



ADMINISTRATIVE AND FINANCE COMMITTEE

THURSDAY, JUNE 14, 2018– 8:00 A.M.

OMNITRANS METRO FACILITY

1700 WEST 5TH STREET

SAN BERNARDINO, CA 92411

The meeting facility is accessible to persons with disabilities. If assistive listening devices or other auxiliary aids or Limited English Proficiency services are needed in order to participate in the public meeting, requests should be made through the Recording Secretary at least three (3) business days prior to the Committee Meeting. The Recording Secretary's telephone number is 909-379-7110 (voice) or 909-384-9351 (TTY), located at 1700 West Fifth Street, San Bernardino, California. If you have comments about items on the agenda or other general concerns and are not able to attend the meeting, please mail them to Omnitrans at 1700 West Fifth Street, San Bernardino, California, Attention Board Secretary. Comments may also be submitted by email to BoardSecretary@omnitrans.org.

A. CALL TO ORDER

1. Pledge of Allegiance
2. Roll Call

B. ANNOUNCEMENTS/PRESENTATIONS

1. Next Committee Meeting: Thursday, August 9, 2018, 8:00 a.m.
Omnitrans Metro Facility Board Room

C. COMMUNICATIONS FROM THE PUBLIC

This is the time and place for the general public to address the Board for items that are not on the agenda. In accordance with rules applicable to meetings of the Administrative & Finance Committee, comments on items not on the agenda and on items on the agenda are to be limited to a total of three (3) minutes per individual.

D. POSSIBLE CONFLICT OF INTEREST ISSUES

Disclosure – Note agenda items contractors, subcontractors and agents, which may require member abstentions due to conflict of interest and financial interests. Board Member abstentions shall be stated under this item for recordation in the appropriate item.

N/A

E. DISCUSSION ITEMS

- | | |
|--|----|
| 1. Approve Administrative & Finance Committee Minutes – April 12, 2018 | 2 |
| 2. Receive and File Final Project Closeout – E Street Corridor Bus Rapid Transit Project - <i>Maurice Mansion</i> | 7 |
| 3. Recommend the Board of Directors Approve Resolution No. 307-18, Transfer of Valley Transportation Services (VTrans) Remaining Assets to Omnitrans – <i>Don Walker</i> | 34 |
| 4. Recommend the Board of Directors Approve Proposed Policy Changes to Policy #406 – Out of Classification Assignments – <i>Marge Ewing</i> | 38 |
| 5. Recommend the Board of Directors Approve the Proposed Policy Changes to Policy #614 – State Disability Insurance (SDI) and Paid Family Leave (PFL) – <i>Marge Ewing</i> | 42 |
| 6. Recommend the Board of Directors Authorize Award – Contract MNT18-74, Janitorial Services – <i>Eugenia Pinheiro</i> | 48 |

F. ADJOURNMENT

ITEM # E1

**ADMINISTRATIVE & FINANCE COMMITTEE
MINUTES, APRIL 12, 2018**

A. CALL TO ORDER

Committee Chair Sam Spagnolo called the regular meeting of the Administrative and Finance Committee to order at 8:00 a.m., Thursday, April 12, 2018.

1. Pledge of Allegiance
2. Roll Call

Committee Members Present

Council Member Sam Spagnolo, City of Rancho Cucamonga – Committee Chair
Mayor Carey Davis, City of San Bernardino
Supervisor Curt Hagman, County of San Bernardino
Mayor Pro Tem John Roberts, City of Fontana
Mayor Pro Tem Sylvia Robles, City of Grand Terrace
Mayor Pro Tem Alan Wapner, City of Ontario

Committee Members Absent

Council Member David Avila, City of Yucaipa
Council Member Ron Dailey, City of Loma Linda

OmniTrans Administrative Staff Present

Erin Rogers, Deputy General Manager
Trischelle Baysden, Director of Rail
Samuel Gibbs, Director of Internal Audit Services
Marge Ewing, Director of Human Resources/Safety & Security
Jacob Harms, Director of Information Technology
Eugenia Pinheiro, Interim Director of Procurement
Connie Raya, Director of Maintenance
Douglas Stanley, Director Special Transit Services
Don Walker, Director of Finance
Tom Dahlin, Capital Services Manager
Maurice Mansion, Treasury Manager
Terry Morocco, Safety & Regulatory Compliance Specialist
Roberta Robertson, Transportation Manager
John Steffon, Transportation Manager
Misty Tshilonda, Human Resources Analyst
Julienne Overland-Villegas, Senior Executive Assistant to the CEO/General Manager

B. ANNOUNCEMENTS/PRESENTATIONS

The next Committee Meeting is scheduled Thursday, May 10, 2018, at 8:00 a.m.

C. COMMUNICATIONS FROM THE PUBLIC

Ms. Pilar Cole, Systems Change Advocate for Rolling Start Independent Living Center, spoke on behalf of some customers who are experiencing accessibility issues in the Muscoy area. She also mentioned a complaint from a customer who is uncomfortable with the QPOD wheelchair securement system. Ms. Cole concluded her comments by reiterating the accessibility limitations in Muscoy, specifically on the corner of Darby Street and State Street. CEO/General Manager, P. Scott Graham stated that staff would follow-up with her following the meeting.

D. POSSIBLE CONFLICT OF INTEREST ISSUES

There were no Conflict of Interest Issues.

E. DISCUSSION ITEMS

1. Approve Administrative & Finance Committee Minutes – February 15, 2018

M/S (Roberts/Robles) that approved the Committee Minutes of February 15, 2018. Motion was passed unanimously by Members present, with the exception of Member Davis, who abstained.

2. Recommend the Board of Directors Authorize the CEO/General Manager to Award Funds for the Call for Projects – 2018 Measure I Specialized Transportation Program for Fiscal Years FY19 and FY20

Director of Special Transit Services, Douglas Stanley, presented this item as detailed in the staff report.

M/S (Wapner/Roberts) that recommended the Board of Directors authorize the CEO/General Manager to award funds for the Call for Projects - 2018 Measure I Specialized Transportation Program for Fiscal Years FY19 and FY20. Motion was passed unanimously by Members present.

Supervisor Hagman arrived at 8:10 a.m.

3. Recommend the Board of Directors Adopt Fiscal Year 2018-19 Annual Budget

Treasury Manager, Maurice Mansion, reviewed the Fiscal Year 2018-19 Annual Budget. He pointed out two expenditures that significantly increased this year's budget, which are the procurement of revenue vehicles and the increase in the purchased transportation contract. Mr. Mansion explained that the higher cost for purchased transportation is due

to the California minimum wage increase and changes related to the liability insurance coverage.

Supervisor Hagman expressed some concern regarding funding being utilized in the most efficient manner possible, especially when considering future changes such as vehicle electrification. He also had some questions regarding the cost and efficiency of using the 60 foot buses versus the cost of operating 40 foot buses. CEO/General Manager, P. Scott Graham addressed Supervisor Hagman's questions.

The Committee engaged in a discussion regarding looking towards the future in terms of vehicle electrification and some of the benefits and challenges. Mr. Graham stated that there is still some uncertainty in terms of funding for electrification; however, stated that the Agency is moving forward as conservatively as possible and is staying abreast of any new developments from the state and other transit agencies.

M/S (Hagman/Davis) that recommended the Board of Directors adopt the Omnitrans Fiscal Year 2018-19 Annual Budget. Motion was passed unanimously by Members present.

4. Receive and Forward to the Board of Directors, Omnitrans Unfunded Accrued Liability (UAL) with California Public Employees' Retirement System (CalPERS)

Director of Finance, Don Walker, presented this item as detailed in the staff report.

The Committee received and forwarded this item to the Board of Directors for receipt and file.

5. Recommend the Board of Directors Adopt Revisions to Personnel Policy #402, Management Confidential Classifications and Structure Reorganization

Director of Human Resources/Safety & Security, Marge Ewing and Human Resources Analyst, Misty Tshilonda, presented this item as detailed in the staff report.

M/S (Hagman/Robles) that recommended the Board of Directors adopt revisions to Personnel Policy 402 – Salary Ranges, Management Confidential Classifications for non-represented employees with an effective date of May 2, 2018.

1. New Positions
 - a. Add one (1) new position - Systems Specialist, Information Technology Department, Level V. This additional position was approved by the Board of Directors at the November, 2017 meeting.
 - b. Reinstate one (1) position - Director of Safety, Security and Regulatory Compliance. This position has been approved by the Board of Directors; however, is not funded in current fiscal year budget.
2. Salary Ranges
 - a. Make a 3 percent market adjustment to the salary ranges.
 - b. Delete the language relative to compa ratio (page 3) for all levels.

- c. Add language that allows for merit increases to be paid in a lump sum payment to employees who are at the top of the salary range.
 - d. Add language that allows the Chief Executive Officer to provide Special Merit payments to employees who perform assignments above and beyond their routine duties.
- 3. Changes to Organizational Structure
 - a. Move One (1) Operations Applications Specialist from Operations Department to the Information Technology Department;
 - b. Move One (1) Capital Services Manager from the Human Resources, Security and Regulatory Compliance Department to the Maintenance Department;
 - c. Effective with the new fiscal year, move seven (7) Operations Training Staff from Operations Department to the to the new Safety, Security and Regulatory Compliance Department;
 - d. Effective with the new fiscal year, move one (1) Safety, Security and Regulatory Compliance Manager, one (1) Environmental and Occupational Health and Safety Specialist, one (1) Safety and Regulatory Compliance Specialist, and one (1) Security and Emergency Preparedness Coordinator to the Safety, Security and Regulatory Compliance Department.

Member Wapner left the meeting at 9:50 a.m. during the discussion on Item #E5 prior to the vote.

Motion was passed unanimously by Members present.

- 6. Recommend the Board of Directors Approve Proposed Policy Changes to the Existing Personnel Policy Manual

Director of Human Resources/Safety & Security, Marge Ewing presented this item as detailed in the staff report.

M/S (Davis/Roberts) that recommended the Board of Directors approve the proposed policy changes to the existing Personnel Policy Manual with an effective date of May 2, 2018.

Policy 614	State Disability Insurance (SDI) and Paid Family Leave (PFL)
Policy 705	Discipline
Policy 901	Tuition and Reimbursement

Motion was passed unanimously by Members present.

- 7. Recommend the Board of Directors Approve System Specialist Position

Director of Human Resources/Safety & Security, Marge Ewing presented this item as detailed in the staff report.

M/S (Davis/Robles) that recommended the Board of Directors authorize the CEO/General Manager to approve the new position of System Specialist, Level V, effective May 2, 2018. Motion was passed unanimously by Members present.

F. ADJOURNMENT

The Administrative and Finance Committee meeting adjourned at 9:14 a.m.

The next Administrative and Finance Committee Meeting is scheduled Thursday, May 10, 2018, at 8:00 a.m., with location posted on the Omnitrans website and at Omnitrans' San Bernardino Metro Facility.

Prepared by:

Araceli Barajas, Executive Staff Assistant

ITEM # E2

DATE: June 14, 2018

TO: Committee Chair Sam Spagnolo and
Members of the Omnitrans Administrative and Finance Committee

THROUGH: P. Scott Graham, CEO/General Manager

FROM: Maurice A. Mansion, Treasury Manager

**SUBJECT: FINAL PROJECT CLOSEOUT – E STREET CORRIDOR BUS RAPID
TRANSIT PROJECT**

FORM MOTION

Receive and forward to the Board of Directors the final closeout documentation for the E Street Corridor Bus Rapid Transit Project, also known as the sbX Green Line as required by the Federal Transit Administration (FTA).

BACKGROUND

In December of 2010, Omnitrans was awarded a FTA 5309 Small Starts Grant to fund the E Street Corridor Bus Rapid Transit Project. Omnitrans also utilized other federal, state and local funds for a total project budget of \$191.7 million.

Omnitrans delivered a 15.7-mile Bus Rapid Transit service with 5.4 miles of dedicated lanes and 16 stations and other major improvements along the E Street corridor. Although revenue service began in April 2014, there are a number of administrative and contractual items that must be completed. Staff is proud to announce the project is officially completed and ready for closeout. The project was budgeted at \$191.7 million and completed for \$188.7 million. Therefore, Omnitrans will be returning \$3,041,024 to the FTA. The project was completed on time for revenue service and with zero lost time accidents.

Staff presented the Before and After Study to the Board of Directors in February 2018, and this is the final administrative closeout of the project with the FTA.

In accordance with FTA Circular C 501.1E, Omnitrans as a recipient of federal funds is required to closeout a Grant Award upon completion of all activities approved in the award. As part of the closeout process Omnitrans is required to report on the following:

- 1) Confirmation that all activities are completed.

- 2) Provide a list of property acquired or improved in support of the Award that will continue to be within the purview of the Grant.
- 3) A final reconciled Award Budget reflecting project costs.
- 4) A final Federal Financial Report.
- 5) A final Milestone Progress Report.
- 6) Any other documentation or reports required as part of the terms and conditions of the Grant Award.

Omnitrans is submitting the above referenced materials to the FTA with a final closeout report and the required documentation attached to this memo. (Attachments A-D)

CONCLUSION

Receive and forward to the Board of Directors the final closeout documentation for the E Street Corridor Bus Rapid Transit Project also known as the sbX Green Line as required by the Federal Transit Administration.

PSG: DW:MM

Attachments:

- A: CEO Letter to FTA
- B: Project Award and Final Budget
- C: Asset List
- D: sbX Before and After Study



1700 W. Fifth St.
San Bernardino, CA 92411
909-379-7100
www.omnitrans.org

July 11, 2018

Attn: Mr. Edward Carranza, Jr.
Federal Transit Administration
San Francisco Federal Building
90 7th Street, Suite 15-300
San Francisco, CA 94103

RE: CA-03-0816-01 | E Street Transit Corridor BRT (sbX): Project Close Out

Dear Mr. Carranza:

Omnitrans is pleased to inform the Federal Transit Administration (FTA) of its completion of the federally funded sbX Green Line project which is located in San Bernardino, California. As you know, Omnitrans was awarded an FTA 5309 Small Starts Grant which received approval on December 14, 2010. With these funds, Omnitrans delivered a 15.7-mile Bus Rapid Transit (BRT) service with 5.4 miles of dedicated lanes and 16 stations. Revenue service for this project began on April 30, 2014. Other key elements of the project, such as the required after study and final construction elements, were completed along the sbX corridor.

In May of 2015, Omnitrans reported to the FTA an unspent contingency of \$7.6 million. Based on the approved participation rate, Omnitrans would return 39.12% or \$2.9 million to the FTA. Omnitrans informed the FTA a desire to complete a pavement project as part of the sbX total project. The funding would utilize Omnitrans local funds and minimal FTA funds. The FTA allowed Omnitrans to move forward with the pavement project.

Omnitrans is proud to announce that while the total project was originally budgeted at \$191.7 million, it was completed under budget with an unliquidated amount of \$3,041,024 to be returned to the FTA upon the closure of FAIN CA-03-0816-01, a grant that is currently pending an executed closure amendment in TrAMS.

Omnitrans would like to take this opportunity to thank the FTA for its financial commitment and project milestone support. Without the exceptional support of FTA's Region 9 staff and the persistent efforts of our administrative teams here at Omnitrans, the accomplishment of the sbX Green Line would not have achieved such a successful outcome.

If you have any questions regarding the contents of this letter or the details of the grants awarded for this project, please contact me at (909) 379-7112.

Sincerely,

A handwritten signature in blue ink, appearing to read "P. Scott Graham", is written over a horizontal line.

P. Scott Graham
CEO/General Manager

Enclosures

IPMO/sbX Expenditures

Period Ended

COMPLETION

Funding Source	Amount
FEDERAL	
5307	\$ 46,252,618
5309	\$ 74,999,999
CMAQ	\$ 21,000,000
SUB-TOTAL	\$ 142,252,617
STATE	
STA	\$ 11,235,864
PROP 1B	\$ 7,128,684
STIP	\$ 5,000,000
SUB-TOTAL	\$ 23,364,548
LOCAL	
LTF	\$ 12,523,879
MEASURE I - Express	\$ 5,484,406
IN-KIND	\$ 8,080,550
SUB-TOTAL	\$ 26,088,835
TOTAL	\$ 191,706,000
FINAL ENGINEER'S ESTIMATE	\$ 191,706,000
SURPLUS	\$ -

Funding Source	Amount	% of Total Funding	Spent	% of Funding Source
FEDERAL				
5307	\$ 46,252,618	24.1%	\$ 46,252,618	100.0%
5309	\$ 74,999,999	39.1%	\$ 71,958,975	95.9%
CMAQ	\$ 21,000,000	11.0%	\$ 21,000,000	100.0%
STATE				
STA	\$ 11,235,864	5.9%	\$ 9,743,839	86.7%
PROP 1B	\$ 7,128,684	3.7%	\$ 7,471,246	104.8%
STIP	\$ 5,000,000	2.6%	\$ 5,000,000	100.0%
LOCAL				
LTF	\$ 12,523,879	6.5%	\$ 13,352,655	106.6%
MEASURE I	\$ 5,484,406	2.9%	\$ 5,484,405	100.0%
IN-KIND	\$ 8,080,550	4.2%	\$ 8,401,239	104.0%
TOTAL	\$ 191,706,000	100.0%	\$ 188,664,976	98.4%

Project Funding Summary (*in millions*)

	Project Funding Amount	% of Total	Expenditure to Date	% of Total
FTA Non Small Starts Share	\$67.3	35.1%	\$67.3	35.1%
FTA Small Starts Share	\$75.0	39.1%	\$72.0	37.5%
Local Share	\$49.5	25.8%	\$49.5	25.8%
TOTAL	\$191.7	100.0%	\$188.7	98.4%
FINAL ENGINEER'S ESTIMATE	\$191.7			

IPMO/sbX Expenditures
Period Ended COMPLETION

Standard Cost Category (SCC)	Description	PCGA Budget (\$000s)	Current Budget (\$000s)	Expenditures (\$000s)	% of PCGA Budget	% of Current Budget
10	Guideway & Track Elements (Route Miles)	\$17,984	\$19,725	\$20,177	112.2%	102.3%
20	Stations, Stops, Terminals & Intermodal (number)	\$17,201	\$14,917	\$14,262	82.9%	95.6%
30	Support Facilities, Yards, Shops, Admin. Bldgs.	\$5,370	\$8,131	\$15,254	284.1%	187.6%
40	Sitework and Special Conditions	\$35,610	\$34,271	\$31,079	87.3%	90.7%
50	Systems	\$19,985	\$16,727	\$21,134	105.7%	126.3%
	Construction Subtotal (10-50)	\$96,150	\$93,771	\$101,905	106.0%	108.7%
60	ROW, Land, Existing Improvements	\$6,532	\$6,532	\$6,370	97.5%	97.5%
70	Vehicles (number)	\$16,628	\$16,628	\$15,385	92.5%	92.5%
80	Professional Services	\$58,365	\$56,702	\$65,005	111.4%	114.6%
90	Unallocated Contingency	\$14,030	\$18,073	\$0	0.0%	0.0%
	Subtotal (10-90)	\$191,706	\$191,706	\$188,665	98.4%	98.4%
100	Financing Costs	\$0	\$0	-	0.0%	0.0%
	Total	\$191,706	\$191,706	\$188,665	98.4%	98.4%

PROJECT COSTS BY SCC

IPMO/sbX Project Costs Through COMPLETION

Standard Cost Category (SCC)	Description		Budget Authority (PCGA) \$	Approved Current Budget	Revised Budget	Expenditures \$ %	Remaining Budget
10	GUIDEWAY & TRACK ELEMENTS		\$ 17,984,000	\$ 19,725,000	\$ 19,281,841	\$ 20,177,207 102.3%	\$ (895,366)
10.02	Guideway: At-grade semi-exclusive (allows cross-traffic)	0.19	\$ 16,686,000	\$ 18,353,000	\$ 15,542,530	16,469,696 89.7%	\$ (927,166)
10.03	Guideway: At-grade in mixed traffic	0.05	\$ 1,298,000	\$ 1,372,000	\$ 3,739,312	3,707,512 270.2%	\$ 31,800
20	STATIONS, STOPS, TERMINALS, INTERMODAL		\$ 17,201,000	\$ 14,917,000	\$ 13,510,810	\$ 14,261,850 95.6%	\$ (751,040)
20.01	At-grade station, stop, shelter, mall, terminal, platform	0.17	\$ 17,201,000	\$ 14,917,000	\$ 13,510,810	14,261,850 95.6%	\$ (751,040)
30	SUPPORT FACILITIES: YARDS, SHOPS, ADMIN. BLDGS		\$ 5,370,000	\$ 8,131,000	\$ 15,401,835	\$ 15,253,590 187.6%	\$ 148,244
30.02	Light Maintenance Facility	0.84	\$ 1,265,000	\$ 4,265,000	\$ 13,060,213	12,850,462 301.3%	\$ 209,751
30.03	Heavy Maintenance Facility	0			\$ -	9,425 0.0%	\$ (9,425)
30.04	Storage or Maintenance of Way Building	0			\$ -	- 0.0%	\$ -
30.05	Yard and Yard Track	0.16	\$ 4,105,000	\$ 3,866,000	\$ 2,341,622	2,393,703 61.9%	\$ (52,082)
40	SITework & SPECIAL CONDITIONS		\$ 35,611,000	\$ 34,271,000	\$ 31,352,991	\$ 31,078,925 90.7%	\$ 274,066
40.01	Demolition, Clearing, Earthwork	0.01	\$ 4,785,000	\$ 4,741,000	\$ 814,292	721,654 15.2%	\$ 92,638
40.02	Site Utilities, Utility Relocation	0.12	\$ 4,745,000	\$ 3,493,000	\$ 9,771,498	10,410,210 298.0%	\$ (638,711)
40.02	Utility Relocation - Utility Company	1	\$ 1,500,000	\$ 1,500,000	\$ 1,224,205	548,863 36.6%	\$ 675,342
40.04	Environmental mitigation, e.g. wetlands, historic/archeologic, parks					160	\$ (160)
40.05	Site structures including retaining walls, sound walls	0.01	\$ 99,000	\$ 90,000	\$ 814,292	447,545 497.3%	\$ 366,746
40.06	Pedestrian / bike access and accommodation, landscaping	0.07	\$ 6,312,000	\$ 6,925,000	\$ 5,700,041	5,745,567 83.0%	\$ (45,526)
40.07	Automobile, bus, van accessways including roads, parking lots	0.05	\$ 6,972,000	\$ 3,601,000	\$ 4,071,458	4,157,392 115.5%	\$ (85,934)
40.08	Temporary Facilities and other indirect costs during construction	0.11	\$ 11,198,000	\$ 13,921,000	\$ 8,957,207	9,047,536 65.0%	\$ (90,329)
50	SYSTEMS		\$ 19,984,000	\$ 16,727,000	\$ 20,180,759	\$ 21,133,927 126.3%	\$ (953,168)
50.02	Traffic signals and crossing protection	0.08	\$ 11,386,000	\$ 10,810,000	\$ 6,514,332	6,634,979 61.4%	\$ (120,647)
50.05	Communications	0.1	\$ 6,294,000	\$ 4,210,000	\$ 8,780,678	8,903,447 211.5%	\$ (122,770)
50.06	Fare collection system and equipment	0.06	\$ 2,304,000	\$ 1,707,000	\$ 4,885,749	5,595,500 327.8%	\$ (709,751)
	Construction Subtotal (10-50)		\$ 96,150,000	\$ 93,771,000	\$ 99,728,236	\$ 101,905,500 108.7%	\$ (2,177,263)
60	ROW, LAND, EXISTING IMPROVEMENTS		\$ 6,532,000	\$ 6,532,000	\$ 6,384,352	\$ 6,369,987 97.5%	\$ 14,366
60.01	Purchase or lease of real estate	0.97	\$ 6,327,000	\$ 6,327,000	\$ 6,179,352	6,205,056 98.1%	\$ (25,704)
60.02	Relocation of existing households and businesses	0.03	\$ 205,000	\$ 205,000	\$ 205,000	164,930 80.5%	\$ 40,070
70	VEHICLES		\$ 16,628,000	\$ 16,628,000	\$ 15,384,638	\$ 15,384,638 92.5%	\$ -
70.04	Bus	1	\$ 15,448,000	\$ 15,448,000	\$ 15,211,154	15,211,154 98.5%	\$ -
70.06	Non-revenue vehicles	1	\$ 250,000	\$ 250,000	\$ -	- 0.0%	\$ -
70.07	Spare parts	1	\$ 930,000	\$ 930,000	\$ 173,484	173,484 18.7%	\$ -
80	PROFESSIONAL SERVICES		\$ 58,365,000	\$ 56,702,000	\$ 63,492,644	\$ 65,004,852 114.6%	\$ (1,512,208)
80.01	Preliminary Engineering	0.63	\$ 12,933,000	\$ 12,921,000	\$ 13,440,341	14,876,525 115.1%	\$ (1,436,185)
80.02	Final Design	0.37	\$ 7,268,000	\$ 7,261,000	\$ 9,682,668	8,849,004 121.9%	\$ 833,664
80.03	Project Management for Design and Construction	1	\$ 17,622,000	\$ 15,997,000	\$ 15,006,001	15,930,143 99.6%	\$ (924,142)
80.04	Construction Administration & Management	1	\$ 6,638,000	\$ 6,632,000	\$ 12,969,303	12,969,303 195.6%	\$ -
80.05	Professional Liability and other Non-Construction Insurance	1	\$ 1,113,000	\$ 1,112,000	\$ -	- 0.0%	\$ -
80.06	Legal; Permits; Review Fees by other agencies, cities, etc.	1	\$ 1,000,000	\$ 1,000,000	\$ 3,718,227	3,713,716 371.4%	\$ 4,510
80.06	In-Kind Contributions		\$ 9,606,000	\$ 9,596,000	\$ 8,401,239	8,401,239 87.5%	\$ -
80.07	Surveys, Testing, Investigation, Inspection	1	\$ 1,464,000	\$ 1,463,000	\$ -	264,922 18.1%	\$ (264,922)
80.08	Start up	1	\$ 721,000	\$ 720,000	\$ 274,866	- 0.0%	\$ 274,866
	Subtotal (10-80)		\$ 177,675,000	\$ 173,633,000	\$ 184,989,871	\$ 188,664,976 108.7%	\$ (3,675,105)
90	UNALLOCATED CONTINGENCY		\$ 14,031,000	\$ 18,073,000	\$ 6,716,129	\$ - 0.0%	\$ 6,716,129
	Subtotal (10-90)		\$ 191,706,000	\$ 191,706,000		188,664,976 98.4%	\$ 3,041,024
100	FINANCE CHARGES		\$ -	\$ -		\$ - 0.0%	\$ -
	TOTAL PROJECT COST (10-100)		\$ 191,706,000	\$ 191,706,000		188,664,976 98.4%	\$ 3,041,024



[List of Major Property Acquisition/Improvement for sbX Project](#)

- 15.7 miles long with 5.6 miles of dedicated bus lanes
- 16 station locations each with shelters, seating, lighting, map case, ticket vending machine, real time arrival signs, emergency call box and public art
- Transit Signal Prioritization system
- Public Address system
- Fourteen 60 foot articulated five-door Compressed Natural Gas powered vehicles
- 4 Park and Ride facilities
- Vehicle Maintenance Facility upgraded:
 - 4 modified service bays
 - New bus wash with 3 lanes
 - New fuel island with 3 lanes
 - Improved bus yard lighting and restriping

May 2018
Final at Closeout

sbX Green Line Before & After Study



Prepared by Omnitrans

Presented to the Federal Transit
Administration

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1. INTRODUCTION

The E Street Corridor Bus Rapid Transit (BRT) Project is the first BRT Omnitrans planned, constructed and brought into revenue service. It was delivered on-time and on budget.

The sbX Green Line is a 15.7 mile BRT with 5.4 miles of dedicated center running lanes that serves the cities of San Bernardino and Loma Linda.

On April 28, 2014, the E Street Corridor began service as the sbX Green Line. Key project milestones are shown in Exhibit 1. A map of the sbX Green Line is seen in Exhibit 2.

Exhibit 1: Key Milestones

Milestone	Date
Entry into Preliminary Engineering	June 2008
Entry into Final Design	June 2009
Project Construction Grant Agreement	September 2011
Revenue Service	April 2014

Upon opening, the sbX Green Line was recognized by the Institute for Transportation & Development Policy (ITDP) as a Bronze BRT based on the BRT Standard. At the time the sbX Green Line was recognized as one of only five true BRTs in the United States by the ITDP.

Exhibit 2: sbX Green Line Map



The sbX Green Line was built as part of a significant transit investment in San Bernardino. In addition to sbX, Omnitrans and the San Bernardino County Transportation Authority (SBCTA, previously known as SANBAG) opened the San Bernardino Transit Center (SBTC) in September 2015.

Originally planned to be opened prior to the sbX Green Line, the SBTC is a multimodal transit center that serves as a core hub in Omnitrans fixed route system. The SBTC has 22 bus bays, serving 13 additional Omnitrans routes and four other agencies. Prior to SBTC completion, which was during the 16th month of sbX operations, Omnitrans used a temporary on-street transfer facility that was 0.4 miles away from the closest sbX station.

Additionally, sbX was intended to provide multimodal connectivity with two rail projects that will be anchored at the SBTC. The first rail project is a one-mile extension of Metrolink commuter rail service into downtown San Bernardino. Initially, this was planned to occur concurrently with the opening of the sbX; however, after delays it opened on December 16, 2017 (after the data collection was completed for this report).

Additionally, SBCTA is building the Redlands Passenger Rail Project, which

Omnitrans will operate as the “Arrow” service, connecting the SBTC and sbX to key employment centers and educational facilities in Redlands.

These rail investments will provide the impetus for sbX to continue to see ridership growth into the future.

From opening day through the writing of this report, the sbX Green Line had delivered 2.3 million boardings. In October 2017, the sbX Green Line’s average weekday boarding stood at 3,323.

Through all construction phases and project closeout, Omnitrans delivered the project with over half a million man hours worked with zero lost time hours from injury.

2. PURPOSE

The Federal Transportation Funding and Authorization Bill, the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU) requires the preparation of a Before and After Study for all projects receiving Federal Transit Administration (FTA) New Starts or Small Starts Funding. The sbX Green Line E Street Corridor project received \$74,999,999 in Small Starts funding in FY2011.

The Before and After Study serves to document the project and its impacts, to provide an understanding of the actual costs and impacts on transit service and transit ridership, and also examines the accuracy of forecasts prepared to support the decision making during the project planning and development. The two key “before” phases are then compared to the actual outcome following the completion of the project.

This reports presents an analysis of five (5) major project characteristics that are required to be included in the Before and After Study:

1. Project Scope & Schedule;
2. Capital Costs;
3. Transit Service Levels;
4. Operations & Maintenance Costs; and,
5. Ridership.

Omnitrans also chose to add information on business impact.

Two sets of forecasts were developed to support decision making: Alternatives Analysis (AA) forecast, which presents the project as defined by the approval of the AA phase Small Starts Submittal in December 2007; and, the before construction forecast defined at the completion of Final Design (FD) in May of 2011 and referred to as the final design

forecast. Finally, these forecasts are compared to actual results of sbX following the completing of its third full fiscal year of operation concluding in June 2017.

While this report focuses more on the differences between Final Design and actual outcomes, there were several high level changes that occurred between the AA Phase and Final Design.

The AA developed a Locally Preferred Alternative (LPA) which included a more frequent BRT that had a dedicated transitway over I-10 at Evans St. and an additional station in Loma Linda. These items were removed and a Refined LPA (RLPA) was used in final design and utilized for the Project Construction Grant Agreement (PCGA) but are referenced now to explain some of the differences between AA and FD.

3. PROJECT SCOPE & SCHEDULE

PROJECT SCOPE

The sbX route alignment and configuration that was built was identical to the RLPA. As shown

by the FD/RLPA map in Exhibit 6 and corresponding tables that compare FRLPA/FD to the actual build, Omnitrans delivered the scope outlined in the PCGA.

Exhibits 3 and 4 presents the project scope as presented at AA, at FD and the actual

scope completed and put into operation.

The original LPA from the AA, mapped in Exhibit 5, was defined as a side-running BRT Project including segments of exclusive and mixed-flow lanes and included a proposed transitway over I-10

Exhibit 3: Project Scope Comparison

	AA (2007)	Final Design (2011)	Actual (2014-2017)
Length	16.5 miles	15.7 miles	15.7 miles
Mode	Bus Rapid Transit	Bus Rapid Transit	Bus Rapid Transit
Stations	17	16	16
Station Locations	1. Kendall/Palm - P&R 80 to 100 spaces 2. California State University-SB 3. Kendall at N. Little Mountain Drive 4. Kendall at Shandin/40th Street 5. E Street at Marshall Blvd. - P&R 150 spaces 6. E Street at Highland Ave 7. E Street at Baseline Street 8. E Street at Carousel Mall 9. E Street at Rialto Ave. - P&R 170 spaces 10. E Street at North Mall Way 11. Hospitality Lane at Hunts Lane 12. Hospitality Lane at Carnegie Drive 13. Hospitality Lane at Tippecanoe 14. Richardson Street at Redlands Boulevard - P&R 440 spaces. 15. Anderson Street at Stewart Street 16. Barton Road at Anderson Street 17. Barton Road at Loma Linda Drive - P&R 120 spaces (structured)	1. Kendall /Palm - P&R 80 spaces 2. California State University-SB 3. Kendall at N. Little Mountain Drive 4. Kendall at Shandin Hills Drive 5. E Street at Marshall Blvd - P&R 160 spaces 6. E Street at Highland Avenue 7. E Street at Baseline Street 8. E Street at Court Street - P&R 120 spaces (structured) 9. E Street at Rialto Avenue 10. E Street at North Mall Way 11. Hospitality Lane at Hunts Lane 12. Hospitality Lane at Carnegie Drive 13. Hospitality Lane at Tippecanoe 14. Anderson at Redlands Blvd - P&R 250 spaces 15. Anderson Street at Prospect 16. Barton Road at Benton Street N/A	1. Kendall /Palm-P&R 81 spaces 2. 2. California State University-SB 3. Kendall at N. Little Mountain Drive 4. Kendall at Shandin Hills Drive 5. E Street at Marshall Blvd - P&R 161 spaces 6. E Street at Highland Avenue 7. E Street at Baseline Street 8. E Street at Court Street - P&R 200 spaces (structured) 9. E Street at Rialto Avenue 10. E Street at North Mall Way 11. Hospitality Lane at Hunts Lane 12. Hospitality Lane at Carnegie Drive 13. Hospitality Lane at Tippecanoe 14. Anderson at Redlands Blvd - P&R 242 spaces 15. Anderson Street at Prospect 16. Barton Road at Benton Street N/A

Exhibit 4: Project Scope Comparison

	AA (2007)	Final Design (2011)	Actual (2014-2017)
Major transfer facilities	2. California State University-San Bernardino-Campus Transfer Center to other Omnitrans Local Bus Routes, VVTA buses and Campus Shuttles.	2. California State University-San Bernardino-Campus Transfer Center to other Omnitrans Local Bus Routes, VVTA buses and Campus Shuttles.	2. California State University-San Bernardino-Campus Transfer Center to other Omnitrans Local Bus Routes.
	9. E Street at Rialto Ave.-San Bernardino Transit Center and Metrolink Commuter Rail Station.	9. E Street at Rialto Ave - Downtown San Bernardino Intermodal Transit Station (Future), Metrolink Commuter Rail station (Future), Redlands Passenger Rail Station (Future)	9. E Street at Rialto Ave - Downtown San Bernardino Transit Center to other Omnitrans Local Bus Routes, VVTA, Mountain Transit, Pass Transit, and Intermodal connection to Metrolink Commuter Rail station and Redlands Passenger Rail Station (Future)
	17. Barton Road at Loma Linda Drive-Loma Linda Trans Center transfer to other Omnitrans Routes, RTA and Sunline Transit bus services, LLUMC Shuttles.	N/A	N/A
Number of vehicles	14	14	14
Above grade	N/A	N/A	None
Below grade	N/A	N/A	None
At grade	16.5 miles	15.7 miles	15.9 miles
Exclusive	5.5 miles	5.4 miles	5.4 miles
Mixed Traffic	11 miles	10.3 miles	10.5 miles

to the then-planned Evans Street project. Evans Street would have connected to Barton Road, leading to the VA Hospital end of line. As shown in the original LPA,

the project included 17 stations and was approximately 16.5 miles in length from the Palm/Kendall Station to the Loma Linda Transit Center at the VA Hospital.

Between the AA and the start of preliminary engineering, it was determined that the Evans Street project and the I-10 Transit way were not feasible.

By September of 2008, during initiation of preliminary engineering, the project scope was revisited as documented in the RLPA report.

The sbX project was redefined to follow the existing Omnitrans Route 2 south on Tippecanoe/Anderson to Loma Linda University Medical Center (LLUMC). In moving from the AA to FD, the VA hospital and Loma Linda Transit Center also failed to materialize due to funding constraints of the VA hospital.

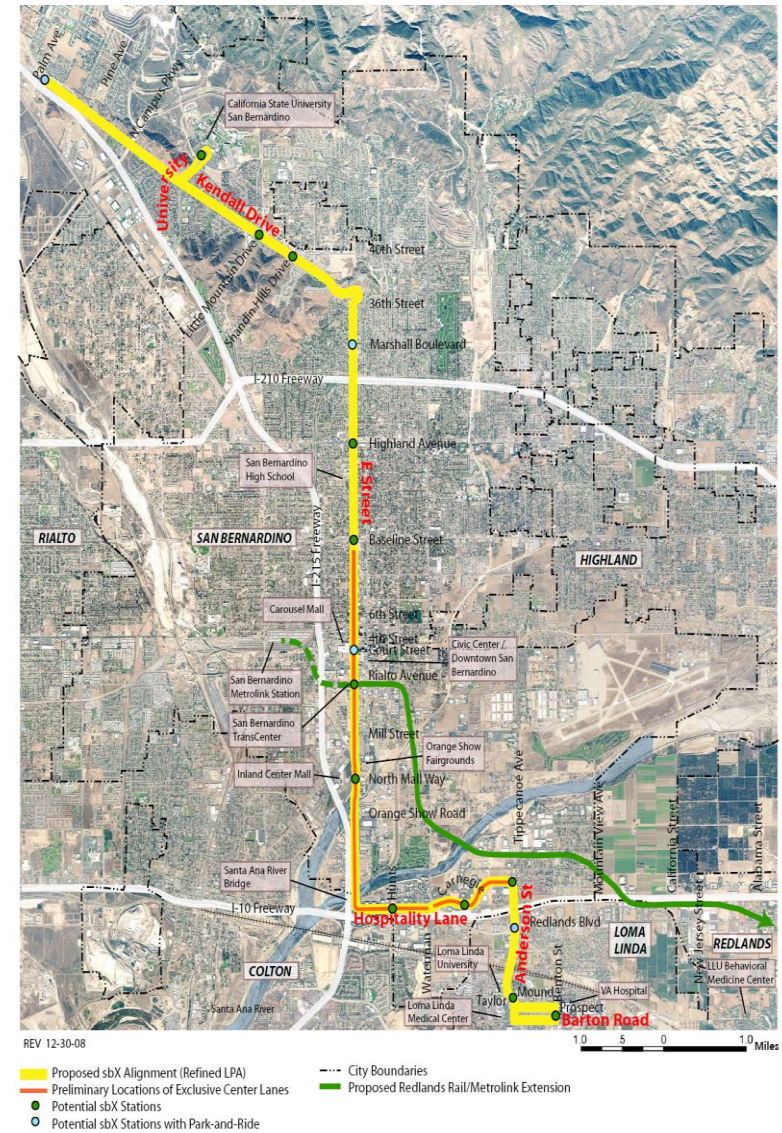
This scope change required a new terminus to be located in the front of the VA Hospital on Benton Street and a loop terminus along Prospect Avenue back to Anderson.

Another refinement in the RLPA was the development of a longer more contiguous section of dedicated center running lanes, compared to the LPA which had several short segments of dedicated lanes.

Exhibit 5: Locally Preferred Alternative Map



Exhibit 6: Refined Locally Preferred Alternative & Actual Route Map



PROJECT SCHEDULE

The primary project schedule goal set at the execution of the Project Construction Grant Agreement (PCGA) was to achieve revenue service by April 30, 2014. This goal was achieved with the start of service on April 28, 2014. The Vehicle Maintenance Facility (VMF), punch list and closeout items were finalized following the start of service.

Exhibit 1 in the Introduction Section of this report highlighted key milestones for the sbX Green Line. Exhibit 7 below provides the details the actual schedule from the beginning of the environmental clearance process to the closeout of the project.

The key change to the schedule from the AA process through final design was a change in delivery method. During the AA phase, the project was envisioned as a

design-build project

Based on discussions between FTA and Omnitrans after the AA Small Starts submittal, the project development process was modified from a design-build process to a traditional design-bid-build process.

Notice to Proceed (NTP) to begin the final design phase was given in July 2008.

Exhibit 7: Actual Project Schedule

	Start Date	End Date	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Environmental Clearance	6/26/2008	9/3/2009										
Preliminary Engineering	6/26/2008	6/11/2009										
Final Design	6/1/2009	12/31/2010										
Final Cost Estimate	9/2/2009	5/19/2010										
PCGA Signed by FTA	9/15/2011	9/15/2011										
E Street Corridor												
Bid & Award	7/1/2010	11/20/2011										
Notice to Proceed	11/21/2011	11/21/2011										
Construction & Testing	12/21/2011	5/30/2014										
Revenue Service	4/28/2014	4/28/2014										
O&M Hazard Modifications	12/23/2015	5/10/2016										
Vehicle Maintenance Facility												
Bid & Award	2/3/2012	12/3/2012										
Notice to Proceed	12/4/2012	12/4/2012										
Construction & Testing	12/10/2012	6/15/2015										
Beneficial Occupancy	6/15/2015	6/15/2015										
O&M Hazard Modifications / Project Completion	10/3/2016	4/30/2017										
Bus Procurement												
Request for Proposals	6/1/2009	5/16/2010										
Manufacturing	5/17/2010	7/31/2013										
Bus Delivery	7/31/2013	7/31/2017										
Project Closeout	6/16/2015	12/31/2017										
Before and After Study	6/13/2016	12/31/2017										

Preliminary Engineering (PE) was completed by June of 2009. The application to enter final design was completed on time, and advance preliminary engineering began on the project, with FTA concurrence, to help meet the aggressive project development process schedule.

The environmental clearance process was deemed complete by the FTA in mid-September 2009. Although the environmental clearance process was delayed from the AA schedule, with the initiation of advanced preliminary engineering, the delay had a negligible effect on the total project schedule.

Final design was retroactively initiated in June 2009 and ended in December 2010. This reflects a delay from the AA forecasts of 10-months. While the final design process began earlier than the AA phase schedule, the unplanned need to include a 60% plan submittal delayed the completion of final design.

Construction of the E Street Corridor was scheduled to begin in September 2011 and was expected to continue until September 2013. Actual Construction began in December 2011 and completed in May 2014. Under separate tracks, the Vehicle Maintenance Facility (VMF) started in December 2010 and achieved beneficial

occupancy in June 2015; while the Bus Procurement went from May 2010 to July 2013.

4. CAPITAL COST

Omnitrans completed the construction of the sbX Green Line \$3.0 million under the \$191.7 million budget with \$3.0 million remaining in unallocated contingency at the completion of the project.

The project was completed with a total cost of \$188.7 million as compared to the Project Construction Grant Agreement budget of (PCGA) of \$191.7 million. The project was \$3.0 million under budget and Omnitrans will return these funds to the Federal Transit Administration.

Detailed capital expenditures can be seen in Exhibit 8 and Exhibit 9. Professional services accounted for the largest share of the capital budget with a cost of \$65.0 million (34.4% of the final expenditure), followed by site-work and special conditions which cost \$31.1 million (16.4%); systems which cost \$21.1 million (11.2%); and, guideway which cost \$20.2 million (10.7%). The remaining capital cost categories including stations, support facilities, right of way and vehicles each cost less than 10% of the project total.

The final design cost estimate was a bottom up estimate prepared from final design documents. The estimate was developed based on equipment and material processes as well as local prevailing construction wages. The basis of estimate, assumptions and methodology was described in detail in the final cost estimate dated June 2011.

Final Design YOE is defined as 2013 and the base year is 2011.

The actual cost was captured by standard category (SCC) and captured during the construction of the project.

The comparison of the two cost estimates and the actual cost are shown in Exhibit 8 and Exhibit 9.

Between AA and FD, the guideway category experienced the second largest change falling from \$45.9 million to \$20.2 million. Final guideway costs came in approximately \$0.5 million higher than the FD estimate at \$19.8 million. The reason the large change between AA and FD was the I-10 transit way was removed from the project. Final costs included improvements from 10th Street to Highland Avenue.

Correspondingly, the site work and special conditions line items were underestimated by approximately \$20.5 million from AA to FD. The FD estimate was \$34.3 million,

while actual expenses came in nearly \$3.2 million lower at \$31.1 million.

In the final capital costs for the project, guideway and site work were a combined \$51.3 million compared to a PCGA budget

of \$53.6 million, which resulted in \$2.3 million in savings compared to the PCGA.

Exhibit 8: Capital Cost Comparison

Standard Cost Category (SCC)	Description		Alternative Analysis \$	Final Design \$	Budget Authority PCGA	Final Cost \$	Final Design vs. Final Cost \$	Final Budget vs. Final Cost \$
10	GUIDEWAY & TRACK ELEMENTS		\$ 45,893	\$ 19,725	\$ 17,984	\$ 20,177	\$ (452)	\$ (2,193)
10.02	Guideway: At-grade semi-exclusive (allows cross-traffic)	0.21	\$ 37,991	\$ 18,353	\$ 16,686	\$ 16,470	\$ 1,883	\$ 216
10.03	Guideway: At-grade in mixed traffic	0.03	\$ 7,902	\$ 1,372	\$ 1,298	\$ 3,707	\$ (2,335)	\$ (2,409)
20	STATIONS, STOPS, TERMINALS, INTERMODAL		\$ 16,132	\$ 14,917	\$ 17,201	\$ 14,262	\$ 655	\$ 2,939
20.01	At-grade station, stop, shelter, mall, terminal, platform	0.17	\$ 11,987	\$ 14,917	\$ 17,201	\$ 14,262	\$ 655	\$ 2,939
20.06	Automobile parking multi-story structure		\$ 4,145	\$ -	\$ -	\$ -	\$ -	\$ -
30	SUPPORT FACILITIES: YARDS, SHOPS, ADMIN. BLDGS		\$ 3,868	\$ 8,131	\$ 5,370	\$ 15,254	\$ (7,123)	\$ (9,884)
30.02	Light Maintenance Facility	0.52	\$ 3,868	\$ 4,265	\$ 1,265	\$ 12,860	\$ (8,595)	\$ (11,595)
30.05	Yard and Yard Track	0.48	\$ -	\$ 3,866	\$ 4,105	\$ 2,394	\$ 1,472	\$ 1,711
40	SITework & SPECIAL CONDITIONS		\$ 13,821	\$ 34,271	\$ 35,611	\$ 31,079	\$ 3,192	\$ 4,532
40.01	Demolition, Clearing, Earthwork	0.06	\$ 1,312	\$ 4,741	\$ 4,785	\$ 722	\$ 4,019	\$ 4,063
40.02	Site Utilities, Utility Relocation	0.06	\$ 4,075	\$ 4,993	\$ 4,745	\$ 10,410	\$ (5,417)	\$ (5,665)
40.02	Utility Relocation - Utility Company	1	\$ -	\$ -	\$ 1,500	\$ 549	\$ (549)	\$ 951
40.03	Hazardous Material		\$ 1,174	\$ -	\$ -	\$ -	\$ -	\$ -
40.04	Environmental Mitigation		\$ 967	\$ -	\$ -	\$ -	\$ -	\$ -
40.05	Site structures including retaining walls, sound walls	0	\$ 898	\$ 90	\$ 99	\$ 447	\$ (357)	\$ (348)
40.06	Pedestrian / bike access and accommodation, landscaping	0.08	\$ 691	\$ 6,925	\$ 6,312	\$ 5,746	\$ 1,179	\$ 566
40.07	Automobile, bus, van accessways including roads, parking lots	0.04	\$ 4,013	\$ 3,601	\$ 6,972	\$ 4,157	\$ (556)	\$ 2,815
40.08	Temporary Facilities and other indirect costs during construction	0.16	\$ 691	\$ 13,921	\$ 11,198	\$ 9,048	\$ 4,873	\$ 2,150
50	SYSTEMS		\$ 16,067	\$ 16,727	\$ 19,984	\$ 21,134	\$ (4,407)	\$ (1,150)
50.02	Traffic signals and crossing protection	0.13	\$ 6,908	\$ 10,810	\$ 11,386	\$ 6,635	\$ 4,175	\$ 4,751
50.05	Communications	0.05	\$ 3,454	\$ 4,210	\$ 6,294	\$ 8,903	\$ (4,693)	\$ (2,609)
50.06	Fare collection system and equipment	0.02	\$ 4,600	\$ 1,707	\$ 2,304	\$ 5,596	\$ (3,889)	\$ (3,292)
50.07	Central Control	0	\$ 1,105	\$ -	\$ -	\$ -	\$ -	\$ -
Construction Subtotal (10-50)			\$ 95,781	\$ 93,771	\$ 96,150	\$ 101,906	\$ (8,135)	\$ (5,756)

Exhibit 9: Capital Cost Comparison Continued

Standard Cost Category (SCC)	Description		Alternative Analysis \$	Final Design \$	Budget Authority PCGA	Final Cost \$	Final Design vs. Final Cost \$	Final Budget vs. Final Cost \$
60	ROW, LAND, EXISTING IMPROVEMENTS		\$ 15,465	\$ 6,532	\$ 6,532	\$ 6,370	\$ 162	\$ 162
60.01	Purchase or lease of real estate	0.97	\$ 15,465	\$ 6,327	\$ 6,327	\$ 6,205	\$ 122	\$ 122
60.02	Relocation of existing households and businesses	0.03	\$ -	\$ 205	\$ 205	\$ 165	\$ 40	\$ 40
70	VEHICLES		\$ 14,177	\$ 16,628	\$ 16,628	\$ 15,384	\$ 1,244	\$ 1,244
70.04	Bus	1	\$ 14,177	\$ 15,448	\$ 15,448	\$ 15,211	\$ 237	\$ 237
70.06	Non-revenue vehicles	1	\$ -	\$ 250	\$ 250	\$ -	\$ 250	\$ 250
70.07	Spare parts	1	\$ -	\$ 930	\$ 930	\$ 173	\$ 757	\$ 757
80	PROFESSIONAL SERVICES		\$ 30,213	\$ 56,702	\$ 58,365	\$ 65,005	\$ (8,303)	\$ (6,640)
80.01	Preliminary Engineering	0.64	\$ 12,676	\$ 12,921	\$ 12,933	\$ 14,877	\$ (1,956)	\$ (1,944)
80.02	Final Design	0.36	\$ 4,954	\$ 7,261	\$ 7,268	\$ 8,849	\$ (1,588)	\$ (1,581)
80.03	Project Management for Design and Construction	1	\$ 4,954	\$ 15,997	\$ 17,622	\$ 15,930	\$ 67	\$ 1,692
80.04	Construction Administration & Management	1	\$ 4,128	\$ 6,632	\$ 6,638	\$ 12,969	\$ (6,337)	\$ (6,331)
80.05	Professional Liability and other Non-Construction Insurance	1	\$ 1,072	\$ 1,112	\$ 1,113	\$ -	\$ 1,112	\$ 1,113
80.06	Legal; Permits; Review Fees by other agencies, cities, etc.	1	\$ 476	\$ 10,596	\$ 1,000	\$ 3,714	\$ 6,882	\$ (2,714)
80.06	In-Kind Contributions		\$ -	\$ -	\$ 9,606	\$ 8,401	\$ (8,401)	\$ 1,205
80.07	Surveys, Testing, Investigation, Inspection	1	\$ 1,667	\$ 1,463	\$ 1,464	\$ -	\$ 1,463	\$ 1,464
80.08	Start up	1	\$ 286	\$ 720	\$ 721	\$ 265	\$ 455	\$ 456
	Subtotal (10-80)		\$ 155,636	\$ 173,633	\$ 177,675	\$ 188,665	\$ (15,032)	\$ (10,990)
90	UNALLOCATED CONTINGENCY		\$ 7,759	\$ 18,073	\$ 14,031	\$ 3,041	\$ 15,032	\$ 10,990
	Subtotal (10-90)		\$ 163,395	\$ 191,706	\$ 191,706	\$ 191,706	\$ -	\$ 191,706
100	FINANCE CHARGES					\$ -		
	TOTAL PROJECT COST (10-100)		\$ 163,395	\$ 191,706	\$ 191,706	\$ 191,706	\$ -	\$ -

Professional services costs increased during each phase of the project. Initially the AA estimated services at \$30.2 million, the FD estimated \$56.7 million while actual costs came in at \$65.0 million. The largest line item increases were in Construction Administration and Management and In-Kind Contributions.

Construction Administration and Management costs increased due to the establishment of the Internal Project Management Office (IPMO) office, which was not considered as part of the professional services costs during the AA phase. The IPMO office had a larger staff

than anticipated in the Project Management Plan (PMP).

Professional Services costs were \$65.0 million compared to a PCGA budget of \$58.4 million. The biggest driver increasing these costs was construction management.

The other major increase in capital costs is reflected in the legal, permits and review fees by other agencies line item. This increase reflects in-kind contributions in the form of plan check fees, building and construction fees to the total of \$8.4 million, and legal fees for Omnitrans in the ROW acquisition process.

Legal/Permits/Reviews and In-kind costs were \$12.1 million compared to a PCGA budget of \$10.6 million. These costs increased over the PCGA budget based on the value of in-kind donations received from the participating cities being greater than planned.

Station costs were \$14.3 million compared to a PCGA budget amount of \$17.2 million, \$14.9 million in FD and \$16.1 million in the AA phase.

Vehicle unit costs remained relatively constant due to a steady vehicle design concept. The 60' New Flyer vehicle was identified early as the design vehicle, utilizing a low floor, articulated design. The dual sided, 5-door vehicles became desirable once median station design was developed, however this change had only a slight increase in the overall vehicle cost during the four year design process.

Vehicle costs were \$15.4 million compared to a FD estimate and PCGA Budget of \$16.6 million. The AA estimated vehicle cost was \$14.2 million. Substantial cost savings were derived in the reduction in spare parts that were purchased with the vehicles as compared to the PCGA.

Systems costs were \$21.1 million compared to a PCGA budget of \$20.0 million. The AA estimate was \$16.1 million and the FD estimate was \$16.7 million. Cost increases were seen in communication equipment and fare collection, while traffic signals and crossing protection saw decreases in cost compared to PCGA budget.

5. TRANSIT SERVICE LEVELS

Omnitrans delivered the sbX Green Line with the proposed and required 10-minute peak and 15-minute off-peak headway and

14 hours of service span.

Omnitrans was able to implement BRT service without degrading service elsewhere in the network. During the first few years of sbX service, Omnitrans did restructure some service for the opening of the San Bernardino Transit center and due to changing demands throughout the network. As seen in Exhibit 10, Omnitrans weekday revenue hours increased 4.6% from 670,700 revenue hours the year before sbX Green line service began to 701,600 after three full years of service. Weekday revenue miles increased at a slightly faster rate of 5.1% growing from 9.2 million revenue miles to 9.6 million revenue miles.

Specifically on the E Street Corridor, revenue hours increased by 43.2% between the two years growing from

Exhibit 10: Changes in Aggregate Measures of Actual Transit Service Levels

Characteristic	Weekday Revenue Miles (Annual 000s)				Weekday Revenue Hours (Annual 000s)			
Milestone	Before (FY2013)	After (FY2017)	Change	% Chg.	Before (FY2013)	After (FY2017)	Change	% Chg.
E Street Corridor	404.0	714.5	310.4	76.8%	35.7	51.1	15.4	43.2%
sbX Green Line	-	558.7	558.7	---	-	37.4	37.4	---
Route 2	404.0	155.7	(248.3)	61.5%	35.7	13.7	(22.0)	61.6%
Other Routes	8,755.8	9,475.7	719.8	8.2%	635.1	650.5	15.5	2.4%
System Total	9,159.9	9,631.4	471.6	5.1%	670.7	701.6	30.9	4.6%

35,700 revenue hours prior to the start of sbX Green Line service to 51,100 revenue hours afterwards. Driven by the faster operating speeds of sbX compared to local service, annual revenue miles on the corridor increased even faster growing 76.8% from 404,000 weekday revenue miles before sbX green line service to 714,500 miles afterwards.

Exhibit 11 shows Weekday Peak and Off-Peak Headway Levels remained as planned for sbX since the AA phase, at a 10-minute peak headway and 15-minute off peak headway. Route 2 headway levels from the AA to FD were adjusted from 20 minutes to 30 minutes. After the SBTC opened and demand on Route 2 adjusted to sbX, the headway was reduced to 60 minutes and resources were transferred to Route 1 which intersects sbX at the SBTC.

Exhibit 11 Weekday Peak/Off-Peak Headway Levels (minutes)

	AA	FD	Initial	Current
Year	2011	2013	2014	2017
sbX	10/15	10/15	10/15	10/15
Rt 2	20	30	30	60

Span has remained the same along the Project Corridor. Exhibit 12 shows an hour of span was added to sbX for a total of 15 hours from FD projections of 14 hours. When sbX began service, Route 2

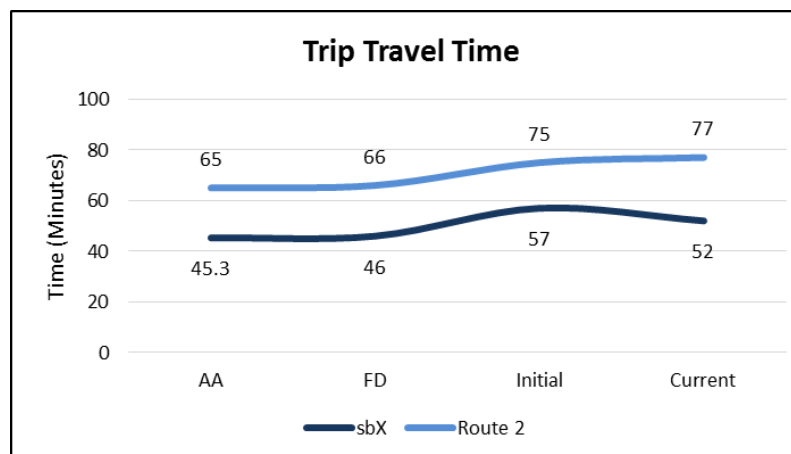
maintained its span of 19 hours, which has remained unchanged.

Exhibit 12 Weekday Service Span (hours)

	AA	FD	Initial	Current
Year	2011	2013	2014	2017
sbX	14	14	15	15
Rt 2	19	19	19	19

Travel time on sbX is faster than Route 2. An average one-way trip is 25 minutes faster on sbX than a trip on Route 2, as seen in Exhibit 13. The trend shows that the Average Trip Travel Time has improved on sbX since launch but remains above earlier predictions of 46 minutes each way from the FD.

Exhibit 13: sbX Green Line & Route 2 One-Way Travel Times



During the AA & FD phase of the, the sbX Green Line was expected to connect directly to three neighboring transit agencies. The connection to Riverside Transit Agency (RTA) and Mountain Transit has been maintained as planned. The extension of Metrolink Service to the San Bernardino Transit Center, initially planned to occur concurrently, with sbX opened on December 16, 2017. Thus it has not had the opportunity to influence sbX service or ridership to date.

In addition to the three planned regional connections, two additional connections have been formed following the implementation of sbX and SBTC. Victor Valley Transit Authority connects to sbX from the high desert as far as 70 miles away in Barstow. Pass Transit also connects to sbX from 25 miles to the east from Riverside County.

FARE POLICY

Omnitrans implemented a planned 16% fare increase in FY2015 one year after the implementation of sbX. This was the first increase in five years and was designed to maintain farebox recovery ratio as

inflationary pressure continued to increase costs. Omnitrans maintained existing discounts and fare multiples. Omnitrans had previously skipped two planned fare increases and has skipped one planned fare increase since.

In January 2015, Omnitrans implemented a new discounted fare program for Veterans. Omnitrans now offers veterans a 50% discount of regular full fare cash, day, 7-day and 31-day passes. Since the sbX Green Line serves the primary VA Hospital in the area, it has a higher share of Veteran Fare usage than other routes in Omnitrans system.

6. OPERATING AND MAINTENANCE COSTS

Generally, sbX annual Operations and Maintenance (O&M) costs slightly

exceeded Final Design expectations while the O&M costs per hour came in slightly lower than expectations. These differences both stem from Omnitrans adding a 12th vehicle into service in the P.M. peak. The additional peak vehicle was required to maintain the 10 minute peak headway as the estimated one-way travel time of 46 minutes stabilized in the P.M. peak between 52 and 55 minutes depending on time of year. This added annual operating costs, but lowered the cost per hour as fixed costs such as station area maintenance and technology costs were allocated over more revenue hours.

Exhibit 14 shows O&M costs in 2014 dollars for the sbX Green Line, Route 2, Omnitrans' Fixed Route services, and system wide services. Costs are shown in both annual totals and per revenue hour. Omnitrans refined the cost allocation

methodology each year sbX was in service so both the first full year (FY2015) and third full fiscal year (FY2017) are provided.

sbX hourly costs were projected to be \$132.61 per hour in the AA, \$146.43 per hour in FD, and actually came in at \$129.01 in FY2015 and \$130.83 in FY2017. In FY2015, hourly costs were -11.9% compared to FD and FY2017 hourly costs were -10.7% compared to FD.

sbX annual O&M costs were estimated at \$4.3 million and came in at \$4.6 million in FY2015 and \$4.9 million in FY2017, a difference of 6.5% and 12.3% respectively.

The actual sbX costs for FY2015 and FY2017 were calculated based on the actual expenses for sbX that were captured in a separate cost center for direct expenses and allocated costs based on Omnitrans' standard allocation methodology for administration and

Exhibit 14: Operations & Maintenance Costs for sbX Green Line, Route 2 and Systemwide (2014 Dollars)

O&M Cost	AA Future	FD Future	FY2015	FY2017	%Δ FD v. FY15	% Δ FD v. FY17
Route 2 Annual O&M Costs (\$000)	\$3,148	\$2,469	\$3,007	\$2,189	21.8%	-11.4%
sbX Annual O&M Costs (\$000)	\$5,700	\$4,354	\$4,636	\$4,889	6.5%	12.3%
Annual Fixed Route O&M costs (\$000)	\$72,898	\$59,134	\$56,974	\$62,263	-3.7%	5.3%
Annual System wide O&M Cost (\$000)	\$87,797	\$70,253	\$69,741	\$74,580	-0.7%	6.2%
Route 2 O&M Costs per Revenue Hour	\$74.58	\$86.61	\$82.44	\$89.94	-4.8%	3.8%
sbX O&M Costs per Revenue Hour	\$132.61	\$146.43	\$129.01	\$130.83	-11.9%	-10.7%
Fixed Route O&M Costs per Revenue Hour	\$74.58	\$86.61	\$88.20	\$93.58	1.8%	8.0%
System wide O&M Costs per Revenue Hour	\$74.58	\$86.61	\$84.88	\$89.61	-2.0%	3.5%

overhead expenses.

The original AA O&M plan (developed in May 2007) used the 2005 base costs of \$74.58 per revenue hour and added 10% maintenance cost of \$7.46 per revenue hour, for a rate of \$82.04 per revenue hour for sbX service. However, the final financial template (approved by the FTA in December 2007) contained a higher operating cost than what was detailed in the O&M plan with sbX cost at \$132.61 per revenue hour.

The final design O&M costs were prepared in 2009 for the project, and then revised later during the final design as a result of the economic recession. The base cost is reported at \$86.61 per revenue hour. The FD sbX O&M cost is identified at \$146.43 per revenue hour.

The remaining costs for Omnitrans fixed route service and system wide services were in line with FD projections. Route 2's annual operating costs were 21.8% over FD forecasts in FY2015 at \$3.0 million. This corrected to 11.4% under the FD estimates by FY2017 at \$2.2 million. This change was the result of the reduction in frequency on Route 2 following the opening of the San Bernardino Transit Center.

Overall, sbX Green Line costs accounted for 6.6% of Omnitrans system wide costs in both FY2015 and FY217.

The National Transit Database (NTD) captures operating costs in four main categories: vehicle operations, vehicle maintenance, non-vehicle maintenance and general administration. Exhibit 15 shows a comparison of cost per revenue hour between traditional fixed route service and the sbX Green Line for each of the NTD cost categories.

Vehicle operations costs show the biggest percent and dollar value difference between sbX and traditional fixed route service. Fixed route services cost \$51.39 per hour while sbX costs \$80.09 per hour. The primary driver of these differences included dedicated field supervisors for sbX, while other routes share field supervisors. Additionally, sbX had a dedicated dispatcher associated with it for the first three years of operations. Omnitrans also has roving 24 hour security

and monitored video security for sbX, which do not exist on traditional fixed route service. Lastly, sbX drivers receive \$2 per hour premium pay compared to regular fixed route operators.

Vehicle maintenance cost per hour for sbX is 12% higher than fixed route service, a difference of \$2.21 per hour. This is associated with slightly higher fuel costs and higher speed of sbX service compared to fixed route service which accumulates more miles per revenue hour than fixed route service.

Non-vehicle maintenance costs are 40% higher on sbX than on traditional fixed route. sbX non-vehicle maintenance costs are \$6.89 per hour, while fixed route non-vehicle maintenance costs are \$4.92 per hour. These costs are associated with maintenance of the dedicated sbX stations and dedicated maintenance staff for these stops and stations.

General administration expenses on sbX are 39% higher than on fixed route

Exhibit 15: Comparison of FY2017 Costs per Revenue Hour by NTD Cost Category (2017 Dollars)

	All FR	sbX	Δ	%Δ
Vehicle Operations	\$ 51.39	\$ 80.09	\$ 28.69	56%
Vehicle Maintenance	\$ 17.85	\$ 20.06	\$ 2.21	12%
Non-Vehicle Maintenance	\$ 4.92	\$ 6.89	\$ 1.98	40%
General Administration	\$ 20.22	\$ 28.12	\$ 7.90	39%
Total Costs	\$ 94.38	\$ 135.15	\$ 40.77	43%

service, at \$28.12 per revenue hour and \$20.22 per revenue hour, respectively. The primary reason for this difference is the technology and licensing costs associated with the cameras, transit signal priority, NexTrip arrival signs and related costs.

7. RIDERSHIP

RIDERSHIP INTRODUCTION

As of October 2017, sbX Green Line average weekday ridership was 3,323 and corridor ridership including the underlying local Route 2 was 4,018. This compares to projected ridership of 5,607 and 7,049, respectively. This is a discrepancy of -40.7% for the sbX Green Line and -43.0% for the corridor as a whole.

A preliminary analysis would indicate that the forecasting methodology significantly overestimated ridership on the corridor. However, multiple unforeseen factors have influenced ridership trends much more broadly than at the corridor level. Additionally, other corridor level impacts such as the delay of the extension of Metrolink commuter rail service, the delay of the SBTC, the current level of economic activity in San Bernardino, and the bankruptcy of the City of San Bernardino may have

hampered ridership growth.

The no-build expected average weekday ridership on the corridor was 4,999. In October 2011 prior to construction, average daily ridership on the corridor was 4,854, in line with trends at the time to reach the expected no-build ridership levels. However, by opening day ridership had fallen to 3,786, a 22% decline. Had this been expected, the forecasted ridership may have likely been 22% lower for the sbX Green Line at 4,373 and the corridor at 5,498. Even considering these potential adjustments, current average daily ridership remains 24% and 27%, respectively, below estimates.

Dealing with the same trends of low gas prices, rising drivers' license levels, increased car ownership and other factors, Omnitrans fixed route ridership has fallen by 28% since peaking in Fiscal Year 2012. Nearly all of the decline occurred since 2014. Comparatively, sbX Green Line

average weekday ridership has grown by 81% since its opening months in FY2014. This represents an increase of 1,309 average daily riders on sbX at the same time, systemwide ridership is falling. Combining these factors, sbX Green Line ridership has exceeded the system wide growth rate by 109 percentage points. Overall E Street corridor ridership has fallen 12.5% over the same time period, which is less than half the systemwide rate of decline of 26% for the same period.

Staff has worked to offset ridership declines by focusing on partnerships in the area. California State University, San Bernardino implemented a University Pass program prior to launch of sbX but in large part because of sbX. Loma Linda University Medical Center used an employee pass program as a construction offset measure during construction on their campus. This is leading to renewed discussion about a longer term University Pass program at that campus. Additionally sbX has been a

Exhibit 16: Comparison of Ridership Before (FY2013) and After (FY2017) by Corridor and System Wide

Characteristic	Weekday Revenue Hours (Annual 000s)				Average Weekday Boardings			
	Before (FY2013)	After (FY2017)	Change	% Chg.	Before (FY2013)	After (FY2017)	Change	% Chg.
E Street Corridor	35.7	51.1	15.4	43.2%	4,163	3,639	(524)	-12.6%
sbX Green Line	-	37.4	37.4	---	-	2,935	2,935	---
Route 2	35.7	13.7	(22.0)	61.6%	4,163	704	(3,459)	-83.1%
Other Routes	635.1	650.5	15.5	2.4%	49,943	35,177	(14,766)	-29.6%
System Total	670.7	701.6	30.9	4.6%	54,106	38,816	(15,290)	-28.3%

helpful asset in reaching partnership with a nearby Amazon distribution center and with renewing a University Pass program with San Bernardino Valley College. As these partnerships continue to develop, sbX ridership will continue to grow.

RIDERSHIP DETAIL

Exhibit 16 shows the specific change in ridership compared to the change in service provided for the sbX Green Line, the E Street Corridor, Omnitrans' other routes and system total for FY2013 and FY2017. E Street Corridor average daily ridership declined 12.6% between the four years as average daily corridor ridership slipped from 4,163 weekday riders to 3,639 weekday riders. This rate is less than half the rate of decline of Omnitrans other routes over this time period, which fell 29.6% from 49,943 average weekday riders to 35,177 riders. System wide average daily riders decline 15,290 riders between 2013 and 2017, a decline of 28.3%. As described earlier, this downward trend has been experienced by other agencies driven by a number of factors ranging from vehicle ownership rates, improving economy, lower gas prices, fare increase, changing drivers license requirements and so on.

Omnitrans contracted Redhill Group to conduct an on-board intercept survey of sbX Green line and system wide riders. This survey included capturing origin, boarding, alighting and destination (OBAD) data, which was used to determine ridership patterns for sbX Green Line riders and also to capture the satisfaction of sbX Green Line riders. The full report can be found in the appendix to this report and key findings are shown below.

While ridership numbers have not met expectations, sbX riders' opinions of sbX have been positive:

- 94% of sbX riders agree that their transit experience is better with sbX;
- 90% of sbX riders say that the initiation of sbX service has changed their transit experience;
- 94% give a positive rating to sbX performance, with more than half (55%)

saying it is excellent;

- 86% of sbX riders indicated that it reduced their travel time;
- 71% say it has resulted in fewer transfers,
- 65% feel safer waiting for sbX;
- 66% indicated that sbX makes trip planning easier; and,
- 67% indicated that they now ride more because of sbX.

The survey data also provide details about trip purpose of sbX riders and this can be compared to Omnitrans riders system wide. This is shown in Exhibit 17. The largest difference between sbX and local services is that sbX has many more home to school/college trips at 19% compared to 11% for regular local service. When the reverse trip is also included 33% of sbX trips are home/school based trips. This is followed by home/work trips at 23%, which is slightly lower than regular fixed

Exhibit 17: Comparison of Trip Purpose Pairs for Omnitrans Fixed Route Service Compared to sbX Green Line

Trip Origins & Destinations.		Destination						
Fixed Route::sbX		Home	Work	School	Medical	Shopping	Other	Total
Origin	Home	2% :: 3%	14% :: 12%	11% :: 19%	4% :: 4%	5% :: 4%	9% :: 6%	46% :: 47%
	Work	13% :: 11%	1% :: 1%	1% :: 0%	0% :: 0%	0% :: 1%	1% :: 1%	17% :: 14%
	School	14% :: 14%	1% :: 1%	1% :: 2%	0% :: 0%	0% :: 2%	1% :: 1%	17% :: 20%
	Medical	3% :: 5%	0% :: 0%	0% :: 0%	0% :: 0%	1% :: 0%	1% :: 1%	5% :: 7%
	Shopping	4% :: 3%	0% :: 0%	0% :: 0%	0% :: 0%	1% :: 0%	1% :: 1%	6% :: 4%
	Other	6% :: 4%	1% :: 0%	0% :: 1%	0% :: 0%	1% :: 0%	2% :: 2%	10% :: 8%
	Total	42% :: 40%	17% :: 14%	13% :: 23%	5% :: 5%	8% :: 8%	15% :: 11%	100% :: 100%

Exhibit 18: Daily Trips on sbX Green Line (October, 2017) by Production Attraction Source

	Daily trips on the sbX Green Line	Attracted to Workplaces and other Activities in:			
		Corridor in San Bernardino	Corridor in Loma Linda	Outside of the Corridor	All Locations
Produced by residents of:	E Street Corridor	1,300	300	400	2,000
	Outside Corridor	1,100	100	100	1,300
	All Locations	2,400	400	500	3,300

route riders' roundtrip 27% share of home/work trips. Other trip origin and destination pairs, such as home/medical and home/shopping, are similar between sbX riders and local route riders.

A typical sbX Green Line trip includes taking an average of 1.7 buses and 59% of trips require a transfer. This indicates that the majority of trips on sbX start or end outside of the sbX corridor. Exhibit 18 shows the daily trips by production and attraction source. 1,600 average daily trips out of 3,300 average daily trips on the sbX Green Line start and end on the corridor, representing 48% of total activity.

1,100 average daily trips (33% of the total trips) start outside of the corridor, but end on the corridor inside the city of San Bernardino. The most common attraction locations in this group are near California State University, San Bernardino and along Hospitality Lane.

A total of 400 trips per day are drawn by attractions in Loma Linda, representing 12% of sbX's total trips.

The rider survey also indicated some demographic differences between sbX riders and Omnitrans riders systemwide. sbX riders were more likely to have a vehicle available for their trip, 23% to 17%. sbX riders are more likely to be a full-time student 42% compared to 28% for systemwide riders. Correspondingly, sbX riders are more likely to be in their 20s at 36% compared to 31% for the system as a whole. The household incomes of riders on sbX are similar to that of those on traditional fixed route service.

8. BUSINESS IMPACT

Omnitrans contracted Redhill Group to conduct a survey of business along the sbX corridor to evaluate the impact of sbX. Full details of this survey can be seen in the appendix to this report and are summarized below.

36% of businesses surveyed indicated that business volume increased during the three years following the introduction of sbX and 28% indicated that business volume remained the same.

Nearly three quarters (73%) of businesses along the sbX E Street Corridor have been in business six years or longer, which is before the construction and opening of sbX. Of businesses that have been at their location for less than six years, 6 percent say their decision to select the location was, at least in part, influenced by the sbX line.

Businesses' satisfaction (56%) with sbX outpaces dissatisfaction (28%) by a margin of two to one.

Satisfaction with sbX varies depending upon the location of the business along the sbX E Street Corridor alignment.

Businesses north of 9th and North E Street, and east of Waterman Avenue, have a higher level of satisfaction (68%) than businesses that lie between those points (40%). The primary difference between the two areas is whether sbX added a median or not. Areas where no median was added, business were more satisfied while areas where a median was added saw lower satisfaction.

More than half (57%) of businesses along the sbX E Street Corridor agree that the project has improved sidewalks and roads near their location, with an additional 20% saying they do not see a change.

TRANSIT-ORIENTED DEVELOPMENT IMPACTS OF SBX GREEN LINE

In July 2012, the City of San Bernardino adopted a Transit Overlay District (TOD) ordinance. The ordinance includes 13 station areas within ½-mile walking distance of the sbX Green Line stations in

the City of San Bernardino. The stations are subdivided into five areas with distinct neighborhood character, density, building heights, etc. The five areas are Kendall Drive Neighborhood Station Areas; E Street Neighborhood Station Areas; Downtown Station Areas; Village/Urban Center Station Areas; and Employment Center Station Areas.

The ordinance reduces minimum parking requirements in the station areas; makes slight changes to the allowable uses in the station areas (such as disallowing auto-

oriented uses like drive-thru fast food restaurants); and adds form-based requirements such as setbacks, building height step-backs, street block lengths, and bicycle parking requirements in order to facilitate a pedestrian and bicycle-friendly environment in the station areas.

Since the TOD ordinance was adopted, several developments have taken place along the corridor, including new construction as well as new occupancy/new employment at existing

Exhibit 19: Developments in San Bernardino on the sbX Corridor

Name of Facility	Type of Project	Opening Date	Location	Influence of sbX on development decision
CSUSB Student Housing	New construction of 400 beds (in first phase) of student housing	2017	Adjacent to CSUSB campus	No, although it's important for students at CSUSB.
Carousel Mall redevelopment	Mixed-use phased redevelopment (including housing and commercial)	Unknown	On E Street (at Court Street station)	Proximity of San Bernardino Transit Center, sbX line, and new rail connections were factors in the decision to develop.
Andreson Building	New owner, new occupants (tech company plus other tenants)	Acquired in 2016	On E Street (at Court Street station)	Not sure of the impact of sbX on ability to get tenants yet, but sbX is convenient to the location. Using it as a sales point to attract tenants, interested in a pass program for employees.
Gateway College (Loma Linda University)	Teaching clinic	September 2016	G Street south of Rialto Avenue (1/2 mile from E and Rialto Station / San Bernardino Transit Center)	Proximity of Transit Center and connection of sbX from Loma Linda was a draw.
Tri-City Corporate Centre	New owner, new occupants	Acquired in March 2015	On Hospitality Lane (at Carnegie station)	Occupancy was at 57% when they acquired property in March 2015, seemed promising to increase occupancy. Transit is a sales point for attracting tenants. Tenants often ask about transit access and say that it's important to their employees and customers.

properties.

Exhibit 19 describes development on the sbX Green Line Corridor in San Bernardino.

The City of Loma Linda does not have any land use regulations specific to the areas around the three sbX Green Line stations in Loma Linda (Anderson and Redlands Blvd., Anderson and Prospect, and Benton and Barton).

However, the City's General Plan adopted in 2009 does designate "Specific Planning Areas" within ½ mile walking distance of all three stations. The Specific Planning Areas have flexible development regulations that allow and encourage the development of high-density housing and mixed use development in proximity to Loma Linda University/Medical Center and the VA Medical Center.

ITEM # E3

DATE: June 14, 2018

TO: Committee Chair Sam Spagnolo and
Members of the Administrative and Finance Committee

THROUGH: P. Scott Graham, CEO/General Manager

FROM: Donald Walker, Director of Finance

**SUBJECT: TRANSFER OF VALLEY TRANSPORTATION SERVICES (VTRANS)
REMAINING ASSETS TO OMNITRANS**

FORM MOTION

Receive and forward to the Board of Directors recommending approval Resolution No. 307-18 to officially accept the surplus assets of Valley Transportation Services.

This item was reviewed by Legal Counsels for Omnitrans and VTrans.

BACKGROUND

In February 2016, the San Bernardino County Transportation Authority (SBCTA) approved the orderly transition of VTrans's functions as the Consolidated Transportation Services Agency (CTSA) to Omnitrans. Since then, staff has worked with legal counsels for both Omnitrans and VTrans to transition the responsibilities and complete the dissolution.

Omnitrans took physical control of VTrans assets in May 2016 and has continued to provide service and support to the community partners of VTrans. SBCTA discontinued allocating Measure I funds to VTrans after Omnitrans was designated the CTSA. Currently VTrans operating cost are being paid with Measure I funds from prior years.

In order to safeguard against funding shortages to the community partners prior to VTrans dissolution, SBCTA has forwarded Omnitrans the Measure I funds that were designated for the CTSA.

VTrans surplus assets consist mainly of cash, shop equipment, and leasehold improvements at the leased maintenance facility in Ontario, CA. The three (3) vehicles previously owned by VTrans were leased to the City of Grand Terrace, Industrial Support Services (ISS), and West End YMCA/Ontario-Montclair Branch.

If approved, Omnitrans will include VTrans surplus assets in its accounting records and financial statements in accordance with generally accepted accounting principles.

CONCLUSION

Receive and forward to the Board of Directors recommending approval Resolution No. 307-18 to officially accept the surplus assets of Valley Transportation Services.

PSG:DW

Attachment A: Resolution No. 307-18

RESOLUTION NO. 307-18**RESOLUTION OF THE OMNITRANS BOARD OF DIRECTORS, SAN BERNARDINO COUNTY, CALIFORNIA, ACCEPTING SURPLUS ASSETS OF VALLEY TRANSPORTATION SERVICES**

WHEREAS, Omnitrans is a Transportation Authority in San Bernardino County created pursuant to California Government Code Section 6506 by that certain Joint Powers Agreement dated March 8, 1976, and amended and restated on July 1, 2016;

WHEREAS, Valley Transportation Services (“VTrans”) is a California non-profit corporation;

WHEREAS, on September 1, 2010, VTrans was appointed by the San Bernardino County Transportation Commission, now known as the San Bernardino County Transportation Authority (“SBCTA”), as the Consolidated Transportation Services Agency (“CTSA”) for the San Bernardino Valley and was provided certain funding as such by SBCTA;

WHEREAS, on November 4, 2015 the SBCTA (formerly Sanbag) Board of Directors designated Omnitrans a CTSA for the San Bernardino Valley;

WHEREAS, in February 2016, the SBCTA Board approved the orderly transition of VTrans’s functions as CTSA to Omnitrans;

WHEREAS, on December 6, 2017, the SBCTA Board authorized the transfer of VTrans assets that were determined to be surplus to SBCTA’s needs to Omnitrans; and

NOW, THEREFORE, BE IT RESOLVED THAT the Omnitrans Board of Directors does hereby approve and authorize Omnitrans’ acceptance of the surplus assets of VTrans.

APPROVED AND ADOPTED this 11th day of July, 2018.

Ron Dailey, Chair
Board Chair, Omnitrans Board of Directors

Approved as to form:

Haviva Shane
Counsel for Omnitrans

CERTIFICATION

I, P. Scott Graham, Secretary, Omnitrans Board of Directors, do hereby certify that the foregoing resolution was adopted by the Omnitrans Board of Directors at a regular meeting thereof held on the 11th day of July, 2018, by the following vote, to wit:

AYES:

NOES:

ABSENT:

P. Scott Graham, CEO/General Manager
Secretary, Omnitrans Board of Directors

ITEM # E4

DATE: June 14, 2018

TO: Committee Chair Sam Spagnolo and
Members of the Administrative and Finance Committee

THROUGH: P. Scott Graham, CEO/General Manager

FROM: Marjorie Ewing, Director of Human Resources & Regulatory Compliance

**SUBJECT: PERSONNEL POLICY #406 – OUT OF CLASSIFICATION
ASSIGNMENTS**

FORM MOTION

Recommend to the Board of Directors the approval of the proposed changes to Policy 406 Out-of-Classification Assignments with an effective date of July 11, 2018.

BACKGROUND

Effective January 1, 2018, Assembly Bill (AB) 1487 added section 20480 to the California Government Code, which limits an out-of-class appointment by a CalPERS contracting agency to 960 hours per fiscal year and imposes a penalty for work in excess of this limit. This pertains to both Classic and New Members of CalPERS.

Government Code section 20480 of the Public Employees' Retirement Law (PERL) defines "out-of-class appointment" to mean an appointment to an upgraded position or higher classification by an employer in a vacant position for a limited duration. A "vacant position" refers to a position that is vacant during recruitment for a permanent appointment. A vacant position does not refer to a position that is temporarily available due to another employee's leave of absence. Section 20480 also states that the compensation for an out-of-class appointment shall be pursuant to a collective bargaining agreement or a publicly available pay schedule.

This policy was reviewed by Legal Counsel, ATU Local 1704 and Teamsters Local 166.

Any increased costs associated with the recommended action will be covered in the Fiscal Year 2019 Budget.

Department: All
Account: Salaries and Benefits

_____ Verification of Funding Source and Availability of Funds


(Verified and initialed by Finance)

CONCLUSION

With the Committee's recommendation, this item will be forwarded to the Board of Directors for the adoption of revisions to Personnel Policy 406 at the July 11, 2018 Board Meeting. Approval of this agenda item supports the compliance with Assembly Bill (AB) 1487 and Government Code section 20480.

PSG:ME

Attachment: A: Policy 406

 PERSONNEL POLICY MANUAL	POLICY 406 PAGE 1 OF 2
SUBJECT Out-of-Classification Assignments	APPROVED BY OMNITRANS BOARD OF DIRECTORS DATE: April 7, 2010 <u>July 11, 2018</u>

I. Purpose

To state Omnitrans' policy on out-of-classification assignments.

II. Scope

All Departments

III. Procedures

- A. From time to time, Omnitrans employees may be assigned duties outside of their normal classification. To qualify for out-of-classification pay, an employee must vacate their normal and customary position and take on the full duties of the new position.
- B. For appointments longer than thirty (30) calendar days, the department authority must initiate a personnel requisition with justification for the need and the duration of the out-of-class assignment. Subject to the approval by the CEO/General Manager. For appointments of less than thirty (30) calendar days, the approval of the CEO/General Manager is not required, but the Human Resources Department must be notified. For any out-of-classification assignment, a personnel action form (PAF), signed by the department authority, is required.
- C. Out-of-classification assignments resulting from industrial injuries (light duty) will be paid at a comparable point in the salary range of the assigned classification. The Workers' Compensation Third Party Administrator will determine if additional monies are due to meet statutory provisions of the law.
- D. Normally, employees who are assigned to a classification higher than their normal classification, for assignments of five consecutive work days or more, will be compensated an additional 5% or at least the minimum of the applicable compensation range.
- E. An employee who is assigned to a classification lower than their normal classification will not incur a reduction in salary.
- F. If you are a represented employee, your MOU will prevail.

F.G. Starting January 1, 2018, Assembly Bill (AB) 1487 adds Government Code section 20480 which prohibits an out-of-class appointment by a CalPERS contracting agency with employees serving in a limited term appointment in a



PERSONNEL POLICY MANUAL

POLICY 406 PAGE 2 OF 2

SUBJECT

Out-of-Classification Assignments

APPROVED BY OMNITRANS
BOARD OF DIRECTORS

DATE: ~~April 7, 2010~~ July 11, 2018

vacant position from exceeding 960 hours worked within each fiscal year. This pertains to both Classic and New Members. Gov. Code section 20480 of the Public Employees' Retirement Law (PERL) defines "out-of-class appointment" to mean an appointment to an upgraded position or higher classification by an employer in a vacant position for a limited duration. A "vacant position" refers to a position that is vacant during recruitment for a permanent appointment. A vacant position does not refer to a position that is temporarily available due to another employee's leave of absence. Section 20480 also states that the compensation for an out-of-class appointment shall be pursuant to a collective bargaining agreement or a publicly available pay schedule.

ITEM # E5

DATE: June 14, 2018

TO: Committee Chair Sam Spagnolo and
Members of the Administrative and Finance Committee

THROUGH: P. Scott Graham, CEO/General Manager

FROM: Marjorie Ewing, Director of Human Resources & Safety Regulatory
Compliance

**SUBJECT: PERSONNEL POLICY #614 – STATE DISABILITY INSURANCE
(SDI) AND PAID FAMILY LEAVE (PFL)**

FORM MOTION

Recommend to the Board of Directors the approval of the proposed policy changes to Policy 614, State Disability Insurance (SDI) and Paid Family Leave (PFL) with an effective date of July 11, 2018.

BACKGROUND

This policy was pulled from the May 2, 2018, Board Agenda at the request of Legal Counsel in order to further review and ensure that the procedural language for State Disability and Paid Family Leave is clearly stated in the policy. The changes in the policy are necessary to comply with changes in the relevant governing laws.

This policy was reviewed by Legal Counsel, ATU Local 1704 and Teamsters Local 166.

FUNDING SOURCE

Any increased costs associated with the recommended action will be covered in the Fiscal Year 2019 Budget.

Department: All

Account: Salaries and Benefits


____ Verification of Funding Source and Availability of Funds
(Verified and initialed by Finance)

CONCLUSION

With the Committee’s recommendation, this item will be forwarded to the Board of Directors for approval of adopting the revisions to Personnel Policy 614 at the July 11, 2018 Board Meeting. Approval of this agenda item supports the Strategic Plan, Section IX: Organizational and Workforce Excellence Goal for Fiscal Years 2017 – 2020; adopted April 6, 2016.

PSG: ME

Attachment A: Policy 614

 PERSONNEL POLICY MANUAL	POLICY 614 PAGE 1 OF <u>43</u>
SUBJECT State Disability Insurance (SDI) and Paid Family Leave (PFL)	APPROVED BY OMNITRANS BOARD OF DIRECTORS DATE: <u>May 5, 2004</u> <u>May 2, 2018</u>

I. Purpose

To state Omnitrans' policy on California State Disability Insurance and California Paid Family Leave.

II. Scope

All Departments

III. Procedure for State Disability Insurance (SDI)

A. The SDI program is a state-mandated, partial wage replacement insurance plan for certain eligible California employees. SDI provides short-term, financial benefits to certain eligible employees who suffer a loss of wages when unable to work due to a non-work-related illness or injury or when medically disabled due to pregnancy or childbirth. SDI is not a leave of absence, but it may provide compensation to eligible employees who are on a medical leave of absence, such as the federal Family Medical Leave Act, California Family Rights Act, or California Pregnancy Disability Leave.

A. Employees may be eligible for compensation from California State Disability Insurance (SDI) funds in whole or in part for loss of pay when they are unable to perform their regular work because of illness or injury.

All employees who are sick more than seven consecutive calendar days must apply for eligible California State Disability Insurance (SDI) funds to coordinate with Omnitrans sick leave payments.

B. There is a seven-day waiting period before disability benefits begin. Employees who are absent due to non-work-connected illness or injury and are eligible for State Disability Insurance (SDI) benefits, must use any may receive sick leave pay accrued but unused paid sick leave during the seven calendar day waiting period, since employees are not eligible to receive disability pay until the eighth calendar day of disability.

C. When the employee receives SDI disability benefits, the amount of sick leave paid by the Agency must be reduced by the disability-SDI benefit amount so that the two together do not exceed 100% of the employee's normal compensation. The amount of sick leave payable to the employee is computed, paid and deducted from the employee's paid sick leave accrual. Accrued vacation may also be used to supplement SDI benefits upon written request by 44



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the employee.

Advance payment of accrued sick leave may be arranged in cases where the waiting period imposes an undue hardship. All requests for advance payments must be referred to Human Resources for approval.

~~D. Weekly and maximum benefit amounts of an employee's claim are based on the wages earned during a certain base period.~~

~~E.D. The Employment Development Department ("EDD"), which administers SDI benefits, determine the eligibility, benefit amounts, and all other aspects of SDI benefits. Qualifications for SDI payment amounts are established and determined by the State of California when the employee applies for SDI. For more information, contact the Employment Development Department at or the Taxpayer Assistance Center at (888) 745-3886.~~

~~E. All employees have received EDD pamphlet DE 2515 – State Disability Insurance Provisions, which summarizes the state disability program, at the time of hire. OmniTrans will also provide this pamphlet to any employee who becomes disabled due to pregnancy or who becomes ill, injured, or hospitalized due to causes unrelated to work.~~

~~F. Benefits are not payable if:~~

- ~~1. Employee is eligible for unemployment insurance.~~
- ~~2. Employee left the labor market prior to becoming disabled.~~
- ~~3. Legal custody is the cause of unemployment.~~
- ~~4. Restrictions stated in a court order.~~

IV. Procedure for Paid Family Leave (PFL)

PFL is a state-sponsored insurance program within the SDI program. PFL provides eligible employees paid leave benefits when they miss work to address specified family responsibilities.

A. Beginning ~~July 1, 2004~~ January 1, 2018, employees may be eligible to receive ~~up to up to 55%~~ approximately 60% to 70% of their wages as part of the State Disability Program if they need to take off time from their regular or customary work due to (a) care for a seriously ill child,



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spouse, parent, or domestic partner, or (b) to bond with a new child within one (1) year of birth or placement. A “domestic partner” is defined in Section 297 of the Family Code.

B. Employees are eligible for up to six weeks in a twelve-month period to care for qualified family members as listed above.

C. Like SDI, PFL does not create a right to a leave of absence, but it may provide compensation to eligible employees who are on a medical leave of absence, such as the federal Family Medical Leave Act, California Family Rights Act, California Pregnancy Disability Leave, or California Parental Leave.

D. As with SDI, PFL is administered by the EDD and employees apply directly to the EDD for benefits. The EDD is also responsible for the process of confirming if the absence qualifies for benefits. The EDD can require medical and other documentation in support of the claim. For more information, contact the Employment Development Department at 888-745-3886.

[Wait is the policy for use of sick leave/vacation while an employee is on PFL? This needs to be addressed here.]

PFL is available after a seven day waiting period has been fulfilled. Benefits are not available until the eighth day.

D. Employees will be required to use two weeks of earned, but unused vacation leave prior to receiving PFL benefits, if available. The second week will be counted towards the seven day waiting period.

———— Vacation approved and scheduled, but not used, will be cancelled.

———— If vacation hours are not available, sick hours up to half an employee’s annual accrual of 48 hours allowed under Kin Care will be applied towards the waiting period.

———— If neither vacation or sick hours are available, the seven day waiting period will be unpaid.

———— E. Weekly and maximum benefit amounts of an employee’s claim is based on the Wages earned during a certain base period.

F. Qualifications for PFL payment amounts are established and determined by the State of California when the employee applies for PFL.

———— G. When applicable, PFL leave will run concurrent with FMLA, CFRA, and Kin Care.



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~~H. Benefits are not payable if:~~

~~(1) Employee is eligible or receives unemployment compensation benefits.~~

~~(2) Employee is eligible to receive State Disability Insurance (SDI) under California law or the law of any other state.~~

~~(3) Another family member is able and available for the same period of time the individual is providing required care.~~

~~(4) Employee is receiving other benefits, such as worker's compensation.~~

~~J. Falsification of Medical Conditions. Section 3305 of the Unemployment Insurance Code addresses the consequences of falsification of medical conditions.~~

ITEM # E6

DATE: June 14, 2018

TO: Committee Chair Sam Spagnolo and
Members of the Administrative and Finance Committee

THROUGH: P. Scott Graham, CEO/General Manager

FROM: Eugenia F. Pinheiro, Contracts Manager

SUBJECT: AUTHORIZE AWARD – MNT18-74, JANITORIAL SERVICES

FORM MOTION

Recommend to the Board of Directors to authorize the CEO/General Manager to award Contract MNT18-74 to Commercial Cleaning Systems (CCS), Inc. of Costa Mesa, CA, for the provision of Janitorial Services for a three (3) year base period beginning August 1, 2018 and ending July 31, 2021, with the authority to exercise two (2) single option years ending no later than July 31, 2023, in the amount of \$1,522,088, plus a ten percent contingency of \$152,209, for a total not-to-exceed amount of \$1,674,297, should all options be exercised.

BACKGROUND

Omnitrans requires the services of a firm to provide all equipment, labor and materials to perform janitorial services at the following locations: East Valley (EV), West Valley (WV), San Bernardino Transit Center (SBTC), San Bernardino Downtown Metrolink Station (SBDM) and the Montclair Transportation Center (MTC). Required services include monthly and quarterly floor maintenance (strip, clean, wax and power buff vinyl and tile floor surfaces), quarterly carpet cleaning and vacuuming of upholstered furniture, and semiannual cleaning of interior and exterior windows.

On February 7, 2018, Omnitrans' Board of Directors authorized release of Request for Proposals (RFP) RFP-MNT18-74. Notices were published in two local newspapers of general circulation and posted on Omnitrans' online bidding system.

Five (5) proposals were received by the March 15, 2018 deadline, and all were deemed responsive and evaluated in accordance with the selection criteria included in the RFP. One firm did not advance after the technical evaluation. Scores related to pricing were then added to the technical scores. The four (4) highest-ranked firms were invited to submit Best and Final Offers (BAFOs).

Criteria	Possible Points	Commercial Cleaning Systems, Inc. of Ontario, CA	Jan Point of Santa Fe Springs, CA	Priority Building Services of Brea, CA	Orange County Building Maintenance of Signal Hill, CA	Quinmar Janitorial, Inc. of Highland, CA
Qualifications of Firm	30	24.00	21.75	22.88	20.25	18.38
Quality of Work	25	20.63	20.31	18.75	15.94	15.63
Staffing and Project Organization	25	20.31	16.56	18.44	16.25	14.69
Technical Total	80	64.94	58.62	60.07	52.44	48.69
BAFO Pricing Score	20	13.14	20.00	8.84	9.42	
Final Score	100	78.08	78.62	68.91	61.86	
Final BAFO Pricing		\$1,522,088	\$1,083,769	\$2,299,356	\$2,055,624	

CCS reduced their original proposed price by \$25,071.48. Due to the total price variance of \$438,319 between CCS and Jan Point, staff requested a breakdown of costs from the two highest ranked proposers. Jan Point's BAFO pricing did not include the required janitorial services for the EV location and could not hold their BAFO pricing. CCS ranked highest technically and provided the lowest pricing. Therefore, staff recommends contract award to CCS.

Criteria	Possible Points	Commercial Cleaning Systems, Inc. of Ontario, CA	Priority Building Services of Brea, CA	Orange County Building Maintenance of Signal Hill, CA
Technical Total	80	64.94	60.07	52.44
BAFO Pricing Score	20	20.00	13.24	14.81
Final Score	100	84.94	73.31	67.25
Final BAFO Pricing		\$1,522,088	\$2,299,356	\$2,055,624

The total annual cost per facility is identified below:

	EV	SBTC* (Bus)	SBDM (Metro)	WV	MTC	Total
Base Year 1	\$ 22,279.40	\$ 122,140.54	\$ 14,216.44	\$ 97,068.75	\$ 10,056.30	\$ 265,761.43
Base Year 2	\$ 24,065.43	\$ 131,932.27	\$ 15,356.09	\$ 104,850.54	\$ 10,862.48	\$ 287,066.81
Base Year 3	\$ 25,839.36	\$ 141,657.48	\$ 16,488.13	\$ 112,579.39	\$ 11,663.19	\$ 308,227.55
Option 1	\$ 27,602.28	\$ 151,321.50	\$ 16,488.13	\$ 112,579.39	\$ 11,663.19	\$ 319,654.49
Option 2	\$ 28,618.44	\$ 156,893.10	\$ 18,261.46	\$ 124,687.61	\$ 12,917.60	\$ 341,378.21
Total	\$128,404.91	\$ 703,944.89	\$ 80,810.25	\$ 551,765.68	\$ 57,162.76	\$1,522,088.49

*Pricing includes 13.5 hours of daily porter services.

This procurement meets the requirements of Omnitrans' Procurement Policies and Procedures.

FUNDING SOURCE

The cost associated with this procurement is budgeted in the Maintenance Department's Operating budget as follows:

Department Number	1200
Expenditure Codes	503160

_____ Verification of Funding Sources and Availability of Funds.
(Verified and initialed by Finance)

Short Range Transit Plan/Strategic Initiative Supported - This procurement supports Omnitrans' Short Range Transit Plan FY2015-2020 goal to expand, maintain and improve existing vehicles, facilities and passenger amenities.

CONCLUSION

By proceeding with this award, Omnitrans will continue to have onsite janitorial services.

PSG:EFK:KNT