



**BOARD OF DIRECTORS WORKSHOP  
THURSDAY, FEBRUARY 28, 2013 – 8:00 A.M.  
OMNITRANS METRO FACILITY  
1700 WEST 5<sup>TH</sup> STREET  
SAN BERNARDINO, CA 92411**

The Board of Directors meeting facility is accessible to persons with disabilities. If assistive listening devices or other auxiliary aids or 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 Board 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.

**A. CALL TO ORDER**

**B. 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 Board of Directors, 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.

**C. DISCUSSION ITEMS**

1. Board of Directors 2<sup>nd</sup> Workshop – Creating Omnitrans 2014 Management Plan, Strategic Plan and Short Range Transit Plan
  - FY 2014 Draft Management Plan Outline
  - SWOT Analysis - Board of Directors Workshop of January 15, 2013
  - Graphic Recording – Board of Directors Workshop of January 15, 2013

**D. ADJOURNMENT**

2

**DATE:** February 28, 2013

**TO:** Board Chair Dick Riddell and  
Members of the Omnitrans Board of Directors

**THROUGH:** Milo Victoria, CEO/General Manager

**SUBJECT:** **2<sup>ND</sup> BOARD OF DIRECTOR'S WORKSHOP FOR CREATING  
OMNITRANS 2014 MANAGEMENT PLAN, STRATEGIC PLAN  
AND SRTP**

**SUMMARY**

The 2<sup>nd</sup> Board of Directors Workshop for preparing Omnitrans' Fiscal Year 2014 Management Plan, the 2035 Strategic Plan, and the 2015 – 2020 Short Range Transit Plan (SRTP) is scheduled as follows:

**Thursday, February 28, 2013, 8:00 AM – 12:00 PM**, (starts with a light breakfast and ends with lunch). Location: Omnitrans, 1700 W. Fifth Street, San Bernardino.

Based on the discussion during the 1<sup>st</sup> Board of Directors workshop on January 15 and subsequent discussions with Senior Leadership Team, we have prepared a draft plan – outline to gather further input and direction from you. The attached draft plan – outline is a short-term, results-oriented Management Plan that will maintain Omnitrans' momentum in Fiscal Year 2014 until the completion of the COA and preparation and adoption of our next Strategic Plan (Strategic Network and Policy Plan) and the Short Range Transit Plan.

The draft plan - outline describes our highest-priority planning and projects. The Omnitrans Board has been or will be considering major decisions about most of these plans and projects in the coming year.

As explained in the attached draft plan – outline, some of the major questions facing Omnitrans today cannot be answered by consultants or by technical analysis. They are questions about values and priorities to which there are no ideal answers. Our community's values, expressed through the elected leaders on the Omnitrans and SANBAG Boards, can and should form the basis for transportation planning in the San Bernardino Valley.

The Board discussed and addressed some of the most urgent questions at the January workshop. Other questions have arisen more recently and are described below as proposals for Board consideration. Still others are best answered as part of next year's

Strategic and Short Range planning efforts, and will guide the agency for the following twenty years and six years respectively.

This Plan does not respond to the recommendations of the recently-completed Comprehensive Operational Analysis (COA) Phase I & II report, which is currently being reviewed and refined by a specially appointed staff working group and the Board ad-hoc committee.

The Omnitrans management team is committed to providing the highest quality transit service in a safe and cost effective manner. We rely on the Board to set high-level values and make major decisions for the agency. This Management Plan is our proposal to the Board and our request for guidance for Fiscal Year 2014.

At the workshop, staff will present the attached draft plan – outline. Again, this workshop is an opportunity to discuss the big questions and for Board Members to give guidance that will make our plans more rigorous and defensible. Your participation is extremely important and thank you for your time.

### **Agenda**

1. Review the discussion from January 15 Board Workshop
2. Board of Director's emerging vision
3. Affirm or refine Omnitrans':
  - a. Allocation of resources between the productivity goal and the coverage goal for 2014.
  - b. Improve Omnitrans' on-time performance standards.
  - c. Evaluate the relative priority of transportation investments.
  - d. Decide whether to seek an expanded role for Omnitrans in other aspects of alternative transportation.
4. Affirm Board's policy guidance on:
  - a. Preparing the FY 2014 Management Plan (Management, Service, Budget and Marketing Elements)
  - b. 2035 Strategic Plan, and
  - c. 2015 – 2020 Short Range Transit Plan
5. Affirm Omnitrans' Management Goals for FY 2014
6. Board's input on the Workshop
7. Next steps
8. Lunch



# **FY 2014 DRAFT MANAGEMENT PLAN OUTLINE**

**WORKING DRAFT – FOR DISCUSSION DURING THE 2<sup>ND</sup> BOARD OF  
DIRECTOR’S WORKSHOP ON FEBRUARY 28, 2013**

**NOT FOR CIRCULATION**

Prepared: February 21, 2013



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## **LETTER FROM THE CEO**

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## **OUR MISSION**

To provide the San Bernardino Valley with comprehensive public mass transportation services which maximize customer use, comfort, safety and satisfaction, while efficiently using financial and other resources, in an environmentally sensitive manner.

## **SHARED VALUES & PRINCIPLES**

Our institutional values define how we approach our work. These shared values help determine appropriate behavior and guide complex decision-making. Taken together, they create an overall operating philosophy-the operating principles. They complement the mission by explaining how we will go about implementing the mission.

### **Shared Values**

- |                        |                                     |
|------------------------|-------------------------------------|
| 1. Integrity           | 7. Contribution to the Greater Good |
| 2. Trust               | 8. Honesty                          |
| 3. Loyalty             | 9. Community                        |
| 4. Family              | 10. Health                          |
| 5. Learning and Growth | 11. Treat Others with Dignity       |
| 6. Ethics              | 12. Have Fun                        |

### **Shared Principles**

1. Take responsibility for our own actions
2. Conduct all activities to develop and implement the highest degree of honesty, integrity and consistency
3. Expect everyone to treat others with dignity and respect
4. Consistently display the highest level of ethical behavior
5. View all actions in relation to their contribution to the greater good
6. Create a pleasant atmosphere, which promotes learning, growth and fun
7. Recognize responsibility to community and family
8. Quickly take action to correct problems and prevent them from recurring
9. Promote a positive, safe, and healthy work environment
10. Promote personal health and wellness
11. Make effective use of resources

## SUMMARY

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In the next year, the Omnitrans Board will need to address the following issues:

- The recent Comprehensive Operational Analysis (COA) of Omnitrans, which proposes (Phase I & II report, January 11, 2013) a major funding deficit to Omnitrans service, which requires an Omnitrans response and action plan.
- Continued growth in ridership.
- Ongoing growth and demographic shifts in the service area population and workforce.

These issues will raise choices that must express the Board's values and long-term goals for the San Bernardino Valley, such as:

- The overall level of service quantity and quality that Omnitrans should aim for.
- The relative importance of ridership goals as opposed to coverage goals.
- The travel markets for which Omnitrans wishes to compete.
- The role of connections in the network, and the level of investment in developing connection points and protecting timed connections.

These choices should not be decided by staff or by consultants, nor ad-hoc as they arise, but rather in the context of a longer-term plan that can be implemented consistently and equitably to San Bernardino Valley's communities. In that context, the future implications of these decisions can be made clear and agreed to by the Board. The appropriate forum for most of these choices lies in two planning tasks:

- The 2035 Strategic Plan (Strategic Transit Network and Policy Plan) which looks further into the future, and which articulates key policies that will guide Omnitrans, in the scale, design, presentation, and monitoring of its service offering.
- The FY 2015 – 2020 Short Range Transportation Plan (SRTP) which guides the agency for six years.

Preparing the Strategic Plan and the Short-Range Transit Plans is Goal 4 of the Management Element.

The Comprehensive Operational Analysis (COA) to be completed should be a useful source material for this effort, but it did not consistently apply the Board's policies and priorities to its recommendations, made numerous questionable assumptions, and did not provide a well-justified and logical transit network plan. As a result, it does not provide the analysis or planning work needed to guide Omnitrans into the future. However, some of data collected by the COA will be a good resource for Omnitrans staff and Board in their work on the Strategic and Short-Range Transit Plans. While the Board ad-hoc committee oversees the completion of the COA, this

ongoing dialogue with the Board of Directors will help staff prepare the necessary analysis to successfully implement some of the recommendations of the COA.

To this end, the following Board actions are proposed.

1. **Extend the current Short Range Transit Plan so that Omnitrans can continue to use Federal Transit Administration (FTA) funds.** The current SRTP expires on June 30, 2013. An amendment to the plan that extends it for one more year will allow Omnitrans to continue investing FTA funds, while writing the new Short Range Transit Plan described above.
2. **Program a Strategic Plan (2035) and Short Range Transit Plan (FY 2015-2020) for completion during FY 2014.**

In addition, we recommend that the Board consider the following issues in the coming year to provide clearer values-based guidance on service development and priorities. Decisions on these issues will be an important dimension of the Strategic Plan completed during this year.

1. **Affirm or refine Omnitrans' allocation of resources between the productivity goal and the coverage goal for 2014.** In the past, the Omnitrans Board has set a policy of devoting at least 65% of agency resources to services designed to maximize productivity (ridership/service cost). The remaining 35% of resources are devoted to predictably low-productivity service that provides basic access to areas that would otherwise not have transit at all.

These two competing goals are called the Productivity Goal and the Coverage Goal, respectively. The Productivity Goal leads to intense service in areas of high demand, typically direct links between major destinations through areas with higher density. The Coverage goal justifies services in low density areas where ridership is predictably low. The two goals reflect two different purposes of transit, so the balance between them is a value judgment. For this reason, the Board adopted a percentage split of resources between these two goals and is asked to affirm or refine it.

2. **Improve Omnitrans' on-time performance standards.** In the recent COA and in Omnitrans operations today, on-time performance is measured using an outdated measurement ill-suited to this transit system. Recently, the TDA (Transportation Development Act) triennial audit proposed lowering Omnitrans' on-time performance standard.

Instead, we propose to make our on-time performance standard more precisely reflective of the customer experience of reliability. To this end, for reasons explained in detail on page 12, we propose the following course of action for FY 2014:

- a. Maintain Omnitrans' (90%) standard for on-time performance, given how integral reliability is to the usefulness and appeal of any transportation mode.
- b. Enhance Omnitrans' on-time performance measurement by measuring reliability at timed transfer points (where a small delay can become a catastrophic delay if it results in a missed transfer).
- c. Enhance Omnitrans' on-time performance measurement by measuring reliability of headway on frequent service lines.

The new measurement processes will be used for information, and as a basis for a proposed standard for the reliability of timed connections and frequent headways. These decisions will guide the type of analysis that should be conducted and the preparation of the SRTP.

3. **Evaluate the relative priority of transportation investments.** Boards of Omnitrans and SANBAG should evaluate the current funding priority order, which funds bus transit last, in light of high and growing bus ridership in the San Bernardino Valley and the need for transit services at various levels to work together.

Pursuant to Public Utilities Code ("PUC") Section 99233<sup>1</sup> SANBAG allocates funds to eligible projects. The current prioritization order applied to the San Bernardino Valley reflects the following:

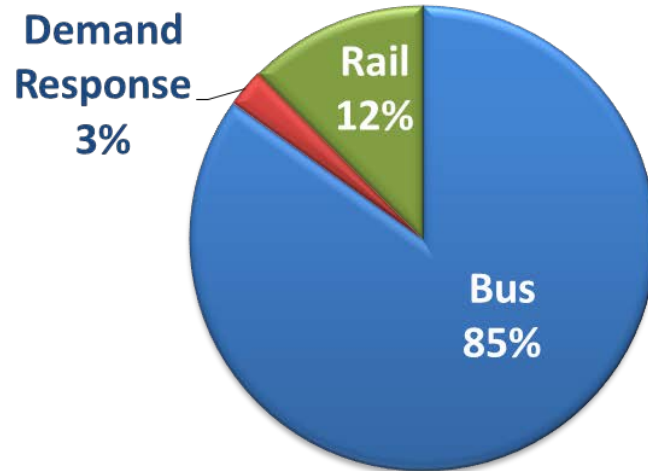
1. Administration
2. Planning and programming
3. Pedestrian and bicycle projects
4. Passenger rail projects (Metrolink, Redlands Rail, other regional rail activities)
5. Consolidated Transportation Service Agency (VTrans)
6. Transit Operations (Omnitrans)

While all of these are important areas of investment, consigning Omnitrans service to last priority risks choking off the portion of the San Bernardino Valley's high performance transit network that is currently achieving the most, in terms of ridership and also in terms of mobility goals.

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<sup>1</sup> Pursuant to Public Utilities Code ("PUC") Section 99233, the LTF (Local Transportation Funds) shall be allocated by the designated transportation planning agency ("TPA") for the purposes specified in PUC sections 99233.1 to 99233.9, inclusive, in the sequence provided in those sections. San Bernardino Associated Governments ("SANBAG") is the TPA and the county transportation commission for San Bernardino County.

## FY2011 San Bernardino Valley Public Transportation by Mode (17.2 Million Trips)



#### 4. **Decide whether to seek an expanded role for Omnitrans in other aspects of alternative transportation.**

The San Bernardino Valley needs leadership on non-motorized transportation (pedestrians, bicycles, etc) and other shared-vehicle modes (carpool/van pools, car sharing, etc.). Related to this topic, the following two questions were raised by Board members during the workshop: Should Omnitrans expand its mission to embrace these areas? Should the governance structure of Omnitrans be changed to better meet the mobility challenges of San Bernardino Valley?

In many places comparable to the San Bernardino Valley, transit agencies grow beyond their founding mission to provide leadership, if not direct services, in multi-modal and non-motorized transportation (such as walking, bicycling, carpooling and vanpooling). In other places, that leadership comes from the regional, county or city governments. As the Board begins work on the next Strategic Plan for Omnitrans, it should consider whether Omnitrans has a role to play in multi-modal and non-motorized transportation.

This decision is not an easy one. Agencies whose missions grow too diverse often have trouble focusing on each part of their mission, and especially on the transit element which is likely to still dominate the budget. Omnitrans must also avoid the appearance of simply expanding its “turf” for its own sake, but must instead be able to argue that it is ideally positioned to take on whatever new roles it proposes to assume, and that delegating those roles to Omnitrans will **deliver**

**best value for the customer and taxpayer.**

**5. Review the 1976 goals of the agency.**

The 1976 goals statement on which the agency was founded assigns the agency a narrow role of serving the transit dependent, and particularly seniors and the disabled. This description may no longer be appropriate to the more complex demands arising today, nor does it capture the fact that transit dependence is a matter of degree, as discussed on page 10, below.).

The remainder of this summary reviews recent events in the context of changing demands, and makes the case for the need to focus and make decisions on the areas listed above.



## **Comprehensive Operational Analysis (COA)**

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The Comprehensive Operational Analysis (COA) is scheduled to be completed by May 2013. This COA focuses on a financial analysis of the agency and on route-by-route data analysis, both of which will be useful as the Omnitrans Board takes its next steps in short- and long-range planning.

The policy direction received from the Board of Directors will help staff prepare the:

- policies and priorities;
- the role and reliability of timed connections in the Omnitrans transit network;
- the resources and strategies it requires; and
- analyze the consequences of potential service cuts and the impact on passengers, employers, local governments, and Omnitrans' bottom line.

The Board ad-hoc committee is overseeing the conclusion of the COA, the preparation of the final COA report and the transit service recommendations for the San Bernardino Valley.

## **Changing Goals for a Changing Valley?**

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The Fiscal Year 2014 Management Plan is written in the context of a changing San Bernardino Valley. Some of the major changes seen in San Bernardino Valley development, transit demand and transit operations are:

1. Demand for intra-San Bernardino Valley transit services is growing, due to infill development, discontinuation of school bus services, and the rising costs of automobile ownership and fuel.
2. Some downtowns are redeveloping as the young and elderly move back to them, in part because they value walkable communities and transit that can meet some of their travel needs. These styles of redevelopment and infill-development make transit more viable and have the potential to build and diversify Omnitrans' ridership, but only if the agency can respond with appropriate service and infrastructure.
3. Local economic development is increasingly understood to depend on reliable and affordable transportation within the San Bernardino Valley, among residential, employment, commercial and educational centers.
4. Intermodal transit connections within the San Bernardino Valley are now understood to be vital to making the transportation system work efficiently. While the Redlands Rail project should not have been placed in conflict with Omnitrans for funding, the increasing interest in rail projects in general signals

an increase in overall support for transit that will inevitably lead to an increased demand for bus services as well.

5. State policy is increasingly concerned with the alignment of transport investments with land use planning. Senate Bill 375, for example, mandates increased integration in the planning of transportation and land use, due to the proven effectiveness of such “sustainable communities planning” in achieving large scale results for mode share and carbon emissions. High frequency bus services, such as the planned sbX system, can contribute to the viability of land use outcomes at an appropriate scale.

Given these trends, it may be appropriate to review the 1976 Goals that were adopted at the founding of Omnitrans. These are as follows:

1. To provide mobility for transit-dependent persons, whereby first priority is given to the...
2. To provide transportation for and equality of service to, elderly and handicapped persons...
3. To provide mass transportation services to all groups, including choice riders...

It may be appropriate to revise these goals in light of the trends outlined above. In particular, the implied division of the population into “transit dependent” and “choice” riders is too rigid. In reality, people are in a range of situations on a spectrum between the extremes of “dependent” and “choice.” For example, a lower-income family may feel constrained to own a car for every adult because of lack of transit options, but if transit enabled them to own fewer cars, they might experience that as opportunity as financially liberating. It is not irrational, in these situations, to *choose to be transit dependent*, and a more subtle statement of goals, one that reconsiders the possibility of greater relevance to riders to have options, may be worth considering by the Board.

Staff will develop a goal statement to more accurately reflect the Board’s vision for transit in the San Bernardino Valley.

## **Board's Emerging Vision for Transit in the San Bernardino Valley: A Values-Based, Customer-Based Transit System**

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Evaluating and reimagining the San Bernardino Valley's transit system must start with the Board's vision and values. The Strategic and Short-Range Transit Plan provide an excellent opportunity for the Board's vision and values to lead the agency and the San Bernardino Valley.

At the January 2013 workshop, the Omnitrans Board discussed its vision for transit. Among the vision statements captured at the workshop were many that could form the basis of a principled, sophisticated reimagining of the San Bernardino Valley's transit network, such as:

1. The San Bernardino Valley's transit system **supports the local economy**
2. Omnitrans service **is reliable**
3. Customers have a **high-quality experience** using Omnitrans
4. Omnitrans **maximizes value to the community** with every transit dollar available.

To develop this vision, staff encourages the Board to adopt more specific goals and policies, such as those suggested above. The proposed Strategic Plan (Strategic Network and Policy Plan), to be completed in FY 2014 (Goal 4), will provide a framework for further analysis of strong policy choices that the Board can make. The following are some of the key issues to be addressed, both now and through the Strategic Plan.

### *Focusing on the Customer: Reliability and Connections*

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For example, a transit service plan that started with the vision of providing **reliable service** and a **high-quality experience** would consider the following:

1. As of 2011, 64% of trips on Omnitrans involved a transfer.<sup>2</sup> For most riders, then, what matters is not just the reliability of individual transit routes but also the reliability of connections between them. It is only through attractive and reliable connections that Omnitrans can offer access from a wide range of residential areas to an equally widely dispersed set of destinations and activity centers.

Any service analysis must consider the impact of service changes on travel time, reliability and customer experience for trips that involve connections. (In the recent COA the reliability of each route is measured as though it were an

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<sup>2</sup> The 2011 *Attitude and Awareness Survey* was based on statistically-valid phone interviews of riders and non-riders.

individual, isolated product, and frequency cuts are proposed without analysis of how these would affect connections.)

2. An analysis of reliability should specifically examine *timed* connections.<sup>3</sup> Where a timed connection is intended in the schedule between two infrequent routes, analysts can compare the actual arrival and departure times of buses to determine how often the departing bus left before the arriving bus arrived. (Timed connections are critical where routes are infrequent, such as every 30 or 60 minutes, because without them waiting times for a connection would make reasonable travel times impossible. Reliability of timed connections were not evaluated in the COA.)
3. An analysis of On-Time Performance (OTP) and lateness should measure their impact on *riders* as well as on *vehicles*. For example, a full bus running late at 8:00 am on a weekday has a bigger (negative) impact on riders than a nearly-empty bus running late at 10:00 pm. A rigorous analysis would reflect the difference between these two buses. (With an old-fashioned OTP indicator, like that used in the COA, these two late buses count the same. This is an outdated practice ill-suited to the Omnitrans network, and tells us little about the real reliability of Omnitrans service as customers experience it.)
4. A network of frequent bus routes (running every 15 minutes or better) provides the backbone of the Omnitrans system. Reliability of these routes is most thoroughly understood if we evaluate not just on-time performance but also *reliability of frequency*.

To measure reliability of frequency, we ask not just "Were the buses on time?" but also "Were the buses consistently spaced at 15 minutes?"<sup>4</sup> At high frequencies, the reliability of frequency matters more than On-Time Performance, because customers start using the service without consulting a timetable. They just go to the stop and know a bus will be along soon. Because frequency is so integral to reliability, customer experience and overall travel time, Omnitrans should rigorously study how well it is delivering on that promise. (Reliability of frequency was not evaluated in the COA.)

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<sup>3</sup> At a timed connection, buses from multiple routes arrive at a transfer point at the same time, so that riders may transfer among them. Because timed connections are often used on routes with low frequencies (every 30 or 60 minutes) a missed timed connection can be disastrous for riders.

<sup>4</sup> To understand this very simply: If a route runs every 15 minutes and all buses on the route are 15 minutes late, that would mean that on-time performance is 0% and yet the service would be just fine; in fact, no customer would notice that anything was wrong. On the other hand, if just one bus is 5 minutes late and all other buses are on time, then the maximum waiting time has gone up by 33%.

## *Telling the Story: How Transit Services the Economy*

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A transit plan that prioritized **supporting the local economy** must consider the following:

1. Public transit of a certain quality causes *voluntary* transit dependence. A family that can sell a car may be able to send a kid to a college as a result. A couple that can get by with one car can invest in a nicer house in an urban area. A teenager who can ride the bus to school relieves his parents of a double-commute. These people's transit "dependence" is a good thing for the Valley, but they are only "dependent" if the transit service is reliable and of a high enough quality.
2. When transit service is reliable not just day-by-day, but also *over many years*, it supports strategic investments by employers, developers and cities. These investments can leverage the reliable presence of transit service *and* the adjacent investments of other parties.

When the backbone of the transit network is well-planned and its funding is stable, local cities can plan adjacent land uses; developers can make nearby investments; and employers know where to expand or relocate to take advantage of transit service. A transit system that is stable over time supports investment in the economy through smart land use and development.

3. A transit system that prioritizes the local economy bases investment decisions on current demand, future growth and concentrations of employment. Productive routes get additional investment to maintain their reliability as they attract even more riders. Span of service (how early and late a service runs) is given appropriate weight when it serves workers who don't make 9-to-5 commutes. (In the COA, major employment and activity centers were ignored, some of the most productive transit services were cut, and span-of-service throughout the day was treated as an unimportant "detail.")

## *Maximizing the Value of Every Dollar*

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A transit service plan that prioritized **maximizing value with every transit dollar** must begin with the following considerations:

1. The goal of maximum productivity and the goal of providing some service to everyone ("coverage") are always in tension, if not in conflict. The Board has, in the past, established that 65% of resources should go to productive services and 35% to coverage services, and that new revenues should be used to enhance the productivity of the system. (The COA proposed to cut productive services, after failing to diagnose their chronic lateness as caused in part by over-crowding and their growing ridership. The COA also proposed additional coverage service above the level set by the Board, while faulting the low

ridership of “coverage” services as though it were not an intrinsic feature of “coverage” services.)

2. Transit services are most efficient when they serve high-density residential and employment areas. Transit planners and land use planners can work cooperatively and iteratively, bouncing transit network and land use maps back and forth repeatedly until their respective plans maximize transit productivity and mobility for residents and workers.
3. Adding frequency to an already-productive bus line is one of the most efficient ways to meet environmental goals, improve reliability and provide a higher-quality experience for riders. Frequent services justify the cost of their investment because so many people ride them that, even weighed against the higher cost of running more buses more frequently, they are still highly productive.<sup>5</sup>
4. In Omnitrans system, one of the most efficient ways to use new revenues is likely to be increasing the frequency of already-productive services. (In contrast, the COA proposed cuts to some of Omnitrans most frequent and productive services.)

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<sup>5</sup> For example, Route 2 (Cal State-Loma Linda) runs every 15 minutes, and carries 34.8 passengers per revenue hour. Route 5 (San Bernardino – Del Rosa – Cal State) runs half as frequently – every 30 minutes – and carries 30 plus passengers per revenue hour. This despite the fact that Route 2 has *many more revenue hours* over which its ridership is divided in the productivity calculation. Frequency is so attractive that the difference in ridership *exceeds the difference in service*.

## **Next Steps: A Strategic Network and Policy Plan**

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With rising ridership and farebox recovery, and local and other revenues, Omnitrans has a rare opportunity to build on success and make strategic, smart investments for the future. The Board's vision is the place to start that process, and the process should include a sophisticated analysis of the data collected by the COA.

The 2035 Strategic Plan (Strategic Network and Policy Plan) and the SRTP is essential to realizing Board vision for transit in the San Bernardino Valley. A suggested scope for the plan is addressed under Goal 4 of the Management Plan below.

## **CHAPTER 1: MANAGEMENT ELEMENT**

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Within the context described above, the Senior Leadership Team has identified 11 key goals to accomplish in FY 2014, and the people who will lead those tasks.

The leadership team also reviewed Omnitrans' 2008 Strategic Short Range Transit Plans, the County/SANBAG Vision, the Draft Regional Transportation Plan & Sustainable Communities Strategy, the Statewide Transit Strategic Plan, the Federal Transit Administration's Strategic Plan, customer and stakeholder input, and numerous regulations and initiatives that call for action.

Coupled with the findings of the SWOT analysis and review of Omnitrans' Mission, Core Values and Principles, staff identified those goals that are strategic in nature and require special attention. These are critical issues, opportunities, and challenges facing Omnitrans and are above and beyond the day-to-day operational and management goals.

Upon approval of the FY 2014 Management Plan, the teams assigned to each goal will develop detailed Action Plans that will consist of a detailed scope, schedule, resources and a Project Management Plan (who, when, how, what, etc.)

The task leaders named below will regularly update the CEO/General Manager and will report each quarter to the Board of Directors. The Board committees responsible for various functional areas will provide policy guidance and oversight.

### **FY 2014 Management Goals**

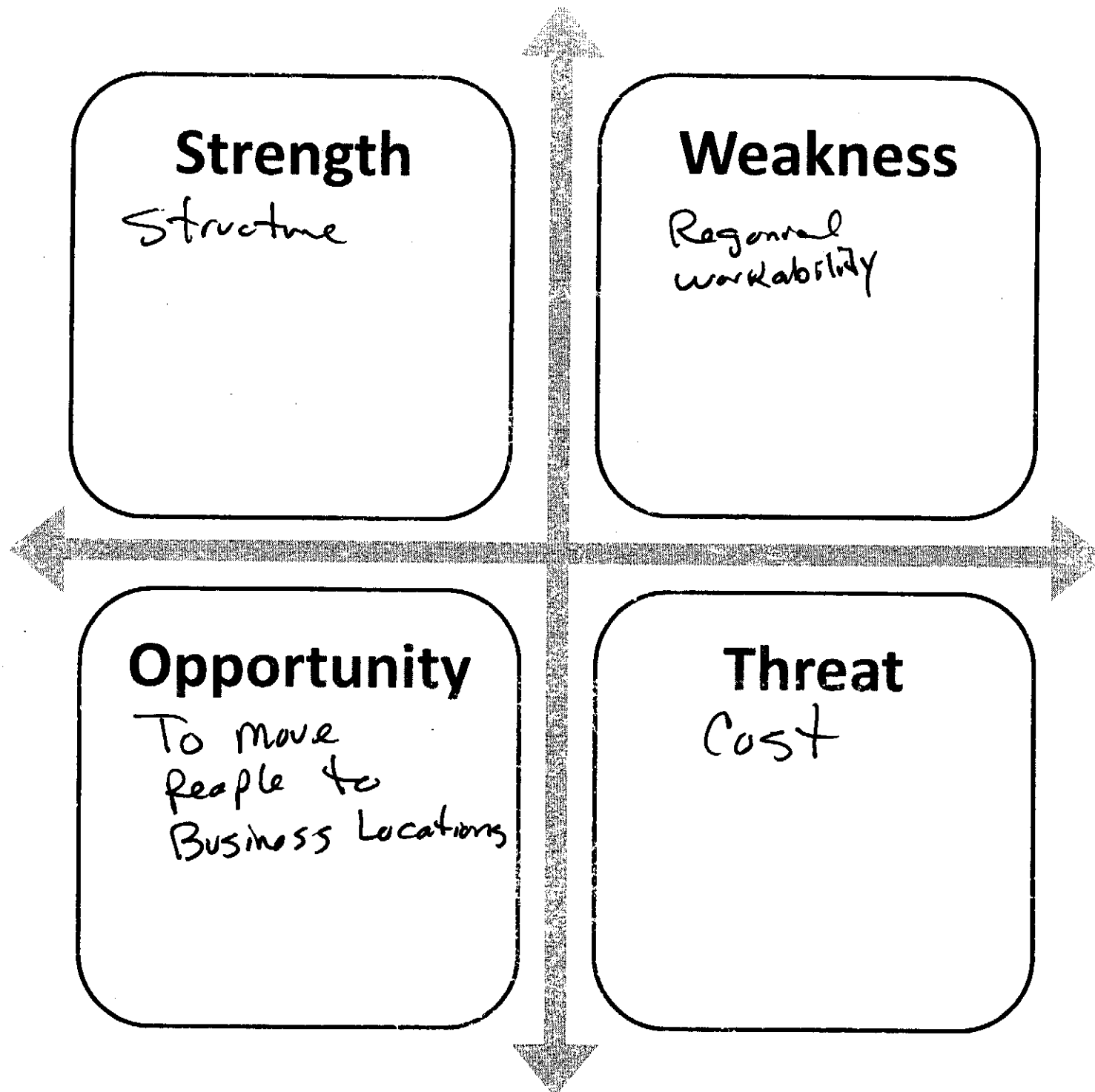
1. Complete the E Street sbX construction & Grand Opening Plan – Milind Joshi, Director of IPMO
2. Prepare the E Street sbX Service: Operations, Management and Marketing Plan – Scott Graham, Director of Operations
3. Complete the Comprehensive Operational Analysis (COA) – Milo Victoria, CEO/GM of Omnitrans and Ray Wolfe, Executive Director of SANBAG
4. Prepare the 2015-2020 Strategic Plan and Short Range Transit Plan (S RTP) – the implementation plan of the COA recommendations – Rohan Kuruppu, Director of Planning & Development Services
5. Bus Arrival Prediction Information System Phase II: Install information displays at major Transcenters/Stations. – William Tsuei, Director of IT
6. Build a strategic partnership between Omnitrans and SANBAG - Milo Victoria, CEO/GM of Omnitrans and Ray Wolfe, Executive Director of SANBAG

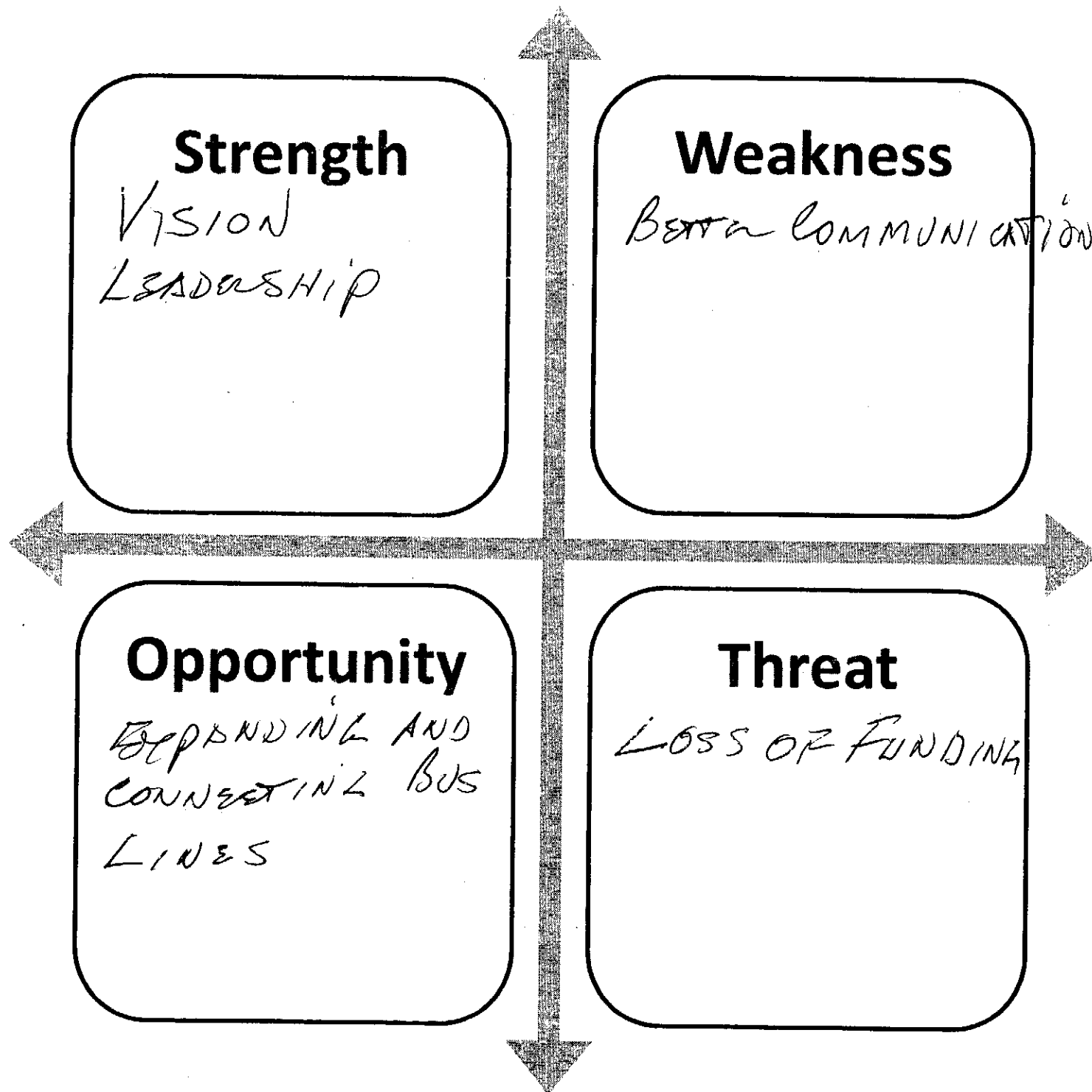


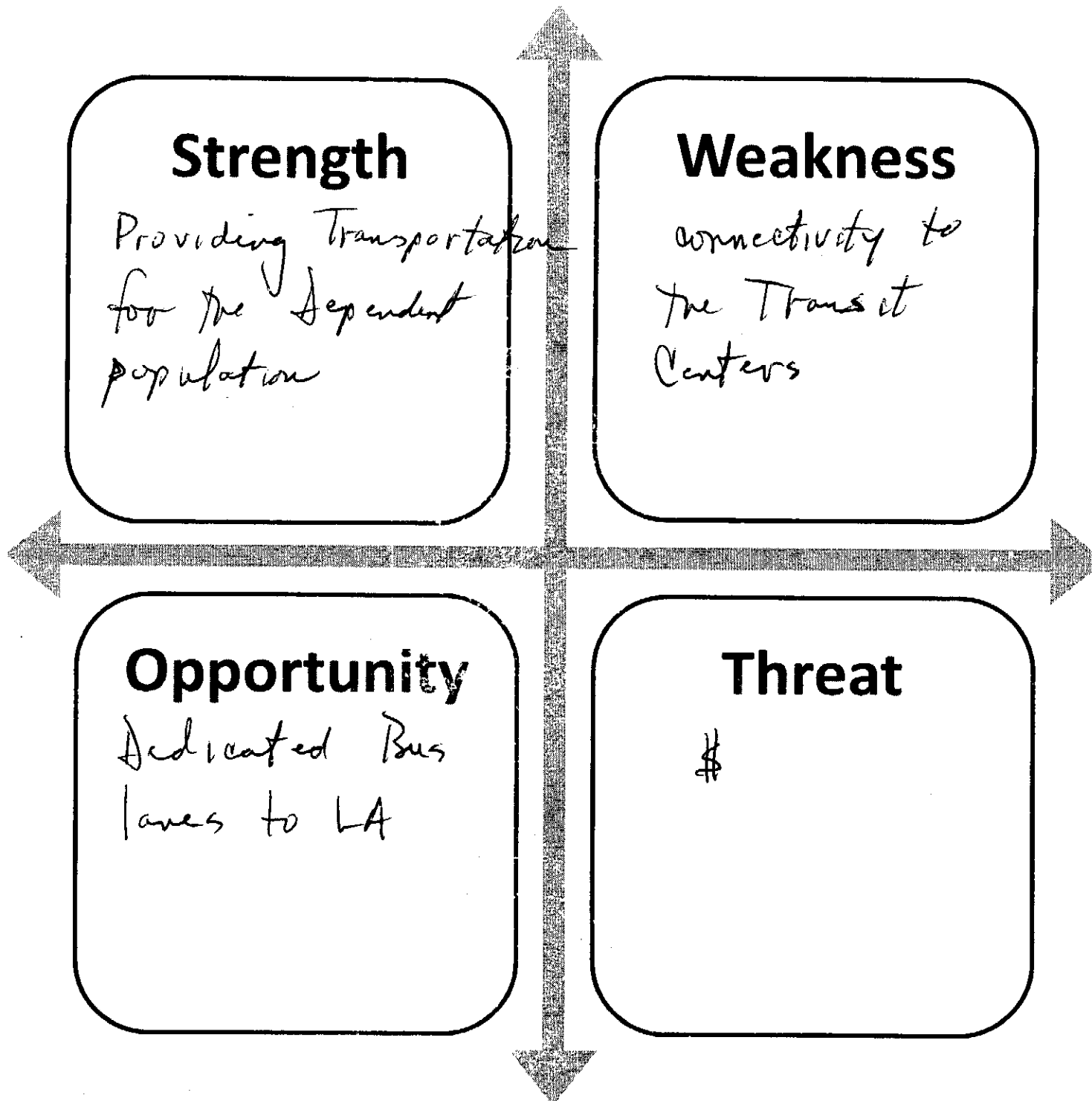
7. Create an innovative financing strategy and partnership-policy and structure – Robert Miller, CFO
8. Update Omnitrans 2020 Employee Development Program – Marjorie Ewing, Director of HR
9. sbX Bus Rapid Transit (BRT) Program – Rohan Kuruppu, Director of Planning & Development Services
  - a. Complete Holt Boulevard corridor project Alternatives Analysis (AA) study
  - b. Participate in City of Rancho Cucamonga/SCAG BRT Study
  - c. Participate in SCAG/SANBAG Foothill Corridor BRT Study
  - d. Conduct E Street sbX Service After Study
10. Explore fare collection technologies to meet customer needs, reduce dwell time and administrative and maintenance costs – William Tsuei, Director of IT
11. Explore ITS solutions to manage operations – Scott Graham, Director of Operations

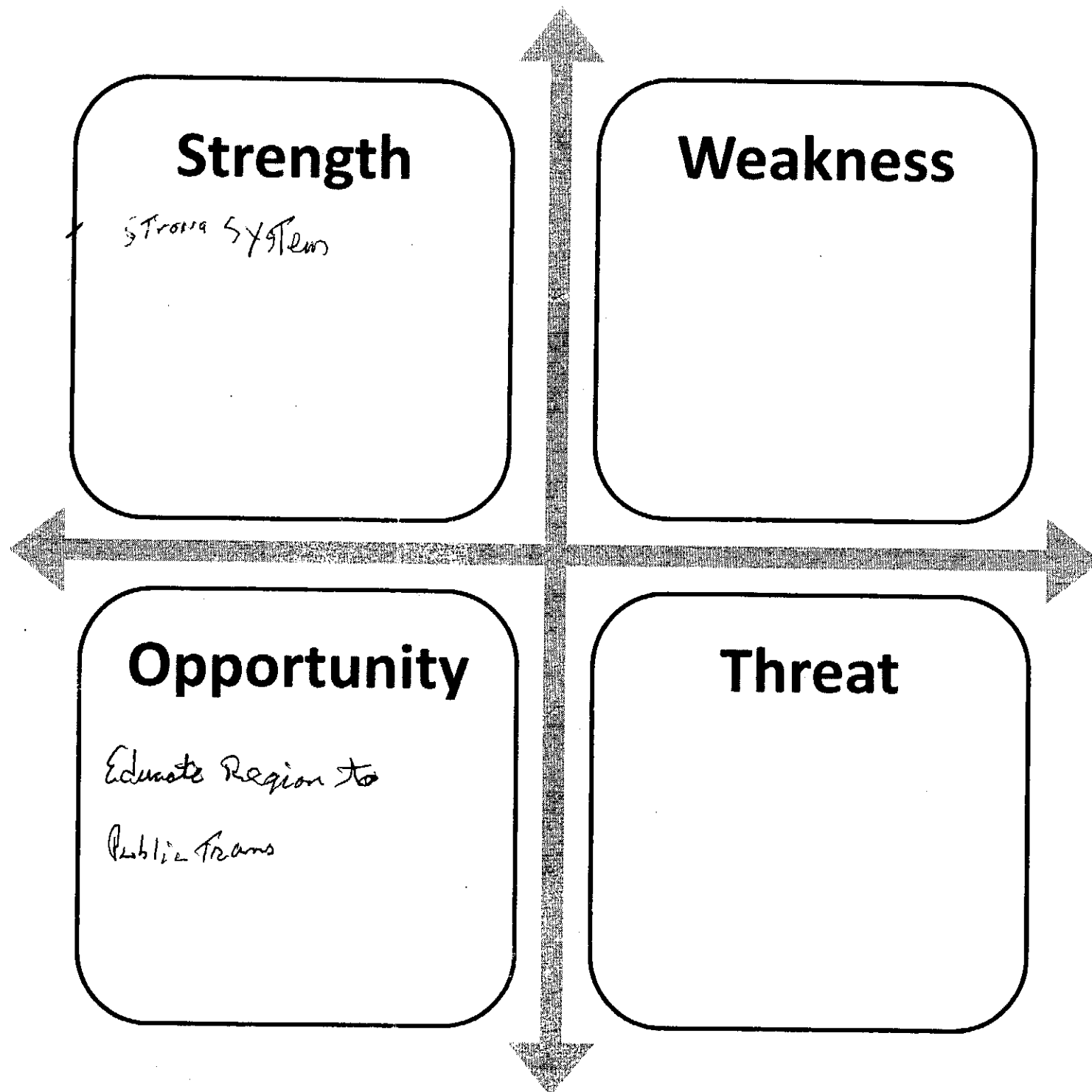
**Board of Directors Workshop SWOT Analysis – January 15, 2013 (verbatim)**

<p><b>Strengths</b></p> <ol style="list-style-type: none"> <li>1. Happy Customers</li> <li>2. Well run agency with eye on the future</li> <li>3. Spirit of collegiality &amp; collaboration in organization</li> <li>4. Track record of success &amp; great board</li> <li>5. Outside reputation</li> <li>6. Staff</li> <li>7. Good organization working together with communities</li> <li>8. Strong system</li> <li>9. Providing transportation for the dependent population</li> <li>10. Vision /leadership</li> <li>11. Structure</li> <li>12. People (leadership)</li> <li>13. Clean fleet</li> </ol>	<p><b>Weaknesses</b></p> <ol style="list-style-type: none"> <li>1. Funding</li> <li>2. Driver attendance</li> <li>3. Lack of communication/planning with SANBAG</li> <li>4. Planning not well integrated with other transit organizations</li> <li>5. Needs more flexibility</li> <li>6. Not integrated with other transportation agencies</li> <li>7. Funding</li> <li>8. Money management</li> <li>9. Connectivity to the Transit Centers</li> <li>10. Better communication</li> <li>11. Regional workability</li> <li>12. Weird funding</li> <li>13. Connectivity</li> </ol>
<p><b>Threats</b></p> <ol style="list-style-type: none"> <li>1. People not attracted to buses</li> <li>2. Funding</li> <li>3. Sufficient resources to carry out our vision</li> <li>4. Limited funding &amp; competing with rail</li> <li>5. Not sure</li> <li>6. Perception that our area is second class</li> <li>7. Cars</li> <li>8. \$</li> <li>9. Loss of funding</li> <li>10. Cost</li> <li>11. Future financial</li> <li>12. Funding dependency</li> </ol>	<p><b>Opportunities</b></p> <ol style="list-style-type: none"> <li>1. Improved communication w/SANBAG</li> <li>2. Fully integrated public transit system connecting our valley and all of So. Cal.</li> <li>3. Transportation needs create a potential for integration</li> <li>4. Economics creates prospects</li> <li>5. Use past successes to bring other agencies together</li> <li>6. Reduced capacity for cars</li> <li>7. Expand to modernize forms of transportation-lessen traffic congestion</li> <li>8. Educate region to public trans</li> <li>9. Dedicated bus lanes to LA</li> <li>10. Expanding and connecting bus lines</li> <li>11. To move people to business locations</li> <li>12. Rethink how service is delivered</li> <li>13. sbX</li> </ol>

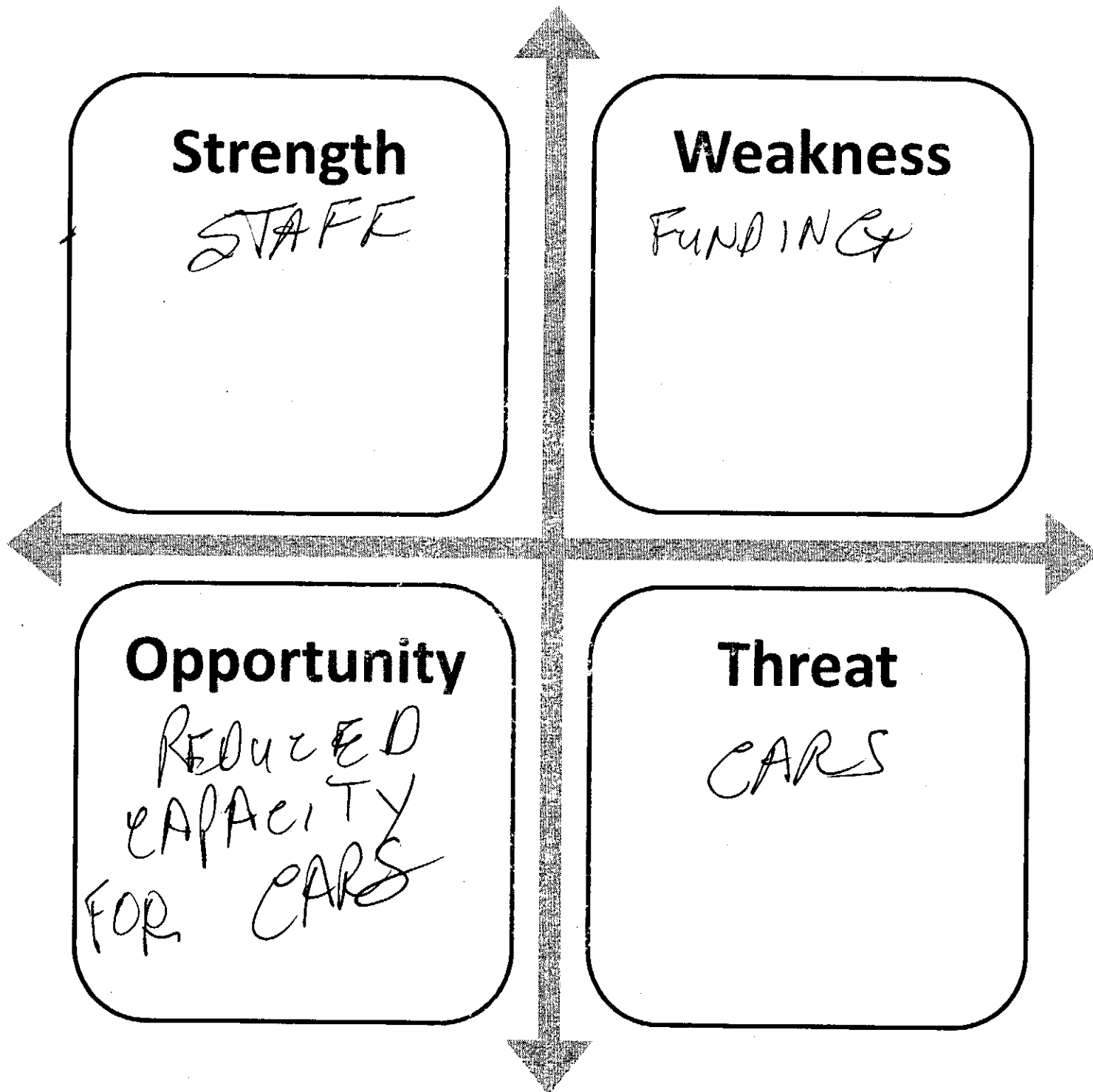




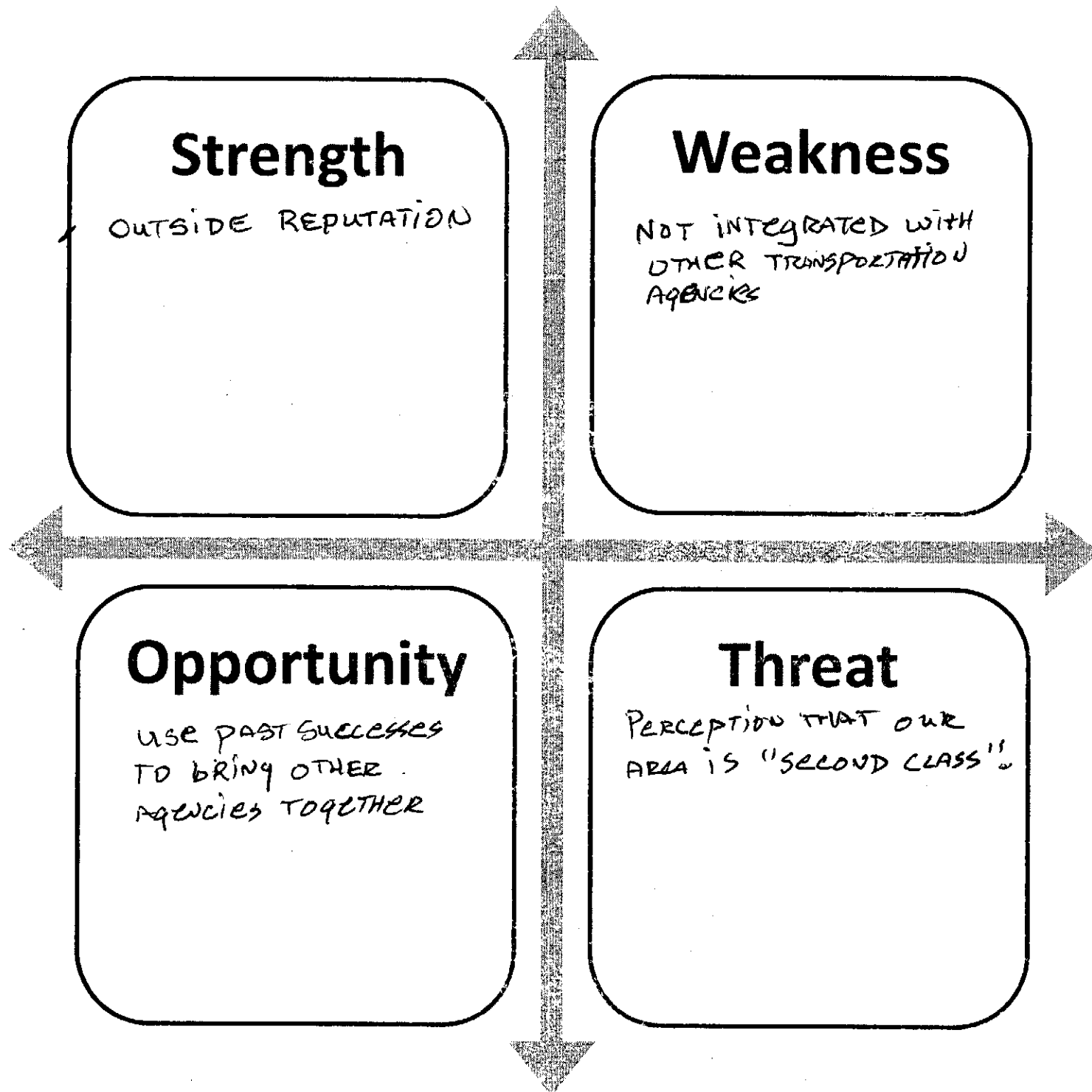


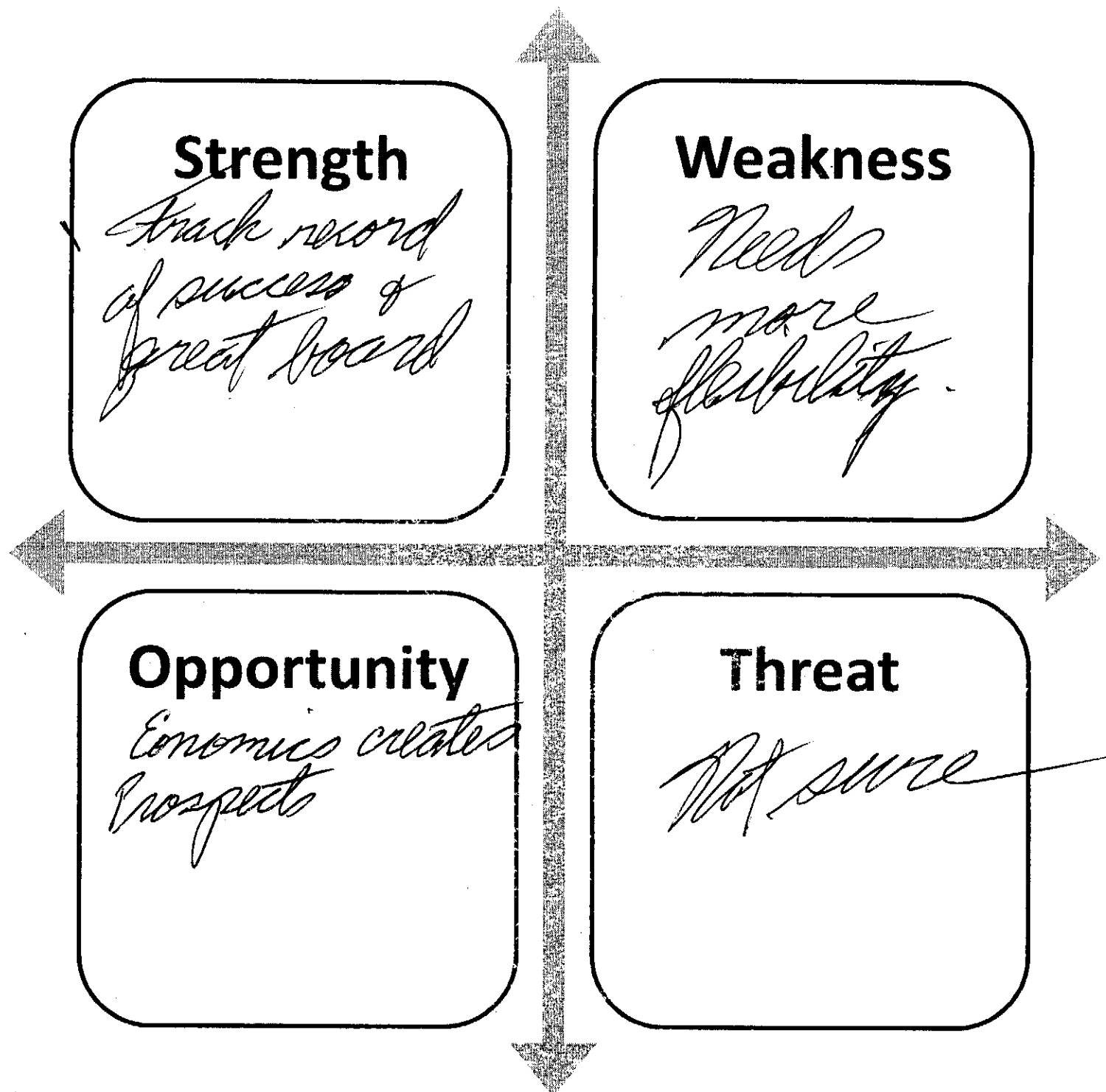


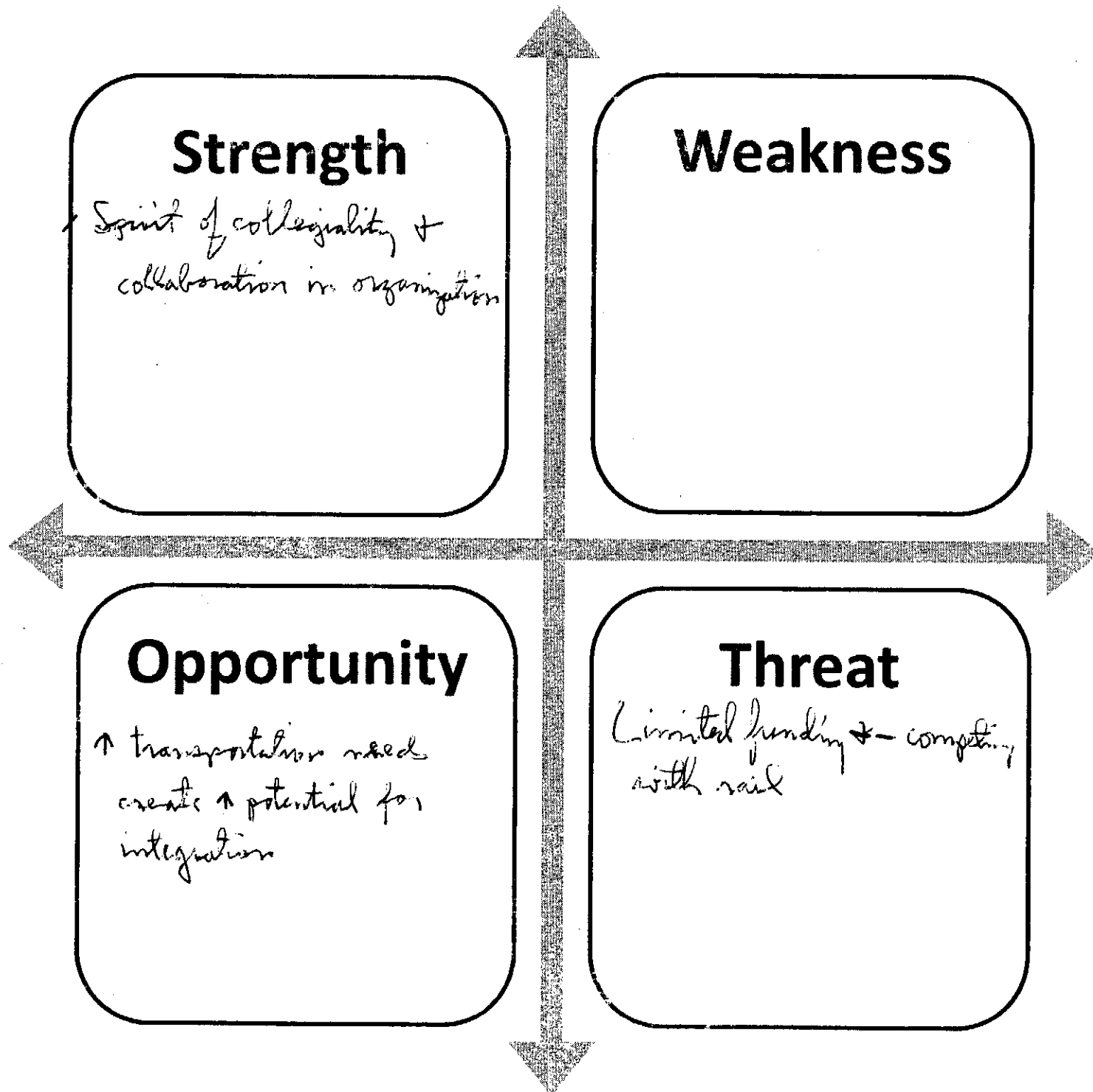












## Strength

well run agency  
with eye on the  
future

## Weakness

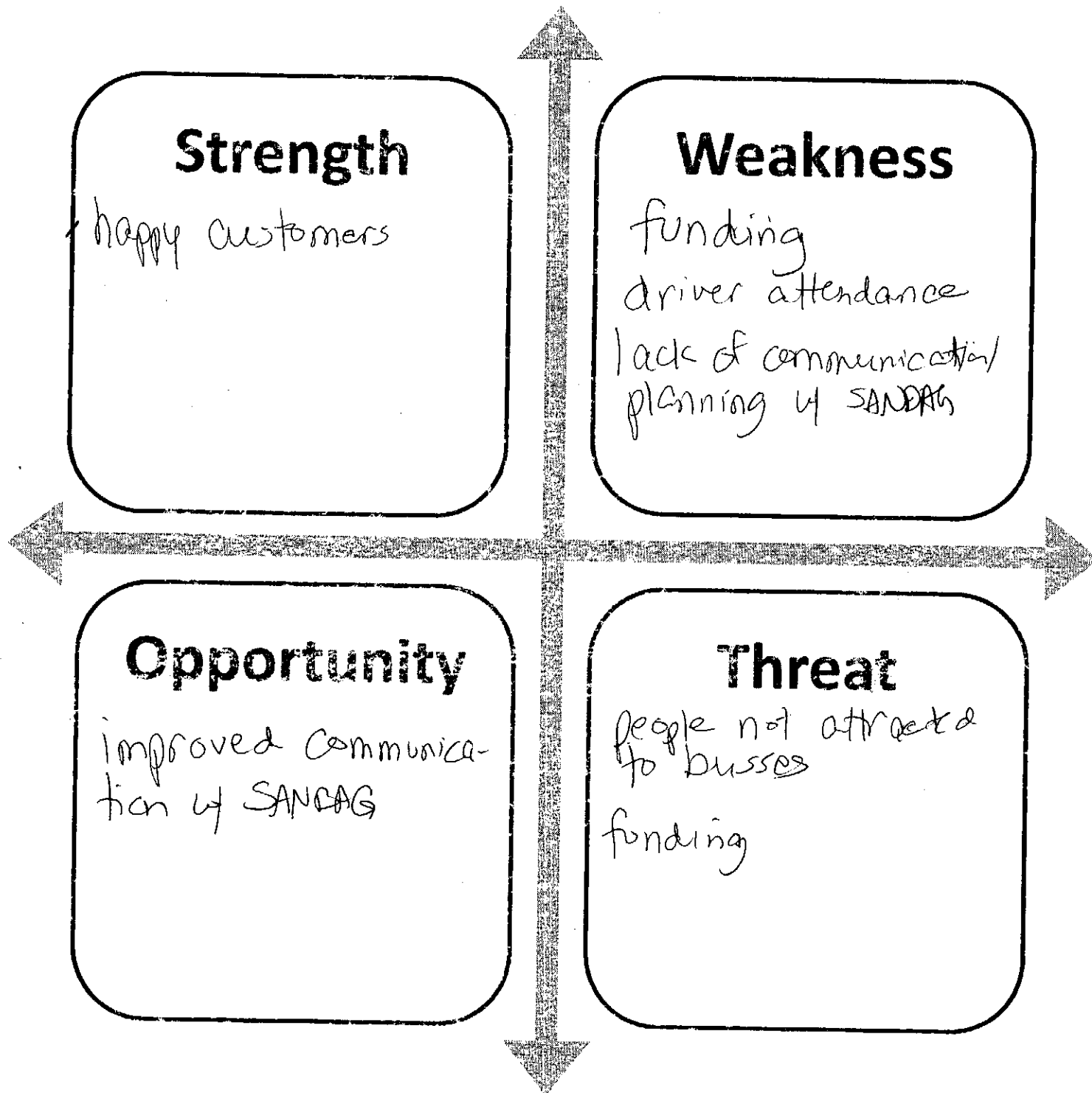
Planning not  
well integrated  
with other transit  
organizations.

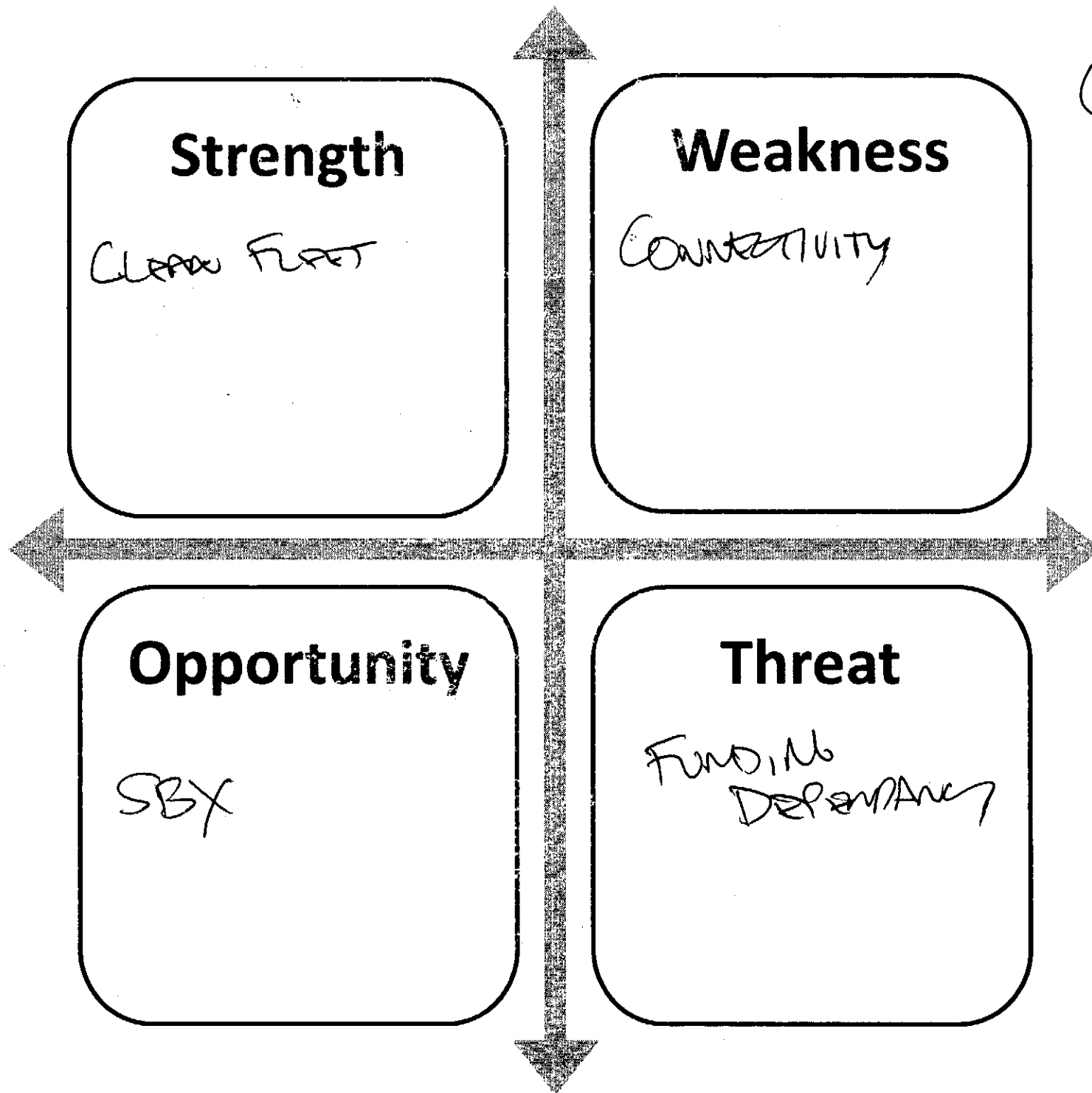
## Opportunity

Fully integrated  
public transit  
system connecting  
our valley and all  
of So. Cal.

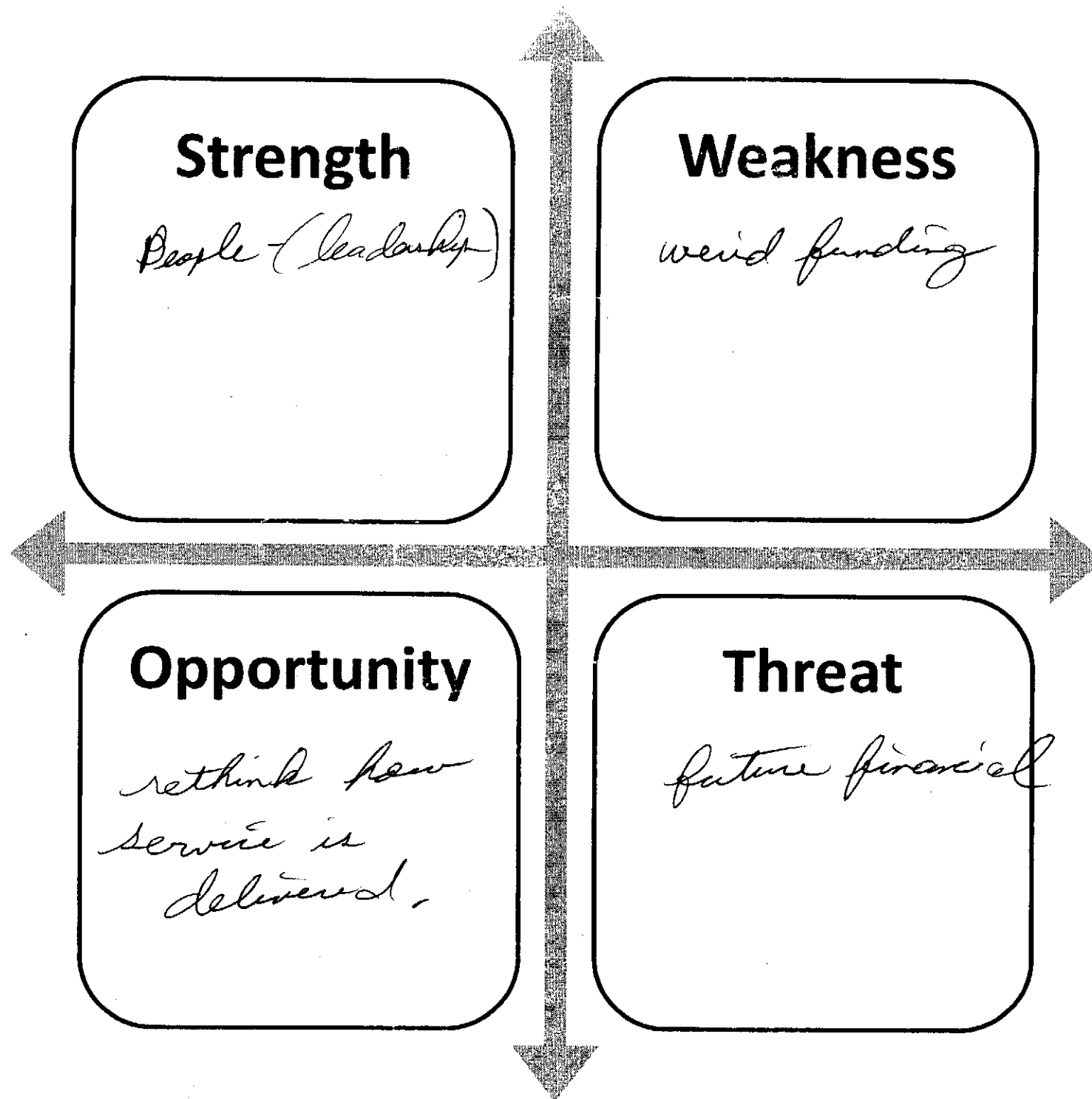
## Threat

Sufficient  
resources to carry  
out our vision





①





# Board of Directors WORKSHOP

Visioning Session

A Look at the **BIG PICTURE**

## Purpose:

- 2015-2020 Strategic Plan
- SRTP
- COA
- SbX
- MAP-21

and... □ Next Steps??

## LEADERS

- Initiate
- Share
- Inspire
- Set the Vision

A Proactive and Strategic Plan for Omnitrans

## GOALS

- Transit-Dependent
- Disabled/Elderly
- Choice Riders

The Board's Decisions in 2001 Led to **AMAZING** Results!

Coverage Oriented?

Productivity Oriented?

In 2001 35%

65%

WHAT'S NEEDED AHEAD?

## Self-Evident Facts:

- ↑ Energy Costs
- Spending 60% on housing & transportation
- Living in Urban areas
- O&M Costs of Infrastructure not sustainable

## What's YOUR Vision for TRANSIT?





Build it...  
and  
They Will Come!

Plan  
Wisely for  
Cost Savings  
and  
Effective Action

## A BIG PICTURE Plan...

to grow use of Transit

We as the  
Board need  
to see these  
things and  
get full info.

## Clarity & Coherence in Communication

- w/ SANBAG
- w/ Board

## Cross-Workability

- Policies
- Projects
- Sharing & Openness
- Collaboration
  - Between Omnitrans & SANBAG
  - Between Omnitrans & Board

Joint Committee?

## WORKING TOGETHER

On our Small Slice of the pie!

Should We Transform ourselves Into a TRANSIT DISTRICT?

Like L.A...

## SAFETY & SECURITY



Omnitrans is Protecting  
• Assets - Centers, Busses  
• Park & Ride Facilities  
• RIDERS & their Assets!

Pro-Active! Guard their SAFETY...

Local P.D.?

Relationships Collaborate for Monitoring?

Something in Between?

Private Police?

What would our Risk/Insurance Expert Say?

Areas of Responsibility?

What Is Your Recommendation?

Cameras in place... need monitors  
Phones, too.  
But these are incident-triggered

BE A DETERRENT TO CRIME

Rolling Patrols?

You're Meeting My Needs!

Dependent Riders Have Higher Tolerance

By Reducing our Goal, do we reduce Performance?

What is the Scheduled Loading Time?

How Could a Hybrid System Work?

## NEXT STEPS

- Catchball, then
- Exec. Comm. Meeting?
- Board meets again for another Workshop

## A Strategic Vision & Plan for the Future!



Now...  
Let's Drill Down!

## PRODUCTIVE COVERAGE

PRODUCTIVITY

COVERAGE

50%	2000	50%
65%	2001	35%
~60%	TODAY	~40%

MOVING FORWARD?

SanBag? Are they informed? Yes... and No

Ridership? Goes up!

Integrated Corridors?

Can We Use Federal Funds?

What is the best use of our Time and Talent?

What Processes are in place to promote Communication with Omnitrans & SANBAG Staffs?

SOLID GROUND TOGETHER

Choice Riders Have Lower Tolerance

You're On Time or You're Fired!

FTA

Is the Project Out of Control?

In Place, Need Work.

## ON-TIME PERFORMANCE



Head-Ways? Extend?

What is the Cost of going from 85% to 90%?

What does "Being on Time" Mean?

Between Zero & Five!

Is a 90% Goal Realistic?

90% at Transfer Points? Hybrid?

You're Meeting My Needs!

By Reducing our Goal, do we reduce Performance?

What is the Scheduled Loading Time?

How Could a Hybrid System Work?