

MANAGEMENT PLAN

»»»» FY 2013

**Prepared by Milo Victoria, CEO/General Manager
and the Omnitrans Senior Leadership Team**

May 2, 2012



MANAGEMENT PLAN

The FY 2013 Management Plan is made up of four elements:

1. **Management Element** – Identifies tasks that require special attention, attention beyond the day-to-day operational and management goals and a plan of action to realize them
2. **Service Element** – Provides an overview of Omnitrans service offerings, its performance and fare policy
3. **Marketing Element** – Focuses on expanding the ridership market share, enhancing community awareness and customer service through marketing and outreach efforts
4. **Budget Element** – Identifies expenses and revenues for implementing the plan

Omnitrans is currently in the midst of a Comprehensive Operational Analysis (COA), one of the most extensive ever to be conducted of Omnitrans by SANBAG. According to the objectives of the COA, numerous major changes will result from the COA. So, this year's Management Plan strictly focuses on what needs to be done to successfully implement the recommendations of the COA adopted by the Board of Directors while maintaining the highest quality of service. The completion of the COA is essential to charting the path forward for Omnitrans and reinventing the agency to meet the growing demand for public transit services.

Omnitrans faces the challenge of providing mobility, environmental and quality of life benefits within the San Bernardino Valley during difficult economic times with rising gas prices, high unemployment, and discontinued school bus services. The FY 2013 Management Element lays out a plan of action to tackle these challenges immediately (next year) as well as in the short term (next seven years) and long term (beyond seven years). The Omnitrans team is committed to providing the highest quality transit service in a safe and cost effective manner.

The FY 2013 Management Element results from a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis of Omnitrans' operations. An extensive review was conducted of Omnitrans' Strategic Plan, Short Range Transit Plan, County/SANBAG Vision, Draft Regional Transportation Plan & Sustainable Communities Strategy, Statewide Transit Strategic Plan, 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 eleven goals that are strategic in nature which 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 2013 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.)

Management will provide routine updates to the CEO/General Manager and quarterly reports to the Board of Directors. The Board committees responsible for various functional areas will provide policy guidance and oversight. The completion of this Management Plan will chart the path forward for Omnitrans to fulfill its mission.

Milo Victoria,
CEO/General Manager

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



OVERVIEW

Changing demographics and economics are creating fundamental shifts in the way we travel, live and conduct business. The cost of housing, owning and operating a personal automobile and increasing gas prices have changed the way we make business decisions and how we run our households.

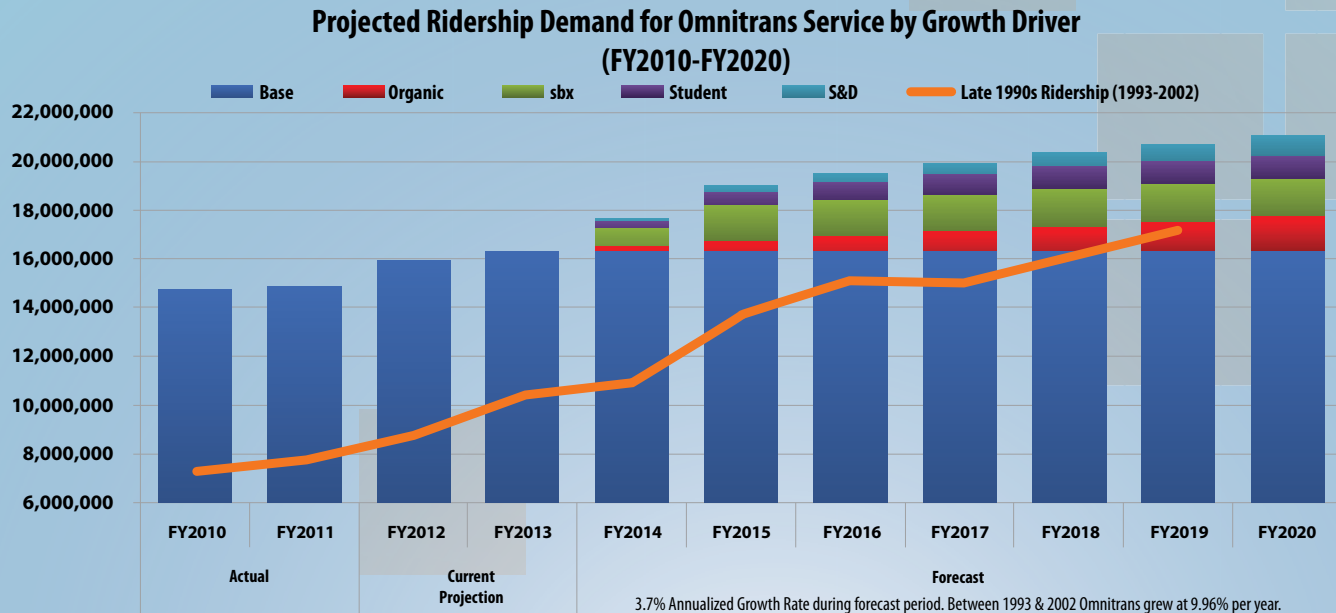
More and more people today understand the importance of living and working in the same area because it is cost effective, it is good for families, and it is healthy. Our personal automobiles will continue to play an essential role in our lives, but people understand that after mortgage expenses, a car is the single largest source of household debt. A typical household spends 18-35% of its household budget on transportation, and 98% of that cost goes toward financing, insuring, maintaining, and fueling personal vehicles.

People have already reacted to this personal economic reality. The baby-boomers and gen-Xers have begun to demonstrate demand for right-sized housing in a community that provides multiple transportation choices. The demand for efficient housing with easy access to jobs, entertainment, services and mass transportation have given rise to a new market. Although it is a delayed reaction to this market shift, California State Senate Bill 375 seeks to implement Climate Action Plans (CAPs) in order to reduce green house gas (GHG) emissions, improve air quality and quality of life through better integration of land use and mobility. Seeing the fastest public transit ridership growth rates in over a decade, the support for high quality transit services, and emerging new partnerships between a wide range of public and private organizations are the best evidence of this market shift.

During the last two years, Omnitrans has seen these demographic and economic transitions turn into ridership growth. During calendar year 2011, Omnitrans experienced systemwide growth of 6.6%, which is nearly three times the 2.3% national ridership growth rate that the American Public Transportation Agency (APTA) reports for the same time period. Omnitrans growth was driven by a number of factors including growth from rising Senior and Student ridership.

These trends, combined with a modestly recovering economy and the introduction of sbX service in 2014 place Omnitrans on the verge of a period of sustained increased demand for our service. As seen in Exhibit 1, ridership demand in the San Bernardino Valley is estimated to surpass 21 million riders per year by 2020. While this 3.7-percent growth may seem surprising given the relatively static ridership that Omnitrans has experienced over the last decade, it is much slower than the ridership growth experienced during Omnitrans last sustained growth period during the late 1990s and early 2000s.

Exhibit 1: 2020 Ridership Projection



Given the rising demand for transportation choices, our communities have to develop in a way that supports multiple, connected modes of transportation. This is called Mobility Oriented Development (MOD), where community activity centers are clearly evolving as thriving public spaces with shops, schools, good jobs, and plenty of parks and green spaces. These are activity centers where everything you want or need can be easily reached by walking, riding a bicycle, or taking high-quality public transportation.

Mobility is the ease of moving about freely, and access is the ability to reach necessary destinations such as jobs, schools, medical care and grocery shopping. Thus, MOD is about creating walkable, sustainable communities for people of all ages and incomes, and providing enhanced mobility and varied housing choices (including townhomes, apartments, live-work spaces, and lofts). It is about implementing smart land-use policies and repurposing existing buildings to create neighborhoods that are affordable and attractive, where our children can play and our parents can grow old comfortably. Omnitrans understands that transit riders and future transit riders want more than quality transit; they want quality lives. This includes the quality of the environments that people experience and live in before and after their commutes.

Footnotes

Ridership demand is projected to grow at a compound annualized growth rate of 3.7% from FY 2013 to FY 2020. The forecast assumptions are: 1) Maintaining "Base" ridership defined as budgeted FY 2013 ridership levels; 2) Experiencing organic growth of 1.19% per year tied to SCAG's estimated population growth for the cities in the San Bernardino Valley; 3) Introduction of sbX service in FY 2014 and the projected 1.4 million riders anticipated from this service with future growth tied to the organic growth rate; 4) Continued gains in student ridership at 3.9% per year which conservatively looks at recent student ridership trends which were growing at 16% per year for the four years that preceded Go Smart and jumped an additional 49% YTD with the introduction of Go Smart; and, 5) Senior and Disabled ridership growth of 3% due to the aging population of the service area. Significant risks to this forecast are: 1) Funding reductions; 2) Stable Fares; 3) Capacity constraints; and, 4) Economic instability in the out years.

To move toward this vision, we need to think beyond the bus and see the bigger picture. Every day people encounter physical barriers in our communities. Any number of things can influence a person's decision as to which mode of transportation they'll take. Is the transit stop within walking or biking distance? How can I plan my transit trip? Is it safe and comfortable? Is there parking for bicycles? Will I have to cross busy streets or empty lots to get to where I am going? Will I be dropped off within easy walking distance of my job?

Transit, land use, development, urban design and public health are interconnected. One cannot thrive without the others. By choosing partnerships that will foster people-centered development, we will improve life for everyone. The active transportation initiative will address the last mile challenge and encourage people to walk, bicycle, run or use other non-motorized means to access their desired destination while getting some much needed exercise – all at the same time!

Building on this philosophy and our long history of delivering projects through strategic public/public and public/private partnerships, the FY2013 Management Plan lays out an ambitious plan of action to meet the growing demand for effective, high quality transit services and to support local economic development, sustainability, mobility, and quality of life objectives. Omnitrans takes pride in its ability to deliver safe, reliable and cost-effective transit services compared to its peers. Similarly, Omnitrans has an outstanding record of delivering infrastructure projects in record time and cost effectively by leveraging limited local funds with competitive federal funds. Optimizing local dollars means leveraging four federal dollars for every local dollar that this region would otherwise not be entitled to receive.

The overall high performance and successes are attributed to our human resources – commitment, technical capabilities, training, and teamwork. The ongoing COA included a peer comparison that shows that our team contributes to a service that exceeds the effectiveness and efficiency of many of our peers. The following thermometer charts in Exhibit 2 illustrate that Omnitrans cost effectiveness is superior to the average and median peers in the categories of Total Costs per Vehicle Hours, Total Costs per Unlinked Passenger, Total Costs per Passenger Mile and Total Cost per Revenue mile. In these four categories not only was Omnitrans superior to the average peer, Omnitrans ranked at or near the highest quartile of each measure.

Exhibit 2: Thermometer Charts Indicate Omnitrans Cost Effectiveness



COA of Omnitrans, Technical Memorandum #5: Administrative Functions dated December 2011 prepared by AECOM for SANBAG

FY 2013 STRATEGIC GOALS

Within this context, Omnitrans is pursuing the following eleven strategic goals, which are essential to reaching the broader mobility objectives of this region:

1. COMPLETION OF E STREET sbX CONSTRUCTION
2. COMPLETION OF THE COMPREHENSIVE OPERATIONAL ANALYSIS (COA)
3. PREPARE THE FY 2014 – 2020 STRATEGIC PLAN AND SHORT RANGE TRANSIT PLAN
4. REBRANDING OF OMNITRANS
5. OPERATION AND MANAGEMENT PLAN OF sbX PROGRAM
6. BUS ARRIVAL PREDICTION INFORMATION SYSTEM
7. BUILD A STRATEGIC PARTNERSHIP BETWEEN OMNISTRANS – SANBAG
8. CREATION OF AN INNOVATIVE FINANCING STRATEGY AND PARTNERSHIP – POLICY & STRUCTURE
9. CREATION OF OMNITRANS 2020 EMPLOYEE DEVELOPMENT PROGRAM
10. LAUNCHING OF THE ACTIVE TRANSPORTATION PARTNERSHIP
11. COMPLETION OF HOLT BOULEVARD CORRIDOR PROJECT



»»»» FISCAL YEAR 2013 MANAGEMENT ELEMENT

GOAL 1:

Completion of E Street sbX Construction

TEAM: Milind, IPMO, Don, Jack, and Maurice

Complete construction of E Street sbX Corridor Bus Rapid Transit (BRT) Project by January 2014

OUTCOME

Deliver a state of the art BRT service that will enhance economic development, the environment, and quality of life in the San Bernardino Valley.

STRATEGIES

1. Follow the Plans, Specifications, Regulatory Requirements, Contracts (Consultants/Contractors), and Cooperative Agreements/MOUs with the stakeholders.
2. Follow the processes and procedures included in the Construction Management Plan (CMP) and Best Management Practices (BMP) in general to manage day-to day activities.
3. Maintain open and regular communication between the Project Team (Omnitrans, Consultants, Contractors, stakeholders, and community) through construction & startup.
4. Develop a Partnering Charter, conduct partnering meetings & surveys through construction.
5. Maintain transparency with the Board of Directors and Federal Transit Administration (FTA).
6. Keep "zero" accidents as the top priority for the safety of the workers and community.

PERFORMANCE INDICATORS

Performance indicators according to the FTA Project Construction Grant Agreement (PCGA):

1. No cost overruns.
2. No scope creep.
3. No schedule delays.
4. No major quality problems.
5. No major safety issues.

TASKS

COMPLETION DATE

- | | |
|--|----------------|
| 1. Start Construction. | December 2011 |
| 2. Complete 25% of Construction. | July 2012 |
| 3. Complete 50% of Construction. | March 2013 |
| 4. Complete 75% of Construction. | September 2013 |
| 5. Complete Vehicle Maintenance Facility (VMF) construction. | November 2013 |
| 6. Substantial completion of construction and begin testing. | December 2013 |
| 7. Complete Construction. | January 2014 |

GOAL STATEMENT

The goal of Integrated Project Management Team is to complete construction of the E Street Corridor Bus Rapid Transit (BRT) project with zero accidents and within the FTA approved budget of \$191.7 million so that the revenue operations can begin in early 2014 as stipulated in the Project Construction Grant Agreement (PCGA).

By introducing the BRT system, Omnitrans can accomplish many agency objectives such as improving transit service to accommodate growing bus ridership, attracting new riders by providing a time-competitive alternative to the automobile, and enhancing the efficiencies by lowering Omnitrans' operating costs per rider. The project supports local and regional goals to organize development along transit corridors and around transit stations. The E Street Corridor project is the first of ten proposed corridors in a system-wide program.

The sbX project success largely depends on the "partnering" spirit between Omnitrans, design consultants (Parsons and STV), construction management consultant (Jacobs), other "on-call" services consultants, Contractors (Griffith-Comet Joint Venture, and the key stakeholders (City of San Bernardino, City of Loma Linda, SANBAG, Caltrans, California State University, San Bernardino, Loma Linda University, and Veterans Administration, etc.). Team has appointed a reputed moderator to develop a sound Partnering Charter and carryout partnering sessions throughout the construction period. A Change Control Board (CCB) was established to address any scope, cost, and schedule changes that may be necessary during the course of construction. Additionally, there is a Dispute Resolution Board (DRB) of independent technical experts to resolve any disagreements that cannot be addressed by project team members.

The project team monitors the project costs by thoroughly scrutinizing the monthly invoices and other costs using a combination of software tools and the state-of-the-art SAP system with routine manual oversight. Based on the current forecast, we are confident that the project will be completed within the budget of \$191.7 million. Monthly construction status reports are provided at Administrative & Finance Committee and Board of Directors meetings and are submitted to FTA. The Project Management Oversight Consultant (PMOC) appointed by FTA meets with the project team on a monthly basis and Quarterly Meetings are conducted per FTA requirements.

Weekly construction progress review meetings provide a dialog with the Regulatory Agencies and the Partnering Agencies on a routine basis so that issues and concerns can be addressed in a proactive manner. The Public Outreach Team holds monthly meetings for corridor business and property owners. A project newsletters is distributed monthly, construction alerts are sent out weekly, and construction status updates are posted on the project website and social media. We participate in various community meetings. A construction hotline (1-877-SBX-NEWS) was set up to respond to issues and concerns.

Through the sbX project, we achieve Omnitrans' long-range goals to cost-effectively enhance mobility and accessibility; improve transit operations; support economic growth and redevelopment; conserve non-renewable resources; and improve corridor safety.

GOAL 2:

Completion of COA

TEAM: Rohan, Directors and COA Technical Advisory Committee (TAC)

Complete the Comprehensive Operational Analysis (COA) of Omnitrans conducted by SANBAG and the consultant team AECOM.

OUTCOME

A comprehensive transit investment strategy and policy guidance to develop Omnitrans' 2020 Strategic Plan and Short Range Transit Plan (S RTP).

STRATEGIES

1. SANBAG/AECOM to conduct a comprehensive independent review of Omnitrans operations and management.
2. Compile and provide data and analysis to SANBAG/AECOM to expedite the completion of the COA.
3. Active participation by Board and staff in conducting the COA, review draft reports and provide input.
4. Ensure that SANBAG/AECOM delivers accurate, comprehensive and useful COA reports with sufficient policy guidance and information that will support the development of Omnitrans' 2020 Strategic Plan and Short Range Transit Plan (S RTP).

PERFORMANCE INDICATORS

Originally scheduled to be completed in January 2012; as of March 2012, Omnitrans expects the COA to be completed as follows:

1. Completion of a Comprehensive Existing Conditions Report by June 2012.
2. Completion of the 2030 Financial Report by June 2012.
3. Completion of the Alternative Service Delivery Analysis by June 2012.
4. Completion of Service Plan by August 2012.
5. Begin to utilize the COA to prepare the Strategic Plan & Short Range Transit Plan by August 2012.
6. Completion of the entire COA by September 2012.

TASKS

	COMPLETION DATE
1. Complete Existing Conditions Report.	June 2012
2. Complete the 2020 Financial Report.	June 2012
3. Complete the Alternative Service Delivery Analysis.	June 2012
4. Complete the Service Plan.	August 2012
5. Complete the COA.	September 2012

GOAL STATEMENT

The SANBAG-led Comprehensive Operational Analysis (COA) is a complete and thorough evaluation of Omnitrans that covers all aspects of the agency including evaluations of: Omnitrans' service offerings and policies; staffing levels; expectations for future services; historical financials; projected operating and capital revenue streams and costs through 2020; and alternative service delivery options. The outcome of the COA must provide detailed information about the community, funding environment and proposed policy changes that Omnitrans requires in order to develop and implement a lasting Strategic Plan and Short Range Transit Plan that will carry the agency through 2020.

Omnitrans' responsibility in the COA process is to first provide any and all data to the consultant team leading the COA, to show that we value transparency and accountability and that we act in accordance with the policies and guidelines that are set forth for the agency. Secondly, Omnitrans will review and objectively consider all recommendations supported by sufficient analysis. After reviewing the proposals, Omnitrans will provide input and guidance to ensure that the recommendations enhance transportation options for our customers, while also maintaining sound financial footing for the agency. Lastly, Omnitrans will ensure that the COA team delivers recommendations that are vetted and based on reliable analysis.

GOAL 3:

Prepare FY2014–2020 Strategic Plan and Short Range Transit Plan (SRTP)

TEAM: Rohan, Directors and Technical Advisory Committee (TAC)

With the completed COA, develop Omnitrans' 2020 Strategic Plan and SRTP.

OUTCOME

A comprehensive business strategy, policy and funding plan to guide Omnitrans through FY2020.

PERFORMANCE INDICATORS

1. Completion of the COA Tasks identified in Goal 2 by August 2012.
2. Board approved Strategic Vision by October 2012.
3. Board approval of the FY2014-2020 SRTP by April 2013.

STRATEGIES

1. Use COA reports, findings and recommendations to guide the preparation of the Strategic Plan and SRTP.
2. Board of Directors and stakeholder involvement in strategy and policy formulation.
3. Develop innovative strategies to deliver major projects and transit services.
4. Develop financially constrained and unconstrained plans to realize Omnitrans' full vision.

TASKS

1. Completion of the COA.
2. Completion of Omnitrans' 2020 Strategic Vision.
3. Complete Draft SRTP.
4. Board approval of the SRTP.

COMPLETION DATE

September 2012

October 2012

December 2012

April 2013

GOAL STATEMENT

Federal and state transportation statutes require that transit agencies develop and periodically update their Short-Range Transit Plan (SRTP) in order to be eligible for transportation funding. The SRTP is the guiding policy document that lays out the roadmap for Omnitrans' services, finances and capital projects for FY2014 to FY2020. This particular SRTP will be developed as the implementation plan that combines the results and findings from the SANBAG-led COA and the guiding principles of Omnitrans' 2020 Strategic Plan. The current SRTP is set to expire June 2013.

Omnitrans' SRTP contains the following elements:

1. An Overview of Omnitrans, the communities we serve, and the local and regional plans driving transportation policies;
2. A catalog of the services that Omnitrans provides along with the performance factors that are associated with each service;
3. A Description of Omnitrans' interconnectivity and interactions with neighboring transit agencies;
4. A Detailed description of the areas Omnitrans serves along with a projection of how these areas are expected to change over the planning horizon;
5. A review and development of Service Goals, Policies and Standards designed to direct and prioritize the deployment of resources;
6. A detailed fare policy that considers the impact on both Omnitrans' finances and customers;
7. A financial operating and capital plan;
8. A prioritized list of unfunded projects and services with enough detail to seek additional funding;
9. A comprehensive service plan; and
10. An implementation plan that allows for a transition to any proposed changes set forth within the SRTP.

GOAL 4:

Rebranding of Omnitrans

TEAM: Wendy, Jack, Scott, and Advertising Agency

Implement rebranding of Omnitrans in FY2013.

OUTCOME

Improve public awareness and positive image of Omnitrans through the rebranding effort.

PERFORMANCE INDICATORS

1. Increase public awareness level to >80%.
2. Increase public opinion to >75% positive.
3. Increase customer satisfaction rating to >85% positive.
4. Complete rebranding launch by January 2013.

STRATEGIES

1. Implement Omnitrans system rebranding in FY2013 including new logo, color scheme, fixed route fleet graphics, signage, tagline within budget constraints, and phasing plan.
2. Promote new image through public relations (PR) and marketing campaigns tied to brand launch.
3. Enhance agency awareness among the general public as a result of rebranding.

TASKS

1. Legal review, trademark review and clearance.
2. Complete brand-standards manual.
3. Finalize new fleet and bus stop sign graphics.
4. Update agency printed collateral, fare media and business materials.
5. Update agency website and other electronic communications.
6. Update employee uniforms, outreach apparel and name badges.
7. Update signage and Omnitrans facilities.
8. Launch new buses with new graphics, PR event.
9. Implement "new looks" advertising campaign.

COMPLETION DATE

July 2012

July 2012

July 2012

November 2012

November 2012

November 2012

November 2012

November 2012

January 2013

GOAL STATEMENT

The Omnitrans rebranding initiative was identified in the Omnitrans FY 2009-2014 Strategic Plan as a strategy to support the marketing goal of increased community awareness. The goal is to refresh the Omnitrans brand image and to create a brand-standards manual to ensure consistency of application. In Omnitrans' 36-year history, the agency has had two logos, with the most recent update occurring in 1986. Updating this outdated image and related elements such as fleet graphics, communications materials, signage and uniforms will help generate a new awareness of and image for the agency. The objective is to update the brand identity so it is better aligned with our current brand positioning, target audiences, and market conditions. A brand is more than a logo and color scheme. The brand identity contributes to the overall customer experience and community perception. It also contributes to employee pride.

The new brand identity, logo, tagline and fleet graphics were developed through a series of workshops and feedback with senior leadership and marketing staff, facilitated by our advertising agency. The new brand will be launched during FY2013 to coincide with the roll out of newly commissioned transit buses. While some elements of the rebranding will be implemented simultaneously, phasing will be necessary. For example, our 2,500 bus stop signs will be replaced over several months. Existing bus fleets will be updated over a period of many months and within budget constraints. Some buses will receive a modified update to minimize associated costs.

It should be noted that the Omnitrans rebranding effort will be applicable to corporate identity and regular fixed route services. Access, OmniLink, OmniGo and sbX services and fleets will retain their current distinctive brand identities.

GOAL 5:

Operation & Management (O&M) Plan of sbX Program

TEAM: Scott/Jack, Wendy, Allen, Mark M, Ray, Mark C, and Milind

Develop a comprehensive operations and management plan for the new E Street sbX program.

OUTCOME

A comprehensive operations and management plan that ensures safety, security and the highest quality of service delivery and maintenance of sbX.

STRATEGIES

1. Develop an O&M plan that assigns responsibilities and provides coordinating instructions for all SBX operations; to include any capital equipment purchases and forecasted operating budget requirements.
2. Review all MOU (s) between Omnitrans and stakeholders (City of San Bernardino, Loma Linda, SANBAG, etc.) to ensure consistency with the O&M plan.
3. Develop labor agreement to support O&M of the sbX system.
4. Conduct monthly O & M progress meetings.

PERFORMANCE INDICATORS

1. Scope of the O&M plan will be completed by July 2012 to provide supporting departments with guidance on infrastructure requirements for review and contributions.
2. The final plan is to be completed by January 2013 and will include all FTA requirements, internal responsibilities, and system operation procedures.

TASKS

	COMPLETION DATE
1. Identify & assign Directors for areas of responsibilities for both internal and external customers.	May 2012
2. Identify Point of Contacts(POCs) for review of the stakeholder MOUs to support O & M Plan.	June 2012
3. Analyze increases in manpower requirements and associated operational costs.	January 2013
4. Develop capital investments and operating cost alternatives in identifying private – public partnerships to share costs.	January 2013
5. Establish “hand-off” between contractor and Omnitrans on infrastructure management, including: training, operations & training manuals, drawings, warranties, etc.	July 2013
6. Letter of Agreement for sbX with Amalgamated Transit Union (ATU) or contracting out service.	July 2013
7. Submit Operations and Management Plan to Senior Leadership Team (SLT) with any proposed stakeholder MOU changes.	January 2013

GOAL STATEMENT

The sbX Operation and Maintenance Plan (O & M Plan) serves the following purposes: to ensure FTA compliance, to define internal responsibilities, to develop system operation procedures, to ensure dedication to customer service and reliability, and to deliver a flagship service that provides the community with safe and secure rapid transit.

The sbX O & M Plan provides for coordinated maintenance and operations of technology to afford the sbX bus rapid transit service a competitive edge in vehicular traffic. Pre-emptive signal priority, dedicated center running bus lanes, bus arrival prediction and messaging system, on board passenger wireless network service, ticket vending machines, and on-board/platform surveillance will all support the advanced rapid transit system. In addition, the plan will develop the workforce to meet the challenges of new technologies featured in the equipment and infrastructure.

GOAL 6:

Bus Arrival Prediction Information System (BAPIS)

TEAM: Bill, Jack, Allen, Milind, Joseph, and Christine/Debra

Provide advanced technology solutions to riders to enable information sharing, enhance rider services, attract potential riders, and to build brand trust between riders and Omnitrans via text messaging, website, mobile devices, Interactive Voice Response (IVR), Quick Response (QR) codes, and station signage.

OUTCOME

Highly accurate real-time bus arrival prediction information to deliver quality services to all riders.

STRATEGIES

1. Work with selected vendor to implement BAPIS.
2. Engage cities to identify power sources and gain permits to start construction work for signage installations at Transcenters.
3. Engage cities to identify solar power requirement and gain permits to start construction work for signage installation at heavy traffic bus stops.
4. Work with Google and Microsoft Bing to provide General Transit Feed Specification (GTFS) data to allow real-time bus arrival information to be delivered via their respected services.
5. Post GTFS data onto www.omnitrans.org website to allow access for application developers to build real time bus arrival information system for smart phones, such as iPhone, Android, Blackberry, and Windows mobile.

PERFORMANCE INDICATORS

1. Accuracy of the prediction information given > 95%.
2. System reliability >95%.
3. System availability >99%.

TASKS

	COMPLETION DATE
1. Establish BAPIS back office system.	December 2012
2. Implement QR website, IVR, mobile devices solution.	December 2012
3. Offer GTFS data to general public to build mobile apps.	December 2012
4. Install signage at Transcenters.	June 2013
5. Install solar powered signage at bus stops.	December 2013

GOAL STATEMENT

The goal of the Bus Arrival Prediction Information System (BAPIS) is to provide the most accurate real time bus arrival information to riders via advanced technology solutions. This will include electronic signage to let passengers know when buses will arrive at Transcenters and high-ridership bus stops.

The BAPIS program will also involve using advanced technology solutions for mobile devices such as the iPhone, iPad, Android smart phones, Blackberry, Windows mobile, and tablets. Non-smart phone users will be able to receive arrival information via text messaging, IVR or a telephone information hotline.

Because the BAPIS system will use GTFS data feed, Omnitrans intends to make the data available to general public as well. This will allow application developers to create mobile applications without requiring any investment from Omnitrans. The GTFS feed will also facilitate data sharing with Google Transit and Microsoft Bing for use in current and future web applications.

GOAL 7:

SANBAG – Omnitrans Partnership

TEAM: Milo Victoria, Ray Wolfe and Senior Staff of SANBAG and Omnitrans

Build a strategic mobility partnership between SANBAG and Omnitrans with each agency's technical skills and expertise to bring about an effective multimodal mobility solution.

OUTCOME

Strategic and visionary mobility partnership.

STRATEGIES

1. Initiate a dialogue between the two Executive Directors.
2. Facilitate a partnering session with key staff of SANBAG and Omnitrans (get an understanding of the situation to develop solutions).
3. Build a strategic partnership based on a valuable and productive working relationship between the two agencies in order to deliver mobility and quality of life benefits to this region.
4. Get a better understanding of roles, responsibilities and expectations of each party today and the changing roles in the future.
5. Promote balanced and equitable transportation investments with minimal disruption to passengers who depend on transit - students, seniors, the disabled, and working poor.

PERFORMANCE INDICATORS

1. Respectful professional working relationship.
2. Jointly develop a comprehensive public transit service, financing and investing plan for the San Bernardino Valley (policy direction for transit operators).
3. Communication and coordination strategy (SANBAG & Transit Operators in the County - quarterly planning coordination meetings and active participation in project development teams).
4. Establish key performance indicators for transit projects and tasks undertaken by each party (e.g. completion of San Bernardino Transit Center-Bus Facility by November 2013 and completion of the Comprehensive Operational Analysis by October 2012).
5. Transit investment decisions and studies to be coordinated with key stakeholders and properly backed up with defensible studies, data, reviews and board approvals.

TASKS

1. Executive Directors meetings.
2. Facilitate a partnering session between key staff of SANBAG and Omnitrans.
3. establish the Board recommended communication protocol of channeling key issues through the two Executive Directors. Eliminate communications through intermediaries and consultants.
4. Jointly develop a transit investment strategy to reach regional mobility goals and to optimize local transit financial resources.
5. Update the memorandum of Understanding (MOU) between the two agencies clearly defining each agency's duties and expectations.
6. Quarterly meetings to review progress.

COMPLETION DATE

March 20, 2012

To be determined by both Executive Directors

GOAL STATEMENT

Omnitrans is an efficient, cost effective and well managed agency that is recognized nationally for its accomplishments, leadership and innovations. In San Bernardino County, Omnitrans is the largest provider of transit services, accounting for over 86% of transit trips. Twice, Omnitrans was recognized as the Outstanding Transit System in North America. Recently, Omnitrans received the California Challenge Award.

Rebuilding a strategic partnership between SANBAG and Omnitrans is essential to maximizing each agency's technical skills and expertise. This will improve our ability to leverage federal funds, and influence transit policy. Collectively, SANBAG and Omnitrans will lead the effort to bring about an effective and sustainable multimodal mobility solution that will act as a catalyst for realizing mobility, economic, environmental and quality of life goals of this region.

This goal attempts to reestablish communications, resources and policy framework that are necessary to accomplish the overarching mobility and quality of life goals for this region. Currently, these elements are not in alignment and have resulted in conflict. With the strategies, tasks and mutually acceptable performance standards, both parties are confident that a strategic business partnership can be established. Irrespective of which agency is responsible for leading various efforts, performance standards and the policy framework will ensure accountability and full disclosure.

GOAL 8:

Innovative Financing and Partnerships

TEAM: Bob, Jack, Don, Bill and Rohan

Develop an organizational structure, policies, and program of projects to foster public-private, and public-public partnerships to deliver projects, leverage technologies, generate revenue, or offset operating costs.

OUTCOMES

1. Innovative transit business model that can deliver vital projects and services, generate revenue, and optimize the potential of local funds.
2. Maximize Omnitrans' contribution toward economic development, mobility improvements, technology development, and quality of life enhancements.
3. An organizational structure capable of planning and executing programs that will generate additional funding sources for Omnitrans. The structure will protect Omnitrans from liability exposure from non-core activities.
4. Collaboratively planned projects based on shared assumptions to ensure long term capital commitments.
5. Omnitrans recognized as a national leader for innovative financing and partnerships.

PERFORMANCE INDICATORS

1. Approved plan and program of projects by: July 2012.
2. Organizational structure and policy framework by: October 2012.
3. Evaluate and report to the board on three or more projects by: June 2013.

STRATEGIES

1. Develop innovative financing and partnerships in accordance with Federal Transit Administration (FTA) guidelines.
2. Conduct a peer review and develop best practices.
3. Develop a program of projects with the highest potential for efficiency, revenue generation, and public benefit.
4. Align resources for startup of the program.

TASKS

1. FTA approval of structure, policies, and program.
2. Board approval of organizational structure, policies, and program.

COMPLETION DATE

October 2012

November 2012

GOAL STATEMENT

Goals for innovative financing or delivery methods usually include acquiring additional revenues for capital projects, programs, or operational costs, but can also include a more efficient and streamlined project delivery process or increased ridership. According to the Federal Transit Administration (FTA) guidance, innovative methods for financing and delivering transit projects fall into the general categories listed below.

1. Public Private Partnership (PPP) – an innovative procurement method for major capital projects, typically fixed guideway transit systems, in which private capital is invested. In a PPP, a single private entity, typically a consortium of private companies, is responsible or financially liable for performing all or a significant number of functions in connection with a project.
2. Joint Development (JD) or Transit Oriented Development (TOD) – a partnership between a transit agency and the private sector to promote real estate development in and around transit facilities. These partnerships provide access to additional capital and operating revenues for transit agencies through the receipt of lease payments, access fees, and increased fare revenues, as well as direct private sector funding of capital facilities that promote access between transit and private development.
3. Other Innovative Financing Mechanisms – There are various methods that FTA grant recipients can use to develop revenues for operating and capital projects. For example, transit agencies can earn revenues through various types of advertising, information technology applications, etc. While Omnitrans currently earns advertising revenues from bus wraps and transit shelters, there are other possibilities such as selling naming rights for transit facilities or selling airspace on the audio announcement system on the buses.

Transit agencies can charge a fee for providing services to outside agencies. Currently, Omnitrans reserves 4% of FTA funds passed through to partner agencies in a Cost Allocation Plan for project oversight. Similarly, Omnitrans could charge a fee for providing services such as vehicle maintenance, auditing, employee development and training.

Expanding partnerships to leverage grant funding

As an FTA grant recipient, Omnitrans has access to competitive discretionary grant programs that require 10% to 20% local match funding, as well as other federal grant sources. The lack of availability of local match funding is a common obstacle to meeting rigorous application deadlines for funding. New partnerships with nonprofit organizations or private entities could make available new types of local match funding.

GOAL 9:

2020 Employee Development Program

TEAM: Marge, Ray, Sam and Milo

Develop leaders, managers and employees capable of assuming key responsibilities when called to lead during an unexpected or a planned change in personnel.

OUTCOME

A stable, well trained multidisciplinary workforce that operates and manages a state of the art transit system that will improve mobility, energy and quality of life to this region.

STRATEGIES

1. Seek out department and external agencies interested in creating a cross training program.
2. Develop a budget and create a plan.
3. Enhance the Leadership Action Programs and deliver two programs per fiscal year. Seek continued internal support.
4. Research and review transit policies on tuition reimbursement; educate employees on how to use the process.
5. Identify projects to present at conferences/workshops.

PERFORMANCE INDICATORS

1. Promoted personnel will possess the capacity and competence to operate, manage and deliver services and projects with periodic feedback sessions and a performance evaluation at five months.
2. Lower average cost to hire on key positions by 10%.
3. Lower average time to hire and related loss of productivity by 10% (1 month).
4. Reduction in turnover Goal <7%.
5. Employee satisfaction is at 74%, increase target 80%.
6. Increase employee longevity, current average employee length of service 11 years.

TASKS

	COMPLETION DATE
1. Identify participants internal and external. <i>Create Individual Development Plans.</i>	July 2012
2. Continue to make Toastmasters available to all employees; continue to invite employees as guests.	July 2012
3. Identify participants internal and external. Create Individual Development Plans.	July 2012
4. Nominate employees for Leadership APTA; develop a template for presentations – showcase our best practices. Complete applications for Agency Awards.	Annually in February
5. Analyze and recommend revision on our tuition reimbursement policy to the Administrative & Finance Committee.	October 2012
6. Create internal budget for developing skill base of employees.	March 2012

GOAL STATEMENT

The objective of Omnitrans 2020 Employee Development Plan is to develop well-rounded leaders, managers and employees capable of assuming key responsibilities when called to lead during an unexpected or a planned change in leadership to ensure the short and long-term success and stability of Omnitrans.

Annually the agency loses about 44 employees; about 9 of whom may retire. Over the next seven years, about 63 employees are projected to retire and 308 employees are projected to separate from Omnitrans due to various reasons based on historic trends. Out of the 105 positions that are projected to become vacant, 49 could be classified as Key (specialized technical) positions that are hard to fill and would require about 6 - 12 months to gain professional and technical competencies. The loss of productivity, recruiting costs, training costs, etc., is about \$75,000 per vacancy. Similarly, other positions that are less skilled and technical cost about \$55,000. Historically, Omnitrans loses about 6 key positions annually. Recently we have seen an increase in this number.

As a result of the investments Omnitrans made in our employees over the years, the agency has emerged as an industry leader in the midsize category. Omnitrans has a well-trained, multidisciplinary workforce capable of operating and managing a state-of-the-art transit system to deliver mobility and quality of life to this region.

The employee development programs currently in place are:

1. Omnitrans Leadership Program
2. Tuition Reimbursement Policy
3. Rolling Thunder Toastmasters
4. American Public Transportation Association's (APTA), Leadership APTA Program:
5. APTA Mid Manager Training Program
6. Mechanic Training Consortium

Proposed employee development programs:

1. Intra agency/Interagency cross training
2. Dedicated funding
3. CTA & APTA participation
4. Professional Development Certificate Programs

GOAL 10:

Active Transportation Partnership

TEAM: Rohan, Nicole, Marge, Sam, Anna, and Elena

Partner with schools, healthcare providers, employers, businesses, unions, cities/county and other organizations to promote active transportation modes, health & fitness, and environmental benefits.

OUTCOMES

1. Improved personal health and fitness, air quality, pedestrian safety, and mobility.
2. Increased transit ridership through active transportation (i.e., walking, biking, and transit) and increased mode share of active transportation.

PERFORMANCE INDICATORS

1. Form an “active transportation” coalition with >15 members by December 2012.
2. Collectively develop a program and measures by March 2013.
3. Launch a self sustaining program with no impact on Omnitrans budget starting in July 2014.

STRATEGIES

1. Form an active transportation coalition.
2. Conduct a SWOT (strengths, weaknesses, opportunities, threats) analysis of active transportation with coalition members.
3. Jointly with the coalition members, develop a program and memoranda of understanding.
4. With coalition members, develop measures of success.
5. Make information available to coalition members on an ftp site or website, via email, and other communication channels.
6. Work with coalition members to develop an action plan, including capital projects to improve first mile/last mile of transit trips, travel demand management programs, etc., to encourage active transportation.
7. Provide technical assistance to coalition members in developing action items, including sharing resources and information, providing design guidelines, identifying precedent studies, and developing grant applications for projects.
8. Integrate action items into Omnitrans’ planning documents, and use private or local funding as leverage to apply for federal funding for projects.

TASKS

1. Develop a list of potential partner agencies and organizations.
2. Hold a kickoff meeting(s).
3. Develop coalition action plan and by-laws.
4. Develop measures of success.
5. Create a coalition website, email list, and other communication channels.
6. Collaboratively write the coalition's action plan with specific projects or programs.

COMPLETION DATE

August 2012
November 2012
February 2012
March 2012
May 2012
July 2012

GOAL STATEMENT

In order to increase transit ridership, it is important to look beyond the bus to the conditions that a rider experiences during the total trip from door to destination. The conditions experienced when walking or biking to and from the transit stop or station, often called the "first mile and last mile" of a transit trip, are crucial to the overall experience. 93% of Omnitrans' riders walk to the bus stop on any particular trip, and 4 percent ride a bicycle to the stop, resulting in 18,000 miles walked and 4,700 miles biked on an average weekday to access Omnitrans' system.

A pedestrian or bicyclist has to overcome a series of obstacles and hazards to reach the transit stop or station safely, such as:

1. Fast-moving vehicular traffic;
2. Long crossings across major arterials;
3. Drivers who do not yield the right of way in crosswalks;
4. Potholes and discontinuous or broken sidewalks;
5. Circuitous and indirect routes and having to walk through long parking lots or driveways;
6. Lack of secure or any parking for bicycles;
7. Inability to get through sensor-activated traffic signals that do not turn green for bicycles;
8. Dark and narrow tunnels under freeways; and,
9. Bus stops with inadequate protection from the weather.

Thus, in order to increase transit ridership, Omnitrans must continue to expand its partnerships with public and private organizations to repair the built environment and influence land use and transportation planning to accommodate active modes of transportation.

This will not only benefit transit, but will have a host of direct and indirect benefits for the broader community. Because transit riders have been shown to walk ten times more than non-transit users, active transportation can help reduce prevalence of illnesses related to inactivity, reduce traffic congestion, improve air quality, and reduce the community's expenditures for healthcare. Transit also provides access to health care facilities, recreational facilities, and grocery stores.

By working with organizations that have large networks of customers, employees, members, and constituents in the Omnitrans service area, an active transportation coalition can make a difference in influencing the built environment and travel behaviors in the San Bernardino Valley. The active transportation coalition can leverage federal funding opportunities and provide technical assistance for infrastructure improvements on public and private property, travel demand management programs, or educational programs. By doing the above, the coalition can develop a consistent message and a uniform program for the region.

GOAL 11:

Completion of Holt Boulevard Corridor Project

TEAM: Rohan, Anna, Project Development Team (PDT) and Consultants

Conduct and participate in studies to determine the optimal mobility option for the Holt Boulevard corridor.

OUTCOME

Adopt a locally preferred alternative for the corridor that will result in travel time savings, increased ridership, population/employment growth, transit oriented development opportunities, economic development and cost effectiveness, and will qualify for federal funding.

PERFORMANCE INDICATORS

1. Adopt a locally preferred alternative (LPA) for the corridor by July 2014.
2. Submit LPA for FTA funding.
3. Increase average weekday transit ridership along Holt Boulevard corridor to 10,000 from 5,500.

STRATEGIES

1. Continue to participate on the Project Development Team (PDT) for the City of Ontario's Holt Boulevard Mobility & Streetscape Strategic Plan.
2. Form a PDT with the cities of Fontana, Montclair, Ontario, Pomona, and Rancho Cucamonga, the County of San Bernardino, the San Bernardino Associated Governments (SANBAG), the Southern California Association of Governments (SCAG), Ontario International Airport, and other key stakeholders.
3. Hire a consulting team to conduct the Alternatives Analysis (AA) for the Holt Boulevard sbX BRT corridor.
4. Manage the AA process, including public and stakeholder involvement, coordination of the consultant and PDT members, and communication throughout the process with FTA staff and the Omnitrans Board of Directors.
5. Develop a budget and timeline for project development.

TASKS

	COMPLETION DATE
1. Form a PDT with appointed members from each agency.	July 2012
2. Contract with consultant for AA work.	October 2012
3. Hold AA kickoff meeting with PDT and consultant.	November 2012
4. Completion of City of Ontario's Holt Boulevard Mobility & Streetscape Strategic Plan.	December 2012
5. Submit Alternatives Analysis Initiation Package.	December 2012
6. Prepare detailed definition and analysis of alternatives.	May 2013
7. Conduct public outreach.	May 2013
8. Complete ridership analysis/patronage forecasting for each alternative.	June 2013
9. Submit grant applications for project development phase.	July 2013

GOAL STATEMENT

The Holt Boulevard Corridor, from the Fontana Transit Center to the Pomona Transit Center generally along Holt Boulevard and Fourth Street, has the highest ridership in the Omnitrans system and serves the cities with the highest employment and population growth. Omnitrans will lead the Alternatives Analysis (AA) for the 20.4-mile Holt Boulevard Corridor and will collaborate with the cities of Fontana, Montclair, Ontario, Pomona, and Rancho Cucamonga, as well as San Bernardino County, SANBAG, SCAG, and the Ontario International Airport.

All of these agencies are committed to the six principles of the USDOT/HUD/EPA Livability Initiative and Partnership for Sustainable Communities, as reflected in their regional transportation plans and in their respective General Plans that encourage nodal economic development with higher densities, integration of affordable housing, and opportunities for Transit Oriented Development (TOD) near potential transit stations.

The AA process will build on the work already completed including the System-wide Transit Corridor Plan adopted by Omnitrans, City of Ontario's Holt Boulevard Mobility & Streetscape Strategic Plan, the Long Range Transit Plan adopted by SANBAG, and Omnitrans' San Bernardino Express (sbX) BRT service plan

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