

September 2008



# STRATEGIC PLAN FY 2009 - 2014



Submitted by:



Evans Planning Group, Inc.

1385 La Rochelle Drive

Columbus, OH 43221

[evansplan@earthlink.net](mailto:evansplan@earthlink.net)

Affiliate Office:

3855 Nobel Drive

San Diego, CA 92122





September 3, 2008

To the Members of the Omnitrans Board of Directors and Citizenry of the County of San Bernardino.

Through this 2009 –2014 strategic plan, Omnitrans will build upon its mission of providing comprehensive public mass transportation services to the San Bernardino Valley, and will guide the organization as it confronts the critical tasks of maximizing customer use, comfort, safety, and satisfaction, while efficiently using financial resources, in an environmentally sensitive manner.

Omnitrans has been maintained as a Joint Powers Authority for thirty-two years. This strategic plan sets forth five goals that will realign our foundation in order to sustain Omnitrans' historic mission in a time of profound change.

Our goals of Governance, Operations, Marketing and Technology are supported by strategies focused on our top priority of providing comprehensive public mass transportation services to the San Bernardino Valley. A key to both sustaining our mission and expanding our service is the Workforce goal. The expertise, talent and dedication of all Omnitrans employees are our greatest assets and the cornerstone of all Omnitrans' efforts.

Now that we've established the architecture, this Omnitrans Strategic Plan 2009 – 2014 will guide us through our next era of success. The plan is only the beginning though. As we take the next steps to implement the plan, we will ask each department, program and individual to make significant and measurable commitments to ensure that this plan and Omnitrans are successful.

What a great time to be part of this amazing organization. It's a time of vast challenge and change. Funds and people are at a premium. Despite this, there is opportunity for Omnitrans everywhere. We have excellent support and productive collaborations.

Omnitrans stands uniquely poised to help the San Bernardino Valley take on the next set of mobility challenges and will deliver results that serve our communities, sustain the environment, and support economic growth.

Durand L. Rall  
CEO/General Manager

Jana C. Evans  
President, Evans Planning Group, Inc.

# TABLE OF CONTENTS

<b>List of Acronyms</b> .....	<b>5</b>
<b>Introduction</b> .....	<b>6</b>
Background	
How the Plan was Developed	
How to Read This Plan	
Mission Statement, Shared Principles, and Shared Values	
<b>Governance Goal</b> .....	<b>9</b>
<b>Operations Goal</b> .....	<b>12</b>
<b>Workforce Goal</b> .....	<b>15</b>
<b>Marketing Goal</b> .....	<b>18</b>
<b>Technology Goal</b> .....	<b>21</b>
<b>Appendix – Omnitrans’ Critical Success Factors “Tree”</b> .....	<b>25</b>

## LIST OF ACRONYMS

<b>ADA</b>	American Disabilities Act
<b>ATU</b>	Amalgamated Transit Union
<b>CTSA</b>	Community Transportation Services Association
<b>ERP</b>	Enterprise Resource Planning
<b>JPA</b>	Joint Powers Authority
<b>SAP</b>	Systems, Applications and Products in Data Processing <i>(vendor/provider of the ERP system)</i>
<b>sbX</b>	San Bernardino Express



# INTRODUCTION

In developing this strategic plan, we considered the changes that have taken place all around us—politically, economically, socially, and environmentally. Some of these changes have been dramatic, such as the rapid rise of energy prices. All are having a direct effect on the public transportation and mobility. Other changes—in technology, in political perspectives, in environmental indicators, and in business practices—may be associated with significant new trends, although these trends are extremely difficult to predict.

Some of the changes are more difficult to capture as discrete events than those listed above, but may be even more influential with respect to Omnitrans' long-term future. Examples include the introduction of hybrid vehicles into the consumer market; the growing availability of broadband Internet access, wireless communication devices, and global positioning system (GPS) units; global outsourcing and economic growth; and indications of climate change.

## How the Strategic Plan was Developed

In August 2008, the Omnitrans strategic planning process began. With the guidance and advice of a strategic planning and organizational development consultant, an Advisory Team, comprised of the five Omnitrans Directors and CEO, met with the consultant and were the internal guiding group for the process. Together they analyzed strategic opportunities within Omnitrans and in the context of the changes taking place in regional public mass transportation, management practices, and the world in general. The analysis led the group to develop a Critical Success Factors “tree” and an assessment of Strengths, Weaknesses, Opportunities, and Threats (S.W.O.T.). Additionally, one-on-one interviews with key individuals were conducted by the consultant to gather further information about the needs of the community and organization, current and future.

After building this information base for planning, a one-day off-site strategic planning retreat was conducted on August 7, 2008. Omnitrans Board, management, union representatives, key subject-matter experts and stakeholders met to create the foundation of the strategic plan. The group was organized into the five cross-organizational teams. At the end of the day, the

## Omnitrans' Background

*Omnitrans was established as a regional transit authority in 1976 through a Joint Powers Authority (JPA) that included the cities of Chino, Colton, Fontana, Loma Linda, Montclair, Ontario, Redlands, Rialto, San Bernardino, Upland and the County of San Bernardino. The cities of Chino Hills, Grand Terrace, Highland, Rancho Cucamonga, and Yucaipa have since joined the JPA. In addition, Omnitrans serves the unincorporated communities of Bloomington, Mentone, and Muscoy. The County and all member cities are represented on the Omnitrans Board of Directors. The Omnitrans Board is responsible for the establishment of all policies, rules and regulations under which the agency operates.*

*Omnitrans serves a 480 square mile service area in Southwestern San Bernardino County with a population close to 1.4 million. The range of Omnitrans services includes:*

- *Twenty-nine fixed bus routes, including 17 routes in the East Valley (east of I-15). Eleven routes in the West Valley (west of I-15), and one regional express route to the City of Riverside.*
- *Two OmniLink general public demand-response services in Chino Hills and Yucaipa.*
- *An ADA complementary paratransit service, Access, operated throughout the Omnitrans service area.*



group had developed a strategic framework of goals, outcomes, and draft strategies to serve as the foundation for the plan.

Following the off-site meeting, a comment/discussion draft was distributed electronically to all Omnitrans staff for comment on strategy. Additionally, four Open Houses were conducted at both the East and West Valley locations to provide added opportunity for feedback. After the comment period, the Advisory Team reviewed all comments and prepared the final strategic plan for presentation to the Board.

The Omnitrans Fiscal Year 2009-2014 Strategic Plan is the result of a tremendous effort by all who participated. This document summarizes the key components of the strategic plan. The five goals are: ***create a governance structure which integrates all mass public transit services in San Bernardino County, improve Omnitrans' system-wide operational strategy to achieve a well coordinated public transit system, build a positive internal culture that guarantees the long-term success of Omnitrans, expand our market share, and lead innovation technology that recognizes greater opportunities to improve regional public mass transportation development.*** For each of these goals, there are “desired outcomes” stated in the plan, along with strategies and performance indicators.

This strategic plan will ensure that Omnitrans fulfills its proven historic mission of providing 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.

## How to Read This Strategic Plan

This plan is formatted to give the reader a comprehensive, yet understandable view of Omnitrans' strategic direction for the fiscal years 2009-2014. The plan has two main sections: Introduction and Implementation.

This Introduction provides a summary of where Omnitrans has come and where it is going. It also explains how the plan was developed. The Implementation sections provide a roadmap for implementing the Strategic Plan. Each goal section includes the goal statement followed by outcomes with strategies, performance indicators, external factors and management challenges.

- The outcomes define what will be accomplished as a result of working toward achieving the goal.
- The strategies represent the multi-year organizational actions from which Omnitrans' departments will develop annual strategies.
- The performance indicators, which are linked to outcomes, identify what Omnitrans will evaluate in determining progress and achievement.
- External factors are those issues outside of the organization which may influence Omnitrans' ability to achieve the goal in the intended time or manner. External factors can be economic, demographic, social or environmental.
- Management challenges are internal processes or policies that will need to be considered in the successful implementation of each goal's strategies.

## Omnitrans Mission Statement

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 Principles

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

## Shared Values

*Integrity*

*Trust*

*Loyalty*

*Family*

*Learning and Growth*

*Ethics*

*Contribution to the Greater  
Good*

*Honesty*

*Community*

*Health*

*Treat Others with  
Dignity*

*Have Fun*



## GOVERNANCE GOAL



*Create a governance structure that integrates all public mass transportation services in San Bernardino County.*

## **GOVERNANCE Goal**

---

**Create a governance structure which integrates all public mass transportation services in San Bernardino County.**

### **OUTCOMES**

The Governance Goal has three outcomes

1. Improved integration
2. Optimized funding potential
3. Increased influence

### **STRATEGIES**

Table 1.1 shows the strategies needed to achieve each outcome.

<b>Outcomes</b>	<b>Strategies</b>
<b>1. Improved integration</b>	1.1 Expand inter-agency agreements, Memorandums of Understanding, and/or collaborative programs. 1.2 Expand Omnitrans transit services. 1.3 Explore discretionary funding options. 1.4 Develop communication network for all related agencies in one newsletter to keep employees and customers informed of big picture. 1.5 Expand access service to provide greater level of service to more clients to enhance use of the Community Transportation Services Association (CTSA). 1.6 Improve connectivity at transit centers.
<b>2. Optimized funding potential</b>	2.1 Hire legislative staff member. 2.2 Review alternate options to a JPA (i.e., district or authority). 2.3 Leverage current and future funding to avoid borrowing. 2.4 Improve education to Board, staff and stakeholders on Advocacy strategy to attract greater support for agency projects and funding.
<b>3. Increased influence</b>	3.1 Improve focused strategy to gain more support from passengers. 3.2 Expand the Board and/or committee(s) to include a non-voting advocate for people with disabilities, if legally viable. 3.3 Develop program to obtain support of business community through use of service organizations to gain new support and partners.
<b>Table 1.1</b>	

## PERFORMANCE INDICATORS

Table 1.2 shows the performance indicators that will be used to measure progress toward the outcomes.

Outcomes	Performance Indicators
1. Improved integration	<ul style="list-style-type: none"> <li>• Reporting capability</li> <li>• Extended service</li> <li>• Service level</li> </ul>
2. Optimized funding potential	<ul style="list-style-type: none"> <li>• Solidity of future funding</li> <li>• Board and stakeholder buy in</li> </ul>
3. Increased influence	<ul style="list-style-type: none"> <li>• Ridership constituency</li> <li>• Board and business advocacies</li> </ul>
Table 1.2	

### External Factors

- Uncertain public funding (state and federal).
- Local agencies are not compelled to implement regional transit solutions (“no teeth in the dog”).

### Management Challenges

- Business model limits growth and flexibility.

# OPERATIONS GOAL



*Improve Omnitrans' system-wide operational strategy to achieve a well coordinated public mass transportation system.*

## **OPERATIONS Goal**

**Improve Omnitrans’ system-wide operational strategy to achieve a well coordinated public mass transportation system.**

### **OUTCOMES**

The Operations Goal has three outcomes.

1. Improved service reliability
2. Fair fare
3. Improved mobility

### **STRATEGIES**

Table 2.1 shows the strategies needed to achieve each outcome.

<b>Outcomes</b>	<b>Strategies</b>
<b>1. Improved service reliability</b>	1.1 Improve system-wide “statusing” by providing open access to real time information to improve customer service, internal management processes, decision making and reduce costs. 1.2 Target investments to improve reliability. 1.3 Integrate “statusing” information into long-range planning. 1.4 Ensure system accessibility issues identified and addressed that impact service reliability. 1.5 Provide safe, clean, reliable fleet. 1.6 Manage budget policy decision-making to allocate resources for maximum productivity and efficiency. 1.7 Improve management information system to provide real-time information to enhance overall performance.
<b>2. Fair fare</b>	2.1 Price services to customers based upon the level of service provided and cost recovery requirements. 2.2 Integrate cost containment as a dimension of fair fare. 2.3 Identify more granular understanding of costs and revenues at the route level.
<b>3. Improved mobility</b>	3.1 Enhance coordinated schedules for regional mobility. 3.2 Leverage available funding to implement new service. 3.3 Identify efficiencies possible through coordinated service delivery using multiple services and meeting broad-based needs. 3.4 Expand and add new services to capture new markets (i.e., sbX, express bus, van pools, limited stop service).
<b>Table 2.1</b>	

## PERFORMANCE INDICATORS

Table 2.2 shows the performance indicators that will be used to measure progress toward the outcomes.

Outcomes	Performance Indicators
1. Improved service reliability	<ul style="list-style-type: none"> <li>• Service interruption               <ul style="list-style-type: none"> <li>○ Pull out</li> <li>○ Mechanical</li> <li>○ Weather</li> <li>○ Labor</li> <li>○ Farebox</li> </ul> </li> <li>• On-time performance</li> </ul>
2. Fair fare	<ul style="list-style-type: none"> <li>• Fare recovery ratio               <ul style="list-style-type: none"> <li>○ Premium services recovery &gt;30%</li> <li>○ Base service recovery &gt;25%</li> <li>○ S&amp;D services recovery &gt;10%</li> </ul> </li> <li>• Cost ratio administrative/operations</li> <li>• Fully utilized data management system</li> </ul>
3. Improved mobility	<ul style="list-style-type: none"> <li>• "E" Street revenue service (by 2012)</li> <li>• Formation of CTSA</li> <li>• Pilot programs launched               <ul style="list-style-type: none"> <li>○ Express bus to LA</li> <li>○ Feeder service</li> </ul> </li> </ul>

Table 2.2

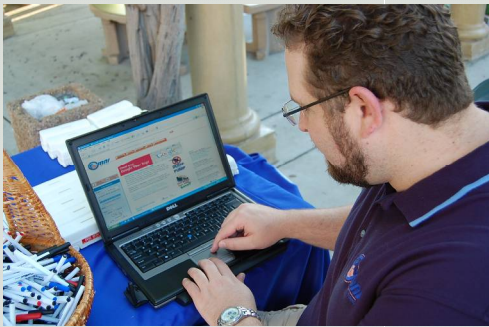
### External Factors

- Funding (state, local and federal).
- Support from stakeholders.

### Management Challenges

- Inability to attract talent.
- Implementation of strategic plan.

## WORKFORCE GOAL



*Build a positive internal culture that guarantees the long-term success of Omnitrans.*

## ***WORKFORCE Goal***

---

**Build a positive internal culture that guarantees the long-term success of Omnitrans.**

### **OUTCOMES**

The Workforce Goal has three outcomes.

1. Workforce with pride of ownership
2. Growth and development of workforce
3. Agency-wide partnership

### **STRATEGIES**

**Table 3.1** shows the strategies needed to achieve each outcome.

<b>Outcomes</b>	<b>Strategies</b>
<b>1. Workforce with pride of ownership</b>	1.1 Identify opportunities for employees to excel in their job. 1.2 Promote a feedback/reward/recognition/appreciation culture to acknowledge a job well done at all levels. 1.3 Develop recognition and incentives for achieving specific work goals. 1.4 Become the employer of choice in the region.
<b>2. Growth and development of workforce</b>	2.1 Expand opportunities for advancement through training, education, and professional development. 2.2 Establish a long-term succession plan. 2.3 Provide competitive compensation packages. 2.4 Create and actively manage high potential to maximize contributions and opportunities.
<b>3. Agency-wide partnership</b>	3.1 Develop cross-collaboration partnering plan across departments. 3.2 Develop partnering relationship with Teamsters and ATU. 3.3 Engage all employees in department decision-making.
<b>Table 3.1</b>	

## PERFORMANCE INDICATORS

Table 3.2 shows the performance indicators that will be used to measure progress toward the outcomes.

Outcomes	Performance Indicators
1. Workforce with pride of ownership	<ul style="list-style-type: none"> <li>• Employee satisfaction</li> <li>• Absenteeism</li> <li>• Employee retention</li> </ul>
2. Growth and development of workforce	<ul style="list-style-type: none"> <li>• Promotions/working out of class</li> <li>• Annual update of succession plan</li> <li>• Training opportunities</li> <li>• Training participation</li> <li>• Competitive compensation</li> </ul>
3. Agency-wide partnership	<ul style="list-style-type: none"> <li>• Contracts settled on time</li> <li>• Cross-functional and multi-level work teams</li> <li>• Employee satisfaction with involvement</li> </ul>

Table 3.2

### External Factors

- Aging workforce.
- Long average time to hire.
- Rising healthcare costs.
- Not geographically attractive work location.
- Legal requirements.

### Management Challenges

- ATU leadership relations
- Limited budget
- No skill bank, central training files.
- No centralized training programs
- Cost of risk management and Workers Compensation

# MARKETING GOAL



*Expand our market share.*

## ***MARKETING Goal***

---

**Expand our market share.**

### **OUTCOMES**

The Marketing Goal has two outcomes.

1. Increased ridership
2. Increased community awareness

### **STRATEGIES**

**Table 4.1** shows the strategies needed to achieve each outcome.

<b>Outcomes</b>	<b>Strategies</b>
<b>1. Increased ridership</b>	1.1 Increase ridership through marketing. 1.2 Conduct market research to evaluate effectiveness of marketing (rider and non-rider). 1.3 Analyze customer data to identify target markets. 1.4 Retain ridership through excellent customer service (and service quality). 1.5 Target niche markets with specialized campaigns.
<b>2. Increased community awareness</b>	2.1 Develop awareness and support for the agency through public relations and outreach programs. 2.2 Advocate for growth, change and competence to regional stakeholders. 2.3 Expand market share by educating our communities and stakeholders on the social, economic and environmental benefits of using public transit. 2.4 Implement re-branding of system to enhance agency image.

**Table 4.1**

## PERFORMANCE INDICATORS

Table 4.2 shows the performance indicators that will be used to measure progress toward the outcomes.

Outcomes	Performance Indicators
1. Increased ridership	<ul style="list-style-type: none"> <li>• Ridership               <ul style="list-style-type: none"> <li>○ Increase new riders</li> <li>○ Increase rider retention</li> </ul> </li> <li>• Outreach activities</li> <li>• Customer satisfaction rating</li> </ul>
2. Increased community awareness	<ul style="list-style-type: none"> <li>• Public awareness</li> <li>• Public opinion</li> <li>• Positive media coverage</li> </ul>
Table 4.2	

### External Factors

- Car culture—low expectations.
- Low density development
- Free parking

### Management Challenges

- No dedicated outreach staff.
- Limited new service to promote.
- Not time competitive
- Limited budget.

# TECHNOLOGY GOAL



**Lead innovation technology that recognizes greater opportunities to improve regional public mass transportation development.**

## ***TECHNOLOGY Goal***

---

**Lead innovation technology that recognizes greater opportunities to improve regional public mass transportation development.**

### **OUTCOMES**

The Technology Goal has four outcomes.

1. Improved service quality
2. Improved air quality
3. Improved fare collection
4. Improved knowledge management

### **STRATEGIES**

**Table 5.1** shows the strategies needed to achieve each outcome.

<b>Outcomes</b>	<b>Strategies</b>
<b>1. Improved service quality</b>	1.1 Achieve on-time performance. 1.2 Apply technology for cost and reliability improvements. 1.3 Prepare and provide appropriate technology training. 1.4 Train existing employees to re-emphasize accountability and greater scheduling. 1.5 Study potential impact to riders for on-board amenities for computer use.
<b>2. Improved air quality</b>	2.1 Evaluate type of vehicle for specialized services. 2.2 Assess value of alternative fuels for vehicles. 2.3 Integrate “green” facility planning.
<b>3. Fare collection</b>	3.1 Seek ways to simplify system for operators and passengers. 3.2 Evaluate need and type of data collected to evaluate route placement and timing. 3.3 Adopt best practices from other agencies on technology and data use to improve systems. 3.4 Evaluate available fare collection systems (i.e., fare media, hardware, software), including backend.

**Table 5.1**

Outcomes	Strategies
<p><b>4. Improved knowledge management</b></p>	<p>4.1 Implement new business software, determine need and agility to adapt change.</p> <ul style="list-style-type: none"> <li>• <i>Assemble qualified team.</i></li> <li>• <i>Monitor training.</i></li> <li>• <i>Ensure that timelines are met for Go Live 7-1-09 (Phase I).</i></li> </ul> <p>4.2 Assess Phase I of the ERP system for future modules and upgrades.</p> <p>4.3 Develop one database to manage and to retrieve data for accuracy and connectivity.</p>

**Table 5.1 (cont.)**

## PERFORMANCE INDICATORS

Table 5.2 shows the performance indicators that will be used to measure progress toward the outcomes.

Outcomes	Performance Indicators
<p><b>1. Improved service quality</b></p>	<ul style="list-style-type: none"> <li>• Technology training</li> <li>• Data reliability</li> <li>• Data timeliness</li> <li>• Data relevance</li> <li>• Customer amenities</li> </ul>
<p><b>2. Improved air quality</b></p>	<ul style="list-style-type: none"> <li>• Zero emissions</li> </ul>
<p><b>3. Fare collection</b></p>	<ul style="list-style-type: none"> <li>• Equipment replacement</li> <li>• Revenue data collection</li> <li>• Clearinghouse capability</li> <li>• Data sharing</li> </ul>
<p><b>4. Improved knowledge management</b></p>	<ul style="list-style-type: none"> <li>• SAP success</li> <li>• Information access</li> <li>• Data management</li> </ul>

**Table 5.2**

### External Factors

- Mandated technology that may not fit.

### Management Challenges

- Organizational technological competence.
- Right-sizing a stable organization.

# APPENDIX

**Critical  
Success  
Factors**

# Critical Success Factors "Tree"

