

Monterey-Salinas Transit District Strategic Plan 2014 - 2016

About The Plan

This plan represents the collaboration of the MST Board of Directors and staff to develop a 3 year vision and identify strategic priorities to focus MST resources and energies.

MST services focus on moving people from where they are to where they need and choose to be. The MST Board of Directors focuses on a similar concept but on a different scale – developing policy to move the District to where it needs to be to effectively serve our communities and constituencies.

A review of MST strengths, weaknesses, opportunities and threats (SWOT) revealed several important facts. The inability of Congress to deal with structural deficits in the National Highway Fund combined with persistently weak local economic conditions has resulted in increasingly unreliable and diminishing federal and state sources of operating and capital funds. Traffic congestion and demands for increased access for public transportation for persons of low-income, seniors, and persons with disabilities in Monterey County continue to increase. Finally, the lack of adequate facilities and a rapidly aging fleet continues to limit the ability of MST to grow its service to meet community needs.

The SWOT analysis also revealed that MST's image in the community, long term growing ridership, as well as its employees and management team, continues to be strong. MST's ability to creatively generate revenue from outside of traditional sources through a variety of private and public partnerships partners continues to be an organizational strength.

Upon completion of the SWOT analysis, a list major challenges and future priorities were identified. After discussion and debate, the highest priority goals identified were:

- To develop adequate and stable long-term revenues
- To provide quality transit and mobility management services
- To implement board protocols and best practices to achieve effective and efficient board operations and board meeting management
- To research, implement, and promote policies and practices that encourage environmental sustainability and resource conservation
- To educate the public on MST services through promotion, communication, and advocacy

- To actively promote organizational values to maintain high-quality relationships with MST employees, contractors, vendors, and community stakeholders

For each goal, staff, working together with the Strategic Planning Committee, will formulate initial objectives and desired outcomes. Indicators of success will be defined to track relative progress towards the objectives and outcomes. Discrete actions to be taken towards the accomplishment of the strategic goals will be defined in the final plan.

Monterey-Salinas Transit Mission:

Advocating and delivering quality public transportation as a leader within our community and with our industry.

Our Vision:

A fully funded public transit system providing quality, valued, and affordable mobility and transportation services for the people in Monterey County

We Believe In...

- **Using Good Judgment**
- **Achieving Win/Win Outcomes**
- **Mutual Respect**
- **Teamwork**
- **Acting With Dignity, Trust, Cooperation, and Loyalty**
- **Constant Measurable Improvement**
- **Recognizing Results**

Strategic Goals

The following are the strategic priorities and goal statements that MST will pursue over the next three years.

- **Develop Adequate and Stable Long Term Revenues**

Pursue public/private and public/public partnerships, fare-pricing strategies and revenue generation from the use of MST assets as a means to generate the revenue required to construct needed capital facilities, purchase vehicles and sustain current and future transit services

Through education and advocacy, encourage policy makers and the general public to enact legislation at local, state and federal levels to provide sustained revenue sources that will support the future growth of Monterey County's public transportation system

- **Provide Quality Transit and Mobility Management Services**

Develop and implement services, infrastructure and technologies to meet and exceed the expectations of customers, reduce subsidies and improve the value of MST in the community. Continue to explore and implement new technologies and practices that enhance the overall customer experience, improve safety and sustainability, reduce costs, attract new customers, retain existing customers, motivate employees and improve the value of MST in the community

- **Implement board protocols and best practices to achieve effective and efficient board operations and board meeting management.**

Implement training and orientation for Board members and provide concise oral and written reports that result in a well informed, well satisfied, participatory policy governance Board.

- **Research, implement and promote policies and practices that encourage environmental sustainability and resource conservation.**

Implement economically sound and environmentally-friendly resource conservation policies that reduce dependence on scarce natural resources and the potential for negative impacts on our environment

- **Educate the public on MST services through promotion, communication and advocacy.**

Attract new riders and improve community support for MST by utilizing effective marketing, promotion and communication techniques and by applying greater focus in meeting individual community and stakeholder needs.

- **Actively promote organizational values to maintain high quality relationships with MST employees, contractors, vendors, board members and community stakeholders.**

Act in manner in all we do to promote individual and organizational safety, efficiency, effectiveness and enhance the satisfaction of our customers, employees, partners board members and other key stakeholders.

- **To attain industry leadership for like-sized agencies within California and the United States.**

Develop and implement programs and practices that distinguish Monterey-Salinas Transit as a leader with the public transit industry.

GOALS, OBJECTIVES AND ACTION PLANS

The following are the seven strategic priorities that MST will pursue over the next three years. Each goal includes specific objectives to be met during to support these goals along with tactics to be used to achieve each objective.

1. **Develop Adequate and Stable Long Term Revenues**

Objectives/Outcomes: Pursue public/private and public/public partnerships, fare-pricing strategies and revenue generation from the use of MST assets as the means to generate the funds required to construct needed capital facilities, purchase vehicles, sustain current and future transit services and reduce the overall subsidy per passenger

Encourage policymakers and the general public, through education and advocacy, to enact legislation at local, state and federal levels to provide sustained funding sources that will support the future growth of Monterey County's public transportation system

Indicators of Success:

- Reduced subsidy per passenger
- Public/private funding agreements executed
- Adequate funding in place to support operating and capital needs
- Increased local funding support through developer fees, sales tax and other funding initiatives as appropriate

Menu of Tactics:

- a. Adopt and execute annual state and federal legislative programs
- b. Develop and adopt a preferred local dedicated funding option to be placed on November 2014 ballot
- c. Participate in community outreach and provide public information regarding preferred local dedicated funding option for improved public transportation.
- d. Identify additional partnerships to fund transit services outside of traditional tax sources.

2. Provide Quality Transit and Mobility Management Services

Objectives/Outcomes: Develop and implement services, infrastructure and technologies to meet and exceed the expectations of customers, reduce subsidies and improve the image of MST in the community; continue to explore and implement new technologies and practices that enhance the overall customer experience, improve safety, reduce costs, attract new customers, retain existing customers, motivate employees and improve the value of MST in the community

Indicators of Success:

- Passenger boarding growth rate that exceeds employment and population growth trends
- Increased customer and stakeholder satisfaction
- Business conducted within approved budget and performance indicators including safety, efficiency, effectiveness, on-time performance, customer satisfaction, employee satisfaction and stakeholder satisfaction

Menu of Tactics:

- a. Continuation of programs that reward safe behavior.
- b. Fine tune existing service to improve convenience and on-time performance
- c. Monitor operating, maintenance and financial performance statistics on a monthly basis and implement programs to support continuous improvement.
- d. Develop comprehensive service plan to focus limited resources on highest priority transit needs.
- e. Establish MST customer service presence at Salinas Intermodal Station.
- f. Participate in Fort Ord multi-modal corridor studies.
- g. Participate in planning of Monterey transit center
- h. Develop pilot program for Department of Defense funded federal transit benefit.
- i. Continue planning activities for Hwy 1 corridor transit improvements.
- j. Renew MST Trolley contract with City of Monterey.
- k. Upgrade and enhance technologies to improve customer experience

- l. Continue planning a comprehensive regional BRT plan and apply for funding, as appropriate
- m. Identify funding for additional shelters and on-street passenger amenities

3. Implement board protocols and best practices to achieve effective and efficient board operations and board meeting management.

Objectives/Outcomes: Implement training and orientation for Board members and provide concise oral and written reports that result in a well informed, well satisfied, participatory policy governance Board.

Indicators of Success:

- Satisfied, involved fully-integrated, well informed and well functioning Board of Directors
- Residents of member jurisdictions feeling well represented

Menu of Tactics:

- a. Develop and implement Board member training and orientation programs
- b. Implement revised Board committee structures to support decision making.
- c. Implement revised Board reporting practices to make better use of limited time available for board meetings.

4. Research, Implement and Promote Policies and Practices that Encourage Environmental Sustainability and Resource Conservation

Objective: Implement economically sound and environmentally-friendly resource conservation policies that reduce MST dependence on scarce natural resources and the potential for negative environmental impact

Indicators of Success:

- Compliance with EPA and California Air Resources Board mandates.
- Reduced consumption and related costs of utilities including water, natural gas and electricity.
- Reduced consumption of fossil and non-renewable fuels.

Menu of Tactics:

- a. Participate in national, state and regional transit conferences, meetings and alternative fuel forums, user groups, etc.) that identify and outline changes to federal and California Air Resources Board (CARB) emission requirements
- b. Maintain a dialogue with CARB staff regarding emission requirements and emission reduction strategies
- c. Adopt Leadership in Energy and Environmental Design (LEED) principles as appropriate in the design and construction of MST facilities
- d. Identify opportunities for energy, water, gas and other resource conservation programs
- e. Implement alternative fuel, and zero emission bus technologies.
- f. Monitor emerging technologies and determine cost-effective sustainable technologies and implement as appropriate

5. Educate the Public on MST Services through Promotion, Communication and Advocacy

Attract new riders and improve support for MST by utilizing effective marketing, promotion, communication and advocacy techniques meeting individual community and stakeholder needs

Indicators of Success:

- 1. Increased awareness of MST transportation and mobility services and the value they provide
- 2. Increased patronage and usage MST website and tools provided
- 3. Increased number of positive media coverage of MST

Menu of Tactics:

- a. Implement and develop coordinated, multi-media, bilingual media communications and advertising programs
- b. Improve MST online and social media presence, and utilize new and emerging technologies to communicate with new markets
- c. Encourage transit-friendly land-use planning through further dissemination of the *Designing for Transit* manual

- d. Implement targeted marketing and promotional efforts designed towards major employers, schools, senior groups, hospitality industry and non-traditional customers

6. Actively Promote Organizational Values to Maintain High Quality Relationships with MST Employees, Customers, Contractors, Vendors, and Community Stakeholders

Act in manner in all we do to promote individual and organizational safety, efficiency and effectiveness and enhance the satisfaction of those who interact with MST including our customers, employees and other key stakeholders and partners

Indicators of Success:

1. High levels of employee, customer, and stakeholder satisfaction
2. Improved relationships with represented labor workforce
3. Increased utilization of employee development programs
4. Improved safety performance and reductions in injuries.

Menu of Tactics:

- a. Recognize and celebrate individual and group achievements in support of MST's mission, vision, values, goals and objectives
- b. Conduct attitude and opinion surveys to gauge satisfaction of riders, non-riders, employees and stakeholders
- c. Improve communication with all employees and the Amalgamated Transit Union leadership
- d. Complete negotiations of the Amalgamated Transit Union and Monterey-Salinas Transit Employee Association agreements
- e. Develop and implement targeted marketing and promotional efforts designed towards major employers, schools, senior groups, hospitality industry and non-traditional riders will also assist in growing ridership
- f. Ensure a proper staff structure is in place that understands and supports the mission, vision and values to meet strategic goals and objectives.

7. To attain industry leadership for like-sized agencies within California and the United States.

Develop and implement programs and practices that distinguish Monterey-Salinas Transit as a leader with the public transit industry.

Indicators of Success:

1. Participate in a leadership role in industry trade associations.
2. Receive recognition and acknowledgement for innovative programs and practices.

Menu of Tactics:

- a. Seek appointment to leadership positions within appropriate national, state, and local trade, business and community associations and committees.
- b. Develop and implement innovative programs and that enhance the overall customer experience, improve safety and sustainability, reduce costs, attract new customers, retain existing customers, motivate employees, and reflect well on Monterey-Salinas Transit and the public transit industry in general.

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Monterey Salinas Transit Board Members:

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Vice Chair, Libby Downey, City of Monterey
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Monterey Salinas Transit Staff and Associates:

Carl Sedoryk, General Manager/CEO
Michael Hernandez, Assistant General Manager/Chief Operating Officer
Hunter Harvath, Assistant General Manager/ Finance & Administration
Kelly Halcon, Director of Human Resources and Risk Management
Mark Eccles, Director of Information Technology
Robert Weber, Director of Transportation
David Laredo, MST General Counsel
Heidi Quinn, Legal Counsel

Monterey Salinas Transit Planning Consultant
Steven Alexander, Facilitator

Strengths	Weaknesses
Innovative	Cash flow
Alternative funding strategies	Fleet availability
Employees and Management team	Unpredictable Funding/revenue sources
Fiscally responsible	Public transit industry politically weak
Legislative representatives/govern-mental relations (FTA, Caltrans)	Low urban density
Well maintained fleet	Low staffing levels due to cutbacks
Support of elderly/disabled community	Lack of physical capacity at transit facilities
Emergency Response Planning	Lack of sufficient funding reserves
System operating performance	Aging population requiring specialized service
Community / stakeholder support	Lack of capital replacement funds
Brand Identity	Recruitment of skilled trades
Recognized industry leadership	High mileage fleet
Public safety relationships	Obsolescence of ITS technology
Advanced technology infrastructure	
No capital debt	
Safety culture	
Broad community use of services	
Public/private partnerships	
Transit District Governance	
Security system	
Mobility management programs	
Local union relationships	
Opportunities	Threats
Reduced sales tax approval threshold	Persistent weak local economic conditions
State bond dollars (Prop 1B – 1C)	Unpredictable fuel cost
Public/private partnerships	Traffic Congestion
Changing habits—new customer types	Local development environment/regulations
Bus on shoulder opportunities	Unfunded mandates CARB/EPA/ADA
Hwy 1 improvement projects	Demographics; aging population & workforce
WAVE electric trolley technology	FTA vehicle spare ratio rule
Veteran's Hospital	Increased costs
Federal authorization bill	Anti earmark sentiments in Congress
Ft. Ord multimodal corridor planning	State transit "fiscal cliff"
Off board fare collection	Former Ford Ord development
Untapped customer base	Federal raids of transit bus funds
Public/private partnerships	Section 13c – Federal Transit Act
Nonprofit status for mobility management	Degradation of industry labor relations
Expanded transit facilities	State financial condition
Regional partnerships	Non transit-oriented development
Labor contract negotiations	MAP-21 compliance
University/College Transit services	Potential labor work action
Enhance safety performance	National Highway Trust Fund deficit
State carbon cap and trade program	Gridlock in Congress

FY 2014 Action Plan

1. Develop and implement service levels appropriate to funding availability. Ongoing
2. Improve monthly Board reporting of operating activities and trends. Sep 2013
3. Adopt new Board Committee structures to better support board governance. Dec 2013
4. Identify new location for monthly Board meetings. Sep 2013
5. Complete procurement for pre approved Legal Services Jul 2013
6. Review alternative sites and identify a long term strategy for financing and construction of expanded transit operations and maintenance facilities. Dec 2013
7. Review service change and related public information process and implement improvements. Mar 2013
8. Implement Spanish language marketing / outreach program. Dec 2013
9. Perform research and outreach to develop of preferred local dedicated transit funding source. Dec 2013
10. Procure upgrade of telecommunications and intelligent transportation systems. Jun 2014
11. Complete federal triennial compliance review. Sep 2013
12. Provide administrative support in service to Monterey County RTA. Ongoing
13. Develop adequate staffing and organizational structure for MST and RTA. Ongoing
14. Implement email and document retention policy. Dec 2013
15. Complete high/medium priority facility repair projects as funding allows. Ongoing
16. Adopt and execute federal and state legislative programs. Ongoing
17. Procure replacement buses as funding allows. Ongoing
18. Establish independent mobility management organization and adopt governance structure. Dec 2013

- 19.** Participate in local and regional planning activities to develop improved transit corridors and transfer locations including Hwy 1, Fort Ord, Salinas Amtrak station, and proposed downtown Monterey transit center. Ongoing
- 20.** Complete procurement of workers compensation third party administrator services. Dec 2013
- 21.** Actively participate in state and national trade associations to resolve issues related to Department of Labor dispute, MAP-21 implementation, California bus axle weights, and next federal transportation authorization funding bill. Ongoing