MINUTES OF THE SEVENTH MEETING
SOUTHEASTERN REGIONAL TRANSIT AUTHORITY

DATE:     August 2, 2010
TIME:     8:00 a.m.
PLACE:    General Mitchell International Airport
          Mitchell Gallery of Flight Museum – Sijan Room
          Upper Concourse Level
          Milwaukee, Wisconsin

Board Members Present
John Antaramian .......................................................................................... City of Kenosha Representative
Earl Buford .............................................................................................. City of Milwaukee Representative
Jon Henderson ................................................................................................. Racine County Representative
Lee Holloway .................................................................................................. Chairman, Milwaukee County Board of Supervisors and Milwaukee County Representative
Joseph “Jody” Karls ........................................................................................ City of Racine Representative
Michael Mayo, Sr. .................................................................................. Vice-Chairman, Milwaukee County Board of Supervisors and Milwaukee County Representative
Karl Ostby .................................................................................................... Kenosha County Representative
Julia Taylor .......................................................................................................... Governor’s Representative

Board Members Excused
Chris Layden ............................................................................................ City of Milwaukee Representative

Staff Members
Kenneth R. Yunker ......................................................................................... Executive Director, SEWRPC
Christopher Hiebert ....................................................................... Chief Transportation Engineer, SEWRPC
Eric Lynde.......................................................................................................... Planner/Engineer, SEWRPC

Guests
Kelly Bablitch ......................... Deputy Director, Intergovernmental Relations, Milwaukee County Board
Peter W. Beitzel .......................................................................................... Vice President, International Trade, Transportation, and Business Development, Metropolitan Milwaukee Association of Commerce
Roy De La Rosa ....................... Director, Intergovernmental Relations, Milwaukee County Board
Moira Fitzgerald ........................................ Broydrick & Associates, Hertz Corp.
Richard Freiberg ...................................................... Director of Business Development, Wisconsin Center District
Lloyd Grant, Jr. .............. Vice President & Deputy Managing Director, Milwaukee County Transit System
Brian Mitchell .......................................................................................... Spokesperson, Wisconsin Car Rental Alliance
H. Carl Mueller .......................................................................................... President, Mueller Communications, Inc.
Alan Richards ........................................................................................................ Mayor, City of St. Francis
Larry Sandler .......................................................................................... Reporter, Milwaukee Journal-Sentinel
Karen Schmiechen ........................................ Planner, Wisconsin Department of Transportation, Southeast Region
ROLL CALL

Chairman Ostby called the meeting to order at 8:15 a.m.

APPROVAL OF AGENDA

Chairman Ostby noted that Milwaukee County Board Chairman Holloway had sent a letter to him requesting that agenda item 9, “Consideration of retention of Mueller Communications as interim communications consultant during search for permanent communications consultant”, be removed from the agenda (see Attachment 1 to these minutes). Milwaukee County Board Chairman Holloway stated that the duration of the proposed interim agreement with Mueller Communications extended past the proposed timeline for hiring a permanent communications consultant, and that the Mueller Communications proposal would be for a new contract and not an extension of their previous contract. He suggested that the Board should follow a competitive request for qualifications/proposals (RFQ/P) process to hire a communications consultant at this time. Milwaukee County Board Vice-Chairman Mayo, Sr. noted that the subcommittee of the Southeastern Regional Transit Authority (SERTA) Board of Directors, formed to develop a recommended communications strategy that SERTA should take moving forward, had met and determined to follow a RFQ/P process, and he questioned the consideration of an interim communications consultant. Chairman Ostby stated that he had included consideration of retaining an interim communications consultant on the agenda because several Board members had indicated the desire to hire a communications consultant soon. He agreed, given the concerns Milwaukee County Board Chairman Holloway had expressed, that item 9 be removed from the agenda and the RFQ/P process be followed to hire a permanent communications consultant. The Board agreed, and item 9 was removed from the agenda.

REVIEW AND APPROVAL OF MINUTES OF THE MAY 17, 2010, MEETING

A motion to approve the minutes of the May 17th meeting as presented was made by Milwaukee County Board Vice-Chairman Mayo, Sr., seconded by Mr. Karls, and carried unanimously by the Board.

[Secretary’s Note: The Commission staff noted an error in the minutes of the May 17th meeting, and made a correction to indicate that the meeting was held in the Sijan Room of the Mitchell Museum of Flight in Milwaukee, not in the Kenosha Civil War Museum.]

UPDATE ON FINANCIAL STATUS OF MILWAUKEE COUNTY TRANSIT SYSTEM

Chairman Ostby suggested that it was important for the Board to stay informed on the financial status of the Milwaukee County Transit System (MCTS), and asked Mr. Lloyd Grant, Jr., MCTS Vice President & Deputy Managing Director, if he could provide an update to the Board. Mr. Grant, Jr. told the Board that the recommended 2011 MCTS budget had been submitted to Milwaukee County Executive Scott Walker for review, and that Milwaukee County Executive Walker was currently preparing his recommended 2011 Milwaukee County budget, but that his recommended budget was not likely to be available until at least September of 2010. In regards to a question from Mr. Antaramian about the proposed MCTS budget, Mr. Grant, Jr. stated that the budget showed a nearly $6 million deficit, with service cuts to MCTS
recommended to attempt to achieve a balanced budget. Chairman Ostby asked if the proposed MCTS budget included a recommended fare change, to which Mr. Grant, Jr. indicated that it did not.

Mr. Grant, Jr. stated that the receipt of Federal funds from the American Recovery and Reinvestment Act (ARRA) had allowed a number of buses to be purchased to replace buses from the aging MCTS fleet. Mr. Yunker noted that the replacement of buses using ARRA funds had delayed the need for extensive cuts to services provided by MCTS, but that MCTS was still facing a continuing financial crisis. Ms. Taylor asked how many years old the buses were that MCTS was currently replacing, suggesting that she believed the average lifespan of a bus is about 12-13 years. Mr. Grant, Jr. indicated that the Federal Transit Administration (FTA) defines the minimum useful life of the type of bus used by MCTS as 12 years of service or an accumulation of 500,000 miles, and that the buses MCTS was replacing were about 16 years old. Mr. Antaramian asked if MCTS was purchasing any hybrid buses. Mr. Grant, Jr. stated that MCTS was not purchasing hybrid buses at this time, but that MCTS is purchasing low-emission, high-efficiency diesel buses. Milwaukee County Board Vice-Chairman Mayo, Sr. indicated that the proposed Milwaukee County bus rapid transit (BRT) services may be provided with hybrid buses.

**REVIEW AND DISCUSSION OF WRITTEN COMMENTS**

Chairman Ostby directed the Board to Exhibit A, which included the recent comments that had been received through the SERTA website and via mail and email (see Attachment 2 to these minutes). A motion to receive and file the comments was made by Mr. Karls, seconded by Mr. Henderson, and carried unanimously by the Board.

**“NEW STARTS” APPLICATION TO THE FEDERAL TRANSIT ADMINISTRATION FOR KENOSHA-RACINE-MILWAUKEE COMMUTER RAIL**

Chairman Ostby asked Mr. Yunker to provide an update to the Board on the “New Starts” application submitted to the FTA to enter preliminary engineering for the KRM commuter rail project. Mr. Yunker told the Board that the “New Starts” application had been submitted to the FTA on June 24, 2010. He noted that the FTA is currently in the process of reviewing the application, but that FTA staff had not yet contacted the Commission staff regarding the application other than to request additional copies of the reports. He also indicated that the FTA period of review is typically between 90 and 120 days.

**REPORT ON MEETING WITH METRA COMMUTER RAIL**

Chairman Ostby told the Board that he, and members of the Commission and KRM project consultant staffs, had met with Metra Interim Executive Director William Tupper and Metra staff on June 23, 2010. He stated that the purpose of the meeting was to provide an update to Metra staff on the KRM commuter rail project, and to discuss with Metra potential issues in the development of the proposed KRM service.

Milwaukee County Board Vice-Chairman Mayo, Sr. asked how long KRM project staff had been coordinating with Metra staff. Mr. Yunker stated that coordination with Metra had been occurring since Metra staff served on an Advisory Committee guiding a feasibility study in the 1990s. Chairman Ostby noted that he expected Metra staff to be in further contact with the Commission staff as the FTA conducts its review of the KRM “New Starts” application, and that the Commission staff had sent a copy of the application to Metra staff.

**REVIEW AND DISCUSSION OF FINANCIAL REPORT**

Mr. Yunker drew the Board’s attention to Exhibit B, prepared by the Commission staff to report the invoices received and payments made under the current budget items approved by the Board (see
Attachment 3 to these minutes). Mr. Yunker indicated that the remaining contract amount of $47,971 represents funding approved for additional KRM project planning consultant work, primarily to respond to potential FTA questions and requests for additional analyses in regards to the “New Starts” application. He noted that there was one outstanding invoice from Mueller Communications for $8,154.35 that was in the process of being paid. He noted that the Board had approved a proposal from Mueller Communications for a total of $142,000 for services between January and April of 2010, but that the proposal had not specifically stated that SERTA was to reimburse Mueller Communications for expenses. Mr. Yunker indicated that Mueller Communications had billed for $4,154.35 in expenses between January and April, and that he had sent a letter to Mr. Mueller requesting a written explanation as to why the total amount of the invoices, including expenses, exceeded the total agreement amount of $142,000 (see Attachment 4 to these minutes). He noted that Mr. Mueller had sent a letter in response with the requested explanation (see Attachment 5 to these minutes). He distributed these letters to the Board.

Milwaukee County Board Vice-Chairman Mayo, Sr. asked that the Board approve the payment of the additional $4,154.35 in expenses invoiced above the total amount of $142,000 in the Mueller Communications agreement for services between January and April of 2010.

Mr. Antaramian made a motion to approve the financial report and expenditures in Exhibit B, including the additional $4,154.35 in expenses invoiced above the total amount of $142,000 in the Mueller Communications agreement for services between January and April of 2010. Mr. Karls seconded the motion, and it was approved unanimously by the Board.

CONSIDERATION OF REQUEST FOR QUALIFICATIONS/PROPOSALS FOR A COMMUNICATIONS CONSULTANT

Mr. Yunker drew the Board’s attention to Exhibit C which presented a draft request for qualifications/proposals (RFQ/P) for the hiring of a communications consultant (see Attachment 6 to these minutes), and to Exhibit D which presented a draft schedule for the hiring of a communications consultant based on Board consideration of the draft RFQ/P at this meeting (see Attachment 7 to these minutes). Chairman Ostby thanked the members of the communications subcommittee – Mr. Karls, Mr. Layden, Milwaukee County Board Vice-Chairman Mayo, Sr., and himself – and the other members of the Board for the input they provided during the preparation of the draft RFQ/P. Mr. Yunker indicated that a draft list of potential firms to receive the RFQ/P had been distributed to the Board (see Attachment 8 to these minutes), and requested that Board members suggest any additional firms that should be provided with the RFQ/P.

Milwaukee County Board Vice-Chairman Mayo, Sr. made a motion to approve the draft RFQ/P and draft RFQ/P schedule in Exhibits C and D. Mr. Karls seconded the motion, and it was approved unanimously by the Board.

ADJOURNMENT

Chairman Ostby suggested cancelling the meeting scheduled for Monday, August 16, 2010. He stated that the next scheduled meeting would then be at 8:00 a.m. on Monday, September 20, in the Sijan Room of the Mitchell Museum of Flight. He suggested that perhaps the meeting on September 20 could be scheduled as a teleconference, as the primary agenda item may only be the approval of the communications consultant selected by the subcommittee of the SERTA Board. Mr. Yunker indicated that a teleconference would be possible, but that proper public notice would need to be given, and there would need to be a location identified where interested members of the public could attend and listen to the proceedings. Mr. Antaramian suggested that, as an alternative to a teleconference meeting, the Board grant the communications subcommittee the authority to hire a communications consultant on a
temporary basis for about one month until the Board would meet in October to formally approve the subcommittee’s selection.

Mr. Karls made a motion to grant the communications subcommittee of the SERTA Board with the authority to hire a communications consultant to approximately a one-month contract based on their selection through the formal RFQ/P process. Antaramian seconded the motion, and it was approved unanimously by the Board.

There being no further business to come before the Board, the meeting was adjourned at 8:58 a.m. on a motion by Milwaukee County Board Vice-Chairman Mayo, Sr., seconded by Mr. Antaramian, and carried unanimously by the Board.

Respectfully submitted,

Kenneth R. Yunker
Recording Secretary
July 29, 2010

Karl Ostby, Chairman
Southeastern Regional Transit Authority

Dear Chairman Ostby,

I write in regard to the Agenda for the August 2, 2010, meeting of the Southeastern Regional Transit Authority (SERTA).

Agenda item 8 is “consideration of request for qualifications/proposals for a communications consultant and potential schedule.” The proposed timeline for SERTA approval of a permanent communications consultant anticipates a September 20, 2010, hiring. As an elected official, I have maintained the importance of SERTA initiating a competitive bid process for its communications consultant position. Consequently, I am pleased SERTA is letting some sunshine into its proceedings with the full Board’s consideration of Agenda item 8.

Given this movement in the right direction, I am puzzled by the placement on the Agenda of item 9, relating to the “consideration of retention of Mueller Communications as interim communications consultant during search for permanent communications consultant.” SERTA’s contract with Mueller Communications has ended. However, Mueller Communications has submitted a proposal for services to be billed at $10,000 a month over a 4-month period. Under the proposed timeline, Mueller Communications presumably would be retained through December 2, 2010.

I request that item 9 be removed from Monday’s Agenda for the following reasons:

- the proposed timeline for an interim consultant conflicts with the proposed timeline for a permanent position;
- the Wisconsin State Legislature is out of session;
- the absence of an emergency communication crisis that warrants a deviation from the competitive bid process; and
- the necessity for this public body to manage its financial resources prudently.

Per Wisconsin Statues, the powers of the Authority are vested in its Board of Directors. Therefore, SERTA members should be mindful of ceding this authority to outside entities. Retention of an interim communications consultant during the bid process may give the impression that the contract for a permanent position is wired for a particular firm that may be perceived as too close. As such, any future communications between Mueller Communications and the SERTA Chairman should be shared with the full Board in order to facilitate an open process. Your consideration and prompt response to this correspondence is appreciated.

Sincerely,

Lee Holloway
Chairman, Milwaukee County Board of Supervisors

cc: SERTA, members
WRITTEN COMMENTS RECEIVED SINCE MAY 17, 2010, MEETING

Submitted: 5/15/2010 11:47:14 PM  
Name: MARK KAPRELIAN  
E-mail: markandbev@wi.rr.com  
City: RACINE  
State: WI  
Zip: 53406  
Comments: NO KRM!!!!! NO NEW TAXES!!!! NO MORE UNELECTED BOARDS!!! HOW CAN YOU ADD NEW TAXES IN THIS ECONOMY???? THE RENTAL CAR TAX WILL NOT COVER THE COST OF THIS HORRIBLE IDEA. THEREFORE I'M SURE YOU WILL BE ADDING A SALES OR PROPERTY TAX INCREASE ON TO OUR ALREADY HIGH TAXES.

Submitted: 5/16/2010 9:24:05 PM  
Name: John Ronayne  
E-mail: jfronayne@yahoo.com  
Organization: Ronayne International, Inc.  
PO Box/Street: P.O. Box 342591  
City: Milwaukee  
State: WI  
Zip: 53234  
Comments: INCREASING THE CAR RENTRAL TAX TO $18.00M PER DAY FOR A TRAIN THAT NO ONE WILL RIDE IS CRAZY. PLEASE DO NOT INCREASE OUR TAXES OR KILL OUR ECONOMY.

From: JFRonayne@aol.com[SMTP:JFRONAYNE@AOL.COM]  
Sent: Sunday, May 16, 2010 9:37:57 PM  
To: SEWISRTA  
Subject: RTA Feedback

How much is Karl Ostby paid per year in salary and benefits?

John Ronayne  
P. O. Box 341591  
Milwaukee, WI 53234  
414-529-1733

Submitted: 5/18/2010 7:05:22 AM  
Name: Brenda Brauner  
E-mail: brenda_brauner@yahoo.com  
Organization: Small Business Owner  
PO Box/Street: 6008 South County Road K  
City: Brodhead  
State: WI  
Zip: 53520  
Comments: NO to this stupid Rail idea. NO NO NO NO NO NO. I REFUSE to pay taxes to this money pit. STOP attempting to make all Wisconsinites pay for this ridiculous JOKE of a plan! And another thing, USE THE LEGISLATION PROCESS instead of ramming it down our throats like any other LIB/PROGRESSIVE idea!! Tell your 'representatives' in Madison to stop doing backroom deals and start letting US THE TAXPAYERS decide what goes on in our state. Disrespectfully yours, Brenda Brauner resident: Brodhead WI
Submitted: 5/18/2010 9:42:26 AM  
Name: PAUL TIGGE  
E-mail: prtigge@att.net  
City: MILWAUKEE  
State: WI  
Zip: 53207  

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Submitted: 5/19/2010 10:36:10 AM  
Name: Ram Bhatia  
E-mail: rampb2003@yahoo.com  
City: Racine  
State: WI  
Zip: 53406  
Comments: I have been monitoring the on-going debate about the KRM for 25 years, and in my opinion it's still at step #1 i.e.do the engineering (PE) study. For heavens sake, lets move forward with this very crucial investment in economic development of the SE wisconsin. Why is that the govt has no problem to impose gas tax and spend on highways construction for "private vehicles", but no one wishes to look into ways to invest in "public transport" ??? Let us commit to invest in our communities and help attract quality businesses by moving forward with the KRM: from drawing board, from PE study to a running commuter rail system, helping drive the local economies. Thank you.

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From: Dennis Kisley [SMTP:DKISLEY@ATT.NET]  
Sent: Friday, June 04, 2010 10:08:10 AM  
To: SEWISRTA  
Cc: John Lehman; Robin Vos  
Subject: Fw: Comments for 6-21-10 Meeting  
To: SERTA Board  
Re: Comments for 6-21-10 Meeting  
I recommend all board members view a speech given by FTA Administrator, Peter Rognoff, available on the FTA website. It was given at the National Summit on the Future of Transit, May 18, 2010 at the Federal Reserve Bank of Boston.

Following are some of his remarks:

- We have a $50 billion shortfall to bring 7 largest rail operations to state of good repair. (SGR)
- We have a $78 billion shortfall to bring all 690 separate rail and bus systems to SGR.
- 75% of SGR shortfall is rail transit systems.
- The majority of transit trips in this country are by bus.
- Solution to problem is honesty and political guts to say no.
- Get Real and Get Honest with the high cost of rail vs. bus.
- With signal preemption, busses can move a lot of people at very little cost compared to rail.
- Bus Rapid Transit is a fine fit for a lot more communities than are seriously considering it.
- Some communities are tempted to pay the extra cost of shiny new rails now, but must be mindful of costs they are teeing up for future generations.
- If you can't afford to operate the system you have, why does it make sense for us to partner in your expansion?
- Are we at risk of just helping communities dig a deeper hole for our children and grandchildren?
- Taking a cold look at the facts might mean spending money on the unglamorous but absolutely vital work of repairing and improving our current systems.

Board Member
Racine Taxpayers Association
Dennis A. Kisley
Caledonia, WI
dkisley@att.net

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From: Lynde, Eric D.
Sent: Tuesday, June 08, 2010 2:28 PM
To: 'lholloway@milwcnty.com'; 'mmayo@milwcnty.com'; 'kostby@wi.rr.com'; 'jkarls@scj.com'; 'john@eccorp.us'; 'lnicky2466@yahoo.com'; 'jonh@horizonretail.com'; 'chris.d.layden@gmail.com'; 'ebuford@wrtp.org'; 'jtylorra@gmail.com'
Cc: 'aileen.switzer@dot.state.wi.us'; 'al@stfranwri.org'; 'albert.stanek@dot.state.wi.us'; 'aconnelly@mcts.org'; 'Angela.Leeper@milwcnty.com'; 'abrenn@sbcglobal.net'; 'BULICHNY1@wi.rr.com'; 'bdranzik@milwcnty.com'; 'Craig.Webster@Wisconsin.gov'; 'dboehm@mcts.org'; 'David.Prott@goracine.org'; 'donna.brown@dot.state.wi.us'; 'gmelcher@co.kenosha.wi.us'; 'gczarnecki@muellercommunications.com'; 'cmueller@muellercommunications.com'; 'jeffrey.mantes@milwaukee.gov'; 'Rep.Stone@egis.wisconsin.gov'; 'jsmith@theshopconsulting.com'; 'karen.schmiechen@dot.state.wi.us'; 'Kelly.Bablitch@milwcnty.com'; 'kenw@martinschreiber.com'; 'lsandler@journalsentinel.com'; 'lennb999@wi.rr.com'; 'trichards@muellercommunications.com'; 'martin@martinschreiber.com'; 'martin.weddle@milwcnty.com'; 'mark.wolfgram@dot.state.wi.us'; 'michele.mcknight@milwcnty.com'; 'njones@cityofracine.org'; 'riwen@kenosha.org'; 'sgiles@gmconline.org'; 'sandy.beaupre@dot.state.wi.us'; 'sean.ryan@dailyreporter.com'; 'tcooley@milwcnty.com'; 'William.McReynolds@goracine.org'; 'Geoff.Greiveldinger@goracine.org'; 'Peter.Hansen@goracine.org'; Yunker, Kenneth R.
Subject: SERTA - Comparison of KRM and Central Florida Commuter Rail Projects

Members of the Southeastern Regional Transit Authority,

We are providing to you in an attachment to this email, correspondence received from the National Business Travel Association, Racine Taxpayers Association, Wisconsin Business Travel Association, and Wisconsin Car Rental Alliance, which compares the KRM commuter rail project to the initial operating segment of the Central Florida (Orlando) commuter rail project. The attached correspondence compares KRM commuter rail to a Central Florida commuter rail project in terms of estimated capital and operating and maintenance costs, and forecast ridership. However, several of the comparisons in the correspondence use inconsistent units of measurement. For example, operating and maintenance costs are compared using 2009 dollars for KRM commuter rail and 2030 dollars for Central Florida commuter rail (costs in 2030 dollars include 21 years of assumed cost inflation, and costs in 2009 dollars do not include this inflation).

Commission staff has compiled the table below, which attempts to make a direct comparison between the two commuter rail projects using equivalent units of measurement. From the table, we would note the following:

- **Capital Costs:** The capital cost estimate for Central Florida commuter rail is about 20% higher than for KRM commuter rail, principally due to additional costs related to Central Florida’s use of conventional commuter rail equipment rather than diesel multiple units, additions stations, and right-of-way acquisition.
- **Operating Costs:** KRM commuter rail estimated operating and maintenance costs per weekday train trip in 2030 dollars are about 25% higher than for Central Florida commuter rail.
- **Ridership:** KRM commuter rail is forecast to achieve about the same average weekday ridership in 2030 as that of Central Florida commuter rail.
## COMPARISON OF KRM COMMUTER RAIL TO CENTRAL FLORIDA COMMUTER RAIL (REVISED)

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>KRM Commuter Rail</th>
<th>Central Florida Commuter Rail*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route Length</td>
<td>33 miles</td>
<td>32 miles</td>
</tr>
<tr>
<td>Number of Stations</td>
<td>9 (3 existing)</td>
<td>12 (0 existing)</td>
</tr>
<tr>
<td>Type of Vehicle</td>
<td>Diesel Multiple Unit</td>
<td>Diesel Locomotive-hauled</td>
</tr>
<tr>
<td>Number of Vehicles</td>
<td>9</td>
<td>21b</td>
</tr>
<tr>
<td>Total One-way Weekday Train Trips (Opening Year Service Levels)</td>
<td>30</td>
<td>32</td>
</tr>
<tr>
<td>Total One-way Weekday Train Trips (Year 2030 Service Levels)</td>
<td>30</td>
<td>56</td>
</tr>
<tr>
<td>Total Capital Cost (Opening Year Service Levels in Year of Expenditure Dollars)c</td>
<td>$283.5 million</td>
<td>$357.2 million</td>
</tr>
<tr>
<td>Annual Operating Cost (Year 2030)</td>
<td>$40.5 milliond</td>
<td>$55.3 million</td>
</tr>
<tr>
<td>Average Weekday Ridership (Year 2030)</td>
<td>8,000 riders</td>
<td>7,400 riders</td>
</tr>
</tbody>
</table>

* Based on estimates for the Initial Operating Segment of the Central Florida commuter rail project. In the opening year, this service will operate on weekdays with 30-minute peak headways and 120 minute off-peak headways. By the forecast year of 2030, service will operate with 15-minute peak headways and 30-minute off-peak headways, with 60-minute headways in the evenings and weekends.

b The Central Florida commuter rail project anticipates purchasing 7 locomotives, 5 coaches, and 9 cab cars, which will provide traditional push-pull commuter rail service. These 21 vehicles will form 7 trainsets, which will be used to provide the opening year level of service. An additional 5 trainsets would need to be purchased to provide the forecast year level of service.

c KRM commuter rail capital costs are anticipated to be incurred from 2014 to 2016, while Central Florida commuter rail capital costs are anticipated to be incurred from 2011 to 2013.

d KRM commuter rail operating and maintenance costs are estimated at $13.4 million in 2009 dollars. This cost estimate is inflated at an annual rate of about 5.5% to estimate operating and maintenance costs in 2030.

We would also note that the population comparison discussed in the correspondence does not appear to accurately depict the population to be served by the two projects. The KRM commuter rail line would run through the Kenosha, Racine, and Milwaukee urbanized areas – with a combined population of about 1.6 million – and would connect to the Chicago urbanized area – with a population of about 8.5 million – via Metra commuter rail service. By comparison, the initial operating segment of the Central Florida commuter rail line would run through the Orlando urbanized area, which has a population of about 1.3 million (U.S. Census Bureau, 2008 American Community Survey). The five-county Census-defined Metropolitan Statistical Area (MSA) for Milwaukee has a population of 1.8 million, and the eight-county Chicago MSA has a population of 8.0 million, while the four-county Orlando MSA has a population of 2.1 million (2009 U.S. Census Estimates).

In addition, when comparing the major transit system serving each of the two projects, the Milwaukee County Transit System (MCTS) has nearly twice the annual ridership, with 51.8 million unlinked transit trips in 2008, than the Central...
Florida Regional Transportation Authority (LYNX), which had 27.2 million unlinked transit trips in 2008. MCTS achieves this ridership despite operating fewer annual vehicle revenue miles than LYNX – 21.3 million miles vs. 23.0 million miles.

Lastly, both projects have the same lead planning and engineering technical consultant, AECOM, Inc.

If you have any questions, please do not hesitate to contact me.

Kenneth R. Yunker, Executive Director
Southeastern Wisconsin Regional Planning Commission

Office: 262-547-6722 Ext 211
Cell: 414-379-6721
Email: kyunker@sewrpc.org

Attachment: 
June 1, 2010

To:       Mr. Karl Ostby, Chairperson,
          and Members
          Southeastern Regional Transit Authority

From:     National Business Travel Association
          Racine Taxpayers Association
          Wisconsin Business Travel Association
          Wisconsin Car Rental Alliance

Subject:  KRM New Starts Application – Capital / Operating Cost and Ridership Projections

Recent comparisons between the proposed Kenosha-Racine-Milwaukee (KRM) commuter rail project and another commuter rail project, the Central Florida project (aka Orlando Sun Rail Project) have raised what we believe are legitimate concerns relative to costs and projections in the KRM commuter rail New Starts application. Please see the attached documents.

Bluntly stated, we question how the KRM project can be constructed and operated for substantially less than the Central Florida project and attract more than twice as many riders on a per capita basis. We recognize that there may be a rational explanation for what appears to be counter-intuitive, but we don’t find it in the available numbers.

For that reason, we believe SERTA should commission an independent, third-party analysis of these radically differing estimates and projections for comparable projects. We also believe that review and analysis should happen before the application is submitted to the Federal Transit Administration since any findings would reflect directly on the credibility of the KRM application. Undoubtedly there are qualified entities or individuals who could accomplish that task in short order and for a relatively modest sum.

Many of us also share the reservations expressed by the Milwaukee County representatives on SERTA about the advisability of submitting the application without a dedicated funding source for mass transit in the region. Arguably without that component in place, what is intended to be a complementary transportation mode becomes a competitive one. Given that policy concern already exists, the application will only be further compromised by the failure to address and respond in an objective way to these cost comparison questions which go to the economic viability of the project.

Thank you for considering this request.
KRM Commuter Rail vs Central Florida (aka Orlando Sun Rail) Project

Background:

At the February 8, 2010 meeting of the Southeastern Regional Transit Authority (SERTA), staff director Kenneth Yunker noted that the Federal Transit Administration had released its list of recommendations for projects to receive New Starts funding for FY 2011. Mr. Yunker stated that the Central Florida (Orlando) Commuter Rail project was on that list and said that it is “similar” to the proposed KRM Commuter Rail Project. He also noted that both projects at this point appear to have a “medium-low” FTA Cost Effectiveness Rating and that it was encouraging that the central Florida project was proceeding, given that rating.

Project Comparisons:

There are some striking physical similarities between the Central Florida (Orlando) project and the proposed Kenosha-Racine-Milwaukee (KRM) commuter rail project. The routes are 32 and 33 miles long respectively, they include 12 and 9 stations each, and both would use existing rail lines, with comparable equipment and schedules.

Financial Disparities:

It is when the respective financing plans for the two projects are compared that there are some rather dramatic differences.

Capital Costs

The Central Florida project capital costs are estimated at $357 million in the New Starts application to FTA. The KRM project was originally projected in 2007 to cost just under $200 million. The proposed application to FTA now estimates capital costs at $283.5 million for KRM, or $73.5 million (20%) less than the Central Florida project.

Operating Costs

When it comes to annual operating costs, Central Florida estimates $55.3 million, while the proposed KRM application projects $13.4 million annually, for an astonishing $41.9 million (75%) difference. Even allowing for some differences in frequency of service, etc, this annual operating cost discrepancy clearly begs for more analysis.

Ridership Estimates

Finally, the ridership forecast for the Central Florida project is 7400 average weekday riders by the year 2030. KRM estimates that it will carry 8,300 riders on the average weekday by 2035. It should be noted here that the population of the Greater Orlando area is over 2 million or more than double the three-county KRM area population. In addition, the Orlando area is a tourism Mecca that draws more than 48 million visitors annually.

Conclusion:

While there are some physical similarities and FTA cost-effectiveness ratings that justify the comparisons drawn by SERTA staff between these two commuter rail projects, there are also some glaring differences in projected capital and operating costs, as well as in ridership estimates, that are difficult to reconcile. Since SERTA initially raised this comparison, we believe it should commission an independent, third-party analysis to explain the apparent discrepancies in project costs between the KRM commuter rail and Central Florida (Orlando) projects.
Central Florida Commuter Rail Transit – Initial Operating Segment
Orlando, Florida
(October 2008)

The Florida Department of Transportation (FDOT) is proposing to construct a new commuter rail system along the existing CSX “A” line Corridor from Volusia County through Lake County and Seminole County, to Orange County and downtown Orlando. The Central Florida Commuter Rail Transit (CFCRT) project would operate entirely at-grade, sharing track with existing freight and Amtrak services. The project includes the purchase of 15 vehicles and construction of 12 stations and approximately 2,100 parking spaces. In the opening year, service would operate every 30 minutes in the peak period and every 120 minutes during the off-peak, with no weekend service. By the forecast year of 2030, service would operate every 15 minutes in the peak period and every 30 minutes during the off-peak, with service every 60 minutes in the evenings and weekends.

The CFCRT runs parallel to Interstate 4 (I-4) and US 17-92, the region’s primary north-south travel routes and the location of much of the region’s population and employment. I-4 is scheduled for reconstruction, and the proposed project is intended to serve as a congestion mitigation measure, as well as more broadly provide a high capacity transit alternative to north-south travel in the corridor.

<table>
<thead>
<tr>
<th>Summary Description</th>
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<tbody>
<tr>
<td><strong>Proposed Project:</strong></td>
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<tr>
<td></td>
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<tr>
<td><strong>Total Capital Cost (SYOE):</strong></td>
</tr>
<tr>
<td><strong>Section 5309 New Starts Share (SYOE):</strong></td>
</tr>
<tr>
<td><strong>Annual Forecast Year Operating Cost:</strong></td>
</tr>
<tr>
<td><strong>Ridership Forecast (2030):</strong></td>
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<tr>
<td></td>
</tr>
<tr>
<td><strong>Opening Year Ridership Forecast (2012):</strong></td>
</tr>
<tr>
<td><strong>FY 2010 Local Financial Commitment Rating:</strong></td>
</tr>
<tr>
<td><strong>FY 2010 Project Justification Rating:</strong></td>
</tr>
<tr>
<td><strong>FY 2010 Overall Project Rating:</strong></td>
</tr>
</tbody>
</table>

The rating described herein is based on information submitted when the project was rated for entry into final design in 2008. The project encountered schedule delays due to an inability to execute the negotiated railroad agreements with CSX pending passage of liability legislation by the Florida State Legislature. In December 2009, the State Legislature passed the necessary legislation and the project is expected to now move forward.

Before an FFGA will be awarded, FDOT must provide documentation of fully executed and completed railroad and other third party agreements. FDOT must then update the project scope, design, cost, schedule, and operating plans to reflect any changes necessitated by the executed railroad agreements as well as the recent change in vehicle type from low-floor, FRA-compliant, Diesel Multiple Unit vehicles to traditional push-pull commuter rail vehicles. FDOT must also provide FTA with updated information to ensure that Americans with Disabilities Act (ADA) and National Environmental Policy Act (NEPA) requirements continue to be addressed appropriately. Lastly, FDOT must update the financial plan to
address the issues described in FTA’s draft financial capacity assessment and maintain a sufficient New Starts rating.

**Project Development History and Current Status**

FDOT completed an alternatives analysis on a 61-mile corridor in May 2004. An Environmental Assessment (EA) was prepared for the entire 61-mile corridor in May 2006, with a Finding of No Significant Impact (FONSI) signed by FTA in April 2007. A 54-mile, 15-station project Locally Preferred Alternative was approved into Preliminary Engineering (PE) in March 2007. A Supplemental EA was prepared to assess the potential impacts of several project scope changes and to include a general analysis of the environmental impacts of moving freight from the CSX “A” Line to the “S” Line. FTA approved and signed the Supplemental EA in May 2008, and an addendum to the FONSI was issued by FTA in July 2008. During PE, FDOT decided to pursue entry into final design for only the current 32-mile, 12 station project, which was approved into final design in August 2008.

**Significant Changes Since FY 2010 Evaluation (November 2008)**

The proposed vehicle type changed from low-floor, FRA-compliant, Diesel Multiple Unit (DMU) vehicles to traditional push-pull commuter rail vehicles as a result of the selected vendor for the DMUs going out of business. In addition, the footprint of several stations locations changed slightly, necessitating supplemental environmental review.

**Project Justification Rating: Medium**

The project justification rating is based on the average of the ratings for cost effectiveness and transit-supportive land use. Per FTA’s 2006 Final Guidance on New Starts Policies and Procedures, once a project has been approved into final design, the project is not subject to any changes in New Starts policy, guidance, and procedures. Thus, the revised weighting of the project justification criteria that took effect in July 2009 does not apply to this project.

**Cost Effectiveness Rating: Medium-Low**

The cost effectiveness rating reflects the level of travel-time benefits (5,100 hours each weekday) relative to the project’s annualized capital and operating costs based on a comparison to a baseline alternative. Due to the unique nature of the project, its travel forecast carries significant uncertainty.

<table>
<thead>
<tr>
<th>Cost Effectiveness</th>
<th>New Start vs. Baseline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost per Hour of Transportation System User Benefit</td>
<td>$29.88*</td>
</tr>
<tr>
<td>Incremental Cost per Incremental Trip</td>
<td>$35.74</td>
</tr>
</tbody>
</table>

* Indicates that measure is a component of Cost Effectiveness rating.

**Transit-Supportive Land Use Rating: Medium**

The rating is based upon the average of the ratings assigned to the subfactors below, each of which contribute one-third to the land use rating.

**Existing Land Use: Medium-Low**

- Population density within ½-mile of the station areas is approximately 2,130 persons per square mile. The project has approximately 78,700 jobs within ½-mile of the proposed stations. The project provides direct service to the central business district (CBD), which contains approximately 729,700 jobs.
- The stations in the City of Orlando and Winter Park can be considered destination stations, with significant levels of development within walking distance and a pedestrian-friendly character.
Development levels within walking distance of the remaining suburban stations are low and land use is highly auto-oriented.

- Parking supplies in the corridor are high, even at stations within the City of Orlando, although parking rates at garages in downtown are high.

Transit-Supportive Plans and Policies: Medium

- The State of Florida Growth Management Act (SB 360) establishes growth management laws to ensure critical transportation infrastructure and services are in place to accommodate future urban growth and redevelopment. The act promotes regional planning through an incentive program and provides funding for transportation investments that support growth management.

- The City of Orlando’s downtown redevelopment plan coordinates transportation and other public infrastructure improvements with private development, embodies “new urbanism” as a guiding principle, and emphasizes mixed land use, pedestrian connectivity, strong neighborhoods, and transit. The only other community along the corridor that has a specific development plan for the station area is Lake Mary, where a master plan has been developed for a small suburban town center. The comprehensive plans for several other corridor communities identify sections of the station areas for development at higher densities, with a varying degree of transit-supportive characteristics.

- Zoning in the downtown Orlando and Winter Park station areas requires higher development densities and transit-supportive character, including mixed uses and pedestrian-friendly design. Several other municipalities in the corridor have zoning provisions allowing reduced parking in activity centers or areas with high levels of transit service.

- Many efforts have been made to reach out to stakeholders. The project sponsor has coordinated station planning and design with major property and facility owners in station areas, including hospitals and utility companies.

Performance and Impacts of Policies: Medium

- Major redevelopment is occurring in downtown Orlando. Although they are subject to the policies incorporated in the downtown revitalization plan, many of the projects and proposals include substantial new parking supplies and thus are not strongly transit-supportive.

- Transit-supportive development at stations beyond Orlando and Winter Park has been minimal.

<table>
<thead>
<tr>
<th>Mobility Improvements Rating: Medium-Low</th>
<th>New Start vs. Baseline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation System User Benefits Per Passenger Mile (Minutes)</td>
<td>3.5</td>
</tr>
<tr>
<td>Number of Transit Dependents Using the Project</td>
<td>1,400</td>
</tr>
<tr>
<td>Transit Dependent User Benefits per Passenger Mile (Minutes)</td>
<td>2.9</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Environmental Benefits Rating: Medium</th>
<th>EPA Designation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criteria Pollutant Status</td>
<td>Maintenance or Attainment for all Pollutants</td>
</tr>
</tbody>
</table>
Local Financial Commitment Rating: Medium
The local financial commitment rating is based on the weighted average of the ratings assigned to each of the following criteria: the New Starts share of project costs is weighted 20 percent; the strength of the capital finance plan is weighted 50 percent; and the strength of the operating finance plan is weighted 30 percent.

Section 5309 New Starts Share of Total Project Costs: 50.0%
Rating: Medium

<table>
<thead>
<tr>
<th>Source of Funds</th>
<th>Total Funds (Smillion)</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Section 5309 New Starts</td>
<td>$178.61</td>
<td>50.0%</td>
</tr>
<tr>
<td>State:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Florida New Starts Transit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program</td>
<td>$89.31</td>
<td>25.0%</td>
</tr>
<tr>
<td>Local:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Volusia County</td>
<td>$6.60</td>
<td>1.8%</td>
</tr>
<tr>
<td>Seminole County</td>
<td>$45.56</td>
<td>12.8%</td>
</tr>
<tr>
<td>City of Orlando</td>
<td>$13.47</td>
<td>3.8%</td>
</tr>
<tr>
<td>Orange County</td>
<td>$23.68</td>
<td>6.6%</td>
</tr>
<tr>
<td>Total:</td>
<td>$357.22</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

NOTE: The financial plan reflected in this table has been developed by the project sponsor and does not reflect a commitment by DOT or FTA. The sum of the figures may differ from the total as listed due to rounding.

Capital Finance Plan Rating: Medium
The capital finance plan rating is based upon the weighted average of the ratings assigned to each of the subfactors listed below. The agency capital condition is weighted 25 percent, the commitment of capital funds is weighted 25 percent, and the capital cost estimate, planning assumptions and capital funding capacity subfactor is weighted 50 percent.

Agency Capital Condition: Medium-High
- FDOT does not have a bus fleet.
- FDOT’s General Obligation bonds are rated as follows: Standard & Poor’s Corporation A+, Moody’s Investor Service Aa, and Fitch AA-.

Commitment of Capital Funds: High
- All of the non-New Starts funding is committed or budgeted. The non-New Starts share will be covered by state transportation trust funds and funds from Volusia, Seminole, and Orange counties and the City of Orlando.
Capital Cost Estimate, Planning Assumptions, and Financial Capacity: Medium-Low
- Assumptions in the capital plan are reasonable.
- The current project cost estimate is considered reasonable at this stage of development.
- There is no plan for cost increases greater than five percent of project cost.

Operating Finance Plan Rating: Medium
The operating finance plan rating is based upon the weighted average of the ratings assigned to each of the subfactors listed below. The agency operating condition is weighted 25 percent, the commitment of operating funds is weighted 25 percent, and the operating cost estimates, planning assumptions and operating funding capacity subfactor is weighted 50 percent.

Agency Operating Condition: High
- The current ratio of assets to liabilities as reported for the State Government Transportation Fund in its most recent audited financial statement is 2.7.

Commitment of Operating Funds: Medium-High
- The majority of operating funding is committed. For the initial seven years of operation, FDOT will fund all operating subsidies through its Strategic Intermodal System program using revenues from the State Transportation Trust Fund. Thereafter, operating subsidies will be provided by Volusia, Seminole, and Orange counties and the City of Orlando.

Operating Cost Estimates, Planning Assumptions, and Financial Capacity: Medium-Low
- Operating and maintenance costs have been lowered from those assumed last year and appear optimistic compared to other commuter rail systems around the country.
- Inflation assumptions are reasonable compared to historic trends.
- The financial plan shows a balanced budget throughout the 20-year plan.
8.0 Local Financial Commitment (continued)

Capital Plan (costs and funding sources)
- Cost - $283.5 million (year-of-expenditure dollars)
  - $170.1 million FTA New Starts discretionary grant
  - $18.0 million FHWA CMAQ grants
  - $46.1 million State Capital Assistance Programs
  - $41.2 million SERTA direct investment
  - $8.1 million SERTA bonds

Operating Plan (costs and funding sources)
- Cost - $13.4 million (2009 dollars, inflated at 5.8%)
  - FTA 5307 commuter rail floor - constant $4.6 million
  - State 85.20 operating assistance - $8.2 to $10.6 million (2017 to 2028)
  - Fare revenues - $5.0 to $6.6 million (2017 to 2028)
  - SERTA vehicle rental fee revenues - $10.0 to $14.2 million (2017 to 2028)
3.0 Travel Forecasts

- Describes methodology for forecasting ridership and estimated user benefits
  - Developed in coordination with FTA staff and in accordance with FTA requirements

- Forecast ridership – about 8,300 daily project trips

- Annual user benefits - about 1 million hours
  - County proportions - 57% in Milwaukee, 25% in Racine, and 17% in Kenosha
Could you please read this letter into the record?

Kelly Rindfleisch
Deputy Chief of Staff
Milwaukee County Executive's Office
Phone: 414-278-4216
E-mail: kelly.rindfleisch@milwcnty.com

Attachment:

May 25, 2010
U.S. Department of Transportation
Federal Transit Administration
East Building, 4th Floor
ATTN: Office of Planning & Environment, Susan Borinsky
1200 New Jersey Avenue, SE
Washington, DC 20590

Dear Administrator Borinsky:

Two members of the Southeastern Wisconsin Regional Transit Authority (SERTA) recently voted against supporting the application to the federal Regional Transit Authority for the Kenosha- Racine- Milwaukee commuter line (KRM). The two members who voted no are elected County Board Supervisors from Milwaukee County. Their stated concern is that the proposed increase in the car rental fee would come predominately from cars rented at the county-operated General Mitchell International Airport (GMIA). They argue that the funds generated within Milwaukee County would end up supporting transit in areas outside of Milwaukee County.

I want to add one other major concern.

It seems clear from the comments made by various supporters of the KRM line that they believe that the federal government will not likely look with favor on an application where the local match is generated through a car rental fee. In that case, the alternative is a sales tax that would be collected in Kenosha, Racine and Milwaukee counties.

I have said this many times in the past, but I want to make it perfectly clear: I oppose an increase in the sales tax. Any thing that opens the door to a sales tax increase is a problem for me and (I believe) for the overwhelming majority of people throughout the region.

In addition, I am also concerned that additional federal and state transportation funds will be used on projects like this when we have clear and apparent infrastructure needs within this region that are not being met under the current system. There is a hole in the state transportation fund and that led to problems for local road aids and local transit aids and a delay in many major highway projects in the region. The Zoo Interchange and the North-South Corridor are two major examples of the projects we need to work on soon.

Thank you for your attention to this important matter.

Sincerely,

Scott Walker
Milwaukee County Executive
From: Fred Young [mailto:fyoung@tds.net]
Sent: Wednesday, June 16, 2010 5:37 PM
To: Lynde, Eric D.
Cc: kostby@fortresspartners.com
Subject: SERTA Application for KRM "Preliminary Engineering" Funds

Eric,

Please forward this to Ken Yunker (whose e-mail address I don’t have), Executive Director of SWERPC and SERTA board members as input for the June 21, 2010 SERTA board meeting.

My message, as argued below to Administrator Simon, is that SERTA should delay submittal of a request for "preliminary engineering" funds for KRM until after the Racine (and possible Kenosha) transit tax referendum(s) in November, state elections in November and next legislative session which begins in January, 2011.

If bus tax and other items important to a KRM "New Starts" application are not supported in the next legislature, the "preliminary engineering" funds will have been wasted. Just because the unelected board of SERTA has the power to levy a car rental tax for local match funds doesn’t justify untimely and likely wasteful expenditures.

Fred Young
Independent Investor
(Former Owner, Young Radiator Company)
One Main St., Suite 390
Racine, WI 53403
262-632-3310
fyoung@tds.net

From: Fred Young [mailto:fyoung@tds.net]
Sent: Wednesday, June 02, 2010 8:37 PM
To: Marisol Simon (marisol.simon@dot.gov)
Cc: SKW@milwcnty.com; robinvos@wi.rr.com
Subject: SERTA Application for KRM "Preliminary Engineering" Funds

Ms. Marisol Simon
Regional Administrator for Region 5
Federal Transit Administration
200 West Adams Street
Suite 320
Chicago, IL 60606

Dear Administrator Simon,

In light of:
(2) the funding shortfalls for and poor condition of the public bus fleet in Southeast WI, esp. Milwaukee
(3) the failure of the WI legislature in its last session to provide new transit funding (next session begins Jan., 2011)
(4) the public opposition to KRM by the leading (in polls) candidate for WI governor (County Executive Scott Walker)
(5) the public opposition to KRM by the likely (if R’s win), next co-chairs of Joint Finance Comm. (Asm. Robin Vos and Sen. Alberta Darling) and the minority leaders of the state Assembly and Senate (Jeff Fitzgerald and Scott Fitzgerald)
(6) the disastrous condition of WI state finances (debt doubling during current administration and large, future structural deficits)
(7) the numerous raids on the WI Transportation fund to supplement shortfalls in the General fund
(8) the new demands on WI Transportation fund for (a) Amtrak to Madison, (b) trolley in Milwaukee, and (c) new train sets for Mil-Chi
(9) the passage (18-2) of a resolution by the Racine County Board to place a new transit tax referendum on the Nov. ballot
(10) the intention of the Kenosha and Milwaukee County Boards to consider a similar/identical referendum resolution
(11) the votes against the SERTA application for KRM “preliminary engineering” by both Milwaukee county members of SERTA board and the detail in their Minority Report for the application
(12) the poor economics (and questionable costs and benefits) of the KRM proposal (esp. versus bus rapid transit)
(13) the planned speed upgrade and increase in number of trains for Milwaukee-Racine-Chicago Amtrak service
(14) the widening of I-94 in IL and WI to four lanes to reduce passenger car congestion (hence, pollution)
(15) the much greater economic and population growth along I-94 versus the proposed KRM connection of lakefront downtowns
(16) Milwaukee Mayor and democratic gubernatorial candidate Tom Barrett has now withdrawn support for KRM

I urge the FTA to reject or, at least, delay action on the new SERTA application for “preliminary engineering” funds (which, if granted, would trigger a local $11/car rental tax) until after the Nov. elections, the Nov. referenda and the Jan., 2011 legislative session. The likelihood of SERTA being able to satisfy requirements for “New Starts” funding for KRM in the foreseeable future is problematic, at best. Expenditures on “preliminary engineering” for KRM would likely be, simply put, wasted.

Fred Young
Independent Investor
(Former Owner, Young Radiator Company)
One Main St., Suite 390
Racine, WI 53403
262-632-3310
fyoung@tds.net

-------------------------------------------
Sent: Friday, June 18, 2010 11:15 AM
To: Yunker, Kenneth R.; kostby@fortresspartners.com
Subject: Letter to FTA regarding New starts application approval

Dear Ken and Karl,

Attached is a letter Jeff Fitzgerald and I submitted today to the FTA regarding the New Starts Application pending before SERTA. I would ask that you include this in the minutes on Monday at your meeting.

Thank you,

Robin Vos

Attachment:
June 18, 2010

Mr. Peter M. Rogoff  
Administrator  
Federal Transit Administration  
East Building, 4th Floor  
1200 New Jersey Ave, SE  
Washington, DC 20590

Ms. Marisol Simon  
Regional Administrator, Region V  
Federal Transit Administration  
200 West Adams St.  
Suite 320  
Chicago, IL 60606

Dear Mr. Rogoff and Ms. Simon,

As a member of the Joint Finance Committee and Republican leader of the Wisconsin state Assembly, we write to you today to strongly urge the Federal Transit Administration against approving the Southeastern Regional Transit Authority (SERTA) application for preliminary engineering.

As you may know, SERTA is submitting an application for preliminary engineering to the FTA this month. There are several reasons we think this application should be denied.

First, there was much debate in the Legislature over the past biennium regarding approval of a funding mechanism for SERTA to establish a Kenosha-Racine-Milwaukee commuter rail line. Ultimately this funding mechanism was not approved by a Legislature that arguably could be considered to have the optimum political makeup for such an approval. We can assure you that should the makeup of the Legislature change after the election, there will be even less support. By approving a preliminary engineering request, the FTA will be circumventing the intent of Wisconsin's Legislature and funding an expensive project without the certainty that Wisconsin intends to financially participate in the initiative.

Further to this point, it is not just the Legislature that exhibits opposition to the project. Both Democrat Tom Barrett and Republican Scott Walker - frontrunners in Wisconsin's gubernatorial race – have expressed opposition to the KRM commuter rail line, as well. (Milwaukee Journal Sentinel article attached).

Second, the Milwaukee bus system is in peril. Fixing this existing system should be the top priority. By approving the application in question, the FTA will be doing a grave disservice to thousands of Milwaukee bus riders who rely on the bus every day. Building KRM on a route for which we have existing commuter bus service will require $53 million from the state’s transportation fund and operating subsidies thereafter. Prioritizing a sparsely used rail line that claims it will carry 2 million riders a year over
an existing transit system that carries 46 million riders per year will cause millions in precious transportation dollars to be siphoned away from this already troubled bus system.

For further reiteration of this particular point, you need only look to the Minority Report submitted to the FTA this month by Milwaukee County Board Chairman Lee Holloway and 1st Vice Chairman Michaeal Mayo, Sr. They have also requested you delay approval of this application until a solution is found for the Milwaukee bus system.

Next, we believe you should deny the application because the general public opposes this project. A survey conducted by the Wisconsin Club for Growth and the Independent Business Association of Wisconsin in 2009 found that voters, after being informed of details of the plan, oppose KRM 59% to 31%. 80% of respondents said they were even more likely to oppose KRM when they found out an unelected board would have the power to raise taxes and issue debt without voter approval.

Finally, many of the local governments who will have representation on the SERTA board do not support the plan as currently drafted. For instance, the Racine County Board recently passed a resolution (on a vote of 18-2) stating their intent to place a non-binding referendum question regarding a transit tax on the November ballot. The Kenosha County Board is considering a similar referendum. These positions are clearly divergent from those of commuter rail supporters who have opposed the idea of referenda because, as illustrated in the points above, they know the public does not support KRM, especially now that an Amtrak train to Madison, a downtown trolley in Milwaukee and track upgrade and new trains set for Amtrak to Chicago have been approved which will draw on the state transportation fund for subsidies.

If the FTA approves this application, a new $11 rental car tax will be collected from Southeastern Wisconsin residents immediately. We would like to save taxpayers from the burden of this tax. We think it will ultimately prove unnecessary, as we assure you we will do everything in our power to stop this project. Please wait for the approval of the Legislature before you allow funds to be spent on preliminary engineering for KRM.

Sincerely,

Jeff Fitzgerald
Assembly Republican Leader
Wisconsin State Assembly

Robin Vos
Ranking Member, Joint Finance Committee
Wisconsin State Assembly

cc: Karl Ostby, SERTA
Ken Yunker, SEWRPC
Susan Borinsky, Associate Administrator for Planning and Environment
Home » News » Wisconsin

Wiscosnin

Rail ideas await their fate in Milwaukee

Three stalled plans for Wisconsin train travel get reanalyzed in the election year

By Larry Sandler of the Journal Sentinel

Posted: May 30, 2010 (110) Comments

Railroads and politics have one thing in common: They're all about the timing.

Trains run by schedules. Politicians wait for the right moment to make their moves.

And timing is everything for rail transportation in southern Wisconsin, where political circumstances have brought three different rail transit plans to the forefront simultaneously - only to thrust them into an election-year controversy where some plans may not survive.

After years of study and debate, the state has landed an $810 million federal grant to build a high-speed train line from Milwaukee to Madison. At the same time, Milwaukee-area authorities are seeking federal permission to start preliminary engineering on a $283.5 million commuter rail line from Milwaukee to Kenosha and a $95.8 million modern streetcar line in downtown Milwaukee, two other long-discussed ideas.

Officially, the three plans are not related, except that all three systems would converge at Milwaukee's downtown Amtrak-Greyhound station, where the streetcar could carry Amtrak or KRM Commuter Link passengers "the last mile" to their destinations, Milwaukee Mayor Tom Barrett said. Supporters also tout all three as ways to stimulate economic development and improve mobility.

Politically, all three are linked in the minds of their opponents, as symbols of unnecessary taxation and skewed transportation spending priorities, say Milwaukee County Executive Scott Walker and state Rep. Robin Vos (R-Racine). Walker, Vos and their allies oppose new sales taxes - which are not currently proposed for any of the rail lines - and want transportation dollars spent on roads and buses.

Although the high-speed rail planning started under former Republican Gov. Tommy G. Thompson, a longtime passenger train booster, the train debate in recent years has turned partisan, pitting Democratic rail backers against GOP critics. Now the rail projects have emerged as an issue in the fall governor's race - in which Barrett is the likely Democratic nominee and Walker is facing former U.S. Rep. Mark Neumann for the GOP nod.

http://www.printthis.clickability.com/pt/cpt?action=ckt&type=Rail+ideas+await+their+fate... 6/18/2010
Walker has taken the hardest line against all three projects, vowing to kill the high-speed train project if he's elected. He has long argued against the streetcar line and recently came out against the KRM, a project he had not vocally opposed before.

Neumann, meanwhile, has said he would analyze the costs and benefits of the high-speed train, but would end work on it if "we find this thing is going to be an economic boondoggle for the people of this state." He says he would apply the same approach to state aid for the KRM and the streetcar line.

**Barrett's qualms on KRM**

Barrett has been the chief advocate for the streetcar and has joined Gov. Jim Doyle in backing the high-speed train line. But he says his support for rail projects doesn't necessarily extend to the KRM.

Unlike the streetcar and high-speed rail, the commuter rail line KRM doesn't have a pot of federal money pledged to it, Barrett noted. Also, he said, the Chicago-area Metra commuter train system hasn't agreed to coordinate its schedules with the KRM, allowing passengers to easily transfer between systems for trips across state lines. Without those factors, Barrett said, "I'm not going to commit to it."

The KRM's fate also has been tied to legislation to overhaul funding for the Milwaukee County Transit System and its counterparts, which floundered in Madison amid concerns about authorizing new sales taxes in an election year.

That leaves the KRM as the most vulnerable of the three rail projects, both advocates and opponents conclude.

"We've got some hurdles to overcome," conceded Karl Ostby, chairman of the Southeastern Regional Transit Authority. "It's a challenging time politically."

And even though construction funding is more solid for the streetcar and the high-speed rail line, all three projects have preliminary financial plans that call for varying levels of state operating aid, which eventually would require approval by the Legislature and the governor in the state budget.

"You can't point to any of these and say it's a done deal," says Rob Henken, president of the Public Policy Forum, which has studied local transit issues.

Yet it was another election, in November 2008, that laid the groundwork for all three rail plans to advance as far as they have. Democrat Barack Obama was elected president, while Democrats captured the Assembly and expanded their majorities in the state Senate and both chambers of Congress. With Doyle as governor, Democrats were solidly in control of both state and federal executive and legislative branches.

Barrett moved quickly to take advantage of the political shift. For 17 years, local and state officials had battled to a stalemate over how to spend $91.5 million in long-idle federal transit funds. Since 2007, Barrett had been pushing to use part of the money for streetcars, while Walker wanted all of it spent on express buses.

But in March 2009, with his former colleagues running Congress and a fellow Democrat in the White House, Barrett engineered a deal to hand the city 60% of the cash, or $54.9 million, for the streetcar line, leaving the rest for the county to spend on buses.

High-speed rail

Similarly, the Milwaukee-to-Madison train plans had sat idle for years, as part of a larger initiative to run fast, frequent trains across the Midwest. State officials had pledged to put up 20% of the cost, but the federal government had never agreed to provide the other 80%.

All that changed with the massive federal stimulus package approved in February 2009. Congress appropriated $8 billion for high-speed rail projects nationwide, and the Obama administration agreed to pay 100% of the cost of the Wisconsin line.

Meanwhile, a lower-profile federal move improved the prospects for the KRM, under study since 1997. Until recently, federal funding standards had favored projects in only the largest metropolitan areas, reducing the chances for a rail line in the Milwaukee area, said Ken Yunker, executive director of the Southeastern Wisconsin Regional Planning Commission.

The Obama administration ushered in a more favorable attitude toward rail transit, broadening the guidelines to consider a project’s impact on its region’s livability and sustainability instead of focusing primarily on cost-effectiveness, said Milwaukee Ald. Bob Bauman.

Locally, the Federal Transit Administration slightly eased its position that it would not approve KRM until public bus systems were financially stabilized, raising the possibility that the rail line could enter preliminary engineering while officials continued work on transit funding, Yunker said.

Those developments encouraged the RTA to seek approval for preliminary engineering, despite the transit legislation’s death.

Yet the legislative debate highlighted the risks of pressing transit plans forward in an election year, even with one-party control of the Capitol. A year earlier, lawmakers had approved a budget provision to create a one-county transit authority that would levy a local sales tax for Milwaukee County’s troubled bus system, but it was vetoed by Doyle, who preferred a regional solution. This year, revised versions of the legislation never even reached the floor of either chamber, reflecting skittishness about authorizing new sales taxes before facing voters.

Vos, a leading rail opponent, calls the legislative hesitation a sign of bipartisan reservations about the KRM.

Current plans call for funding the KRM with a rental car tax of up to $18 a car, but Walker fears the rental car tax would prove unsustainable and would be replaced by a sales tax. Even if that doesn't happen, federal approval for final KRM construction hinges on bus funding that likely would require a sales tax, Ostby noted.

Commuter rail backers such as Ostby, Greater Milwaukee Committee President Julia Taylor and state Rep. Peter Barca (D-Kenosha) say the transit bill mobilized a strong coalition of business, labor and community groups for both bus and rail transit.

Find this article at:
Eric,

I ask that you forward the attached Letter to Editor which was published in the July 7, 2010 Milwaukee Journal Sentinel to the SERTA board and include in their next meeting agenda package. For convenience, the attached is a Word file of the letter at [http://www.jsonline.com/news/opinion/97888679.html](http://www.jsonline.com/news/opinion/97888679.html)

Thank you.

Fred Young
One Main Street
Suite 390
Racine, WI 53403
262-632-3310

***

KRM
Only a sales tax can fund system

SERTA (Southeast Regional Transit Authority) recently submitted an application to FTA (Federal Transit Administration) for funds to pay 80% of cost of “preliminary engineering” for KRM commuter rail. If approved, SERTA would levy $10/car rental tax for the other 20%.

If FTA later fails to fund KRM, the $8M study will be wasted. The amount may not seem large, but this principle is: an unelected board with taxing authority is insulated from accountability.

The Democrat majority legislature failed to pass a sales tax to allow KRM to proceed. A Republican majority legislature or Governor would be unlikely to approve such.

An accountable authority would wait to see if Democrats retain the legislature and governorship. It would wait, also, for the non-binding transit tax referendum planned for Racine County.

A very accountable authority would wait for a future legislature to pass a sales tax.

No transit authority in the country is funded with a car rental tax. Only a sales tax is big enough to fund KRM plus needed bus system improvements. Without a sales tax, KRM won’t happen!

Without a sales tax, No Further Spending by SERTA should occur….not for engineering….not even to continue lobbying, public relations and “citizen education”.

Fred Young
Racine
***
June 23, 2010

Mr. Karl Ostby
Chairman
Southeastern Regional Transit Authority

KRM New Starts Application – Projected Capital and O&M Costs and Ridership

Recent comparisons between the proposed Kenosha-Racine-Milwaukee (KRM) commuter rail project and another commuter rail project, the Central Florida project (aka Orlando Sun Rail Project) have given rise to what we believe are legitimate concerns relative to costs and projections in the KRM commuter rail New Starts application.

We question how the KRM project can be constructed for substantially less than the Central Florida project and attract more than twice as many riders on a per capita population basis. We recognize that there may be a rational explanation for what appears to be counter-intuitive, but we don’t find it in the available numbers as presented.

For that reason, we believe SERTA should commission an independent, third-party analysis of these radically differing estimates and projections. We also believe that review and analysis should happen before the application is submitted to the Federal Transit Administration since any findings would reflect directly on the credibility of the KRM application. Undoubtedly there are qualified entities or individuals who could accomplish that task in short order and for a relatively modest sum.

We also share the reservations expressed by the Milwaukee County representatives on SERTA about the advisability of submitting the application without a dedicated funding source for mass transit in the region. Arguably without that component in place, what is intended to be a complementary transportation mode becomes a competitive one. Given that policy concern already exists, we believe it is vital that you address and respond in an objective ways to these cost comparison questions which go to the economic viability of the project.

Thank you for considering this request.

[Signature]
Franklyn M. Gimbel
Chairman
Wisconsin Center District Board

[Signature]
Richard A. Geyer
President/CEO
Wisconsin Center District
July 1, 2010

Franklyn M. Gimbel
Chairman
Wisconsin Center District Board
400 W. Wisconsin Avenue
Milwaukee, WI  53203

Richard A. Geyer
President/CEO
Wisconsin Center District
400 W. Wisconsin Avenue
Milwaukee, WI  53203

Dear Mr. Gimbel and Mr. Geyer:

This is to acknowledge receipt of, and respond to, your letter of June 23, 2010, in which you raise concerns relating to a comparison of Kenosha-Racine-Milwaukee (KRM) commuter rail to a Central Florida (Orlando) commuter rail project, as well as concerns about submitting a “New Starts” application given the funding problems currently facing the existing bus transit systems in southeastern Wisconsin.

Your concerns relative to the costs and forecast ridership for the KRM commuter rail project were recently raised in correspondence sent to me by the National Business Travel Association, Racine Taxpayers Association, Wisconsin Business Travel Association, and Wisconsin Car Rental Alliance, which compared the KRM commuter rail project to the initial operating segment of the Central Florida (Orlando) commuter rail project. The comparison included capital and annual operating and maintenance costs, and forecast ridership, but several of the comparisons in the correspondence use inconsistent units of measurement. For example, operating and maintenance costs are compared using year 2009 dollars for KRM commuter rail and year 2030 dollars for Central Florida commuter rail (costs in year 2030 dollars include 21 years of assumed cost inflation, and costs in year 2009 dollars do not include this inflation).

The Southeastern Wisconsin Regional Planning Commission staff has compiled the table below, which attempts to make a direct comparison between the two commuter rail projects using equivalent units of measurement. From this table, it may be noted:

<table>
<thead>
<tr>
<th></th>
<th>Central Florida Commuter Rail</th>
<th>KRM Commuter Rail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital Costs</td>
<td>$X,XXX (in year 2030)</td>
<td>$Y,YYY (in year 2030)</td>
</tr>
<tr>
<td>Operating Costs</td>
<td>$Z,ZZZ (in year 2030)</td>
<td>$W,WWW (in year 2030)</td>
</tr>
<tr>
<td>Ridership</td>
<td>1,234 passengers</td>
<td>1,234 passengers</td>
</tr>
</tbody>
</table>

- Capital Costs: The capital cost estimate for Central Florida commuter rail is about 20% higher than for KRM commuter rail. The Central Florida commuter rail project has additional costs due to use of conventional commuter rail equipment rather than diesel multiple units, three additional stations, and right-of-way acquisition.

- Operating Costs: KRM commuter rail estimated operating and maintenance costs per weekday train trip in the year 2030 in year 2030 dollars are about 25% higher than for Central Florida commuter rail.

- Ridership: KRM commuter rail is forecast to achieve about the same average weekday ridership in the year 2030 as that of Central Florida commuter rail.
<table>
<thead>
<tr>
<th>Characteristic</th>
<th>KRM Commuter Rail</th>
<th>Central Florida Commuter Rail&lt;sup&gt;a&lt;/sup&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route Length</td>
<td>33 miles</td>
<td>32 miles</td>
</tr>
<tr>
<td>Number of Stations</td>
<td>9 (3 existing)</td>
<td>12 (0 existing)</td>
</tr>
<tr>
<td>Type of Vehicle</td>
<td>Diesel Multiple Unit</td>
<td>Diesel Locomotive-hauled</td>
</tr>
<tr>
<td>Number of Vehicles</td>
<td>9</td>
<td>21&lt;sup&gt;b&lt;/sup&gt;</td>
</tr>
<tr>
<td>Total One-way Weekday Train Trips (Opening Year Service Levels)</td>
<td>30</td>
<td>32</td>
</tr>
<tr>
<td>Total One-way Weekday Train Trips (Year 2030 Service Levels)</td>
<td>30</td>
<td>56</td>
</tr>
<tr>
<td>Total Capital Cost (Opening Year Service Levels in Year of Expenditure Dollars)&lt;sup&gt;c&lt;/sup&gt;</td>
<td>$283.5 million</td>
<td>$357.2 million</td>
</tr>
<tr>
<td>Annual Operating Cost (Year 2030)</td>
<td>$40.5 million&lt;sup&gt;d&lt;/sup&gt;</td>
<td>$55.3 million</td>
</tr>
<tr>
<td>Average Weekday Ridership (Year 2030)</td>
<td>8,000 riders</td>
<td>7,400 riders</td>
</tr>
</tbody>
</table>

<sup>a</sup> Based on estimates for the Initial Operating Segment of the Central Florida commuter rail project. In the opening year, this service will operate on weekdays with 30-minute peak headways and 120 minute off-peak headways. By the forecast year of 2030, service will operate with 15-minute peak headways and 30-minute off-peak headways, with 60-minute headways in the evenings and weekends.

<sup>b</sup> The Central Florida commuter rail project anticipates purchasing 7 locomotives, 5 coaches, and 9 cab cars, which will provide traditional push-pull commuter rail service. These 21 vehicles will form 7 trainsets, which will be used to provide the opening year level of service. An additional 5 trainsets would need to be purchased to provide the forecast year level of service.

<sup>c</sup> KRM commuter rail capital costs are anticipated to be incurred from 2014 to 2016, while Central Florida commuter rail capital costs are anticipated to be incurred from 2011 to 2013.

<sup>d</sup> KRM commuter rail operating and maintenance costs are estimated at $13.4 million in 2009 dollars. This cost estimate is inflated at an annual rate of about 5.5% to estimate operating and maintenance costs in 2030.

Commission staff also noted that the population comparison discussed in the correspondence does not appear to accurately depict the population to be served by the two projects. The KRM commuter rail line would run through the Kenosha, Racine, and Milwaukee urbanized areas – with a combined population of about 1.6 million – and would connect to the Chicago urbanized area – with a population of about 8.5 million – via Metra commuter rail service. By comparison, the initial operating segment of the Central Florida commuter rail line would run through the Orlando urbanized area, which has a population of about 1.3 million (U.S. Census Bureau, 2008 American Community Survey). The five-county Census-defined Metropolitan Statistical Area (MSA) for Milwaukee has a population of 1.8 million, and the eight-county Chicago MSA has a population of 8.0 million, while the four-county Orlando MSA has a population of 2.1 million (2009 U.S. Census Estimates).

In addition, when comparing the major transit system serving each of the two projects, the Milwaukee County Transit System (MCTS) has nearly twice the annual ridership, with 51.8 million unlinked transit trips in 2008, than the Central Florida Regional Transportation Authority (LYNX), which had 27.2
million unlinked transit trips in 2008. MCTS achieves this ridership despite operating fewer annual
vehicle revenue miles than LYNX – 21.3 million miles vs. 23.0 million miles.

I would also note, in regards to the comparison of KRM commuter rail to Central Florida commuter rail,
that both projects have the same lead planning and engineering technical consultant, AECOM, Inc.

An additional concern raised in your letter is whether or not it is advisable to submit a “New Starts”
application to the Federal Transit Administration (FTA) requesting entry into preliminary engineering for
the KRM commuter rail project, while dedicated local funding has not yet been provided for the existing
bus transit systems. While I strongly believe that dedicated local funding for the existing bus transit
systems is a necessity, I do not believe that submitting a “New Starts” application to the FTA at this time
will lessen the chances of passing legislation to provide dedicated local transit funding. On the contrary, I
believe it will put additional pressure on the State Legislature to pass transit funding legislation, and the
SERTA Board will continue its efforts to pass the legislation, as we did in the most recent attempt during
the regular session of the State Legislature this past April.

In the week prior to the SERTA Board determining to submit the “New Starts” application to the FTA on
a 7-2 vote at our May 17, 2010, meeting, I met with FTA staff, along with staff from the Regional
Planning Commission, Wisconsin Department of Transportation, and representatives from the Milwaukee
County Board of Supervisors. At that meeting, FTA staff indicated they would consider a “New Starts”
application for KRM commuter rail, even though the funding problems of the existing bus systems have
not yet been addressed. However, I understand that if the FTA were to approve the KRM commuter rail
project for entry into preliminary engineering, the FTA would likely identify the funding problems of the
existing bus systems as a concern that would need to be addressed if the project is to move beyond
preliminary engineering.

It is also important to understand that the submittal of a “New Starts” application at this time does not
commit the SERTA Board to conducting preliminary engineering for the KRM commuter rail project
upon FTA approval of the “New Starts” application, nor does it necessitate that the SERTA Board enact a
vehicle rental fee at this time. Should the FTA approve the “New Starts” application, the SERTA Board
would then need to determine whether or not it is prudent to initiate preliminary engineering and whether
or not a vehicle rental fee should be enacted. The status of transit funding legislation will undoubtedly
factor into our decision-making at that time.

If you have any further questions or comments, please do not hesitate to contact myself or Ken Yunker of
the Regional Planning Commission staff.

Sincerely,

Karl J. Ostby
Chairman, Southeastern Regional Transit Authority

cc: Kenneth R. Yunker, Executive Director, Southeastern Wisconsin Regional Planning
Commission
July 13, 2010

Federal Transit Administration
Peter M. Rogoff, Administrator
U.S. Department of Transportation
East Building, 4th Floor
1200 New Jersey Avenue, SE
Washington, DC 20590

Federal Transit Administration, Region V
Ms. Marisol R. Simon, Regional Administrator
U.S. Department of Transportation
200 West Adams Street, Suite 320
Chicago, IL 60606

Re: SE Wisconsin Commuter Rail (KRM)

Dear Mr. Rogoff and Ms. Simon,

This letter is in support of Wisconsin legislators Jeff Fitzgerald and Robin Voss, and Southeastern Regional Transit Authority (SERTA) members Lee Holloway and Michael Mayo, Sr., who have expressed their opposition to the New Starts application being submitted to the FTA.

We are a group of Racine County taxpayers that oppose the high cost and minimal benefit of commuter rail. We believe the majority of residents hold this same opinion and will express it in an Advisory Referendum this November.

Proponents for KRM Commuter Rail are well funded, well organized and we felt their onslaught for the past few years. However, the overwhelming resistance of the majority forced these advocates to try legislative maneuvering to get it passed. They failed and are now holding the Milwaukee County Bus System hostage with Commuter Rail as ransom.

Your May 18, speech in Boston seemed tailor made for our debate in Southeastern Wisconsin. However, “Get Real and Get Honest with the high cost of rail versus bus”, does not seem to be of interest to the proponents. They want “shiny new rails now” and ignore the “costs they are teeing up for the future”.

We find the SERTA New Starts application to be incomplete, does not include contracts with rail operators, overstates the number of daily rides and understates negative impact on local bus service and costs to local taxpayers.

We urge you to deny the SERTA New Starts application for KRM Commuter Rail.

Racine Taxpayers Association:

John Haumersen President

Leonard Jensen Board Member

Dennis Kisley Vice President

Jim Morrison Board Member

Dick Reich Secretary

George Meyers Treasurer

cc. Karl Ostby, SERTA
    Kenneth R. Yunker, SEWRPC
    Ms. Susan, Borinsky, Federal Transit Administration
### Progress, Billing, and Payment Report

<table>
<thead>
<tr>
<th>Budget Item</th>
<th>Total Contract Amount</th>
<th>Billing Period</th>
<th>Amount Invoiced</th>
<th>Amount Paid</th>
<th>Outstanding Invoices</th>
<th>Remaining Contract</th>
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<td><strong>Mueller Communications - 1-month</strong></td>
<td>$12,000.00</td>
<td>Dec. '09</td>
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<td>Expenses</td>
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<td>4,154.35</td>
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<td>Spreenkler</td>
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<tr>
<td>Direct Mail Campaign</td>
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<td>40,500.00</td>
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<td><strong>Schreiber and Associates - 4-month</strong></td>
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<tr>
<td>Services</td>
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<td>Jan. - Apr. '10</td>
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<tr>
<td>Expenses</td>
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<td>-</td>
<td>750.00</td>
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<td>The Shop Consulting (Jim Smith)</td>
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<td><strong>Current KRM Study Funding Request</strong></td>
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<td>Remaining Local Match and</td>
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<td>SEWRPC Direct Expenses</td>
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<td>SEWRPC Costs as KRM Project Managerb</td>
<td>$3,060.00</td>
<td>Jan. - Apr. '10</td>
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<td>SEWRPC Costs as Staff to SERTA</td>
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<tr>
<td>Other</td>
<td></td>
<td>Dec. '09 - Feb. '10</td>
<td>370.00</td>
<td>370.00</td>
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<tr>
<td><strong>Total</strong></td>
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<td>$214,240.85</td>
<td>$206,086.50</td>
<td>$8,154.35</td>
<td>$47,971.00</td>
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</tbody>
</table>

* At their March 15, 2010, meeting, the SERTA Board approved expending up to $55,000 to provide the remaining local share of the current KRM study costs, to fund additional consultant work for the KRM project, and to cover $7,028.82 in direct expenses incurred by Commission staff during the current KRM studies, primarily including study mailings, advertisements, court reporters, and room rental fees associated with public meetings held for the project’s draft environmental impact statement. At their May 17, 2010, meeting, the SERTA Board approved funding 20 percent of the $7,028.82 in direct expenses, directing Commission staff to seek the remaining 80 percent from an Federal Transit Administration grant for the KRM project.

b At their May 17, 2010, meeting, the SERTA Board approved funding 20 percent of the $15,299 in Commission salary expenditures from January through April of 2010 for work as project manager for the KRM project. The Board directed Commission staff to seek the remaining 80 percent from an Federal Transit Administration grant for the KRM project.

### Financial Summary

<table>
<thead>
<tr>
<th>Financial Summary</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Initial Balance</td>
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<tr>
<td>Total Expenditures</td>
<td>$206,086.50</td>
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<tr>
<td>Total Outstanding Invoices</td>
<td>$8,154.35</td>
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<tr>
<td>Final Balance</td>
<td>$1,270,319.79</td>
</tr>
</tbody>
</table>
July 26, 2010

Mr. H. Carl Mueller
President
Mueller Communications, Inc.
1749 North Prospect Avenue
Milwaukee, WI 53202

Dear Mr. Mueller:

Milwaukee County Board Supervisor Michael Mayo, Sr., as Treasurer of the Southeastern Regional Transit Authority (SERTA), has authorized payment of the final invoice of your $142,000 agreement with SERTA for services performed from January through April, 2010. The invoice, requesting a total payment of $8,154.35, brings the total amount invoiced for the agreement to $146,154.35, including $142,000 for your staff team efforts, and $4,154.35 for expenses. SERTA Treasurer Michael Mayo, Sr. has requested that you submit a written explanation as to why the total amount of your invoices exceeded the total agreement amount of $142,000.

In addition, SERTA Treasurer Michael Mayo, Sr. has requested your attendance at the next SERTA Board meeting, scheduled for 8:00 a.m. on Monday, August 2, 2010, in the Sijan Room of the Mitchell Gallery of Flight Museum, to address potential questions during the Board’s review of its financial report. Please confirm that you will be able to attend this meeting.

Sincerely,

Kenneth R. Yunker, P.E.
Executive Director

EDL/edl/dad
#152637 V1 - SERTA - LETTER TO MUELLER REGARDING FINAL INVOICE

cc: Karl Ostby, Chairman, SERTA Board of Directors

bcc: Mr. Michael Mayo, Sr., Supervisor, Milwaukee County Board
July 29, 2010

Mr. Kenneth R. Yunker, P.E.
Executive Director
Southeastern Wisconsin Regional Planning Commission
W239n1812 Rockwood Dr
Waukesha, WI 53188-1113

Dear Mr. Yunker:

As requested, I am responding to your recent letter regarding our April, 2010 invoice to the Southeastern Regional Transit Authority (SERTA).

Since our work with SERTA was on a temporary basis and not in response to a formal Request for Proposal or Qualifications process, we did not include a formal Letter of Agreement (LOA). The standard in our business would have outlined our standard reimbursement policy.

It is standard practice by all communications firms to bill professional fees and expenses separately. This is a standard practice for good reason. While we are able to plan for and project professional fees, expenses often vary based on the needs and direction of a specific client and project.

The expense amount in question represents less than one-third of one percent of our overall budget, which is relatively small considering the amount of work accomplished. Rest assured, we take these issues seriously and work hard to manage all costs within budget.

Thank you for your follow-up, we greatly appreciate our work with SEWRPC and SERTA and are hopeful that we will be able to continue working together. In future agreements, we will be sure to outline standard reimbursement policies in detail.

Sincerely,

H. CARL MUELLER
President
INTRODUCTION

The Southeastern Regional Transit Authority (SERTA) is requesting proposals from interested and qualified consultants and consultant teams to assist in the development and implementation of a communications strategy for SERTA.

The purpose of this Request for Qualifications/Proposals (RFQ/P) is to set forth the requirements and procedures for the submission of qualifications and proposals from consultants interested in performing the desired work. This RFQ/P includes pertinent introductory information, describes the work desired, sets forth the submittal requirements, and describes the consultant selection procedure to be followed.

Background

SERTA was created by the Wisconsin State Legislature and Governor in July 2009 to serve the counties of Kenosha, Racine, and Milwaukee. The function of SERTA under State law is to oversee the development of commuter rail service in Kenosha, Racine, and Milwaukee Counties. Additional legislation creating dedicated local funding for existing public transit systems, currently introduced in the State Legislature, has the potential to extend SERTA’s responsibilities to overseeing these existing transit systems. The website for SERTA (www.sewisrta.org) documents the statutory responsibilities of SERTA, its governing bylaws, its members and staff, its past and scheduled upcoming meetings, all materials considered to date by SERTA, and reports of interest to SERTA’s work. The proposed work of the consultant is to develop and implement a communications strategy to assist SERTA and its staff in communicating the work of SERTA, which currently includes overseeing the development of KRM commuter rail, and may extend to overseeing existing public transit systems should dedicated local funding be provided for existing transit systems.

Issuing Organization

This RFQ/P has been issued by SERTA. The Southeastern Wisconsin Regional Planning Commission (SEWRPC) staff, which is assisting SERTA, will be responsible for project management and contract administration until SERTA hires its own permanent staff. The consultant responsible for conducting the
desired work will contract with SERTA for the completion of the work described in this RFQ/P and ultimately in the contract. SERTA and SEWRPC staff will provide appropriate oversight to all the activities envisioned to be accomplished under this work effort.

Contact Person
For further information about this RFQ/P, contact:

Kenneth R. Yunker, Executive Director  
Southeastern Wisconsin Regional Planning Commission  
W239 N1812 Rockwood Drive  
P. O. Box 1607  
Waukesha, WI 53187-1607  
Telephone: (262) 547-6721  
Fax: (262) 547-1103  
kyunker@sewrpc.org

SCOPE OF WORK

The purpose of this section is to describe the desired consultant services, management of the desired work, and the type of consulting contract required. The work effort described in this RFQ/P is intended to develop and implement a strategy for communicating the work of SERTA, which currently includes overseeing the development of a KRM commuter rail line, and is to ultimately include constructing the line, acquiring equipment for the line, and operating the line. Essential to the work of SERTA is addressing the funding problems of the existing bus transit systems in southeastern Wisconsin, particularly in Milwaukee County, by obtaining dedicated local funding for these transit systems. Accordingly, a primary focus of the communications strategy will be to promote the passage of legislation in the State of Wisconsin which will provide dedicated local funding for the existing bus transit systems.

Work Elements
There are four elements of work outlined below, which are to be performed by the consultant or consultant team. The description of each work element should be viewed as guidance for the development of a communications strategy, with examples provided as appropriate. The consultant should propose specific tasks for each work element that will be accomplished, and should provide the additional information for each work element identified in the next section of the RFQ/P, “Statement of Qualifications/Proposal Requirements”. The four work elements to be performed include:

1. Develop Materials to Communicate the Work of SERTA
2. Distribute Communications Materials
3. Maintain and Build a Coalition of Supporters for the Work of SERTA
4. Other

1. Develop Materials to Communicate the Work of SERTA

The consultant will be responsible for proposing, developing, and producing materials to communicate the work of SERTA. Potential communications materials may include, but are not limited to:

- Fact sheets
- Newsletters
- Brochures
- Briefing materials and packages for communities, businesses, and local/County governments, as well as for SERTA Board meetings
- Electronic information provided through a SERTA blog and social media networks (e.g. Facebook or Twitter)

These materials should include information on the statutory responsibilities of SERTA; the status, proposal, and potential benefits of the KRM commuter rail project; and the need and status of dedicated local funding for the existing bus transit systems in southeastern Wisconsin.

2. Distribute Communications Materials

The consultant will be responsible for distributing the communications materials which were proposed, developed, and produced as part of the first work element. The focus of distributing these materials should be to develop awareness and understanding of the responsibilities of SERTA, the potential benefits of a KRM commuter rail line, and the need for dedicated local funding for the existing bus transit systems in southeastern Wisconsin. This work element will include clearly identifying specific recipients to be targeted, and the methods of distribution which will be utilized. Potential types of recipients may include, but are not limited to:

- State of Wisconsin legislators
- Local, County, State, and Federal elected officials
- Key public agency staff
- Businesses
- Community organizations
- General public
3. Maintain and Build a Coalition of Supporters for the Work of SERTA
The consultant will be responsible for maintaining the current coalition which has demonstrated support of the work of SERTA, and for broadening this coalition by identifying and recruiting additional supporters. The consultant should work with these supporters to ensure they have access to updated, accurate information on the work of SERTA, including the communications materials which are to be developed and distributed under the first two work elements. The focus of the coalition of supporters should be to promote dedicated local funding for the existing bus transit systems in southeastern Wisconsin, and to garner support for advancing the development of a KRM commuter rail line. Potential tasks for maintaining and building a coalition of supporters may include, but are not limited to:

- Identify existing individuals and groups which support KRM commuter rail
- Identify existing individuals and groups which support dedicated transit funding
- Identify individuals and groups which have the potential to support KRM commuter rail and dedicated transit funding
- Actively coordinate with and reach out to advocates of transit funding legislation, assisting these advocates in developing and executing strategies to demonstrate their support

As an alternative, which would expand on the work for maintaining and building a coalition of supporters, the consultant would additionally be responsible for working to unite all supporters of the work of SERTA to form a single, unified coalition of supporters. This alternative approach will require additional work by the consultant. Upon review of all proposals submitted by potential consultant firms, the SERTA Board may select one of the two alternative approaches to include in the contract offered to the firm which is selected to develop and implement the communications strategy.

4. Other
The consultant should propose any additional tasks and materials that may aid in communicating the work of SERTA, but are not included in one of the other three work elements. The proposed additional tasks and materials should be consistent with the overall communications strategy.

Work Management
The consultant will be required to use the project manager and key staff members named in its Statement of Qualifications/Proposal. A condition of the consultant contract will be that a single project manager be identified and assigned to this work effort for its duration. Changes in the assigned project manager or in key staff members will not be permitted and may be cause for termination of the contract.
Schedule
The responsibilities of the consultant will commence upon execution of the consultant contract and issuance of a notice to proceed.

Type of Contract
Any contract resulting from this RFQ/P will be a monthly contract, at a set amount, negotiated between the selected consultant and SERTA. Payments to the consultant will be based on invoices submitted monthly by the consultant, with each invoice paid within 20 days of receipt. Each invoice will be required to include the following information:

- Name of the contractor or subcontractor providing the service;
- Brief description of the nature of the service or deliverable being billed;
- Hourly rate billed for the service;
- Number of hours worked;
- Actual expenses incurred to-date compared to the total contract; and
- Detail on the progress of billing for Emerging Business Enterprise or Disadvantaged Business Enterprise services.

STATEMENT OF QUALIFICATIONS/PROPOSAL REQUIREMENTS

The purpose of this section is to describe what is being requested for inclusion in the statement of qualifications/proposal and the procedures for submittal by the consultant.

Contents of Proposal
Each consultant will submit a proposal that will include the following items:

1. A clear and concise statement which indicates the consultant’s ability to address each work element to be conducted. A list of at least three references for each work element for which the consultant has provided similar services as described in the proposal should be provided.

2. A statement by work element indicating the qualifications of the key persons who will be assigned to each work element of the project. As a condition of the contract, the assignment and use of a single project manager and key consultant personnel as proposed will be required
throughout the entire project. Resumes for key personnel who will be assigned to the project should be included in the proposal as appendices. A single project manager must be identified.

3. A brief statement indicating the availability of qualified personnel, facilities, and services and the ability of the consultant to complete the work of the study on a continual monthly basis. The consultant will identify the location where the project manager and key personnel for this study will be based.

4. A discussion for each of the four work elements, identifying the consultant’s proposed approach to each element, and the level of effort including number and type of proposed tasks and proposed communications materials. Note: a discussion of each of the two alternative approaches for the third work element, “Maintain and Build a Coalition of Supporters for the Work of SERTA”, should be provided.

5. An estimated cost budget and schedule over the next year for each of the four work elements including a separate cost budget and schedule for each of the two alternative approaches for the third work element, “Maintain and Build a Coalition of Supporters for the Work of SERTA”. The schedule should identify for each work element the work to be accomplished each month. The budget should indicate by work element: personnel assigned, labor hours by persons, and other expenses. The direct labor hours and rate for each person assigned shall also be included. The cost budget should indicate the percentage of the work which will be performed by Emerging Business Enterprise firms as certified by City of Milwaukee, Disadvantaged Business Enterprise firms as certified by the Milwaukee County Community Business Development Partners, or Disadvantaged Business Enterprise firms as certified by the State of Wisconsin. A minimum of 17 percent of the proposed work should be proposed to be completed by Emerging or Disadvantaged Business Enterprise firms.

Format
The proposal shall be submitted on letter-size (8 1/2 inches x 11 inches) paper and bound. Elaborate graphics and expensive papers and bindings are not necessary. Fifteen (15) copies of the proposal shall be submitted.
Directions for Submittal
Consultants shall submit the required number of copies of the proposal to the Southeastern Wisconsin Regional Planning Commission. The proposals must be received at the Southeastern Wisconsin Regional Planning Commission offices by 12:00 noon Central Daylight Time (CDT) on _________________, located at the following address:

Southeastern Wisconsin Regional Planning Commission
W239 N1812 Rockwood Drive
P. O. Box 1607
Waukesha, WI 53187-1607

Packaging containing the proposals and any related materials should be plainly marked on the outside in the following manner: “Qualifications/Proposal for Southeastern Regional Transit Authority Communications Strategy.” Envelopes or packages containing proposals and related materials which are received after the above time and date will not be accepted and will be returned unopened.

Costs Incurred in Responding to this Request for Qualifications/Proposals
The Southeastern Wisconsin Regional Planning Commission and the Southeastern Regional Transit Authority, as well as any other companies, businesses, organizations, units of government, and public agencies, are not liable for any costs incurred by consultants or consulting firms in responding to this RFQ/P, or for any costs associated with discussions required for clarification of items relating to this RFQ/P.

CONSULTANT SELECTION PROCEDURE
A single consultant will be selected from those submitting qualifications/proposals for the development and implementation of a communications strategy for SERTA.

Evaluation of Consultant Qualifications/Proposals
A qualifications-based selection process will be used to evaluate and select a consultant. Each proposal will be evaluated on the basis of the experience and qualifications, particularly of the proposed project manager and staff, and the proposed approach to the effort, as outlined in the proposal. Familiarity with southeastern Wisconsin will also be considered.

Each proposal will be evaluated and ranked by a team on the basis of the following evaluation criteria. Percentages indicate the proportional weight of each criterion.
1. Experience and qualifications of proposed project manager -- 15%
2. Experience and qualifications of proposed key personnel -- 25%
3. Experience with and knowledge of southeastern Wisconsin -- 15%
4. Experience with and knowledge of public transit and commuter rail -- 15%
5. Proposed work program -- 15%
6. Commitment to use emerging and/or disadvantaged business enterprise firms -- 15%

Consultant selection may be made solely on the basis of submitted statements of qualifications/proposal, or an evaluation of the qualifications/proposals may be used to select one or more consultants for a personal interview. If interviews are conducted, final selection will then be based upon interview and qualifications/proposal. Not every firm submitting a statement of qualifications/proposal may be selected for an interview. Interviews, if conducted, will be held on the morning of ________________.

Approval of Selection Decision
Following review of the qualifications/proposals and possible interviews of the consultants, SERTA will select the highest ranked consultant and attempt to negotiate a contract with that consultant. Should such negotiations with the highest ranked consultant prove unsuccessful, then a contract may be negotiated with a next highest ranked consultant. SERTA reserves the right to reject any or all proposals received, cancel this RFQ/P, issue a subsequent RFQ/P, require confirmation of any information provided by consultants, establish a short list of RFQ/P respondents for interviews or clarifications, select a consultant without a short list, negotiate with any, all, or none of the RFQ/P respondents, and enter into a contract for all, part, or none of the required work.

Requests for Clarifications
In all cases, the services to be furnished under a contract resulting from this RFQ/P shall fully comply with the scope of work being requested herein. Questions regarding unclear or restrictive requirements, the procurement process, requests for clarification, or alleged improprieties shall be submitted in writing and received no later than by 12:00 noon Central Daylight Time (CDT) on ________________, at the following address. All correspondence should be directed to:

Kenneth R. Yunker, Executive Director
Southeastern Wisconsin Regional Planning Commission
W239 N1812 Rockwood Drive
P. O. Box 1607
Requests and questions must be submitted in writing. Faxes and e-mail are also acceptable. Telephone requests are discouraged. Responses to all written requests will be sent by e-mail or U.S. mail to all consultants that have requested the RFQ/P. Responses will be mailed by the end of ____________________.

* * *

KRY/EDL/edl
07/29/10
#152835 v1 - SERTA - Minutes of Mtg 7 - 080210 Attachment 6 Draft RFQP
PROPOSED SERTA COMMUNICATIONS CONSULTANT HIRING SCHEDULE
(REVISED AUGUST 2, 2010)

Fri 7/2    Draft RFQ/P transmittal to SERTA for comment
Mon 8/2    SERTA Board meeting, including consideration and approval of draft RFQ/P
Fri 8/6    RFQ/P issued
Fri 9/3    Consultant Statements of Qualifications/Proposals due
Tue 9/14   SERTA subcommittee meeting to evaluate consultant Statements of Qualifications/Proposals
Thu 9/16   SERTA subcommittee interviews consultant teams
Mon 9/20   SERTA Board meeting, including consideration and approval of SERTA subcommittee consultant team recommendation
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<thead>
<tr>
<th>Firm Name</th>
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<td>100 Monkeys Inc.</td>
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