



PLANS AND PROGRAMS COMMITTEE
TUESDAY, DECEMBER 3, 2013 – 10:30 A.M.
OMNITRANS METRO FACILITY
1700 WEST 5TH STREET
SAN BERNARDINO, CA 92411

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

A. CALL TO ORDER

B. ANNOUNCEMENTS/PRESENTATIONS

1. Next Committee Meeting: Not scheduled at this time.

C. COMMUNICATIONS FROM THE PUBLIC

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

D. POSSIBLE CONFLICTS OF INTEREST ISSUES

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

N/A

E. DISCUSSION ITEMS

- | | |
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| 1. Approve Plans & Programs Committee Minutes – July 25, 2012 | 2 |
| 2. Receive and File, Results of Benchmarked Customer Satisfaction Survey Results | 7 |
| 3. Receive and Forward to Board of Directors, Notice of Upcoming Sub-Recipients for Job Access Reverse Commute and New Freedom Federal Funds | 14 |
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| 5. Recommend Approval to Board of Directors, Proposed Chino Hills OmniGo Tripper Service | 22 |
| 6. Recommend Approval/Direction of One Option to Board of Directors, Potential Upland OmniGo Service | 26 |
| 7. Receive and Forward to Board of Directors, Status Report, OmniConnects, Fiscal Year 2015-2020 Short Range Transit Plan | 33 |

ITEM # E1

**PLANS & PROGRAMS COMMITTEE
MINUTES
July 25, 2012**

The Plans & Program Committee meeting was called to order by Chair Pat Morris at 11:04 a.m. on Wednesday, July 25, 2012.

Board Members Attending

Mayor Pat Morris, City of San Bernardino – Committee Chair
Councilmember Ron Dailey, City of Loma Linda
Mayor Pro Tem Lee Ann Garcia, City of Grand Terrace
Mayor Pro Tem Penny Lilburn, City of Highland
Mayor Ray Musser, City of Upland
Councilmember Ed Palmer, City of Rialto
Mayor Dick Riddell, City of Yucaipa
Mayor Pro Tem Sam Spagnolo, City of Rancho Cucamonga
Mayor Dennis Yates, City of Chino

Committee Members Absent

Supervisor Neil Derry, County of San Bernardino
Supervisor Josie Gonzales, County of San Bernardino

Omnitrans Administrative Staff

Milo Victoria, CEO/General Manager
Robert Miller, Chief Financial Officer
Marjorie Ewing, Director of Human Resources
Scott Graham, Director of Operations
Jeremiah Bryant, Planning & Scheduling Manager
Mitch Alderman, SANBAG
Carol Angier, Administrative Secretary

AGENDA ITEMS

1. Approval of Plans & Programs Committee Minutes for May 30, 2012

M/S (Musser/Riddell) to approve the minutes of the May 30, 2012 Plans & Programs Committee meeting. Motion was unanimous by members present.

2. Receive & File Comprehensive Operational Analysis (COA) Update

Committee Chair Morris asked when the COA would be finalized. Mr. Alderman said he did not have an exact date, but it should be done the latter part of October. CEO/General Manager Victoria said at the last Committee meeting in May, staff did ask the COA consultant, AECOM, to give an update at this meeting. However, SANBAG informed us the consultant would not be at this meeting. Therefore, staff will provide basically the same update that AECOM provided at SANBAG's Commuter Rail and Transit Committee in June. Member Lilburn asked why AECOM is not attending this meeting, and CEO/General Manager Victoria said SANBAG instructed them not to come as the update was presented at their Commuter Rail & Transit Committee meeting.

Planning & Scheduling Manager Bryant said while most of the presentation is the same as AECOM's, staff will have a few more slides to provide a better understanding of the project and provide Omnitrans' perspective. He said the last COA status update was delivered to this Committee in May. At that time, Omnitrans had just received Technical Memo #2 (TM), Financial Analysis, from AECOM that included a \$99.1 million shortfall compared to the level required to maintain service over seven years starting in 2014. Omnitrans did provide comments on the TM, but has received no response to date from AECOM on our comments. In addition, Omnitrans has not received any further deliverables from AECOM (three more TMs were expected) or any requests from them for data. The only visible activity since May was AECOM's presentation at SANBAG's June Committee meeting. AECOM maintains the COA will be completed in September/October.

Member Spagnolo said this information needs to be presented to the full Board and not just this Committee. A letter was sent to the full Board from Chair Riddell that some important decisions need to be made regarding the COA within the next three months. Mr. Alderman said SANBAG never meant to deliver bits and pieces of various information for consideration. The intent was to deliver the final draft COA to both SANBAG and Omnitrans Boards. It was Omnitrans' request to review each Technical Memo to this Committee. Member Lilburn said some red flags came up during the study concerning large funding cuts for Omnitrans. It was the Board Members that gave direction to CEO/General Manager Victoria to provide more information and answers to this Committee.

Chair Morris said the COA has been a very slow process, has gone on longer than anticipated, and is very expensive. He assumes substantial memos have gone back and forth between Omnitrans and AECOM on the accuracy of the data analysis and data amendments. We need to present the finalized COA before both Boards in order to see the entire picture. Member Spagnolo said the COA was not conducted because Omnitrans was having problems, but instead has shown that Omnitrans is a very well-run, low-cost organization. There is a redirection of funding that could affect bus operations and strand passengers in the service area. Chair Morris said we are just receiving and analyzing a report on how to best to allocate these resources. No recommendations are being made at this point. Member Spagnolo asked if the Omnitrans Board would be making these recommendations. Member Riddell said Omnitrans has been put into a state of limbo due to reduced future funding. It is the SANBAG Board that will make the decision on the Redlands Rail, and funding will be taken from Omnitrans for this rail. While he is not against rail, he does not want to cut back bus service to thousands of people. Chair Morris said he agreed, and stated at the completion of this report, we will have the complete analysis and information necessary to decide how to allocate resources. Member Riddell said any

decisions should be delayed until completion of the COA. Chair Morris said that is up to SANBAG to make that decision as they are the allocators of the funding resources.

Mr. Alderman said SANBAG has taken no action at this point. Regarding the Redlands Rail, preliminary engineering and the environmental is all that is being done at this point. SANBAG also wants to do more Bus Rapid Transit (BRT) projects and more Metrolink projects. SANBAG has to decide what we can do with the funding we have. This is what our intent is. We have to do these projects in the most efficient manner possible. Chair Morris said we will find a way to get these SANBAG projects done and keep Omnitrans continuing operations. There is no need to panic at this point. When the COA is finalized, then we will decide what needs to be done. Member Riddell said if Omnitrans bus service has to be cut back due to lack of funding, it is the passengers in San Bernardino that will suffer the most. Chair Morris agreed and said this is why he supports the sbX BRT project.

Member Dailey asked what role the Omnitrans Board will have when the COA is finalized. Mr. Alderman said SANBAG will review it first and then make a decision on the funding levels. The Omnitrans Board will then have to decide what they will do with the available funding. AECOM will provide options for this Board to consider. Member Dailey said he is not satisfied with just seeing the final COA. It is important to review each TM as it is completed. The AECOM reports he has seen so far have not been very satisfactory. He asked if there was a conflict of interest with SANBAG and Omnitrans having many of the same Board Members. Chair Morris said while there may be a perception of a conflict, this process is still legal. Member Garcia said she agreed with Member Dailey that this Committee needs to review the individual reports rather than just the final COA. She asked if Omnitrans agrees with the data provided so far. Planning & Scheduling Manager Bryant said that the information in TM #2, Financial Analysis, is completed with the projected \$99.1 million shortfall locked in place. That will have an effect on the outcome of Phase II and Phase III of the COA. Staff wanted to present the information on the shortfall prior to the completion of the other phases.

Member Spagnolo said that if the \$99.1 million funding cut to Omnitrans over seven years is a done deal, what will we do? The other cities in Omnitrans' service area will also suffer; not just San Bernardino. Member Riddell said he sent the letter to the Board on the COA because this funding cut is very serious for Omnitrans. Member Spagnolo said the funding cut is due to a redirection of funds by SANBAG for another project and not due to a lack of funding. Member Yates said no one on the SANBAG Board has voted yet on any redirection of funds. Mr. Alderman said this is an option on what may be done; no decision has been made yet by SANBAG.

Planning & Scheduling Manager Bryant continued with the June SANBAG presentation by AECOM. He reviewed what a COA is and what the COA will study. He stated that AECOM presented that the COA is not scoped to address other SANBAG projects such as the Redlands Rail, Metrolink Rail, other BRT routes beyond the sbX BRT, other San Bernardino County transit operators, or SANBAG's policy or allocations decision. While the details of these programs may be outside the scope of the COA, they are nevertheless the driving factors that required the need for a COA. The funding dynamics are driven by the rail program, and Omnitrans has asked several times for the funding impact of these programs detailed. The COA will be in three phases – Phase I which is the overview of existing conditions, Phase II which is the development of recommendations, and Phase III which is the action and implementation plan. The COA started in March 2011, and AECOM said Phase I will be completed in August 2012. They also believe the other two COA phases can

be completed by October 2012. AECOM's primary deliverable in Phase I was the financial analysis that provides a revenue and cost model for operation and capital programs for Omnitrans for 2014 to 2020. AECOM stated they were evaluating two funding scenarios – a baseline analysis that maintains existing service and capital plans and alternative services based on outsourcing, reductions in service, or other changes. To date, Omnitrans has seen no details on the alternative services from AECOM.

To develop Omnitrans' revenue projections, AECOM relied on SANBAG's Measure I Ten Year Delivery Plan that tentatively allocates funding to various transit projects and includes funding distributions besides Measure I. It is important to note that Omnitrans and SANBAG also formally adopted a funding plan through 2016 sent to the FTA to secure the sbX Project Construction Grant Agreement (PCGA). In AECOM's presentation to SANBAG, multiple funding sources for Omnitrans were shown. LTF has the largest share of Omnitrans operating revenue (49%). Omnitrans also receives Measure I funds. AECOM also stated Omnitrans receives STA funding. While Omnitrans FY12 budget was approved by SANBAG and includes STA funding of \$2.3 million, Omnitrans has not received any of the STA funding. SANBAG also informed Omnitrans the \$2.3 STA funding will not be allocated to us. In spite of this, the STA funding remains as part of AECOM's funding graph for Omnitrans.

Omnitrans' funding will be seriously reduced starting in 2014, which is the same year the sbX service starts. At the June SANBAG meeting, AECOM shows LTF funding for the Valley growing at a rate of 4.7 percent per year. However, Omnitrans will receive reduced LTF funding. Historically, LTF funding to Omnitrans was significantly higher, but was reduced by \$17 million due to lack of LTF funding around 2010. Although the LTF funds are increasing, the funds are being carved up for other transit projects. AECOM's analysis shows that Omnitrans is a cost effective provider of service, which was necessary due to the reduced LTF funding. Omnitrans has already reduced service and evaluated various degrees of outsourcing to accommodate the budget available. The shift in LTF funding is perceived by Omnitrans to be the primary reasons why the \$99.1 million shortfall to Omnitrans is a policy choice and not a structural issue.

The issue is similar for Measure I funds. In 2009, Omnitrans had a high of \$7.3 million in Measure I funds, but now will fall to only \$1.7 million in 2014. This will be a 77 percent reduction to Omnitrans in spite of the fact that Measure I funds are growing in the Valley by five percent and will keep growing at over four percent per year. Chief Financial Officer Miller said if Omnitrans is not able to provide and maintain sbX service, along with the other service we provide, the FTA will consider this a breach of contract. This reduction of funding will result in a likely reduction of Omnitrans service by over 25 percent.

At the SANBAG Committee meeting, AECOM also developed a capital cost model based on their analysis of Omnitrans' capital needs. Staff is concerned about this methodology because the peaks and valleys of the capital plan are not in line with our continual gradual fleet replacement goals. AECOM's revenue assumptions rely on two issues. The first one is nearly \$20 million in California's Prop 1B bond sales. The problems with this funding is that California has not been selling bonds as they did in the past, and this funding source is not expected to resume in the time frame provided. The second issue is the assumption that Omnitrans will obtain funding from \$16 million in competitive bus replacement grants. As these grants are competitive, there is no guarantee that Omnitrans will obtain the amount of grants needed to fund bus replacements. This funding relies too heavily on unlikely funding sources and will have a negative impact on bus replacement and drive up maintenance costs.

Task 5 is a review of Omnitrans' administrative functions. AECOM compared Omnitrans to 22 peer transit agencies. Planning & Scheduling Manager Bryant reviewed the chart that showed Omnitrans to be an efficient lower-cost provider when evaluated on cost per passenger mile, cost per trip, cost per vehicle hour, and operations cost per trip. Our demand response service is also better than average in terms of efficiency. As Omnitrans is already a low cost provider, the reduced funding will make it difficult to meet our budget without significant reductions in service.

Task 6 is the alternative service delivery that addresses outsourcing. The first time Omnitrans saw anything on this Task was at the June SANBAG Committee meeting. AECOM recommended using the CTSA to manage Access growth. AECOM also stated that SANBAG may be more appropriate to handle large capital projects. Omnitrans has historically evaluated each project to partner with the best option, be it SANBAG, private partners, contractors, or in-house staff. This allows us the best ability to economically use federal monies to deliver the most transit to our passengers. It is best to evaluate all these options rather than just use one – SANBAG. AECOM reviewed outsourcing options including some weekend service, all of West Valley, and all fixed route service. AECOM did state it would be difficult to find a large area for savings in the administration area because Omnitrans already evaluates these options on a regular basis.

The next step for AECOM is to finalize Phase I, which is scheduled for August. Phases II and III are due by September/October. Omnitrans requests that in addition to evaluating cuts, AECOM and SANBAG also look at ways to minimize the funding reductions as they are the driving factor behind the COA analysis. Chair Morris said that when the final COA is available, SANBAG and Omnitrans should form a joint committee to review it. Member Lilburn said she disagreed, as recommendations may be made that have a negative effect on Omnitrans. Member Garcia said the current findings should be presented to both Boards for them to have a better understanding, especially the Measure I issue. Member Spagnolo agreed. Member Riddell stated that no decision should be made until both Boards have reviewed the COA. Chair Morris said SANBAG has made no decisions yet on the funding or what projects will get the funding. SANBAG will allocate funding for projects that have the most priority. Member Riddell said SANBAG controls the funding and should not make any decision until this is ironed out. Priorities need to be determined. After some discussion, Committee consensus was to send a supplemental agenda for the August 1 Omnitrans Board of Directors' meeting stating the concerns of this Committee regarding the \$99.1 funding shortfall to Omnitrans.

Chair Morris said the next Committee meeting will be scheduled when the COA is finalized. Several Committee members requested continual updates be provided to this Committee. The Plans & Program Committee meeting adjourned at 12:54 p.m.

Carol Angier, Recording Secretary

ITEM # E2

DATE: December 3, 2013

TO: Committee Chair Penny Lilburn and
Members of the Plans and Programs Committee

THROUGH: P. Scott Graham, Interim CEO/General Manager

FROM: Anna Rahtz, Acting Director of Planning and Development Services

SUBJECT: **BENCHMARKED CUSTOMER SATISFACTION SURVEY RESULTS**

FORM MOTION

Receive and file this staff report summarizing Omnitrans' results in the American Bus Benchmarking Group's 2013 Customer Satisfaction Survey.

BACKGROUND

Omnitrans is an active member of the American Bus Benchmarking Group (ABBG). ABBG is a consortium of mid-sized bus agencies in North America that was established to benchmark performance and share experiences and best practices. There are 17 ABBG member agencies representing the communities of Austin, TX; Buffalo, NY; Arlington Heights, IL; Cleveland, OH; Dayton, OH; Des Moines, IA; Eugene, OH; Fort Worth, TX; Orlando, FL; Providence, RI; Rochester, NY; St. Petersburg, FL; San Bernardino, CA; Spokane, WA; Stockton, CA; Salt Lake City, UT; and, Vancouver, WA.

ABBG is facilitated by the Railway and Transport Strategy Centre (RTSC) at Imperial College London. ABBG members benchmark metrics that cover the multiple components of an agency's performance. Using the Balanced Scorecard approach, ABBG benchmarked metrics focus on Growth & Learning, Customers, Internal Processes, Financials, Safety and the Environment.

In order to evaluate and benchmark Customer Satisfaction, ABBG members added a Customer Satisfaction Survey component in 2013. The survey was developed and administered by RTSC at a very low cost of \$500 per member agency. The purpose was to administer an identical survey at all partner agencies so that the results would be comparable across agencies.

This report provides the Omnitrans-specific results of the survey administered and provides a comparison to the survey average.

METHODOLOGY

The survey had one general question on overall satisfaction. There were 19 specific questions designed to measure eight key areas that impact customer satisfaction, including: Availability, Ease of Use, Comfort, Customer Care, Environment, Information, Security and Time. Customers were given the opportunity to rank the eight priorities. The survey ended with four demographic questions. The general satisfaction question was based on a scale of 1 (very dissatisfied) to 5 (very satisfied) and the specific questions were based on 1 (strongly disagree, (negative)) to 5 (strongly agree, positive)).

The survey was executed through an online questionnaire between April 8th and May 5th, 2013. The survey was administered in both English and Spanish.

While online surveying does introduce an element of self-selection bias, the bias introduced is the same at each of the member agencies and as a result the comparisons between agencies remain valid. In total, 4,344 surveys were completed including 648 Omnitrans customers participating. From the original responses, a cleaning approach was applied that removed surveys that were incomplete, clones from the same IP address or answered too quickly. Following the cleaning, Omnitrans had 506 surveys. With this number of responses, the survey results are accurate at a minimum of $\pm 4.5\%$ with a 95% confidence level.

RESULTS

Overall Satisfaction

Omnitrans scored a positive satisfaction rating from 83% of respondents to the question “How satisfied are you overall with the bus service?” The benchmarked average for this question was 65%. Omnitrans overall satisfaction was the second highest of the benchmarked peers.

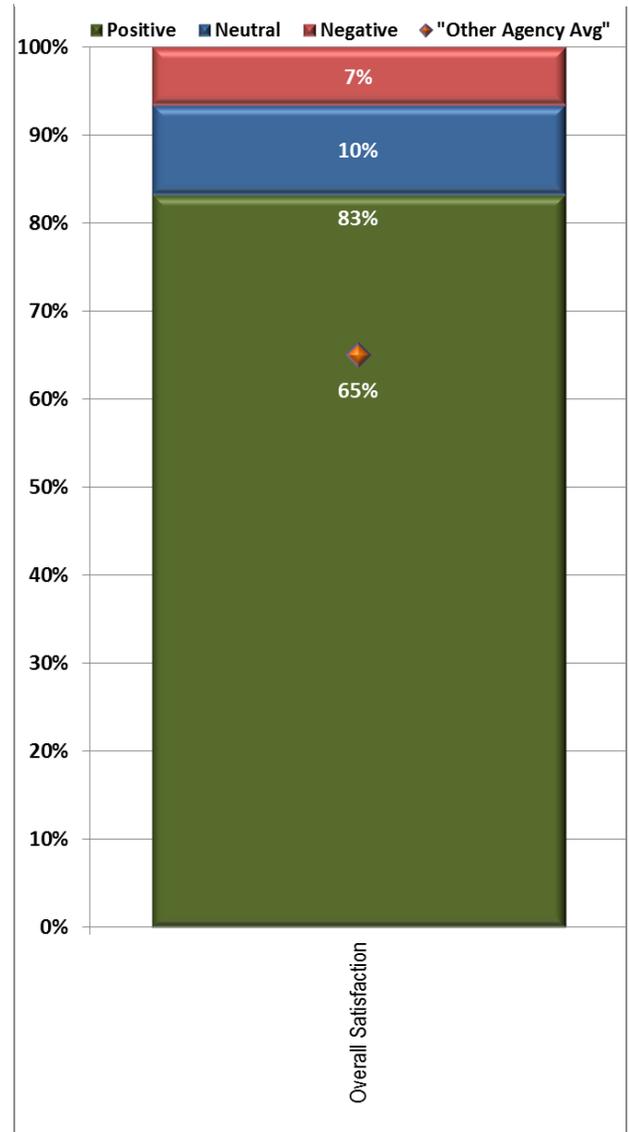
Omnitrans 83% positive was 11.5 times greater than the negative rating of 7%. This implies that for each one rider that has a negative opinion of Omnitrans, there are 11.5 people with a positive opinion.

Availability

Omnitrans scored a weighted 74% positive score on the measure of Availability. On the statement “The buses operated on the days and times that I need them,” Omnitrans scored a 66% agree rating compared to a 57% agree rating on average. On the statement “the bus routes are conveniently located for me” Omnitrans scored an 81% positive (agree), compared to an average of 70%.

Ease of Use

Exhibit 1: Overall Satisfaction

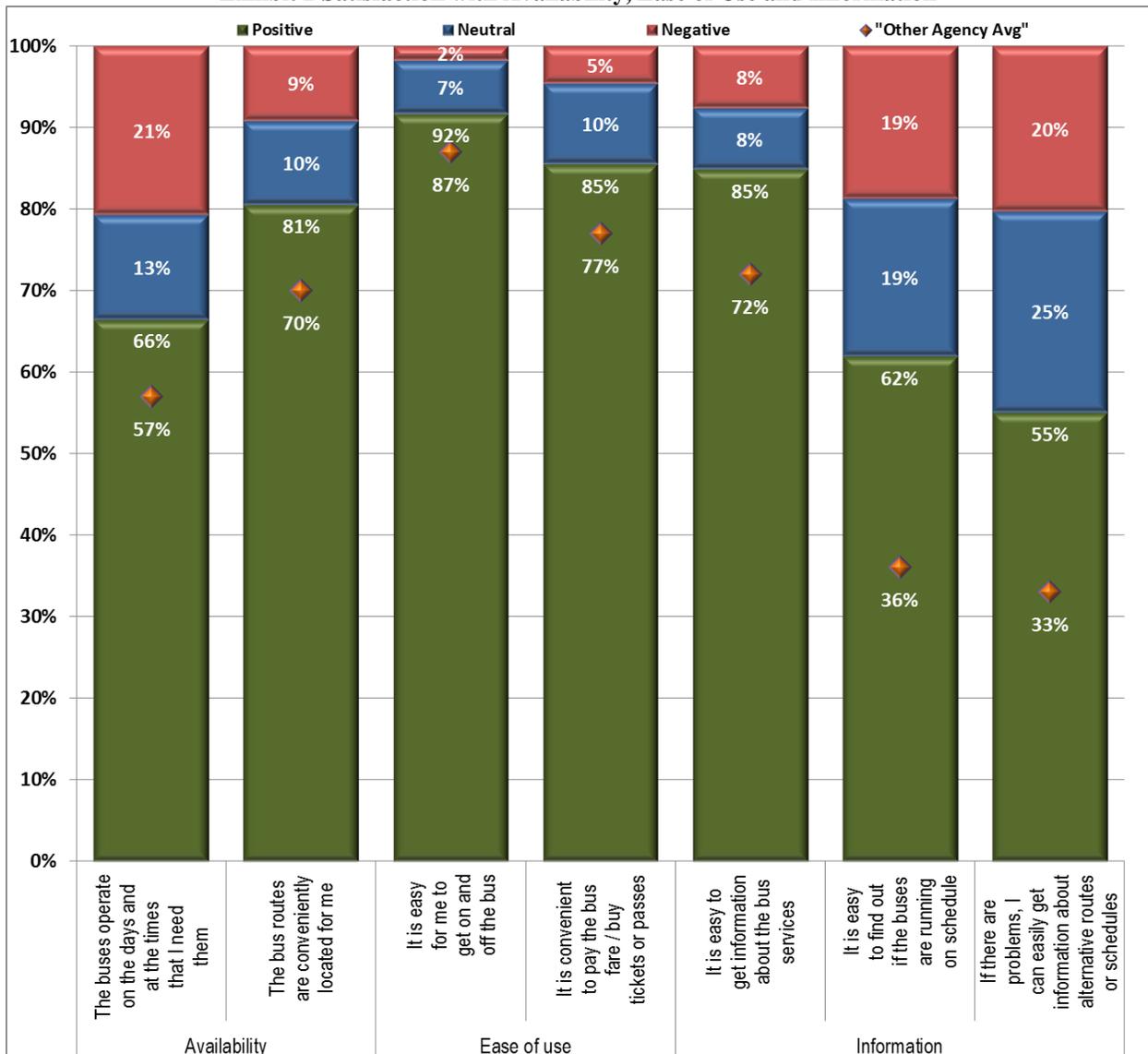


Omnitrans scored a weighted 89% positive score on Ease of Use which measured ease of getting on and off the bus and convenience of paying the fare. Specifically, Omnitrans scored 92% agree that “It is easy for me to get on and off the bus” compared to an 87% average for the group. Omnitrans scored 85% on “It is convenient to pay the bus fare/buy tickets or passes” compared to an average of 77% for the group.

Information

Omnitrans scored significantly higher than partner agencies on two of the three items related to Information. While Omnitrans only scored a 55% agree mark on “If there are problems, I can easily get information about alternative routes or schedules,” which was Omnitrans’ lowest score on any of the 19 questions, it was significantly higher than the group average of 33%. This indicates that both Omnitrans and the group have an area to improve upon, but that

Exhibit 2 Satisfaction with Availability, Ease of Use and Information



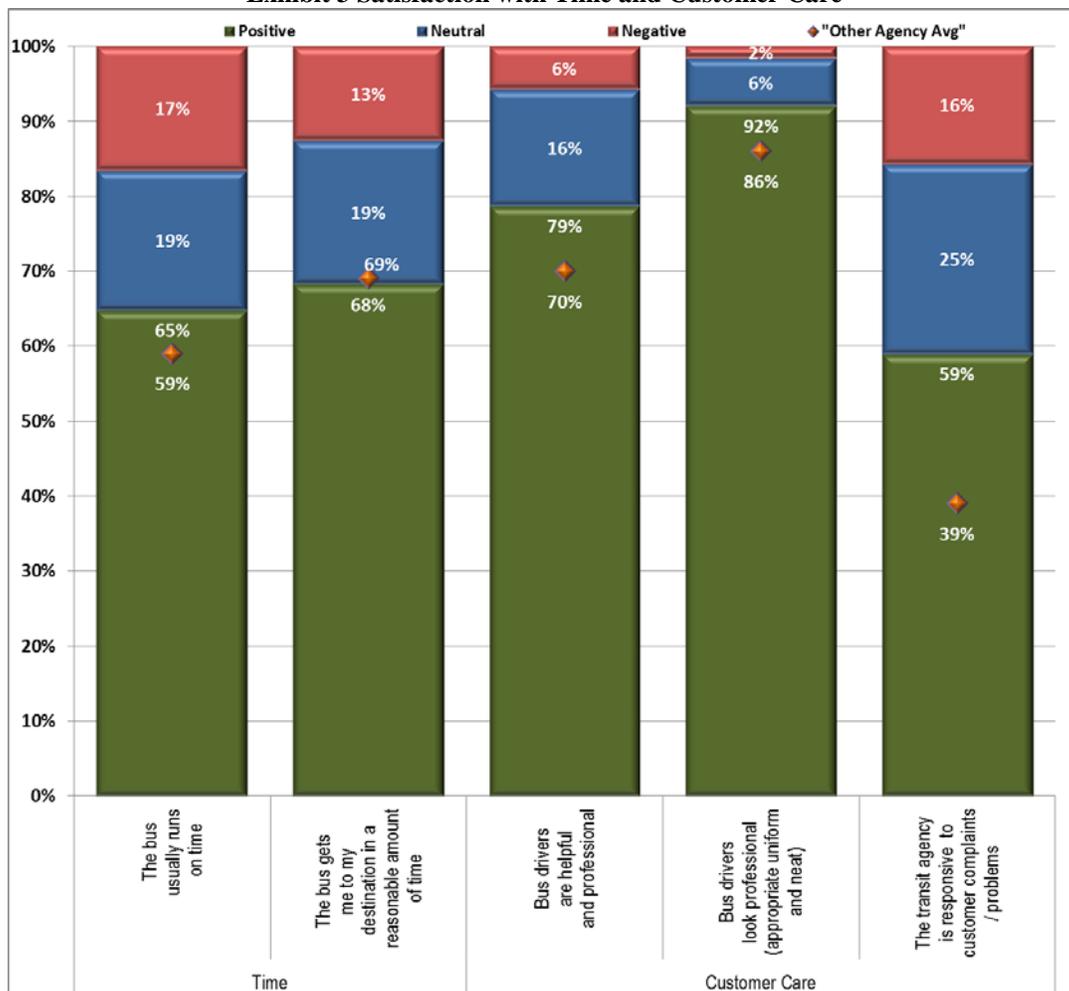
Omnitrans is outperforming peers. Similarly scored was a 62% agree rating on “It is easy to find out if the buses are running on schedule” compared to a 36% group-wide average. Omnitrans relatively high score may be attributed to the launch of NexTrip in the few months preceding the survey.

Time

Omnitrans scored a weighted 67% score in matters related to Time (travel time and on-time performance). In the on time performance question, 65% of responses indicated that they agreed that “The bus usually runs on time” compared to 59% among peers.

Omnitrans only scored below the peer group on two questions. One of these was “the bus gets me to my destination in a reasonable amount of time.” Omnitrans scored 68%, which was below but similar to the group average of 69%. Many of the ABBG partner agencies have introduced some version of Bus Rapid Transit (BRT) or BRT-lite. Many other partners have a more extensive collection of commuter express/freeway based routes. These services are important in 1) actually speeding up travel and 2) in the perception of speeding up travel. Improving travel speeds is a crucial measure to improving the customer experience.

Exhibit 3 Satisfaction with Time and Customer Care



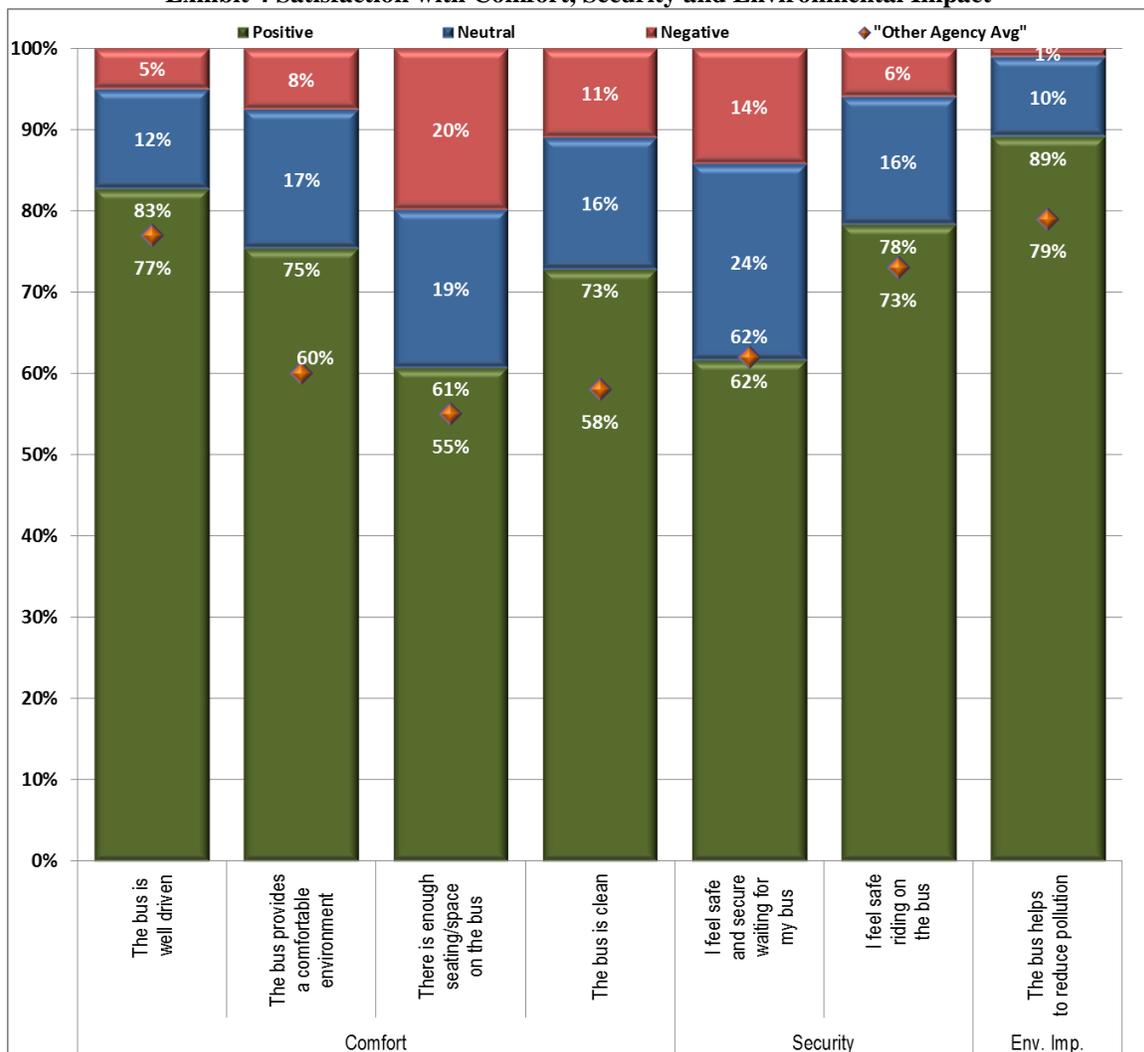
Customer care

Omnitrans scored one of its highest and lowest scores in the area of Customer Care. While the riders have a 77% positive response to questions in this area, the scores ranged from a high of 92% agree that “Bus drivers look professional” to a low of 59% agree that “the agency is responsive to customer complaints.” While the 59% rating on responsive to complaints is Omnitrans second lowest score, it again is significantly higher than the 39% scored by the group peers. Additionally, on this question it is important to note that a large portion, 25% were neutral on this question, rather than disagreeing with this question. 16% of respondents indicated that Omnitrans was not responsive, which is a ratio of 3.7-to-1 that found the agency responsive compared to those that do not.

Comfort

Omnitrans scored a weighted average of 73% of respondents agreed with statements related to Comfort on board. Omnitrans scored above the group average in each of the four specific statements: “the bus is well driven,” “the bus provides a comfortable environment,” “there is enough seating/space on the bus,” and “the bus is clean.”

Exhibit 4 Satisfaction with Comfort, Security and Environmental Impact



Security

In a statement that measured satisfaction with Security levels, Omnitrans received mixed results. On board security, 78% of respondents agreed that “I feel safe riding on the bus” above the group average of 73%.

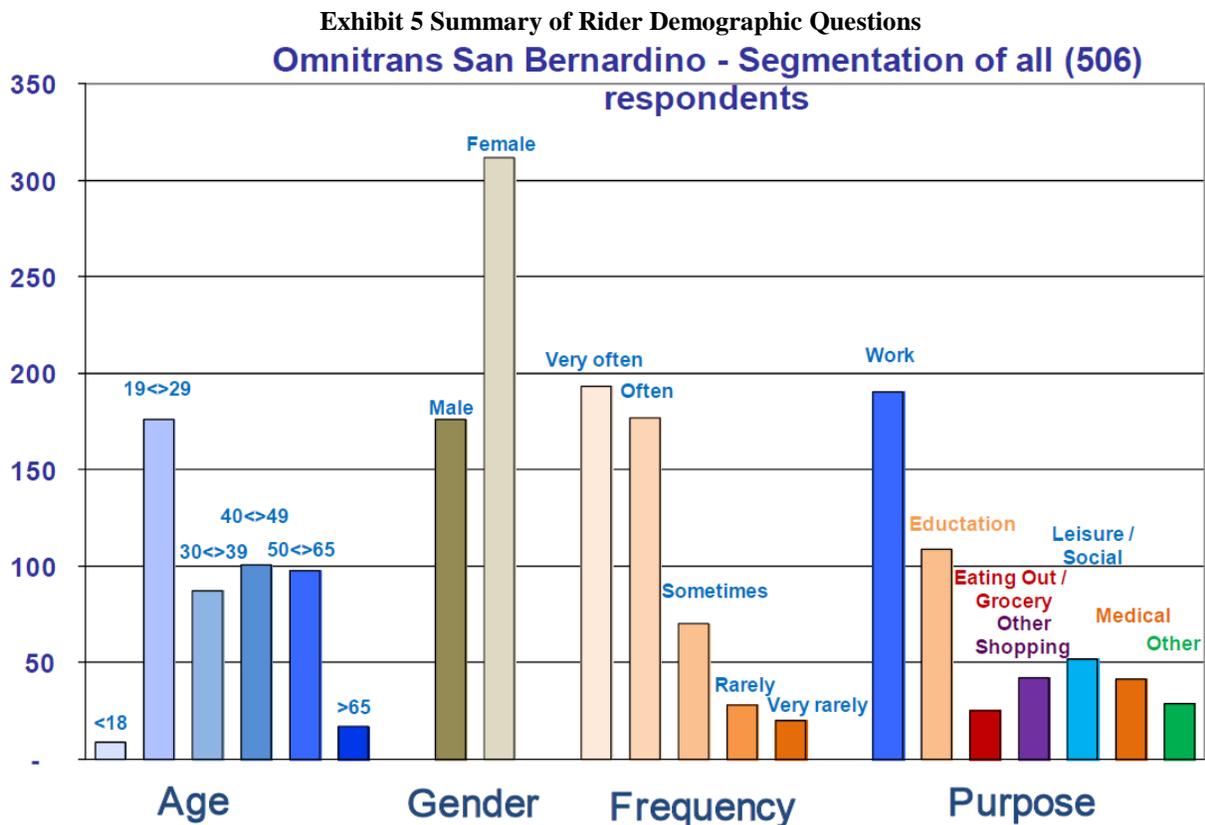
At stop security, Omnitrans measure slightly below the group average with only 62% agreeing that “I feel safe and secure waiting for my bus.” In terms of rounding, this is below the 62% achieved by the group average.

Environmental Impact

89% of respondents indicated that “The bus helps to reduce pollution” which was above the 79% group wide average.

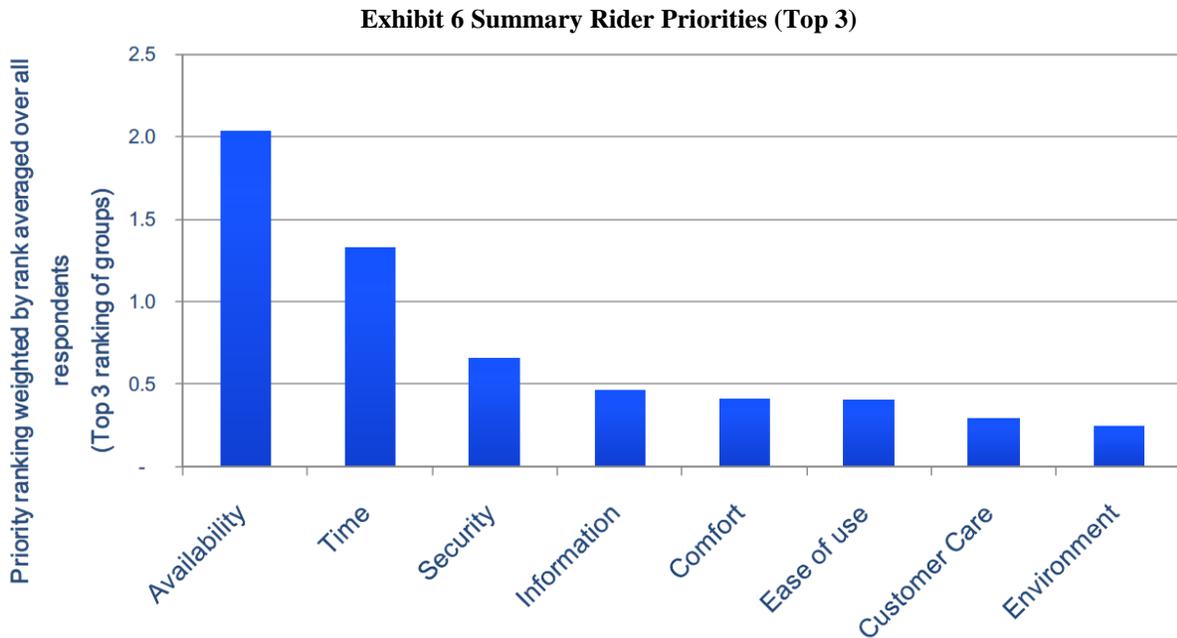
Demographics

Omnitrans demographic results within the ABBG Customer Satisfaction results were similar to Omnitrans own surveys and generally similar to that of partner agencies. The most common riders are young (19-29), Female, who ride transit often or very often to work or to an educational institution.



Rider Priorities

Each member of ABBG saw very similar results when asked to rank priorities for their agency. In nearly every case, availability of service (frequency and hours of service), time (travel time and on-time performance) and security (on board and at stops) were the three highest prioritized characteristics. Specifically for Omnitrans, 79% included availability as a top three priority, followed by 66% that included time and 37% that included security. When looking only at the “top single” priority, 53% of Omnitrans respondents indicated availability, 17% indicated time and 10% security.



CONCLUSION

As measured by the ABBG benchmarked Customer Satisfaction Survey, Omnitrans performs well compared to peers in terms of many aspects of customer satisfaction. In general, overall satisfaction with Omnitrans was 83%, one of the highest in the group and well above the 65% survey average. One area where Omnitrans scored below average was in “Time” particularly in travel times and this measure to “Time” is the second most important aspect to riders.

Staff recommends that the Committee receives and files this staff report that summarizes the benchmarked customer satisfaction survey.

SG:AR:JB

ITEM # E3

DATE: December 3, 2013

TO: Committee Chair Penny Lilburn and
Members of the Plans and Programs Committee

THROUGH: P. Scott Graham, Interim CEO/General Manager

FROM: Anna Rahtz, Acting Director of Planning and Development Services

**SUBJECT: UPCOMING SUB-RECIPIENTS FOR JOB ACCESS REVERSE
COMMUTE AND NEW FREEDOM FEDERAL FUNDS**

FORM MOTION

Receive and forward to the Board of Directors notice that Omnitrans is working to enter into funding agreements with sub-recipients who were awarded Section 5316 Job Access Reverse Commute (JARC) and Section 5317 New Freedom (NF) federal funds through SANBAG's 2013 Call for Projects.

BACKGROUND

On October 2, 2013, SANBAG's Board of Directors awarded 14 grants to eight (8) agencies. Seven (7) of these will become sub-recipients of federal funding through Omnitrans because they are not directly eligible recipients of Federal Transit Administration (FTA) funds.

Omnitrans' pass through of federal funding in this round of awards totals \$1,664,548 in JARC funds and \$1,238,092 in NF funds as part of the 2013 Call for Projects. Table 1: Sub-Recipient Awards below provides details by agency.

Table 1: Sub-Recipient Awards

Sub-Recipient	JARC	NF
Community Senior Services		\$ 374,450
Victor Valley Transit Authority	\$ 167,429	\$ 75,381
Central City Lutheran Mission	\$ 54,727	\$ 98,231
Pomona Valley Workshop	\$ 318,751	\$ 123,960
Valley Transportation Agency	\$ 588,556	\$ 505,634
United Way 211	\$ 181,309	\$ 60,436
OPARC	\$ 353,776	\$ 10,074
Total	\$ 1,664,548	\$ 1,248,166

In addition, Omnitrans successfully was awarded a total of \$731,257 for three projects which include Omnitrans Travel Training, Omnitrans Travel Training DVD, and operating funds for all existing OmniGo routes.

Each sub-recipient applied for the federal funds through SANBAG's 2013 Specialized Transportation Combined Call for Projects, which evaluated and scored each proposed program. Based on the scoring, the funded programs were selected. The awards are for a combination of capital and/or operating transportation projects that will span over two years.

As the designated recipient of federal transportation funding, Omnitrans is the pass-through agency of JARC and NF funds. In addition to reimbursing the sub-recipients, Omnitrans is required to ensure that each sub-recipient is complying with the FTA guidelines by monitoring each agency's program. SANBAG allows for a 4% administration cost to be reimbursed to Omnitrans to cover the required administrative and oversight work, which totals approximately \$144,000 over two years.

Over the next two to three months, Omnitrans' Planning staff will be working with each sub-recipient on drafting each sub-recipient funding agreement. After each funding agreement is reviewed and approved by the legal counsel of each agency, the agreements will be presented to the Omnitrans Board of Directors for approval.

Agreements may also be presented to the Plans & Programs Committee, depending on committee schedules, before going to the Board of Directors.

The programs that were awarded funding and that Omnitrans will work to enter agreements with are:

- a) Community Senior Services: operating funds for the mileage reimbursement volunteer driver program for seniors and persons with disabilities;
- b) Victor Valley Transit Authority: operating funds for the Valley portion of the BV Link, which connects Barstow and Victorville with San Bernardino.
- c) Central City Lutheran Mission: operating funds to transport HIV clients to medical and work related trips.
- d) Pomona Valley Workshop: capital and operating funds to continue transporting clients.
- e) VTrans: operating funds for the Transportation Reimbursement Escort Program (TREP).
- f) VTrans: continue funding for Travel Training Programs.
- g) VTrans: operating funds for the taxi voucher program VTrans Ride.
- h) United Way 211: operating funds for the One Click One Call Access Mobility and Marketing program.
- i) OPARC: capital and operating funds for the OPARC transportation Connect program.

CONCLUSION

Recommend the information is forwarded to the Board because the Board will be asked to authorize the Interim CEO/General Manager to execute the funding agreements as they come before the Board of Directors.

PSG:AR:JB:BR

ITEM # E4

DATE: December 3, 2013

TO: Committee Chair Penny Lilburn and
Members of the Plans and Programs Committee

THROUGH: P. Scott Graham, Interim CEO/General Manager

FROM: Anna Rahtz, Acting Director of Planning and Development Services

SUBJECT: SERVICE CHANGE PROCESS

FORM MOTION

Receive and file this staff report that describes the approval process for Omnitrans fixed route service changes.

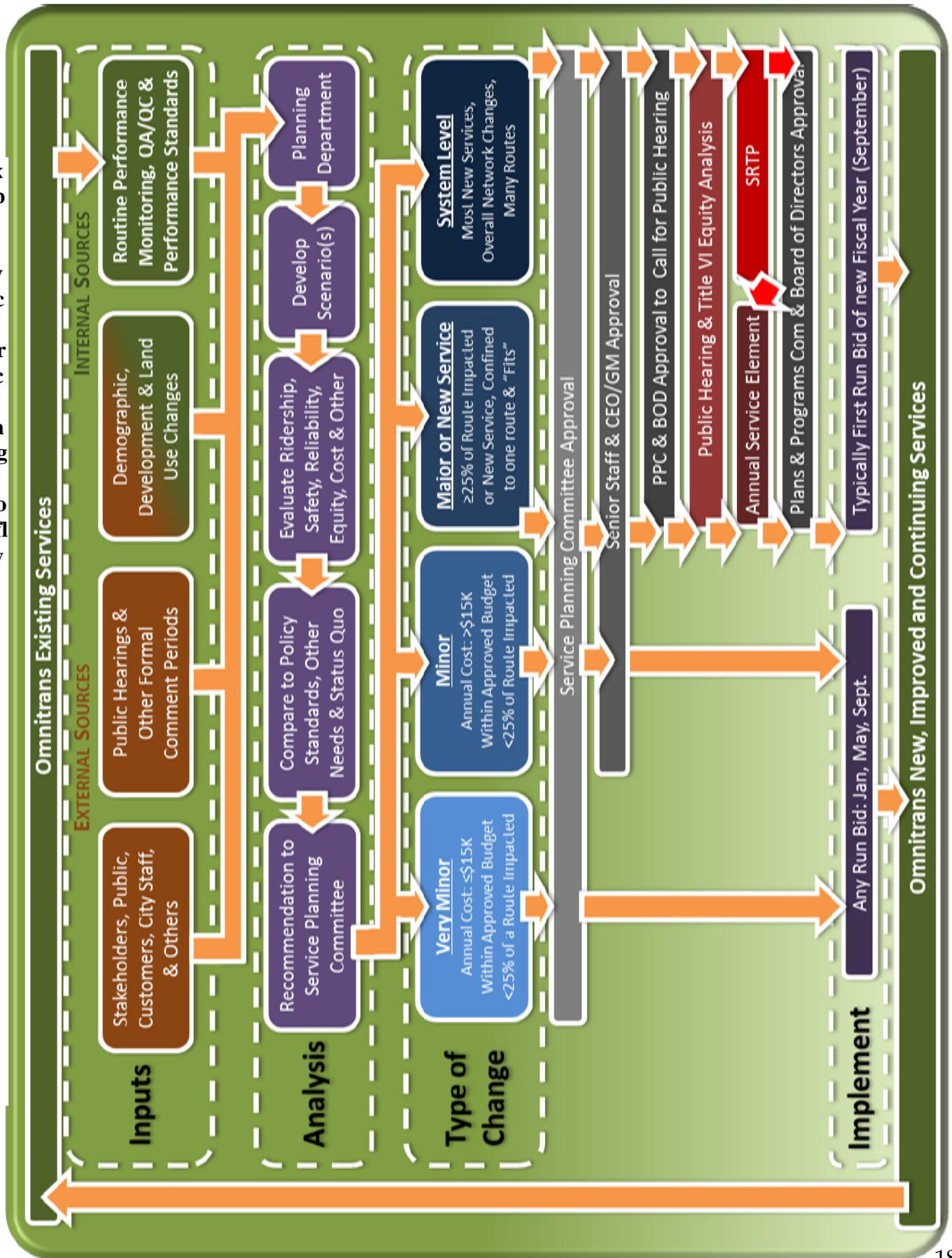
BACKGROUND

Omnitrans staff receives and evaluates several service requests per week. These requests come from multiple sources, including: Omnitrans' 1-800 customer service number, social media, the customer feedback form on Omnitrans.Org, city staff, community stakeholders, elected officials, staff at peer agencies and similar entities. Additionally, Omnitrans' own internal service monitoring protocols and driver, field supervisor and other in-field staff recommendations generate service requests on an ongoing basis.

With numerous service requests evaluated, questions have arisen as to why some service requests are acted on and implemented quickly, while others take longer and some do not get implemented at all. Conversely, some service changes occur when there were no specific requests. This memo summarizes the typical workflow, some key standards, and approval process for service changes. Exhibit 1 illustrates the typical workflow.

Omnitrans strives to take a proactive rather than reactive planning approach. Proactively planned service levels and changes are based on strategic policy and designed to accomplish broader level network design objectives. Reactively initiated service changes tend to be based on specific requests with a limited focus. Reactive planning often devolves into service change by complaint rather than attempts to develop long-term sustainable service.

Exhibit 1: Typical Service Change Workflow



SERVICE CHANGE CLASSIFICATIONS

Service changes are classified as major or minor. The Federal Transit Administration (FTA) requires that transit agencies have a policy that defines a major service change because there are federal requirements for major service changes. Omnitrans has defined a major service change as a change that impacts 25% or more of a route's service hours, service miles or ridership.

Typical major service changes include:

- the development of a new route;
- the elimination of an existing route;
- changes to the days that service is offered;
- frequency changes;
- routing changes to a parallel corridor;
- significant changes in service span; and,
- similar changes which fundamentally alter the route.

Major service changes like these require a public hearing and a Civil Rights Act of 1964-related Title VI Service Equity Analysis. As a result of the regulatory efforts required and because these changes tend to have larger impacts, Omnitrans staff tends only to propose major service changes in the Short Range Transit Plan or in the Service Element of the Annual Management Plan. Also because of regulatory requirements and the typical budgetary impact of a major service change, major service changes come to the Omnitrans Board of Directors for approval.

Minor service changes impact less than 25% of the salient service characteristics of a route. Most service requests and Omnitrans service monitoring practices are related to minor service changes. These minor service changes are typically:

- the addition or removal of a bus stop;
- shifts to route timing to improve reliability, or to improve transferability between routes, peers' routes or another mode;
- shifts to route timing to accommodate work shifts or school bell time schedules;
- a slight rerouting over a small segment of a route to accommodate a major trip generator or destination;
- a slight rerouting over a small segment to accommodate traffic changes or long term construction projects;
- a few times a day or less frequent deviation of a route from its regular routing to accommodate a trip generator that operates on a clear and repeated schedule such as a high school slightly off of a regular route (called a tripper service); and,
- the addition of a bus on existing routing for a short period of time to accommodate overcrowding issues.

Assuming that the minor service change can be accommodated within the existing annual budget and the annual dollar amount of change is within appropriate spending authorities, staff can implement these minor changes without specific Board of Directors approval. These changes are reviewed and implemented by the staff level Service Planning, Monitoring and Implementation

Committee (often just called the Service Planning Committee or (SPC)). The SPC is a multi-disciplinary committee that includes staff from Planning, Marketing, Finance, Operations, Maintenance and Safety and Security.

Minor service changes are implemented on the first Monday in January, May or September. These three dates correspond to new run bids and when new bus books are published. Staff recommends not making changes at other times of the year because then the publically available schedule and the actual schedule that a bus follows may not match, which leads to customer confusion.

Whether the service is directly operated or contracted out is another service classification that can have a significant impact on the timing of service changes. Based on the size of the change, service changes for contracted out services may require a contract change order which would also need Board approval.

SERVICE PLANNING ANALYSIS

The majority of service changes considered originates from Omnitrans staff as part of its internal performance monitoring processes. The primary metrics tracked include ridership, passengers per hour, farebox recovery, cost per hour, on-time performance, runtimes, boarding and alighting activity by stop, and demographic changes. Staff develops recommendations to improve these metrics and the underlying services and customer travel patterns they represent. When a change is considered, Planning staff develops service alternatives and estimates the impact.

Planning's alternatives and estimated metrics are compared to Board established standards defined in the Short Range Transit Plan and tradeoffs between the metrics are considered. The analysis and recommendations are vetted by the Service Planning Committee (SPC) and depending on the classification of the change started down the path for approval.

Service change requests that originate from other sources such as riders, stakeholders, city staff, or elected officials move through the same process.

A few key standards play a crucial role in determining if a service change or a new service is approved internally. These standards include:

- **Productivity-Oriented vs. Coverage-Oriented Service:** Measures and states what share of Omnitrans resources should go to high-quality, productivity-oriented services and what share should go to lifeline, coverage-oriented service. Currently, Omnitrans policy is to move towards dedicating 65% of service to productivity-oriented service and 35% to coverage-oriented service.
- **Walking Standard:** Measures the distance considered an acceptable walking distance to a route. Omnitrans' current walking standard is ½-mile.
- **Coverage Gap:** Measures the distance between a proposed new route and existing service. Omnitrans' current coverage gap standard indicates that new routes should be no closer than ¼-mile from an existing service.
- **Route Deviation Standard:** Measures the additional passenger travel time added to a route compared to the passenger walking time saved by a route deviation. Omnitrans

current standard is to calculate a ratio between the two and whichever has the shortest total passenger travel time (including walking time) is implemented.

- **Load Factor:** Measure the number of people on board at maximum compared to the seated capacity. Omnitrans current standard is a load factor of 1.2 (20% more than seated capacity) is acceptable.
- **Estimated Ridership:** Measures the estimated ridership derived from a route. It is either based on existing service and a frequency elasticity applied to the service or an evaluation of per capita ridership in a similar area applied to the draw area of the new route. There is no specific ridership standard, but estimated ridership is used in the determination of passengers per hour, cost per rider and farebox recovery standards.
- **Estimated Passengers per Hour:** Measures the expected passenger volumes on a route compared to the amount of service offered. Omnitrans' overall standard for Passengers per Hour is 25, although it varies by day and type of service. Typically the passengers-per-hour measure is used as a relative measure when comparing one scenario versus another.
- **Estimated cost, cost per hour and cost per passenger:** Measures the total costs and costs per unit of service or per unit of ridership. There isn't a specific standard for costs; however, it is used both in the calculation of estimated farebox recovery and as a comparison point between multiple options.
- **Estimated Farebox Recovery:** Measures the share of costs that are recovered in farebox revenue receipts. California's Transportation Development Act (TDA) requires that general public services achieve a Systemwide average of 20% fare recovery. Omnitrans has adopted this as the minimum for traditional fixed route service.

There is no explicitly defined threshold for the combination of all measures for staff to recommend a service change or the introduction of new service. Ultimately, staff looks at the totality of the measures, taking into account tradeoffs before making any specific recommendations or before implementing (very) minor changes.

SHORT RANGE TRANSIT PLAN

The Short Range Transit Plan (SRTP) plays a crucial role in developing service changes. Each SRTP brings about a new existing condition, as the SRTP typically ushers in any systemwide major changes that are going to take place.

The SRTP also sets the goals, standards and metrics that are going to be used in the evaluation of future service changes. In this, the SRTP puts in the practices that subsequent changes will be evaluated against. It is these lasting policies that often provide the greatest direction in each SRTP.

CONCLUSION

Receive and file this staff report that describes the approval process for Omnitrans fixed route service changes.

SG:AR:JB

ITEM # E5

DATE: December 3, 2013

TO: Committee Chair Penny Lilburn and
Members of the Plans and Programs Committee

THROUGH: P. Scott Graham, Interim CEO/General Manager

FROM: Anna Rahtz, Acting Director of Planning and Development Services

SUBJECT: **PROPOSED CHINO HILLS OMNIGO TRIPPER SERVICE**

FORM MOTION

Recommend approval to the Board of Directors that authorizes Interim CEO/General Manager to implement the proposed Chino Hills High School Tripper service to Butterfield Ranch (a very minor service change) to OmniGo Chino Hills Route 365 at the start of the next school year.

BACKGROUND

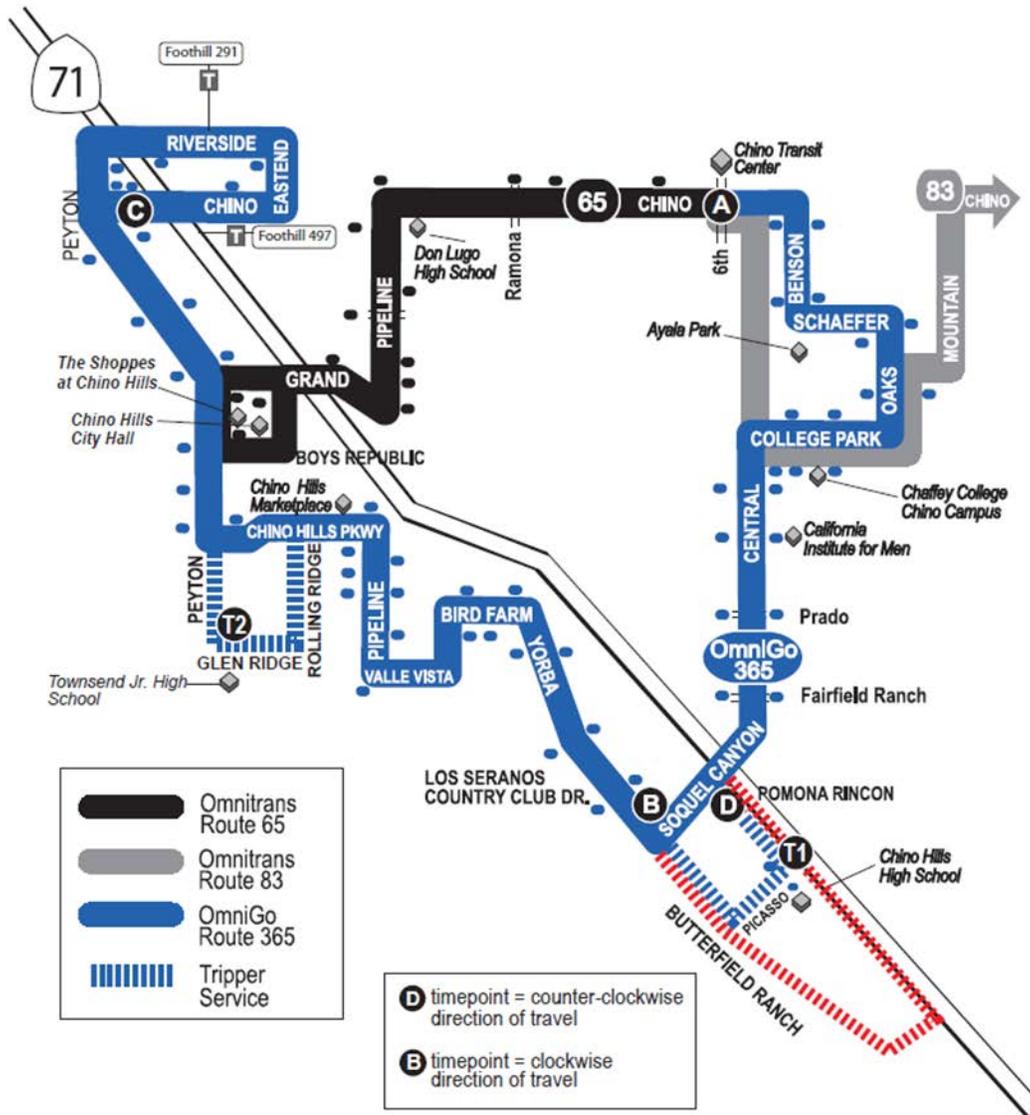
OmniTrans' OmniGo routes have been the fastest-growing ridership routes over the last few years. In fiscal year 2013 (FY2013), OmniGo Chino Hills Route 365 carried approximately 50,680 passengers, and is growing year-to-date at 16.9%.

Currently, this route provides school tripper service to both the Chino Hills High School and Townsend Jr. High School. Tripper service is when a bus deviates from normal routing in order to serve a specific trip generator at a specific time of day (like for a school at bell time).

Staff has received several requests to expand the already successful school trippers to serve a residential area that is southwest of the Chino Hills High School along Butterfield Ranch Road. The area currently does not have public transportation and is within the school's boundary. The proposed tripper would serve a larger population of students traveling to and from the Chino Hills High School. Exhibit 1 displays the expanded school tripper in red.

The existing tripper service on OmniGo Chino Hills has been very successful. Youth, Student and Go Smart fares account for 19.8% of ridership on this route. More specifically, ridership on the four total trippers account for 38% of the routes average weekday ridership despite representing only 12% of the daily 33 trips.

Exhibit 1 – Chino Hills OmniGo 365 Proposed Route Alignment



The proposed route tripper expansion (displayed in red on Exhibit 1) would include the use of freeway 71 and Butterfield Ranch Road on the school tripper currently being utilized to serve the Townsend Jr. High School. The extension would provide service to a large residential area that is within the Chino Hills High School and Townsend Jr. High School boundary areas, allowing Omnitrans to serve a larger population of students traveling to and from the schools.

Through the implementation of the proposed tripper, staff aims to cultivate the same level of success in student ridership. The current school tripper that is providing direct service to the Chino Hills High School has an average daily boarding of 26 at the school stop, which attributes to the standing load, as shown in Exhibit 2.

Exhibit 2 – Existing Load Condition



The highest ridership boarding and alighting activity are generated by the school tripper services that are provided twice a day as shown in Exhibits 3 and 4. The highlighted trips have shown to exceed Omnitrans load factor standard which measures the number of people on board at maximum compared to the seated capacity. Omnitrans current standard is a load factor of 1.2 (20% more than seated capacity) is acceptable. Daily weekday activity at the Chino Hills High School stop shows a regular standing load that exceeds 20% of the seating capacity which provides an additional justification to expand on the successful trips.

Exhibit 3 – Northbound Ridership by Trip (Existing School Trippers Circled)

Northbound Average Daily On Per Trip Time

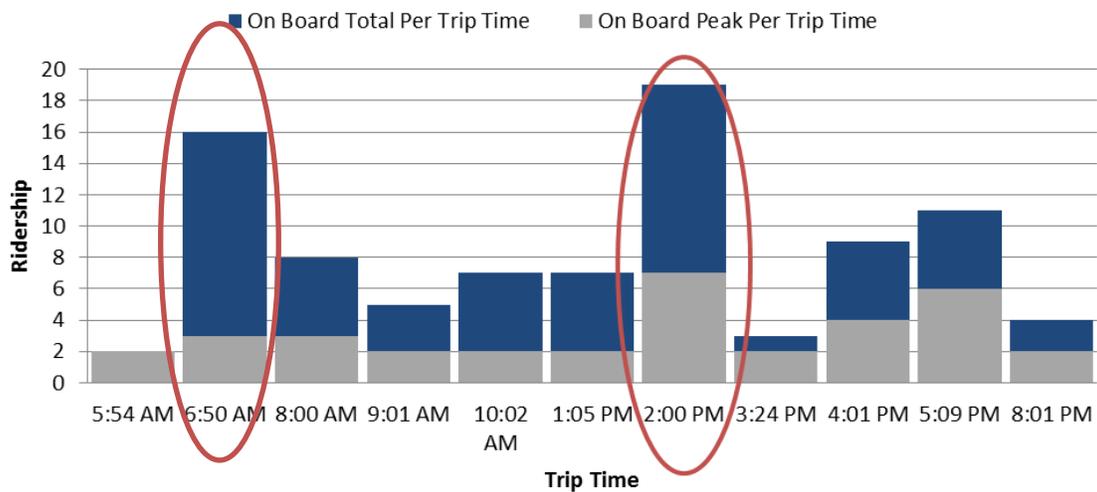
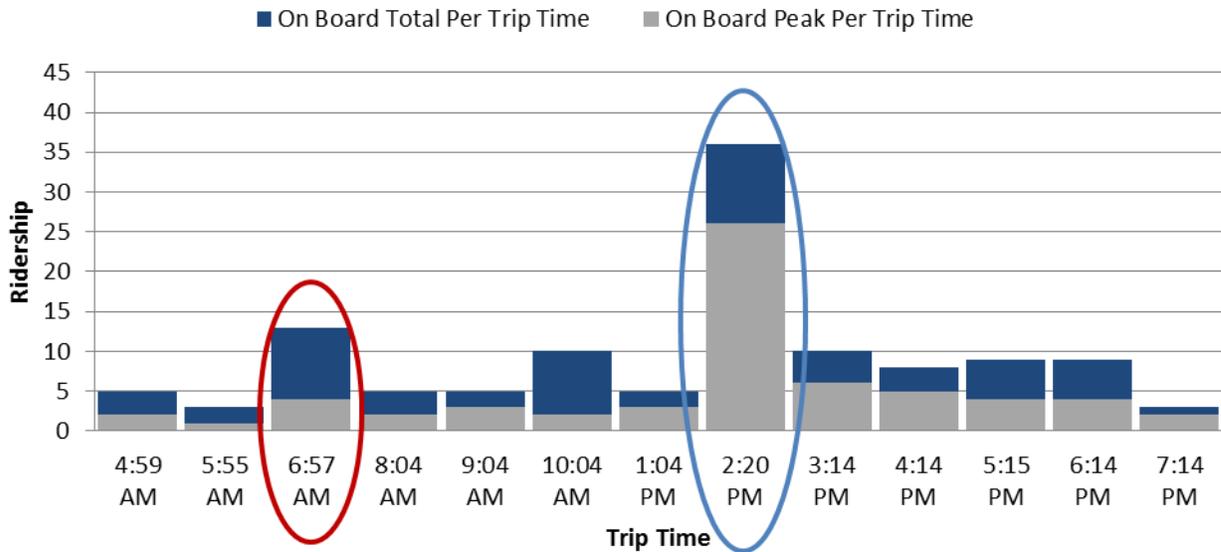


Exhibit 4 – Total Southbound Average Daily Ridership Alighting per trip

Southbound Average Daily On Per Trip Time



The proposed route expansion conforms to our route deviation standard and is anticipated to increase estimated passengers per hour. If the new tripper performs like the existing tripper service to Chino Hills High School, annual ridership could increase by 17% (9,000 additional riders) with essentially no increases in operating cost.

Staff has analyzed the proposed service and can implement the service change at a nearly cost neutral setting. Cost neutrality is achieved through a slight shift in scheduled time required to extend the service to the new area. In addition, the proposed trips would only include two daily weekday trips (AM and PM) during school days.

In addition, the proposed service extension has been reviewed and approved by the staff level Service Planning, Monitoring and Implementation Committee (often just called the Service Planning Committee or (SPC)). The service would be provided by Omnitrans contractor, First Transit, who is currently providing all OmniGo service. Based on the ability to extend the service through the use of existing resources, the change would not require a contract change order.

Based on standard practices, staff would typically implement this change in the May service change with the tripper service running on the first day of the next school year.

CONCLUSION

Staff recommends that the committee recommend approval of the proposed school tripper on Chino Hills OmniGo Route 365.

SG:AR:JB:BR

ITEM # E6

DATE: December 3, 2013

TO: Committee Chair Penny Lilburn and
Members of the Plans and Programs Committee

THROUGH: P. Scott Graham, Interim CEO/General Manager

FROM: Anna Rahtz, Acting Director of Planning and Development Services

SUBJECT: POTENTIAL UPLAND OMNIGO SERVICE

FORM MOTION

Recommend approval of one of the following options to Board of Directors on the proposed Upland OmniGo Service:

- 1) Move forward on an expedited path with the goal of implementing Upland OmniGo during the Current Fiscal Year 2013 and recommend that the Board of Directors authorize a Call for a Public Hearing to be held in February;
- 2) Move forward on Upland OmniGo in a traditional manner with consideration in the Short Range Transit Plan (SRTP), specifically in the unconstrained plan, with potential adoption in the SRTP constrained plan and the FY2015 Management Plan; or,
- 3) Cease consideration of a potential Upland OmniGo service at this time.

BACKGROUND

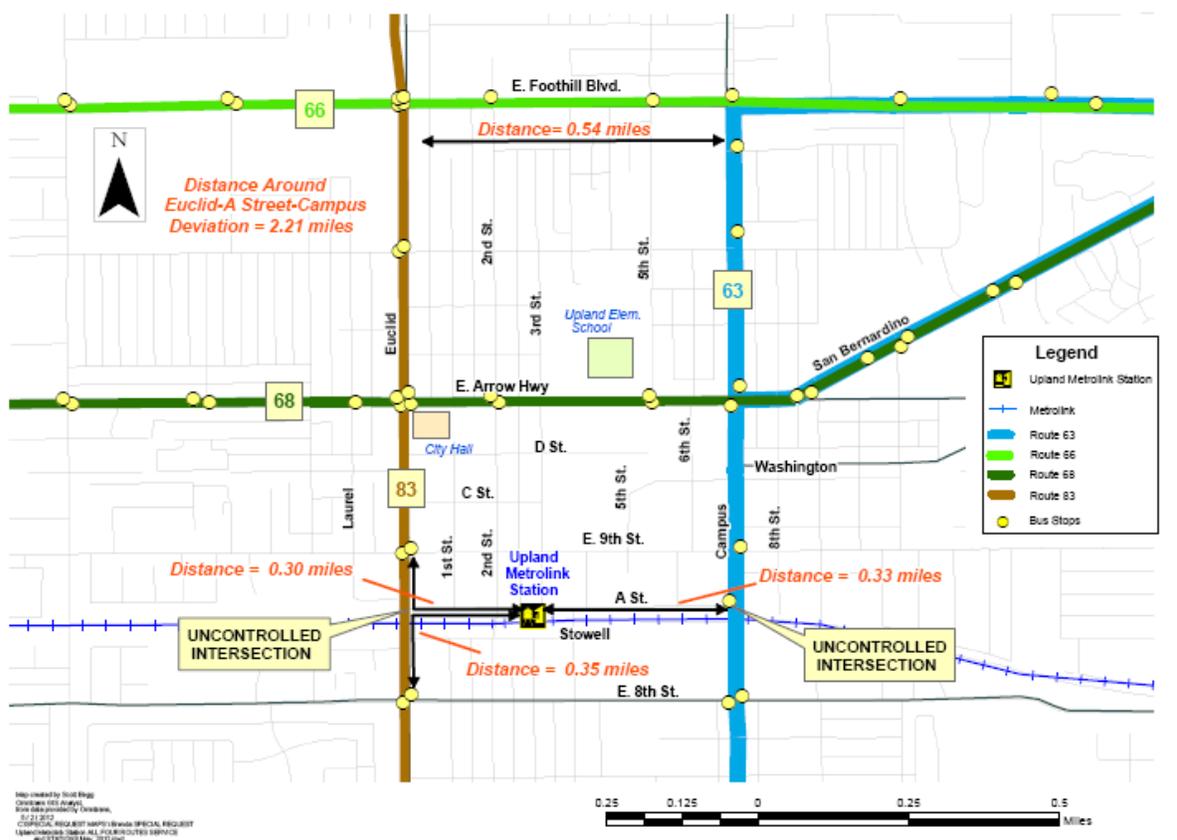
There are eight Metrolink Stations in the Omnitrans Service area: San Bernardino, Rialto, Fontana, Rancho Cucamonga, Upland, Montclair, East Ontario and Downtown Pomona. Six of the eight have direct access to Omnitrans bus service either in the station or on the immediately adjacent street. Bus service to the Upland Metrolink Station is the furthest away with a walk of 0.3 miles to the nearest bus stops.

Exhibit 1 shows the Metrolink stations, Metrolink boardings and Omnitrans routes that serve the stations. Exhibit 2 shows the current routes and bus stops near the Upland Metrolink Station.

Exhibit 1: Metrolink Stations in Omnitrans Service Area

Station	Metrolink Avg. Daily Boardings	Omnitrans Route(s)	Distances to nearest Stop (in miles)
San Bernardino	806	1	0.0
Rialto	295	22	0.0
Fontana	451	14, 15, 19, 20, 61, 66, 67, 82	0.0
Rancho Cucamonga	1,103	81	0.0
Upland	583	63 66 68 83	0.3 1.1 0.6 0.3
Montclair	364	65, 66, 67, 68, 80	0.0
East Ontario	438	81	0.2
Downtown Pomona	246	61	0.0

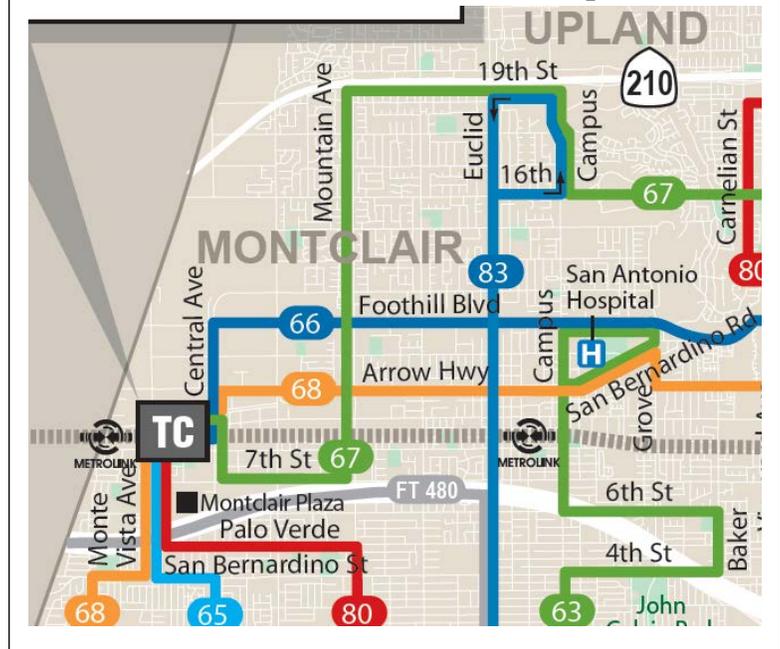
Exhibit 2: Current Routes and Bus Stops near Upland Metrolink



As demonstrated by the relatively high Metrolink boarding count in Upland, Omnitrans Planning staff agrees that Upland Metrolink Station is a worthwhile location for bus service. Despite this recognition, the location suffers from many safety and ingress/egress concerns. The streets around the station are narrow. The primary entrance to the station, from Euclid Ave. and A St., is an uncontrolled intersection that is difficult for a 40-foot bus to traverse.

While the Upland Metrolink Station does not currently offer a superior transfer point, Upland residents do have many direct service options to Metrolink stations. There are five routes that serve the City of Upland, and three of these travel from Upland directly to the Montclair Transit Center and Metrolink Stations. The remaining two routes, offer a one transfer connection to Metrolink.

Exhibit 3: Omnitrans Routes in Upland



Expansion of bus service to Upland Metrolink is a frequent request from Upland staff and Stakeholders, but this request rarely comes in from riders on either Omnitrans' customer service number or through Omnitrans web site.

Solutions Evaluated

Since service to the Upland Metrolink Station is a reoccurring request, service options have gone through the service evaluation process described previously in Item #E4 earlier on the agenda.

Stop Placement

The first potential solution evaluated was to add bus stops at Euclid Ave. and A Street on Route 83. This would reduce the walking distance from 0.3 miles to 0.1 miles. This option suffered from two main issues: 1) The potential stop locations were not ADA-compliant and 2) the potential southbound stop on the west side of Euclid was across an uncontrolled intersection, which would be unsafe. The second stop was removed from consideration.

The northbound stop was still in consideration. When SANBAG released its call for Transportation Development Act (TDA) Article 3 Transit Stop Access Improvement projects, the City of Upland, with support from Omnitrans, applied for accessibility improvements for three stops including this northbound stop. On July 10, 2013, SANBAG awarded TDA Article 3 projects including this stop in Upland. The City received \$61,800 to make the three accessibility improvements.

Once improvements are made, Omnitrans will add a bus stop in the area. This will reduce the walking distance, but will still not specifically address placing a stop directly at the Metrolink Station.

Route Deviations

A series of route deviations were evaluated as secondary solutions. Omnitrans staff evaluated deviating Route 83 from Euclid Ave. directly onto A Street to serve the Metrolink station on the north side. The width of A Street and the uncontrolled intersection at Euclid and A Street made this route alignment impossible given safety concerns.

Omnitrans then evaluated the option of placing a stop on Second Avenue, just to the west of the Metrolink Station. Access to this stop would come from wider streets of 8th and 9th that had controlled intersections at Euclid. A bus was taken out to test these configurations, and the turns were too tight to allow for safe passage of the bus through downtown Upland.

Omnitrans expressed these concerns to the city. The city engineer developed a recommended path of travel. This was similar to the one Omnitrans staff developed above, but this time used Third Avenue to 9th or Arrow instead of First and Second Avenues. On September 3, 2013, Omnitrans' Planning, Operations and Safety staff, along with Upland city staff from Public Works and Engineering, tested the proposed routing with a full size 40-foot bus. Omnitrans and Upland staff unanimously concurred that this path was unsafe.

Omnitrans staff believes that all routing deviations to serve the Upland Metrolink Station have been evaluated and found to be unsafe at this time. Staff does not plan any further evaluation of routing deviations in this area unless the built environment changes.

Smaller Bus Circulator Service: OmniGo

With the low cost options evaluated and exhausted, staff continued to consider options for service to Upland Metrolink due to the expressed importance of this service by stakeholders and City staff. Similar options were considered by AECOM during the Comprehensive Operational Analysis (COA) of Omnitrans.

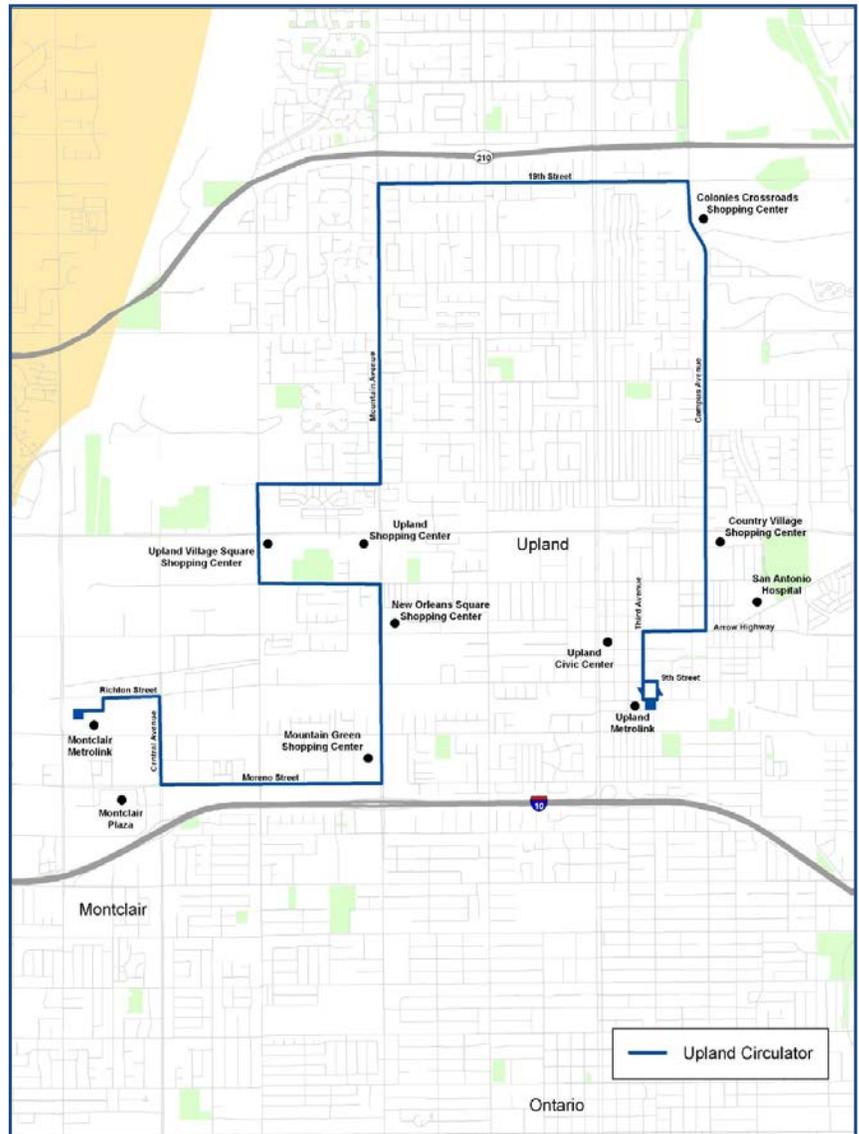
In the COA's unconstrained-plan¹, AECOM recommended the addition of the Upland OmniGo shown in Exhibit 4. The first year of operation was shown in 2015, with 30-minute service and an estimated annual operating cost of \$1.16 million.

In the COA's constrained plan, operation of the Upland OmniGo still begins in 2015, but the frequency of service was reduced to 60 minutes. This brings the annual operating cost down to \$544,329 per year.²

This circulator may work if it is adopted as part of the short-range transit plan and is accompanied by a reduction in regular bus service in the area. However, if the route were enacted today, the route would duplicate unproductive service that is already provided by Route 67.

Additionally, one of the ridership generators that has been successful on each of the OmniGo routes thus far has been

Exhibit 4 COA Proposed Upland Circulator



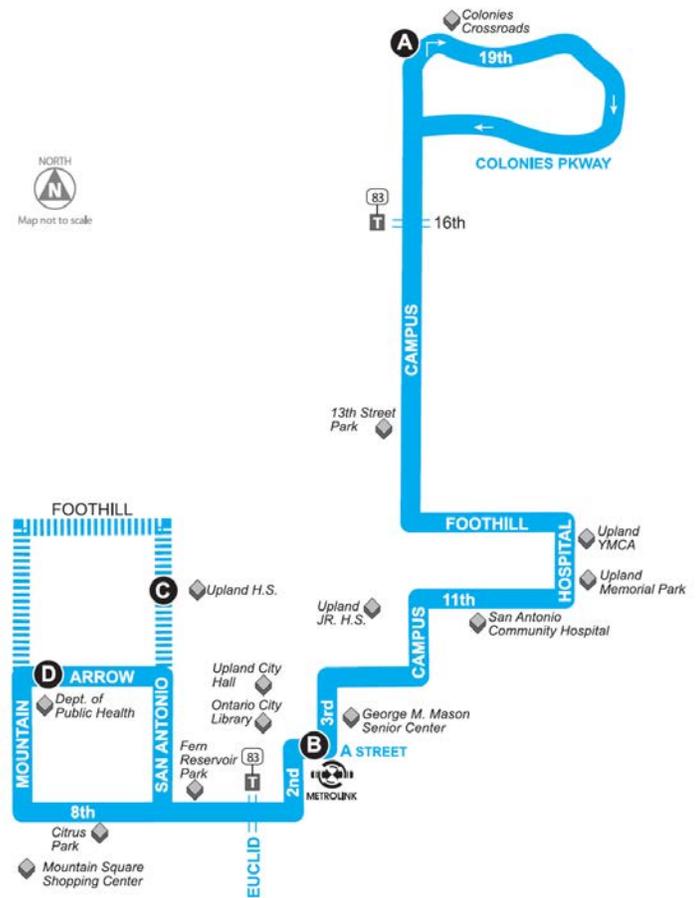
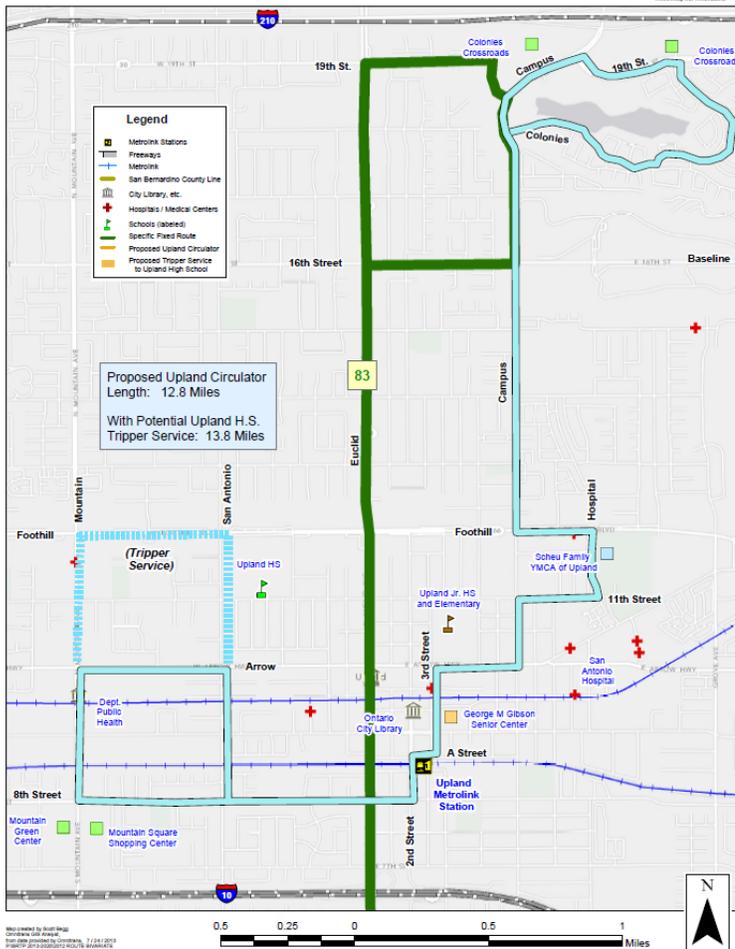
¹ COA of Omnitrans Final Report, April 2013: Phase II, page 1-77, Table 1-8.

² COA of Omnitrans Final Report, April 2013: Phase II, page 1-91, Table 1-23.

area schools. This proposed service does not serve Upland High School, which has the potential to provide reasonable ridership activity.

OmniTrans developed another potential Upland OmniGo route with the goal of reducing the number of vehicles and operating cost required. The other goal was to reach Upland High School, the Upland Metrolink Station, Scheu Family YMCA of Upland, George M. Gibson Senior Center and the Colonies Crossroads shopping center. This potential OmniGo Tripper is shown in Exhibit 5. The annual operating cost for service would be approximately \$300,000 per year. If a shorter trial period was implemented, the costs would be proportionally less (\$150,000 for a six month trial period, \$100,000 for a 4 month trial period).

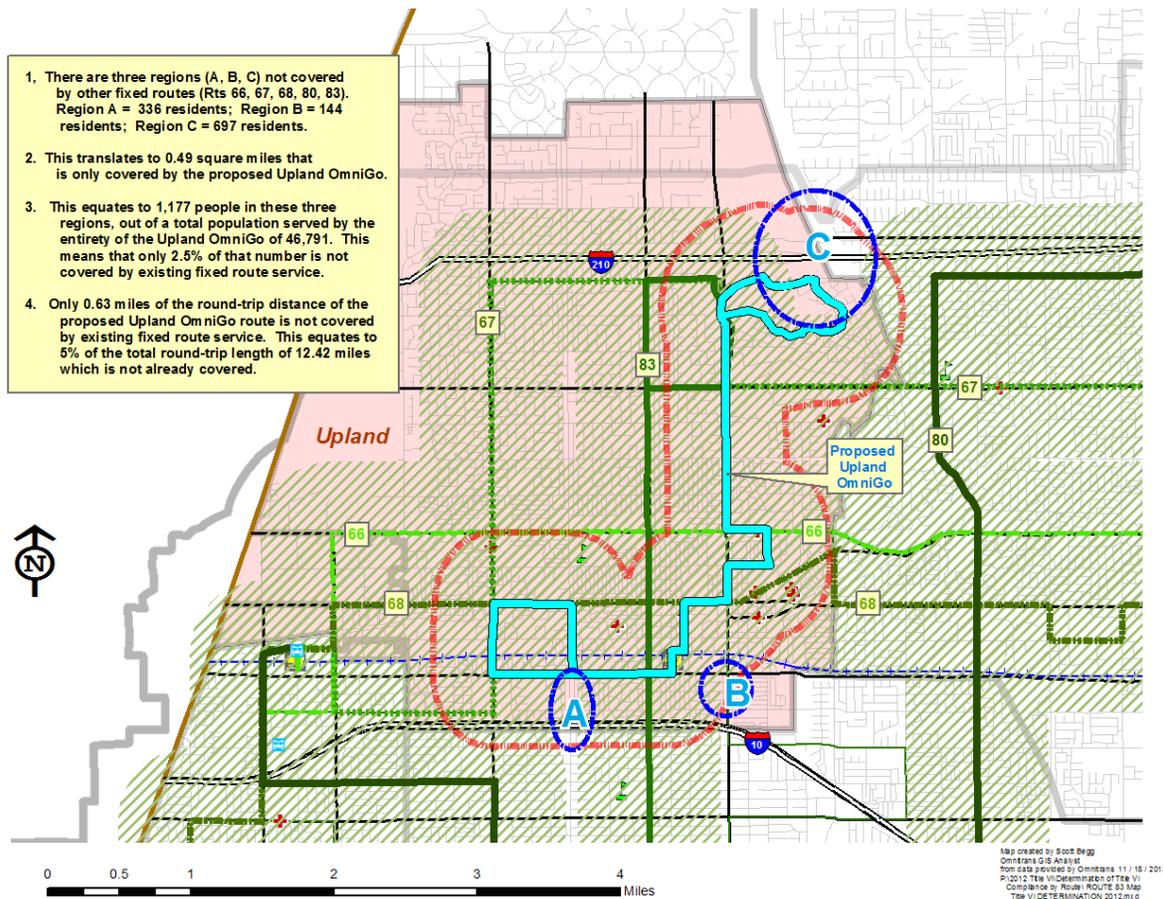
Exhibit 5: Potential Upland OmniGo Service (Two Maps)



This potential Upland OmniGo route reached all requested destinations and added Upland High School via a tripper service. It also eliminated the exact road duplication with the existing Route 67 service from the COA recommendations. However, all but 0.63 miles (5%) of this 12.4 mile round trip route are within the ½-mile walking standard of another route.

Similarly, the route's draw area includes a population served of 46,791. However, all but 1,177 people (2.5% of the total draw area) are served by an existing route and a ½-mile acceptable walking distance. These areas are shown in Exhibit 6 below and represented by the circles labeled A, B and C.

Exhibit 6: Potential Upland OmniGo Service Compared to Existing Services



The current ridership just within that northern portion of the City of Upland has a daily activity of 60 riders per weekday, while ridership along Arrow has 218 boardings per day. In both cases, compared to the level of service offered, these ridership figures are below average and would indicate that the potential ridership for this potential Upland OmniGo is low. Ridership estimates are approximately 1,000-1,500 riders per month, which would yield a productivity of about 3.5 passengers per hour and a farebox recovery ratio under 5%.

Omnitrans has discussed with the city the need to make bus stops on the potential route ADA accessible. If Omnitrans were to implement service, the City of Upland would need to provide for the bus stop accessibility enhancements. Both the Planning and Stop & Stations staff have reviewed the route alignment and have identified 32 potential bus stop locations. Out of those identified bus stop locations, 30 will need enhancements to bring those stops into ADA compliance prior to the launching of the service.

Current Status

Omnitrans has contemplated multiple evaluations of service to Upland Metrolink. SANBAG's awarding of TDA Article 3 Funds to Upland will allow for one stop to be moved closer to the Upland Metrolink Station, but will still not allow for service at the Upland Metrolink Station.

Omnitrans has evaluated multiple deviation options for regular fixed route service, but none of these work given the current street widths in the area.

Omnitrans has evaluated multiple OmniGo routes in the area. Of these, the routing shown in Exhibit 5 has the most potential, but generally duplicates existing service given Omnitrans ½-mile acceptable walking distance standard. The cost of this is \$300,000 per year, which could be reduced for a trial period less than one year. Omnitrans has not identified a specific funding source for this OmniGo at this time.

Omnitrans continues to receive regular requests to provide this service and seeks the Plans and Programs Committee's recommendation for how to proceed.

CONCLUSION

Staff seeks a recommended course of action for a potential Upland OmniGo service for presentation to the Board of Directors for approval.

SG:AR:JB

ITEM # E7

DATE: December 3, 2013

TO: Committee Chair Penny Lilburn and
Members of the Plans and Programs Committee

THROUGH: P. Scott Graham, Interim CEO/General Manager

FROM: Anna Rahtz, Acting Director of Planning and Development Services

SUBJECT: **OmniCONNECTS**
FY2015-2020 SHORT RANGE TRANSIT PLAN STAFF UPDATE

FORM MOTION

Receive and forward to the Omnitrans Board of Directors this status report on OmniConnects, the FY2015-2020 Short Range Transit Plan.

BACKGROUND

What is the Short Range Transit Plan?

The Short Range Transit Plan (SRTP) is Omnitrans’ business plan for the next several years. It describes the current conditions of the agency; establishes goals, strategies, performance metrics, and standards; and establishes fare policy and financial projections. It outlines the capital plan, service delivery plan, and an unconstrained “wish list” of projects and services that the agency would like to provide should the funding become available in the future.

SRTP Name

OmniCONNECTS

A Short Range Transit Plan that connects people, businesses and our community with safe, reliable and convenient public transportation in a financially and environmentally sustainable manner. (FY2015-2020)

The goal in naming the SRTP is to show that the report is trying to promote an active outcome. This outcome is a plan designed to improve connectivity in the community that Omnitrans serves. This name, OmniConnects, is designed to focus on the action that Omnitrans is completing rather than using a technical transit jargon title of SRTP.

Approach

The OmniConnects plan will be completed on a short timeline. It is anticipated to present a preliminary draft to the Plans & Programs Committee in February/March and a final working draft to the Board of Directors in April 2014. The Federal Transit Administration (FTA) requires us to have an up-to-date SRTP. The current SRTP expired in June 2013, but was extended by Board action to June 2014.

The goals and strategies developed in the OmniConnects will also lead into the development of the Annual Management Plan for Fiscal Year 2015, which will be presented to the Board of Directors on a similar timeline with the SRTP.

A tentative schedule and content outline for the SRTP are on the following pages.

Guiding Documents and Input

While OmniConnects will become the primary guiding policy document for Omnitrans between FY2015 and FY2020, it is based on many previous documents and discussions. OmniConnects will be guided by the following elements:

- FY2008-2013 Short Range Transit Plan: for continuity of standards and policy when appropriate.
- Comprehensive Operational Analysis (COA) of Omnitrans: for existing conditions, proposed standards and policy enhancements, public outreach (general public, Board members, city staff and other stakeholders), routing, and status quo financial projections. The feedback provided by the COA Ad Hoc committee will be utilized, as well.
- SANBAG's 2009 Long Range Transit Plan: for uniformity of transit vision and goals within the San Bernardino Valley.
- SCAG's 2012-2035 Regional Transportation Plan and Sustainable Communities Strategy: for uniformity of transit vision and goals within Southern California.
- 2013 Omnitrans Board of Directors Workshops: two workshops were held in early 2013 that discussed policies and goals, such as affirming the Productivity/Coverage Split and desire to maintain reach goals
- Public Hearings: The COA conducted two extensive public input sessions. The summary of the input sessions along with the recommendations derived from them will be used in the initial formation of the SRTP. Once the draft service and fare recommendations are prepared, public input will be sought to refine the recommendations.
- Omnitrans' Senior Leadership Team: provide strategies to meet established goals and refine goals.
- Omnitrans' Service Planning, Monitoring and Implementation Committee: serves as the technical advisory committee that provides input and reviews the SRTP prior to submission to Senior Leadership or the Board of Directors.

Proposed Goals and Strategies

One of the initial elements of developing OmniConnects was to develop a list of key goals and strategies. These goals and strategies are provided below.

Proposed Goals

- Deliver maximum value to riders in terms of safe, reliable, clean, frequent, convenient, comfortable and equitable service.

- Develop an effective, efficient and innovative network design.
- Minimize impact to existing riders while seeking opportunities to expand ridership.
- Support the local economy by providing connections to where people want to go.
- Maximize cost recovery while charging a fair fare.
- Support initiatives that are financially and environmentally sustainable in the short and long term.
- Expand, maintain and improve existing vehicles, facilities and passenger amenities.

Proposed Strategies

Overall Goals/Core Mission

- Focus on the core mission of providing bus service that connects the communities of the San Bernardino Valley.
- Provide a range of bus services including express routes and community circulators, using the type of service that most efficiently meets ridership demand for each community or destination.
- Evaluate every proposed project by the value it provides for customers, for the community and for the agency.
- Implement new services as market development routes with a defined trial period and ridership target.
- Continue the Workforce Development program to foster a well-trained pool of potential candidates and a well-trained workforce able to move into future leadership roles.

Cost Efficiency

- Leverage existing resources with potential new funding sources (such as available grants) in order to provide improvements for passengers and to make service more efficient.
- Explore available technology for improved efficiency, such as the following:
 - Intelligent transportation systems (ITS) such as transit signal priority (TSP) along high-traffic corridors.
 - Fare collection technologies to reduce boarding time.
- Make adjustments to routes, as needed, that make service more productive (measured in passengers/hour), and reevaluate unproductive routes each time the Short Range Transit Plan is updated (every 2-3 years).

Connections

- Take advantage of efficiencies from the sbX Green Line bus rapid transit route, such as adjusting other local bus routes to feed into the sbX Green Line.
- Provide connections with other transit systems (bus and rail), including future Redlands Rail service.
- Use transit centers to provide efficient transfer connections for passengers.

Partnerships

- Explore ways to reduce costs, such as sharing resources with other agencies or participating in joint procurements.
- Expand partnerships with the community, including schools, medical facilities and job centers.

- Support partner agencies’ initiatives that have the potential to generate additional Omnitrans ridership (i.e., improvements to Metrolink commuter rail service, or transit-oriented development).
- Align Omnitrans’ goals, strategies, and plans with those of partner agencies including member cities, County of San Bernardino, San Bernardino Associated Governments (SANBAG), Southern California Association of Governments (SCAG), and neighboring transit providers.

Proposed Schedule

The proposed schedule shown below will develop the SRTP during FY2014. The plan will be completed by April, which will meet deadlines such that the previous SRTP will not need to be re-extended. Additionally, the SRTP will be completed in conjunction with the development of the FY2015 Management Plan so that the impact of the SRTP can begin immediately in FY2015.

SRTP Chapters/Tasks	Nov	Dec	Jan	Feb	Mar	Apr	May
Senior Staff Workshops							
1 Intro							
2 Our Community							
3 Our Riders							
4 Our Existing Services							
5 Status Quo Financing							
6 Policies, Standards and Performance Measures							
Key Items from Chaps 1-6 to PPC							
7 Unconstrained Plan							
8 Constrained Plan							
9 Capital Plan							
10 Fare Policy							
Key Items from Chapters 7-10 to PPC							
11 Financial Plan							
12 Sustainability							
13 Title VI and LEP							
14 Appendices							
Call for Public Hearings							
Public Hearings							
Draft Final (Working Version) to PPC							
Final Version to Board							
FY 2015 Management Plan*							
Service Assumptions and Budget Assumptions to SLT							
Budget Assumptions to A&F							
Budget developed by departments							
Draft for inter-agency review							

Draft Management Element, Service Element, and Marketing Element to PPC			
Draft Budget Element to A&F			
Final Version to Board			

* The Management Plan will be a separate document from OmniConnects, but will be developed on a parallel timeline.

Preliminary Outline of Contents

1. Executive Summary
2. Introduction
 - a. Mission
 - b. Purpose of SRTP
 - c. Goals and Strategies
3. Our Community
 - a. Service Area
 - b. Service Area Demographics
 - c. Business Densities, Growth Areas, Key Trends
 - d. Residential Densities, Growth Areas, Key Trends
 - e. Upcoming Developments
4. Our Riders
 - a. Rider Characteristics
 - b. Comparison of Rider Characteristics to Service Area
 - c. Fare Trends (Senior and Student Growth)
5. Omnitrans Existing Services
(Description and High Level statistics, details in the appendix)
 - a. sbX
 - b. Fixed Route
 - i. Local
 - ii. Express
 - iii. OmniGo
 - c. Demand Response
 - i. OmniLink
 - ii. Access
 - d. Partner/Neighboring Transit Agency
 - i. Existing
 - ii. Planned Future
6. Status Quo Financing
 - a. Finance Plan from O&M
7. Policies, Standards and Performance Measures (KPIs)
 - a. Route and System Level Measures
 - b. Service Delivery Metrics
 - c. Efficiency Metrics
 - d. Effectiveness Metrics
 - e. Safety Metrics
 - f. Reliability Metrics
 - g. Customer Service Metrics
 - h. Staffing Metrics

- i. Sustainability Metrics
- 8. Unconstrained Service Plan
 - a. Key Considerations
 - b. Limited Stop/Express/Bus Rapid Transit
 - c. Local Route Improvements
 - i. Mapping Changes
 - ii. Frequency Changes
 - iii. Span Changes
 - d. OmniGo Growth Areas
- 9. Constrained Service Plan
 - a. Annual Implementation Plan based on Menu from constrained plan
- 10. Capital Plan
 - a. Capital Plan Goals
 - b. Asset Management Strategy
 - c. Unconstrained Capital Improvement Plan
 - d. Constrained Capital Improvement Plan
- 11. Fare Policy
- 12. Financial Plan
- 13. Title VI & Limited English Proficiency Considerations
- 14. Appendices
 - a. COA Existing Conditions Reports
 - b. COA Public Outreach Reports
 - c. Detailed Community Profiles
 - d. Detailed Route Performance Profiles
 - e. Detailed Capital Inventory (Rolling Stock & Stations/Amenities)
 - f. APTA Sustainability Commitment Signature Page

CONCLUSION

Staff recommends that the Committee receives and forwards this staff report that provides an update on the Short-Range Transit Plan.

SG:AR:JB