



# MANAGEMENT PLAN

FY2021



## Letter from the Chief Executive Officer / General Manager

To the Omnitrans Community:

One year ago, we knew 2020 would be a year of change for Omnitrans, but none of us could have imagined how the changes the COVID-19 health crisis, as well as organizational transformation, would impact the Agency. As families, businesses, indeed all of us, have had to adapt to a “temporary new normal,” while we are faced with a “new normal” that will be much different than how we lived and operated prior to the pandemic.

I am pleased to report that with the support of the Board of Directors, Omnitrans has risen to the challenge. Despite ridership plunging 65% percent since the state’s “Stay-at-Home” order, the Agency has focused on providing service to essential workers. We provide a safe, clean, and efficient trip for customers who depend on us. And our frontline staff have risen to the level of essential workers themselves in the process of doing their jobs.

In fact, every part of the Agency has responded to meet the challenge. Through collaboration and teamwork, the Senior Leadership Team (SLT) and our staff have directed their attention to meeting the immediate needs of our customers and employees while moving the business of the Agency forward. They have also remained focused on how Omnitrans transitions from the current restrictions to more normal business activity. This Management Plan reflects these dual objectives: preparing for service resumption and preparing for long-term future service, operations, and financial sustainability.

This is the last annual Management Plan associated with the FY2017-2020 Strategic Plan. The last Management Plan of any strategic plan represents a moment of organizational transition. As a result, this Management Plan focuses on four Strategic Initiatives intended to move the Agency forward in the current conditions and is consistent with the overall direction of the FY2017-2020 Strategic Plan.

- Business Resumption
- Safety, Security and Resiliency
- Customer and Employee Engagement
- Financial Management and Strategic Development

Business Resumption will be the dominant initiative for the first six months of the next fiscal year. As the Agency transitions to more steady-state service in the second half of the fiscal year, the other three initiatives will take prominence. The following themes are guiding our efforts.

- **Essential Service for Customers and Employees:** Omnitrans is an essential service supporting essential workers and riders. The Agency must

deliver safe, clean, and efficient service to our customers and employees. Marketing and employee engagement strongly support this effort.

- **Alignment of Service Levels with Available Funding:** Connecting the community requires an efficient organization delivering the best service it can afford. The fiscal challenges of the COVID-19 situation will require managing resources to deliver the essential service needed. Pursuing federal and state grant and stimulus funding is a priority now and in FY 2021. The Agency's overall long-term fiscal health remains an issue of concern that will continue to be addressed in the coming year.
- **Innovation and Efficiency:** The COVID-19 crisis has forced the Agency to innovate at all levels of the organization to respond to the day-to-day needs of our customers and employees. In adapting to this "temporary new normal," staff has delivered safe, clean, and efficient service. Staff is also strategizing on how Omnitrans can do business more efficiently and more innovatively. We look forward to tapping into the ingenuity of our employees in FY 2021 and beyond.
- **Regional Mobility:** Consideration of Omnitrans' consolidation with SBCTA remains a management priority in FY 2021. Both agencies play integral roles in providing mobility to San Bernardino Valley residents and businesses. The issue of how the agencies complement one another—and the structure of that relationship—is a key near-term effort, as well as a consideration in the development of the Omnitrans FY 2021-2025 Strategic Plan.

COVID-19 has disrupted the public's trust in many public and private institutions. During the coming year, transit agencies must focus on ensuring the public has confidence that agencies are responsibly cleaning and disinfecting buses, amenities and facilities while also prioritizing the health and safety of customers. As such, Omnitrans will work at all levels of the agency to restore and maintain the trust the public has in our services.

Omnitrans remains committed to its Vision and Mission in the face of COVID-19 more than ever. The people who work for Omnitrans are committed to contributing to the regional mobility landscape of the San Bernardino Valley by connecting its communities with the best transit service available. We understand the critical role we play in helping to keep the San Bernardino Valley economy moving in tough times. We also look forward to the future and helping our neighbors get around the Valley as we emerge from this crisis.

Sincerely,



Erin Rogers  
Interim CEO/General Manager

## Overview & Strategic Initiatives for FY2021

Guiding this Management Plan are the Omnitrans Vision and Mission.

### Omnitrans' Vision

Omnitrans' vision for Transit in the San Bernardino Valley is a values and customer based vision where:

- The San Bernardino Valley's multimodal transit system supports the local economy.
- Omnitrans' service is reliable, not just in the narrow sense of on-time performance, but in a broader manner: Omnitrans' service is worthy of the community's trust.
- Customers have a high-quality experience using Omnitrans.
- Omnitrans maximizes value to the community with every transit dollar available.

### Omnitrans' Mission Statement

Omnitrans' mission is: 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.

### This Plan

The Senior Leadership Team applied the following criteria in establishing the Strategic Initiatives for the FY2021 Management Plan.

- Providing safe, clean, and efficient essential transit services during the COVID-19 restrictions and afterward during business resumption
- Enhancing safety, security, and resiliency throughout the Agency
- Engaging customers, community stakeholders, and employees in developing service offerings
- Incorporating technology and operational efficiencies to improve business practices
- Aligning service with available funding

Each Strategic Initiative includes five elements:

1. Strategic Initiative Objective—Statement of need and purpose focused on FY 2021.
2. Actions—Key activities for FY 2021 necessary to complete the Initiative.

3. Accountability Measures—Milestones and/or indicators used to articulate quarterly progress and achievements. All completion target dates are in fiscal year 2021.
4. Support for the Omnitrans Strategic Plan FY2017-2020—Identifies the Strategic Goals and Outcomes, that each Strategic Initiative supports to ensure continuing alignment with the Strategic Plan.
5. Lead Department(s)—SLT members responsible for executing and coordinating implementation and reporting across functions of the Strategic Initiative.

## Implementation

The FY 2021 Management Plan provides a framework for the workplans of individual departments during the fiscal year. Directors will communicate the Plan to staff to ensure employees understand how their performance impacts the Strategic Initiatives. In addition, the Management Plan is predicated on departments collaborating to achieve the objectives of the Strategic Initiatives. At both the departmental and interdepartmental levels, the focus of the Management Plan is on improving the Agency's performance. Key to the implementation of the Management Plan is regular progress reporting.

- Monthly meetings of the SLT will be dedicated to discussing and evaluating progress on the Management Plan and addressing challenges that may arise in execution
- The CEO and Directors will provide quarterly progress updates to the Board of Directors, highlighting successful strategies and corrective actions required to achieve Accountability Measures

## OmniTrans Management Plan FY21

### A. Strategic Initiative: Business Resumption

**Objective Statement: Resume and refine service to support evolving community needs and conditions consistent with state and local COVID-19 restrictions.**

Actions	Accountability Measures	Timeframe:			
		Q1	Q2	Q3	Q4
1. Maintain essential service focus	a. Develop and define indicators for service changes via demand (e.g., school trips, Connect Forward, customer confidence)	X	X		
	b. Implement and market service changes based on defined indicators	X	X		
	c. Demonstrate to riders and stakeholders the ways in which all levels of the agency deliver safe, clean efficient mobility services	X	X	X	X
2. Align services with funding available	a. Manage available financial resources to support service levels	X	X	X	X
	b. Explore, pursue and strategically utilize stimulus funding	X	X	X	X
	c. Coordinate procurement with local, regional, and state partners to source essential items	X	X	X	X
	d. Complete FY2021-25 SRTP				X
3. Develop lessons learned from COVID-19 emergency response	a. Update customer service/ marketing, operations, maintenance, safety, emergency service deployment, procurement and administrative plans to enhance resiliency	X	X		
4. Update workforce operations and management protocols	a. Establish and implement plans for working on-site safely	X	X		
	b. Establish and implement plans for extended remote working	X	X		
5. Inform local, federal and State representatives on community service needs and opportunities for new funding	a. Continue outreach to community stakeholders and elected officials to support Business Resumption efforts	X	X		
	b. Leverage stakeholder resources to pursue stimulus funding	X	X	X	X

**Supports Strategic Plan Goals:**

- **Safety and Security**—Provide a safe and clean transit experience for customers and safe and clean buses and facilities for employees.
- **Service and Operations**—Provide essential transit service and resume and restore service consistent with state and local COVID-19 requirements and demand.
- **Technology**—Increase capacity to provide technology solutions to enhance customer experience and improve operations.
- **Finance**—Manage funding and financial opportunities to support essential services, business resumption, and long-term sustainable funding.
- **Marketing**—Position Omnitrans as an essential community mobility provider and rebuild ridership.
- **Organizational and Workforce Excellence**—Continue to manage and support both on-site and remote work environments.

**Outcomes:**

- **Maintain** safe and clean essential transit service
- **Restore** and resume safe and clean service consistent with post COVID-19 restrictions
- **Rebuild** ridership to pre-crisis levels
- **Align** service to available financial resources
- **Pursue** operational and workforce innovations to adapt to post COVID-19 restrictions
- **Restore** trust as a valued, regional mobility provider

**Leads: Senior Leadership Team**

## B. Strategic Initiative: Safety, Security and Resiliency

**Objective Statement: Ensure safety, security and resiliency are essential elements of all aspects of Agency services, operations, and culture.**

Actions	Accountability Measures	Timeframe:			
		Q1	Q2	Q3	Q4
1. Implement elements of the Agency Safety Plan	a. Implement Learning Management System			X	
2. Develop and implement Continuity of Operations Plan	a. Complete plan				X
3. Develop Integrated Clean Transit training	a. Provide training to Maintenance employees working on electric vehicles and charging equipment			X	X
4. Enhance Agency risk management strategy	a. Reduce casualty and liability and workers compensation costs	X	X	X	X

### Supports Strategic Plan Goals:

- **Safety and Security**—Instill prevalent safety culture.
- **Service and Operations**—Upgrade Agency plans to comply with evolving federal and State regulations
- **Technology**—Facilitate transition to zero emission bus service
- **Finance**—Reduce insurance costs

### Outcomes:

- **Implement** the elements the Agency Safety Plan and Continuity of Operations Plan
- **Enhance** maintenance and operations workforce training for electric bus service
- **Increase** Agency focus on risk management, resiliency and fully embedding a safety culture
- **Incorporate** safety and cleanliness policies and procedures to meet customer and employee needs

**Leads: Jerome Rogers, Safety and Regulatory Compliance;** Connie Raya, Maintenance; Shawn Brophy, Operations; Suzanne Pfeiffer, Human Resources; Alex Chen, IT



## C. Strategic Initiative: Customer and Employee Engagement

**Objective Statement: Align customer marketing and workforce development to evolving service offerings.**

Actions	Accountability Measures	Timeframe:			
		Q1	Q2	Q3	Q4
1. Implement service changes	a. Market service changes to customer base, community, and employers	X	X	X	X
	b. Manage and train workforce for service changes	X	X	X	X
	c. Pursue organizational innovations to support service changes	X	X	X	X
2. Communicate and partner with local, federal, and State representatives on service changes	a. Continue outreach to community stakeholders and elected officials on aligning service to ridership demand and financial resources	X	X	X	X
3. Implement MicroTransit Chino Hills Pilot	a. Initiate new OmniRide MicroTransit service	X	X	X	X
	b. Market service to Chino Hills community	X	X	X	X
	c. Monitor defined indicators for pilot		X	X	X
4. Expand Community Stakeholder Partnerships	a. Increase the number of Regional Mobility Partners (RMPs)		X	X	X
5. Develop a compensation policy and performance management tool that aligns performance to organization mission and goals	a. Implement new policy and tool following approval of strategic plan				X
	b. Implement and expand professional development initiatives at all levels of Agency to focus on meeting performance goals	X	X	X	X

### Supports Strategic Plan Goals:

- **Marketing**—Continue customer-focused outreach on service changes to connect the community

- **Organizational and Workforce Development**—Provide employee training for new service levels and offerings; ensure professional development opportunities for staff
- **Service and Operations**—Adapt service levels and offerings to evolving transit ridership needs in Valley communities

**Outcomes:**

- **Manage** customers' and employees' needs for safe, clean, and efficient transit service
- **Position** Omnitrans as a forward-looking mobility provider
- **Enhance** workforce development and training to support evolving service levels and organizational needs
- **Evaluate** potential of MicroTransit with OmniRide Chino Hills pilot
- **Increase** connectivity and ridership among Regional Mobility Partners

**Leads: Nicole Ramos, Marketing; Suzanne Pfeiffer, Human Resources;**  
Shawn Brophy, Operations; Jeremiah Bryant, Strategic Development

## D. Strategic Initiative: Financial Management and Strategic Development

**Objective Statement: Manage the Agency's financial structure to scale with service levels and align service planning with changing transit landscape.**

Actions	Accountability Measures	Timeframe:			
		Q1	Q2	Q3	Q4
1. Manage operating costs	a. Manage "controllable" costs consistent with service level	X	X	X	X
	b. Initiate procurement process efficiencies to reduce costs and increase efficiencies	X	X	X	X
2. Advocate for future funding and strategic partnerships (local, regional, federal)	a. Actively and continually network and partner with community stakeholders, and with local, state, regional and federal agencies			X	X
	b. Partner with local, state, and regional entities to achieve economies of scale on large purchases	X	X	X	X
3. Manage long-term financial forecasts	a. Align service with funding levels		X	X	X
	b. Align funding to meet mandates (e.g., ICT) and risk management		X	X	X
4. Pursue grant funding opportunities	a. Apply for federal and state discretionary grants	X	X	X	X
	b. Seek grant partnerships with local and regional agencies and industry partners	X	X	X	X
5. Develop FY 2021-2025 Strategic Plan	a. Complete FY 2021-2025 Strategic Plan	X	X		
	b. Educate staff and community partners on key strategies		X	X	X
	c. Restructure Management Plan FY22 to align with Strategic Plan			X	X
6. Participate in SBCTA Consolidation Study and Innovative Transit Review	a. Develop sustainable funding and financing approach to transit	X	X		
	b. Support collaborative regional mobility policy direction	X	X	X	X

**Supports Strategic Plan Goals:**

- **Finance**—Manage financial resources to meet the Agency’s service levels, workforce development, operations, maintenance and safety, security, and resiliency needs
- **Service and Operations**—Provide safe, clean, and efficient transit service for customers and employees

**Outcomes:**

- **Increase** grant funding to offset anticipated loss of farebox and sales tax revenues
- **Pursue** financial and technology innovations to increase revenues and manage costs
- **Pursue** procurement strategies to manage costs and enhance efficiency
- **Complete** FY 2021-2025 Strategic Plan
- **Complete** SBCTA Consolidation Study process

**Leads: Don Walker, Finance;** Jeremiah Bryant, Strategic Development; Art Torres, Procurement