. 2-56-7. Rules and regulations.**

The transit authority board shall have the power and authority to promulgate and enforce such rules and regulations governing the system as they may deem proper in the operation of the transit authority.

(Code 1967, § 2-285; Code 1985, § 2-342; Ord. No. 2252, § 8, 5-13-1975)

**Sec. 2-56-8. Authority board to acquire, maintain and operate transportation system.**

The transit authority board shall have all the power and authority provided in T.C.A. §§ 7-56-101 through 7-56-109 not inconsistent with this chapter and such provisions are incorporated herein by reference which provides authority to establish, acquire, purchase, maintain and operate the public transportation system.

(Code 1967, § 2-286; Code 1985, § 2-343; Ord. No. 2252, § 8, 5-13-1975)

**Sec. 2-56-9. Rates, fares and tolls.**

The MATA board shall have authority to make changes in rates, fares and tolls for MATA transportation services.

(Code 1967, § 2-287; Code 1985, § 2-344; Ord. No. 2252, § 10, 5-13-1975; Ord. No. 4230, § 1, 11-9-1993; Ord. No. 4326, § 1, 5-16-1995)

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(Supp. No. 26)

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**Sec. 2-56-10. Purchasing of supplies and materials.**

The transit authority board shall make all purchases for supplies, equipment and materials in accordance with city procedures taking such bids as are required by such procedures for purchases under the amount specified in the Charter for like purchases by the city and advertising for bids on all purchases of at or in excess of the amount specified in the Charter for like purchases by the city as required by law.

(Code 1967, § 2-288; Code 1985, § 2-345; Ord. No. 2252, § 11, 5-13-1975)

**Sec. 2-56-11. Powers generally; authority.**

- A. The transit authority board shall have the right to make any and all contracts necessary, appropriate, or convenient for the full exercise of the powers herein granted, including, but not limited to, contracts with any person, firm, federal agency, municipality, or public or private corporation relating to the acquisition, construction, maintenance, and operation of all or any part of any transportation system, and contracts for grants or other financial assistance from any state or federal agency.
- B. The transit authority board shall have the authority to purchase liability and property damage insurance in such amounts as they determine is necessary and develop transit programs and plans and be responsible for encouraging and establishing public transit as a viable transportation alternative.
- C. The transit authority board shall have no power to incur indebtedness, issue any notes or other obligations constituting a lien upon the properties, real or personal, used in the system for the purpose of transporting passengers, sell, purchase or lease real estate or enter into any service and operation agreements with any other governmental jurisdiction for transportation services, except with the approval of the mayor and city council.
- D. The transit authority board shall prepare an annual operating and capital budget in accordance with procedures established by the mayor and shall submit the same in the time designated by the mayor to be submitted with the general budget request of the city for consideration by the council, such budget submitted by the transit authority board to the director of finance and administration, to thereafter be submitted to the mayor for submission to the council in the annual budget request book using the same format and accounting methods used in budget presentations by the divisions of city government.
- E. The MATA board shall have authority to select and determine all routes and scheduling of the transportation system.

(Code 1967, § 2-289; Code 1985, § 2-346; Ord. No. 2252, § 12, 5-13-1975; Ord. No. 4230, §§ 2, 3, 11-9-1993; Ord. No. 4326, § 2, 5-16-1995)

State law reference(s)—General powers of transit authorities, T.C.A. § 7-56-101 et seq.

**Sec. 2-56-12. Retirement system.**

The transit authority board is authorized by resolution to take action as to retirement and disability allowance of its employees, former employees of the transit authority and employees of the former Memphis Transit Authority, as deemed necessary or appropriate by the transit board, including, but not limited to, the transfer to and assumption by a management company, employed pursuant to section 2-56-5, of the assets and administration of the retirement and disability retirement plan.

(Code 1967, § 2-290; Code 1985, § 2-347; Ord. No. 2252, § 13, 5-13-1975)

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(Supp. No. 26)

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(Supp. No. 26)



ORDINANCE ABOLISHING THE MEMPHIS TRANSIT AUTHORITY AND ESTABLISHING A NEW MEMPHIS AREA TRANSIT AUTHORITY, PROVIDING FOR THE MEMBERSHIP, TERMS OF OFFICE, OFFICIALS, OFFICERS AND EMPLOYEES, POWERS, DUTIES AND RESPONSIBILITIES AND TO PROVIDE FOR THE SETTING AND APPROVING OF RATES, SCHEDULES AND ALL OTHER MATTERS NECESSARY IN THE OPERATION OF SAID AUTHORITY.

WHEREAS, TCA 6-3801, et seq., provides that any municipality may dissolve any existing transit authority established under a private act and establishing a new transit authority as authorized in said Chapter; and

WHEREAS, the Memphis Transit Authority is existing pursuant to Chapter 26 of the Private Acts of 1943, as amended; and

WHEREAS, it is the desire of the Council to dissolve said transit authority and to establish a new transit authority Board and set forth the powers and duties of said Board, and organization of said transit authority.

NOW, THEREFORE,

SECTION 1. BE IT ORDAINED BY THE COUNCIL OF THE CITY OF MEMPHIS, That the Memphis Transit Authority as established by Chapter 26, of the Private Acts of 1943, as amended, be and the same is hereby abolished as of the qualifications of the new Memphis Area Transit Authority as established hereinafter. This ordinance shall not in any way, however, impair any obligations of the present Memphis Transit Authority, or the City of Memphis, to any person or persons and shall not change or alter the obligations of any existing contracts but all said obligations and contracts outstanding are assumed by the Memphis Area Transit Authority established herein and shall be binding upon the City of Memphis.

ELECTION AND TERMS OF MEMBERS, FILLING OF VACANCIES, COMPOSITION, QUALIFICATIONS, BOND AND OATH OF MEMBERS

SECTION 2. BE IT FURTHER ORDAINED, That the initial members of the Memphis Area Transit Authority shall be the members of the newly dissolved M.T.A., whose terms of Office have not expired and who shall serve for a term designated by the Mayor and approved by the Council. The MATA Board shall consist of seven members, and the members shall be nominated by the Mayor and approved by the Council for terms of one, two and three years, and upon expiration of the terms their successors shall be elected upon nomination by the

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all

000261

Mayor and approved by the Council for terms of three years. In the event a vacancy occurs by death, resignation or removal of said Memphis Area Transit Authority Board members, their successors shall be appointed in like manner only to fill the unexpired term of such member.

SELECTION AND TERMS OF PRESIDENT AND VICE PRESIDENT

SECTION 3. BE IT FURTHER ORDAINED, That immediately upon the qualification of the transit authority, the Mayor of the City of Memphis shall designate one of the members of said authority as Chairman, and the transit authority shall elect one of its members as Vice-chairman. The term of the Chairman shall be two years and he may succeed himself upon proper designation by the Mayor. Terms shall be from July 1st or when a successor is designated for each year thereafter.

REGULAR AND SPECIAL MEETINGS: QUORUM

SECTION 4. BE IT FURTHER ORDAINED, That the Transit authority shall hold regular meetings at least once each month, at a definite time to be fixed by resolution of the authority, and such special meetings as may be necessary for the transaction of the business of the transit authority. Special meetings may be called by the Chairman, by a majority of the Board or by the Mayor. A majority of the Board shall constitute a quorum for the transaction of business at any regular or special meeting. Notice of any special meeting may be waived, either before or after the holding thereof; and personal attendance at any special meeting shall constitute a waiver of notice by the members present; and absence of any member from the City of Memphis shall dispense with the necessity of giving such member any notice of any special meeting. (Private Acts 1943, Ch. 26, Section 8).

GENERAL POWERS - MEMBERS

SECTION 5. BE IT FURTHER ORDAINED, That the members of the authority Board shall have general supervision over the operation of the transit system and of all employees of said system. They shall keep themselves advised as to the general operating and financial condition of said system and furnish such reports as required by the Mayor, Comptroller or Council with regard to the operations, maintenance and financial condition of said system and from time to time shall furnish such other information as the Mayor or Council may request.

## MANAGEMENT COMPANY AUTHORIZATION

SECTION 6. BE IT FURTHER ORDAINED, That the MATA Board shall, as soon as practicable after ~~their~~ qualification, hire or contract with a management company, or a general manager to operate said transportation system.

## EMPLOYMENT OF OTHER SUBORDINATE OFFICERS AND EMPLOYEES

SECTION 7. BE IT FURTHER ORDAINED, That the Memphis ~~Area Transit~~ Authority Board shall be authorized to employ such other superintendents, engineers, assistants, consultants and other subordinate officers and employees as may be necessary for the efficient operation of said Memphis Area Transit Authority, who shall hold office at the will and pleasure of the Memphis Area Transit Authority Board.

## RULES AND REGULATIONS

SECTION 8. BE IT FURTHER ORDAINED, That said transit authority board shall have the power and authority to promulgate and enforce such rules and regulations governing said system as they may deem proper in the operation of said transit authority.

## AUTHORITY TO ACQUIRE, MAINTAIN AND OPERATE TRANSPORTATION SYSTEM, ETC.

SECTION 9. BE IT FURTHER ORDAINED, That the MATA shall have all the power and authority provided in Tennessee Code Annotated Sections 6-3801 through 6-3809 not inconsistent with this ordinance and said provisions are incorporated herein by reference which provides the authority to establish, acquire, purchase, maintain and operate the public transportation system.

## RATES, FARES AND TOLLS

SECTION 10. BE IT FURTHER ORDAINED, That the MATA Board shall have authority to make changes in rates, fares and tolls for its transportation service.

## PURCHASING OF SUPPLIES, MATERIALS, ETC.

SECTION 11. BE IT FURTHER ORDAINED, That the MATA Board shall make all purchases for supplies, equipment and materials through the City Purchasing Agent of the City of Memphis who shall take such bids as are required in his office for purchases under \$2,000 and advertise for bids on all purchases over \$2,000 as now required by law.

## POWERS GENERALLY-AUTHORITY

SECTION 12 BE IT FURTHER ORDAINED, That the transit authority shall have the right to make any and all contracts necessary, appropriate, or convenient for the full exercise of the powers herein granted, including, but not limited to, contracts with any person, firm, federal agency, municipality, or

public or private corporation relating to the acquisition, construction, maintenance, and operation of all or any part of any transportation system, and contracts for grants or other financial assistance from any state or federal agency.

The MATA Board shall have the authority to select and determine all routes and scheduling of the transportation system, purchase liability and property damage insurance in such amounts as they determine is necessary; develop transit programs and plans and be responsible for encouraging and establishing public transit as a viable transportation alternative.

THE MATA shall have no power to incur indebtedness, issue any notes or other obligations constituting a lien upon the properties, real or personal, used in the system for the purpose of transporting passengers, sell, purchase or lease real estate or enter into any service and operation agreements with any other governmental jurisdiction for transportation services, except with the approval of the Mayor and Council of the City of Memphis.

The MATA shall prepare an annual operating and capital budget in accordance with procedures established by the Mayor and shall submit the same in the time designated by the Mayor to be submitted with the general budget request of the City for consideration by the Council, said budget submitted by the MATA to the Comptroller as required by Charter Section 330, to thereafter be submitted to the Mayor for submission to ~~the Council~~ in the consolidated city budget.

#### RETIREMENT SYSTEM

SECTION 13. BE IT FURTHER ORDAINED, That the MATA is authorized by resolution to assume the employees retirement and disability allowance plan of the MTA and all employees of said transit authority shall be members of said retirement system as is required by said plan.

#### SEVERABILITY

SECTION 14. BE IT FURTHER ORDAINED, That the provisions of this ordinance are hereby declared to be severable.

If any of these sections, provisions, sentences, clauses, phrases or parts is held unconstitutional or void, the remainder of ~~this~~ ordinance shall continue in full force and effect.

SECTION 15. BE IT FURTHER ORDAINED, That this ordinance shall take effect from and after the date it shall have been passed by the Council, signed by the Chairman of the Council, certified and delivered to the office of

the Mayor in writing by the Comptroller, and become effective as otherwise provided by law.

ROBERT LOVE  
Chairman of Council

Attest:

GEORGE SUPENSKY, COMPTROLLER

\_\_\_\_\_

THE FOREGOING ORDINANCE

2252 PASSED

1st Reading APR 29 1975

2nd Reading MAY 6 1975

3rd Reading MAY 13 1975

Approved *Robert S. Love*  
Chairman of Council

APPROVED:

*W. H. Chaffin*  
Mayor, City of Memphis

I hereby certify that the foregoing is a true copy, and said document was adopted by the Council of the City of Memphis, as above indicated and approved by the Mayor.

*Pauline B. Temple*  
Deputy Comptroller - Council Records

THE FOREGOING ORDINANCE  
 PASSED \_\_\_\_\_  
 1st Reading APR 29 1975  
 2nd Reading MAY 6 1975  
 3rd Reading MAY 13 1975

Approved \_\_\_\_\_  
 Chairman of Council  
 APPROVED:

Mayor, City of Memphis  
 I hereby certify that the foregoing  
 is a true copy, and said document  
 was adopted by the Council of the  
 City of Memphis, as above indicated  
 and approved by the Mayor.

Deputy Comptroller - Council Records

COUNCIL AGENDA CHECK-OFF SHEET

000265

FOR COUNCIL ACTION ON 4-29-75 (date)

1. ITEM (check one)

- Ordinance
- Resolution
- Appointment
- Discussion Item

- Condemnations
- Request for Public Hearing
- Notation for Minutes
- Other (specify)

2. DESCRIPTION OF ITEM: Ordinance abolishing the Memphis Transit Authority and establishing a new Memphis Area Transit Authority.

Ordinance abolishes the existing transit authority and establishes a new Memphis Area Transit Authority for the appointment term of office and function of a seven member MATA Board, selection of the chairman and vice-chairman. It sets out the MATA Board is to be for employment of personnel, enforcement of rules, establishment/operation of public transportation system, rate changes, contracts, route selection and scheduling; purchasing to be through the City Purchasing Agent; budgeting to be part of City budget procedures; and incurrence of debts and real estate matters to be with Mayor and City Council approval.

Mayor and Director of Public Service recommend approval.

3. RECOMMENDED COUNCIL ACTION:

4. PREVIOUS ACTION TAKEN BY COUNCIL, BOARDS, COMMISSIONS, COUNTY, STATE OR FEDERAL GOVERNMENTS:

5. THIS ACTION WILL ( ) WILL NOT ( ) REQUIRE EXPENDITURE OF CITY FUNDS.

6. ACTUAL COST \_\_\_\_\_ OR ESTIMATED COST \_\_\_\_\_

7. SOURCE OF FUNDS:

OPERATING BUDGET:  Funds Available  
 Budget Transfer Required  
 Supplemental Appropriation Requested

CAPITAL IMPROVEMENT PROGRAM:

CIP Line No. \_\_\_\_\_ or CIP Amend. from Line No. \_\_\_\_\_ to Line No. \_\_\_\_\_

Year Project Scheduled \_\_\_\_\_ Source of Funds for Project \_\_\_\_\_

Amount of Appropriation Requested \_\_\_\_\_

State Funds (Program) \_\_\_\_\_ Amount \_\_\_\_\_

Federal Funds (Program) \_\_\_\_\_ Amount \_\_\_\_\_

County Funds \_\_\_\_\_ Amount \_\_\_\_\_

8. DEADLINE (if yes, explain): \_\_\_\_\_

9. DEPARTMENT AND DIVISION APPROVAL:

Department Head \_\_\_\_\_ Date \_\_\_\_\_

City Engineer \_\_\_\_\_ Date \_\_\_\_\_

Division Director *William C Boyd* \_\_\_\_\_ Date *4/25/75*

10. CHECKED AND TRANSMITTED BY \_\_\_\_\_ Date \_\_\_\_\_

11. FINAL APPROVAL:

City Attorney \_\_\_\_\_ Date \_\_\_\_\_

Chief Administrative Officer \_\_\_\_\_ Date \_\_\_\_\_

COUNCIL AGENDA CHECK-OFF SHEET

FOR COUNCIL ACTION ON 4-29-75 (date)

000266

1. ITEM (check one)

- Ordinance
- Resolution
- Appointment
- Discussion Item

- Condemnations
- Request for Public Hearing
- Notation for Minutes
- Other (specify)

2. DESCRIPTION OF ITEM: Ordinance abolishing the Memphis Transit Authority and establishing a new Memphis Area Transit Authority.

Ordinance abolishes the existing transit authority and establishes a new Memphis Area Transit Authority for the appointment term of office and function of a seven member MATA Board, selection of the chairman and vice-chairman. It sets out the MATA Board is to be for employment of personnel, enforcement of rules, establishment/operation of public transportation system, rate changes, contracts, route selection and scheduling; purchasing to be through the City Purchasing Agent; budgeting to be part of City budget procedures; and incurrence of debts and real estate matters to be with Mayor and City Council approval.

Mayor and Director of Public Service recommend approval.

225/24

3. RECOMMENDED COUNCIL ACTION:

4. PREVIOUS ACTION TAKEN BY COUNCIL, BOARDS, COMMISSIONS, COUNTY, STATE OR FEDERAL GOVERNMENTS:

5. THIS ACTION WILL ( ) WILL NOT ( ) REQUIRE EXPENDITURE OF CITY FUNDS.

6. ACTUAL COST \_\_\_\_\_ OR ESTIMATED COST \_\_\_\_\_

7. SOURCE OF FUNDS:

OPERATING BUDGET:

- Funds Available
- Budget Transfer Required
- Supplemental Appropriation Requested

CAPITAL IMPROVEMENT PROGRAM:

CIP Line No. \_\_\_\_\_ or CIP Amend. from Line No. \_\_\_\_\_ to Line No. \_\_\_\_\_

Year Project Scheduled \_\_\_\_\_ Source of Funds for Project \_\_\_\_\_

Amount of Appropriation Requested \_\_\_\_\_

State Funds (Program) \_\_\_\_\_ Amount \_\_\_\_\_

Federal Funds (Program) \_\_\_\_\_ Amount \_\_\_\_\_

County Funds \_\_\_\_\_ Amount \_\_\_\_\_

8. DEADLINE (if yes, explain): \_\_\_\_\_

9. DEPARTMENT AND DIVISION APPROVAL:

Department Head \_\_\_\_\_ Date \_\_\_\_\_

City Engineer \_\_\_\_\_ Date \_\_\_\_\_

Division Director \_\_\_\_\_ Date \_\_\_\_\_

10. CHECKED AND TRANSMITTED BY \_\_\_\_\_ Date \_\_\_\_\_

11. FINAL APPROVAL:

City Attorney \_\_\_\_\_ Date \_\_\_\_\_

Chief Administrative Officer \_\_\_\_\_ Date \_\_\_\_\_

7



ROLL CALL

COUNCIL OF THE CITY OF MEMPHIS

DATE: 5-13-75

Pres. Abs.	N A M E	AYE	NO	OTHER
	A. D. ALISSANDRATOS	✓		
	FRED L. DAVIS			
	JOHN N. FORD			
	BILLY Z. HYMAN	✓		
	ROBERT B. JAMES	✓		
	ED MCBRAYER	Remained		
	JACK MCNEIL	✓		
	J.O. PATTERSON, JR.	✓		
	PHILIP A. PEREL, SR.	✓		
	GLENN RAINES	✓		
	THOMAS H. TODD, JR.			
	MRS. PAT VANDER SCHAAF	✓		
	ROBERT LOVE	✓		

2252

Remained

ROLL CALL

COUNCIL OF THE CITY OF MEMPHIS

DATE: 5-13-75

Pres. Abs.	N A M E	AYE	NO	OTHER
	A. D. ALISSANDRATOS (2)		✓	
	FRED L. DAVIS			
	JOHN N. FORD			
	BILLY Z. HYMAN		✓	9
	ROBERT B. JAMES		✓	
	ED MCBRAYER	Remained		
	JACK MCNEIL (1)	✓		
	J.O. PATTERSON, JR.	✓		
	PHILIP A. PEREL, SR.	✓		
	GLENN RAINES		✓	
	THOMAS H. TODD, JR.			
	MRS. PAT VANDER SCHAAF		✓	
	ROBERT LOVE		✓	

Failed

000258

ROLL CALL

MAY 13 1975

COUNCIL OF THE CITY OF MEMPHIS

DATE:

Pres. Abs.	N A M E	AYE	NO	OTHER
	A. D. ALISSANDRATOS (2)			
	FRED L. DAVIS			
	JOHN N. FORD			Ord. 2252
	BILLY Z. HYMAN			
	ROBERT B. JAMES			#9
	ED MCBRAYER	Recused		
	JACK MCNEIL (1)			
	J. O. PATTERSON, JR.			
	PHILIP A. PEREL, SR.			Third & Final Reading
	GLENN RAINES			
	THOMAS H. TODD, JR.			
	MRS. PAT VANDER SCHAAF			
	ROBERT LOVE			

ROLL CALL

MAY 6 1975

COUNCIL OF THE CITY OF MEMPHIS

DATE:

Pres. Abs.	N A M E	AYE	NO	OTHER
	A. D. ALISSANDRATOS (1)	✓		
	FRED L. DAVIS			Ord. 2252
	JOHN N. FORD			
	BILLY Z. HYMAN	✓		(#6)
	ROBERT B. JAMES	✓		
	ED MCBRAYER	Recused		
	JACK MCNEIL (2)	✓		
	J. O. PATTERSON, JR.	✓		Second Reading
	PHILIP A. PEREL, SR.			
	GLENN RAINES			
	THOMAS H. TODD, JR.	✓		
	COUN. WOMAN			
	MRS. PAT VANDER SCHAAF	✓		
	ROBERT LOVE			

000259

ROLL CALL

COUNCIL OF THE CITY OF MEMPHIS

DATE: APR 29 1975

Pres. Abs.	N A M E	AYE	NO	OTHER
	A. D. ALISSANDRATOS	✓		
	FRED L. DAVIS	✓		
	JOHN N. FORD	② ✓		Ord. 2252
	BILLY Z. HYMAN	① ✓		#7
	ROBERT B. JAMES	① ✓		
	ED MCBRAYER	Rescinded		
	JACK MCNEIL			
	J.O. PATTERSON, JR.	✓		
	PHILIP A. PEREL, SR.			First Reading
	GLENN RAINES	✓		
	THOMAS H. TODD, JR.	✓		
	MRS. PAT VANDER SCHAAF	✓		
	ROBERT LOVE	✓		



# Appendix D

Job Descriptions



## Chief Financial Officer (CFO)

### JOB OVERVIEW

Directs and controls all MATA's activities in the areas of financial management. Guides and monitors the operations of the Offices of Accounting, Financial Management & Budget, Revenue Operations, Treasury Services, and Contracts, Procurement & Materials and Grants Administration. Advises the Chief Executive Officer (CEO) and the Board of Commissioners on fiscal management/planning matters for the Authority. Responsible for the Authority's operating budget.

### EDUCATION and/or EXPERIENCE

Bachelor's degree in finance, Accounting, Economics, Business Administration or related field required, graduate degree desirable. Minimum of ten years of experience in financial management including accounting, treasury services or related financial areas. At least five years' experience must have been at a middle or senior management level, in a function similar in size and scope to the Department of Finance. In lieu of a degree, experience may be substituted on a year-for-year basis.

### QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### ESSENTIAL DUTIES AND RESPONSIBILITIES

1. Oversees and improves the budget development process to ensure the annual budget meets all statutory requirements and accurately reflects the Authority's financial environment. Provides guidance, training, and assistance to operating staff, as necessary, in developing their annual budgets. Monitors departments' execution of the annual budget and ensures budgets are maintained within approved levels.
2. Provides the CEO with timely financial strategy advice based on changes in the financial environment in sufficient time to implement effective tactics and strategies and to ensure sound fiscal management.
3. Plans, develops, and oversees implementation of long, and short-range strategies and programs for the Department, in support of the Authority's goals, objectives, and strategic plans.
4. Directs the overall activities of the Finance Department, including the offices of Accounting, Financial Management & Budget, and Contracts, Procurement & Materials.
5. Interdepartmental & Board Relations - Makes recommendations and presentations to the Board of Commissioners on matters of the Authority's financial health. Ensures coordination and cooperation between the Department of Finance and all other MATA work units. Represents MATA on financial matters with financial institutions, federal agencies, local groups and organizations, professional associations, and other similar groups.
6. Provides oversight of MATA's Bond and Commercial Paper Program. Performs other related duties as assigned by the CEO.



## Chief Financial Officer (CFO)

7. These duties are not to be construed as exclusive or all-inclusive, and do not include marginal functions of the position that are incidental to the performance of the essential job functions.

### **SUPERVISORY RESPONSIBILITIES**

Responsible for the management of the Department of Finance. Oversees and directs the activities of Offices and staff responsible for MATA finances. Customarily and regularly directs the work of managers and supervisors, and their direct reports. Interviews, hires and develops subordinate personnel; sets standards and evaluates performance of employees; provides feedback, coaches, disciplines and discharges as appropriate.

### **SAFETY RESPONSIBILITIES**

Takes every reasonable precaution, given the circumstances, to ensure the protection of employees, patrons, and members of the public. Identifies and informs employees of hazards in the workplace. Determines safe work methods and ensures that employees are notified of new and modified methods. Ensures employees are trained on safety policies and procedures. Ensures employees follow procedures. Responds to health and safety concerns of employees in a timely manner.

### **LANGUAGE SKILLS**

Ability to read, analyze, and interpret common scientific and technical journals, financial reports, and legal documents. Ability to respond to common inquiries or complaints from customers, regulatory agencies, or members of the business community. Ability to write speeches and articles for publication that conform to prescribed style and format. Ability to effectively present information to top management, public groups, and/or boards of directors.

### **MATHEMATICAL SKILLS**

Ability to work with mathematical concepts such as probability and statistical inference. Ability to apply concepts such as fractions, percentages, ratios, and proportions to practical situations.

### **REASONING ABILITY**

Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

### **CERTIFICATES, LICENSES, REGISTRATIONS**

N/A

### **PHYSICAL DEMANDS**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel; reach with hands and arms; and talk and hear.

### **WORK ENVIRONMENT**



## **Chief Financial Officer (CFO)**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Work is ordinarily performed in a standard office environment.

### **AMERICANS WITH DISABILITIES ACT**

If you are a qualified individual with a disability, you have the right to request that MARTA make reasonable accommodations in order to help you accomplish your work, which must still be performed in all its essential functions.



## AUDITOR

### JOB OVERVIEW

Performs complex analyses, evaluations, investigations, and audits of various operations (financial and compliance) of the Authority to assist management in ensuring that an appropriate control environment exists to support the achievement of organizational objectives related to the reliability of financial reporting, safeguarding of assets, compliance with laws and regulations (federal and state), MARTA policies and procedures, and the effectiveness and efficiency of operations. Provides guidance and direction to lower-level Auditors, if applicable.

### EDUCATION and/or EXPERIENCE

Bachelor's Degree in Accounting or a closely related field and a minimum of six years of progressively responsible experience in auditing (either private or government sector). A Master of Business Administration or Master of Professional Accountancy degree is highly desirable. In lieu of audit experience, experience using audit-related skills can be substituted on a year-for-year basis.

### QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions

### ESSENTIAL DUTIES AND RESPONSIBILITIES

1. Performs financial, operational, and compliance audits, investigations and special projects, including risk assessment and internal control evaluations.
2. Lead auditor/auditor-in-charge of large, complex audits, providing supervision/leadership and assistance to auditors while serving by setting priorities, establishing scope and objectives, coordinating resources and overseeing the audit process.
3. Performs walkthroughs and completes narratives and/or flowcharts for all applicable audit areas prior to beginning fieldwork to understand the audit area, determine the effectiveness and design of control, and identify possible efficiencies. Presents information in a concise, accurate, and thorough manner.
4. Advises management regarding adequacy of internal control structures and recommends effective, efficient solutions to internal control and efficiency weaknesses. Communicates verbally and in written form to all levels of the MATA's management, including the Board of Commissioners, Audit Committee and senior staff.
5. Lead development of a risk-based audit plan linked to the MATA's key business processes.
6. Organizes workload to meet changing priorities and deadlines.
7. Performs other duties as assigned.

### SUPERVISORY RESPONSIBILITIES

Assigned as auditor-in-charge and supervise the work of other auditors.

### SAFETY RESPONSIBILITIES

Follows the work practices and standard operating procedures for this position. Uses and/or wears the appropriate equipment, protective devices or clothing that MARTA requires. Reports health and safety concerns related to performing the duties of the job to supervisors and reports any on-going/unresolved health and safety concerns to the Joint Health and Safety Committee (JHSC) co-chair, JHSC representative or safety representative.

### LANGUAGE SKILLS





### **AUDITOR**

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Excellent oral and written communication skills required. Ability to write reports, business correspondence, and procedure manuals. Ability to present information and respond to questions from groups of managers, clients, customers, and the general public.

### **MATHEMATICAL SKILLS**

Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, and statistical analysis. Ability to apply concepts of basic algebra and geometry.

### **REASONING ABILITY**

Ability to solve practical problems creatively and deal with a variety of concrete variables in situations where only limited standardization exists. The ability to effectively participate in many cross-organizational/multi-discipline teams where participation results in consensus and group decisions are adopted by the organization.

### **CERTIFICATES, LICENSES, REGISTRATIONS**

Certified Internal Auditor (CIA) is preferred. Certified Public Accountant (CPA) or Certified Fraud Examiner (CFE) highly desirable.

### **PHYSICAL DEMANDS**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. While performing the duties of this job, the employee is regularly required to sit or stand; use hands to finger, handle, or feel; reach with hands and arms; communicate effectively; lift and carry audit files and portable computer; and see with eyes to examine physical evidence. The ability to climb into rail cars and buses may also be required. Specific vision abilities required by this job include close vision

### **WORK ENVIRONMENT**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Work is ordinarily performed in a standard office environment.

### **AMERICANS WITH DISABILITIES ACT**

If you are a qualified individual with a disability, you have the right to request that MATA make reasonable accommodations to help you accomplish your work, which must still be performed in all its essential functions.

**Job Code:**

**Department:**

**Reports To:**

**Grade:**

**FLSA Status:** Exempt

**Approved By:**

**Approved Date:**

**Revision Date:** 07/01/2024

**Safety Sensitive:** No



MEMPHIS AREA TRANSIT AUTHORITY

**AUDITOR**



## Grants Specialist

### JOB OVERVIEW

Provides programming, budgeting and oversight support for federal and state grant programs. Represents the Department of Finance with the Federal Transit Authority (FTA), Department of Transportation (TDOT), the Department of Homeland Security (DHS), and the Tennessee Emergency Management Agency (TEMA). Ensures MATA is following Federal and State regulations. Research grant opportunities and identify, pursue and obtain innovative funding opportunities for the Authority. Prepares Grant Applications, milestone status reports, and other specialized reports. Assists in the allocation of grant funding to support MATA's capital improvement programs. Provides specialized analysis throughout the Authority in support of major capital projects. Provides financial investment and revenue cash flow analysis to prepare forecast reports for management and capital budget development

### EDUCATION and/or EXPERIENCE

Master's Degree preferred or a bachelor's degree in finance, Business Administration or related field, and a minimum of eight years of progressively responsible experience in the analysis of complex financial issues. Experience in researching grant opportunities and preparing grant applications is required. FTA Grants preferred. Experience with managing grant finances, and with communicating funding issues to management. Experience may be substituted on a year-for-year basis in lieu of a degree.

### QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### ESSENTIAL DUTIES AND RESPONSIBILITIES

1. Provides programming, budgeting and oversight support of federal and state grant.
2. Represent the Department of Finance with the FTA, TDOT, DHS, and TEMA. Ensures MATA follows Federal and State regulations.
3. Manages grants capital budget expenditures and develops key performance indicators to track grant project performance and expenditure.
4. Research grant opportunities.
5. Identifies, pursues and obtains innovative funding opportunities for the Authority.
6. Prepares Grant Applications, milestone status reports, and other specialized reports.
7. Assists in the allocation of grant funding to support MATA capital improvement programs.
8. Provides specialized analysis throughout the Authority in support of major capital projects.
9. Provides financial investment and revenue cash flow analysis to prepare forecast reports for management and capital budget development.
10. Performs other related duties as assigned.

### SUPERVISORY RESPONSIBILITIES

N/A



## Grants Specialist

### **SAFETY RESPONSIBILITIES**

Follow the work practices and standard operating procedures for this position. Use and/or wear the appropriate equipment and wear the protective devices or clothing that MATA requires. Report health and safety concerns related to performing the duties of your job to supervisors and report any on-going/unresolved health and safety concerns to the Joint Health and Safety Committee (JHSC) co-chair, JHSC representative or safety representative.

### **LANGUAGE SKILLS**

Must have the ability to communicate through written and verbal means, especially in receiving information from various sources and applying input to transportation needs. Information related to recommendations made by this position must be communicated to senior management, the Board of Commissioners, and the CEO concisely and effectively.

### **MATHEMATICAL SKILLS**

Ability to perform addition, subtraction, division, and multiplication in all units of measure, using whole numbers, common fractions, and decimals. The ability to perform complex financial calculations related to treasury functions.

### **REASONING ABILITY**

Ability to solve practical problems creatively and deal with a variety of concrete variables in situations where only limited standardization exists. The ability to effectively participate in many cross-organizational/multi-discipline teams where participation results in consensus and group decisions are adopted by the organization.

### **CERTIFICATES, LICENSES, REGISTRATIONS**

N/A

### **PHYSICAL DEMANDS**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. While performing the duties of this job, the employee is regularly required to sit, use hands to finger, handle, or feel; reach with hands and arms; and talk and hear.

### **WORK ENVIRONMENT**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Work is ordinarily performed in a standard office environment.

### **AMERICANS WITH DISABILITIES ACT**

If you are a qualified individual with a disability, you have the right to request that MATA make reasonable accommodations to help you accomplish your work, which must still be performed in all its essential functions.



MEMPHIS AREA TRANSIT AUTHORITY

## Grants Specialist

**Job Code:**

**Department:**

**Reports To:**

**Grade:**

**FLSA Status:** Exempt

**Approved By:**

**Approved Date:**

**Revision Date:** 07/01/2024

**Safety Sensitive:** No

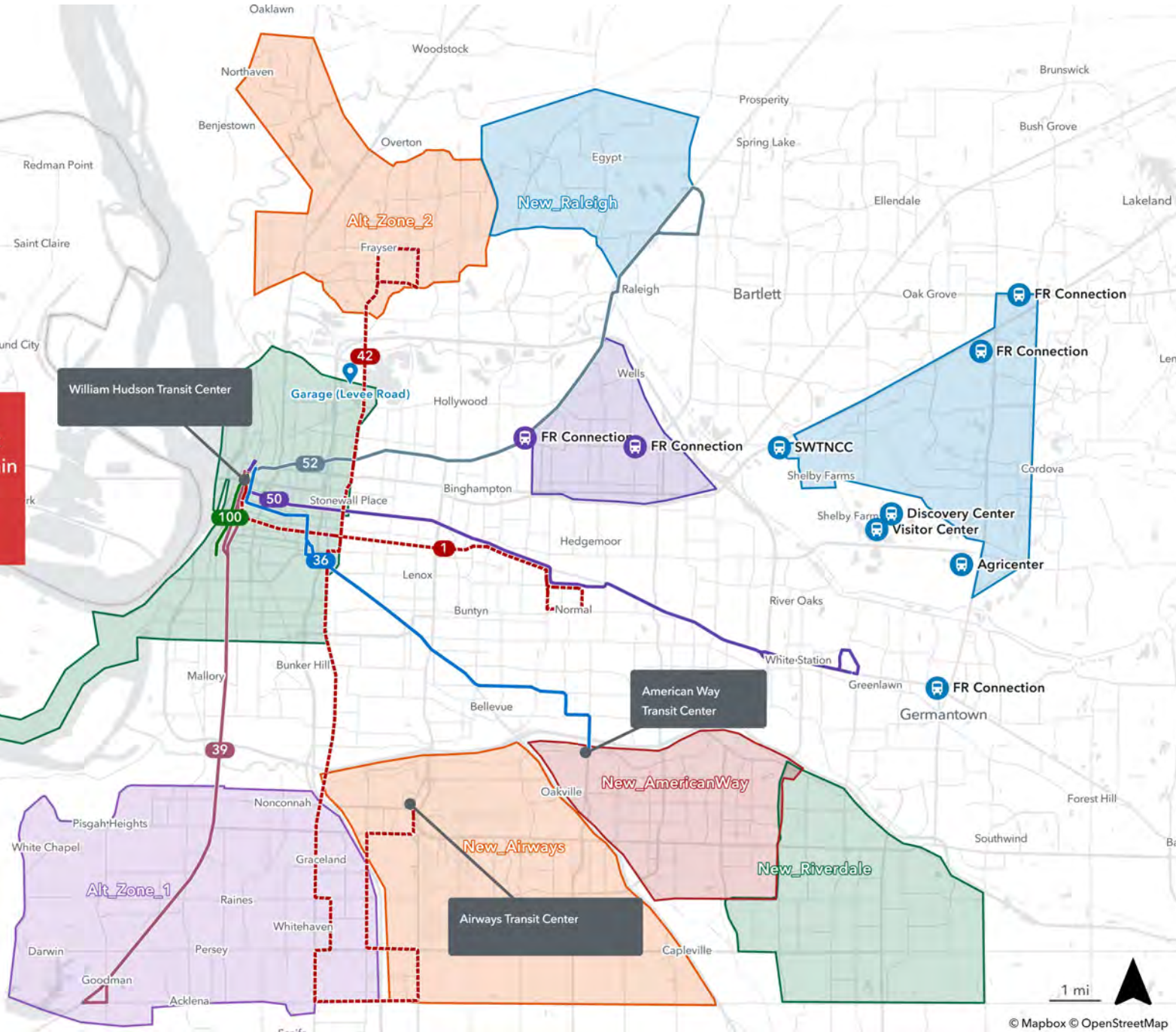


# Appendix E

Service Scenarios

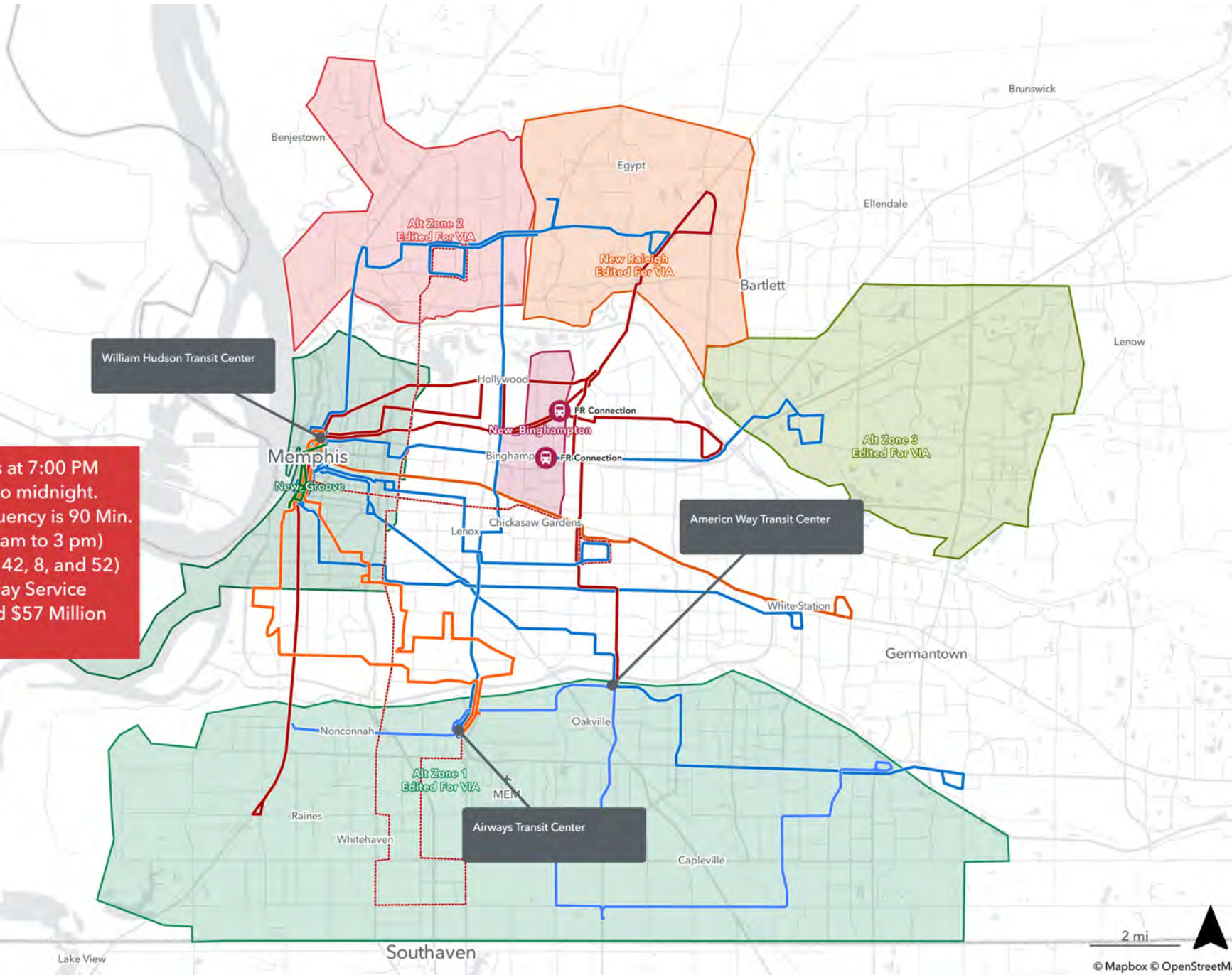
- 1 Union (Future BRT)
  - 36 Lamar
  - 39 South Third
  - 42 Crosstown (Future BRT)
  - 50 Poplar
  - 52 Jackson
  - 100 Trolley Main Line
- 📍 Point layer 1

- 1) Weekday service ends at 7:00 PM.  
Night groove from 7 pm to midnight
- 2) Weekday Service frequency is 180 min
- 3) No Saturday and Sunday service
- 4) Alt 4: Budget is around \$41 Million
- 5) Headcount: 265



- 1 Union (Future BRT)
- 2 Madison
- 4 Walker
- 8 Chelsea & Highland
- 11 Frayser
- 12 Mallory
- 19 Vollintine
- 30 Brooks
- 32 Hollywood & Hawkins Mill
- 36 Lamar
- 39 South Third
- 42 Crosstown (Future BRT)
- 50 Poplar
- 52 Jackson
- 53 Summer
- 57 Park
- 100 Trolley Main Line

- 1) Weekday Service ends at 7:00 PM  
Night groove from 7 to midnight.
- 2) Weekday Service frequency is 90 Min.  
30 min during peak (9 am to 3 pm)  
on top 5 route (50, 36, 42, 8, and 52)
- 3) No Saturday and Sunday Service
- 4) Alt 3: Budget is around \$57 Million
- 5) Head count: 374



Lake View

Southaven

2 mi

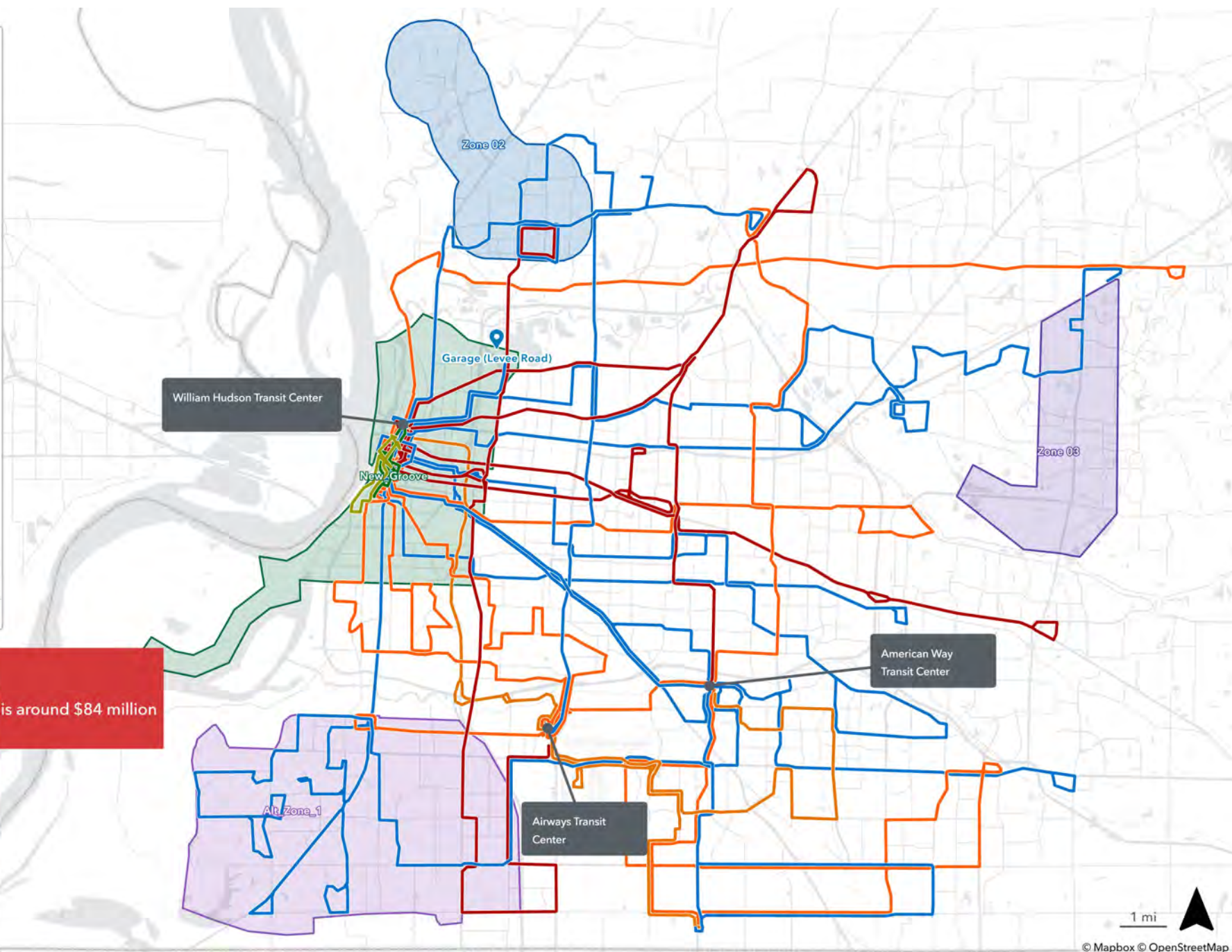


© Mapbox © OpenStreetMap



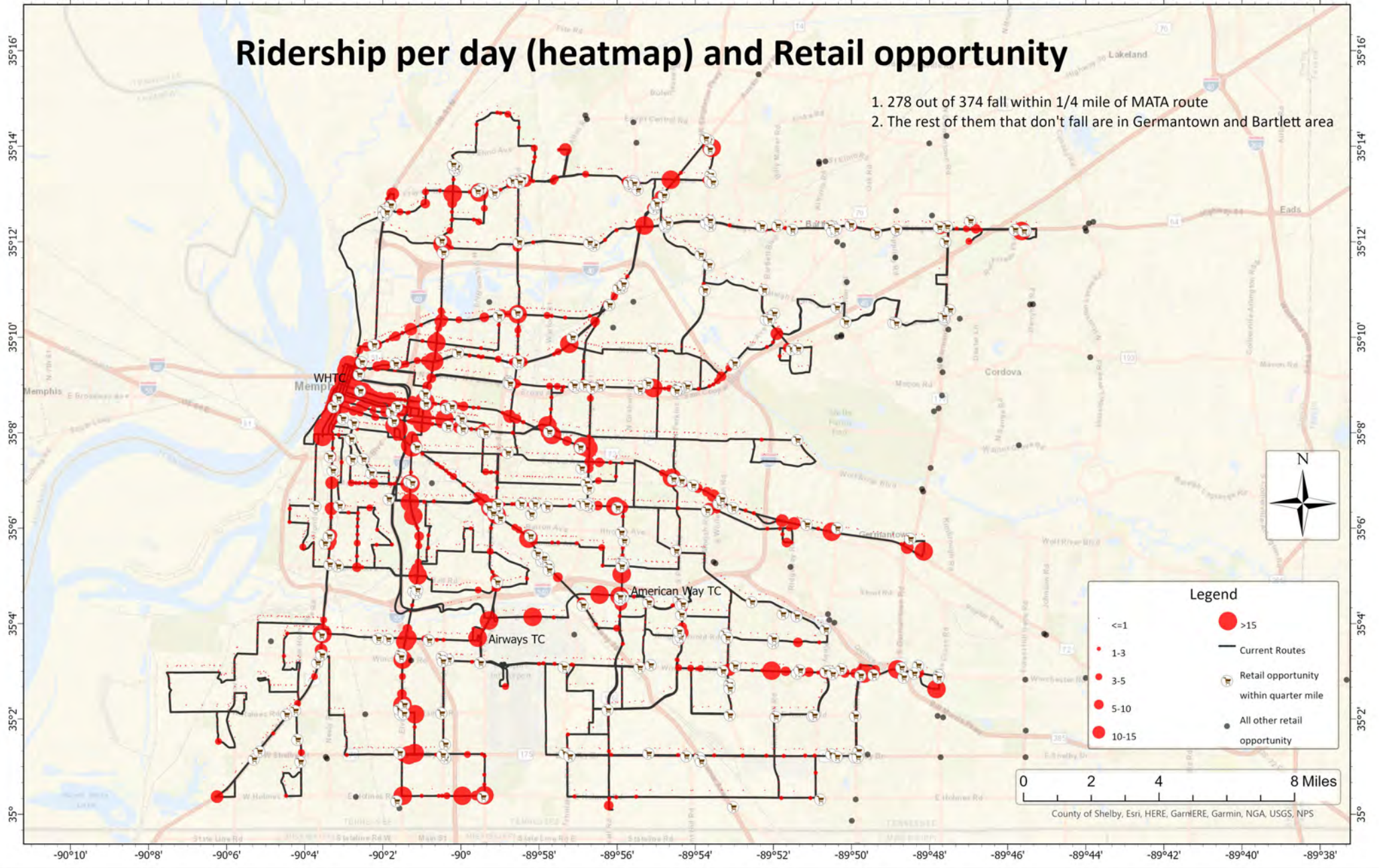
- 1 Union
  - 2 Madison
  - 4 Walker
  - 7 Shelby & Holmes
  - 8 Chelsea & Highland
  - 11 Frayser
  - 12 Mallory
  - 16 Southeast Circulator
  - 19 Vollintine
  - 28 Airport
  - 30 Brooks
  - 32 Hollywood & Hawkins Mill
  - 34 Central & Walnut Grove
  - 36 Lamar
  - 37 Perkins
  - 39 South Third
  - 40 Stage and Lauderdale
  - 42 Crosstown
  - 50 Poplar
  - 52 Jackson
  - 53 Summer
  - 57 Park
  - 69 Winchester
  - 100 Trolley Main Line
  - 101 Trolley Riverfront Line
  - 102 Trolley Madison Line
- Point layer 1

- 1) Everyday Service
- 2) 30 to 60 min frequency
- 3) Current service: Budget is around \$84 million
- 4) Headcount: 512



# Ridership per day (heatmap) and Retail opportunity

1. 278 out of 374 fall within 1/4 mile of MATA route
2. The rest of them that don't fall are in Germantown and Bartlett area





# Appendix F

Cost Saving Memo - July 1, 2024



July 1, 2024

To: CHIEFS & DIRECTORS  
From: Bacarra S. Mauldin, Interim Chief Executive Officer

Subject: Immediate Temporary Expense Reduction Measures

Considering the current economic challenges and the need to maintain financial stability, we find it imperative to implement immediate temporary expense reduction measures across our organization. This memorandum outlines key steps and expectations for each department in achieving these goals.

1. Expense Review:
  - Conduct a thorough review of all current and upcoming expenses within your departments.
  - Identify non-essential expenses and prioritize critical ones that directly contribute to our core operations.
2. Travel and Accommodation:
  - Suspend all non-essential business travel and accommodation expenditures until further notice.
  - MATA's Employee Travel Authorization Form must be completed and submitted for approval by me (the Interim CEO) or my designee.
  - Utilize virtual meetings and conferences as an alternative to in-person events.
3. Supplies and Equipment:
  - Postpone any non-essential purchases of supplies and equipment.
  - Encourage teams to optimize the use of existing resources.
4. Training and Development:
  - Temporarily halt all non-mandatory training programs.
  - Explore cost-effective alternatives for essential training needs, such as online courses and pre-licensed courses such as Pryor Learning.
5. Personnel Costs:
  - Freeze overtime work hours for all administrative staff.
  - Monitor and seek overtime hours reduction methods amongst all contract staff across all operational modes. Report all overtime hours daily with written justification.
  - Freeze hiring for non-essential positions until further notice.

Budget responsibility is not just the responsibility of the Finance Department. It's everyone's job. If you have more suggestions or have questions about this directive, please do not hesitate to reach out to me.

Thank you,

Bacarra S. Mauldin  
Interim CEO