Monterey-Salinas Transit District
Strategic Plan – 2018-2020

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 challenges (SWOC) revealed several important facts. The inability of Congress to deal with structural deficits in the National Highway Trust Fund combined with state transportation funding resulted in increasingly unreliable and diminishing federal and state sources of operating and capital funds. Traffic congestion and demands for increased access to 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 and difficulty recruiting qualified employees continue to limit the ability of MST to grow its service to meet community needs.

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

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

- Develop and maintain adequate and stable long-term revenues
- Provide quality transit and mobility management services
- Maintain effective board protocols and best practices to achieve effective and efficient board operations and board meeting management
- Promote policies and practices that encourage environmental sustainability and resource conservation
• Educate the public on MST services through promotion, communication, and advocacy

• Promote organizational values to maintain high-quality relationships with MST employees, contractors, vendors, and community stakeholders

• Maintain industry leadership for like-sized agencies within California and the United States.

For each goal, staff, working together with the Strategic Planning Committee, has formulated initial objectives and desired outcomes. Indicators of success were 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 each annual budget during the life of the strategic 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 and Maintain Adequate and Stable Long Term Revenues**

  Maintain 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 and maximize 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.

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

  Offer training and orientation for board members and provide concise reports that result in a well-informed, well-satisfied, participatory policy governance board.

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

Promote individual and organizational safety, efficiency and effectiveness and enhance the satisfaction of our customers, employees, partners, board members, and other key stakeholders

• Maintain 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
FY 2018-2020 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 FY 2018-2020 to support these goals along with tactics to be used to achieve each objective.

1. Develop and Maintain Adequate and Stable Long Term Revenues

Objectives/Outcomes:

Maintain 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, sustain current and future transit services, and maximize the value of MST services to the community.

Through education and advocacy, encourage policymakers and the general public 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:

- Maximize opportunities to leverage local funds with Federal, State, and private sources to support transit projects maximized
- 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. Utilize debt financing from bonds, private financing, and other sources as appropriate

c. Identify additional partnerships to fund transit services outside of traditional tax sources

d. Maintain adequate cash reserves to support a state of good repair for assets

e. Identify grant opportunities to leverage local funds for transit projects
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 and maximize 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, and motivate employees.

Indicators of Success:

- Passenger boarding growth rate that supports 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 where demand is highest
f. Continue participation in Fort Ord multi-modal and other transportation corridor studies
g. Continue to monitor autonomous vehicle technology and implement as appropriate
h. Develop and improve workforce development plans to sustain service levels
i. Continue planning activities for Hwy 1 corridor transit improvements

j. Maintain 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 on-street passenger amenities

n. Maintain and develop partnership with alternative mobility providers, including taxis, van pool and TNC (transportation network company) to improve mobility options

o. Plan for a South County operations and maintenance facility

p. Determine appropriate level of contracted transit services to provide highest value services to communities served

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

Objectives/Outcomes: Offer training and orientation for board members and provide concise 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. Continue board member training and orientation programs

b. Continue board committee structures to support decision making

c. Monitor board reporting practices to make better use of limited time available for board meetings
4. **Promote Policies and Practices that Encourage Environmental Sustainability and Resource Conservation**

Objective: 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

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
- Increased investment in zero-emission technology
- Recognition for efforts to reduce greenhouse gas emissions

Menu of Tactics:

- 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
- Maintain a dialogue with CARB staff regarding emission requirements and emission reduction strategies
- Adopt Leadership in Energy and Environmental Design (LEED) principles as appropriate in the design and construction of MST facilities
- Identify opportunities for energy, water, gas, and other resource conservation programs
- Implement alternative fuel and zero-emission bus technologies
- 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, and communication techniques and by applying greater focus in meeting individual community and stakeholder needs.

Indicators of Success:

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

Menu of Tactics:

a. Implement and develop coordinated, multi-media, bilingual media communications and advertising programs and include special emphasis on providing relevant messaging to young people

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 education and promotional efforts designed towards major employers, students, tourists, senior groups, hospitality industry, and non-traditional customers

e. Develop educational materials that explain the necessity for continued subsidizing for transit services

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

Promote individual and organizational safety, efficiency and effectiveness and enhance the satisfaction of our customers, employees, partners, board members and other key stakeholders

Indicators of Success:

- High levels of employee, customer, and stakeholder satisfaction
- Improved relationships with represented labor workforce
• Increased utilization of employee development programs

• 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. Monitor employment contract with Amalgamated Transit Union and Monterey-Salinas Transit Employee Association agreements

e. Develop and implement targeted marketing and promotional efforts designed towards major employers, students, senior groups, hospitality industry, tourists, and non-traditional riders will also assist in growing ridership

f. Develop and implement workforce recruitment, training, development, and succession plans to ensure a proper staff structure is in place that supports the mission, vision, and values to meet strategic goals and objectives

g. Monitor implementation of new marijuana laws to ensure safety of MST workforce and customers

7. **Maintain 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:

• Participate in a leadership role in industry trade associations

• 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

a. 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

b. Implement targeted marketing, educating and promotional efforts designed towards major employers, students, tourists, senior groups, hospitality industry, and non-traditional customers.
Acknowledgements:

MST thanks and acknowledges the American Public Transportation Association and California Transit Association for their excellent strategic plans from which several of this document’s elements were derived. We also acknowledge the following for their participation in the development of this document:

Monterey-Salinas Transit Board Members:

Chair, Tony Barrera, City of Salinas
Vice Chair, Mayor Mike LeBarre, City of King City
Dave Pacheco, City of Seaside
Kristin Clark, City of Del Rey Oaks
Carolyn Hardy, City of Carmel-by-the-Sea
Robert Bonincontri, City of Gonzales
Ken Cuneo, City of Pacific Grove
Frank O’Connell, City of Marina
Leah Santibañez, City of Greenfield
Patricia Stephens, City of Soledad
David Pendergrass, Sand City

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
Lisa Rheinheimer, Director of Planning and Marketing
Robert Weber, Director of Transportation Services
David Laredo, MST General Counsel
Heidi Quinn, Legal Counsel
Jeanette Alegar-Rocha, Executive Assistant to the GM/Clerk to the MST Board

Monterey-Salinas Transit Planning Consultant
Lisa Yates, ACS Quantum Strategies, Facilitator
<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fast Act Authorization</td>
<td>Fleet availability</td>
</tr>
<tr>
<td>Innovative</td>
<td>Unpredictable funding/revenue sources</td>
</tr>
<tr>
<td>Alternative funding strategies</td>
<td>Public transit industry politically weak</td>
</tr>
<tr>
<td>Employees and management team</td>
<td>Low urban density</td>
</tr>
<tr>
<td>Fiscally responsible</td>
<td>Low staffing levels due to cutbacks</td>
</tr>
<tr>
<td>Legislative representatives/governmental relations (FTA, Caltrans)</td>
<td>Lack of physical capacity at transit facilities</td>
</tr>
<tr>
<td>Well maintained fleet</td>
<td>Aging population requiring specialized service</td>
</tr>
<tr>
<td>Support of elderly/disabled community</td>
<td>Recruitment of skilled trades</td>
</tr>
<tr>
<td>Emergency response planning</td>
<td>High mileage fleet</td>
</tr>
<tr>
<td>System operating performance</td>
<td>Growing population of disability patients</td>
</tr>
<tr>
<td>Community / stakeholder support</td>
<td>Lack of visibility to transportation career</td>
</tr>
<tr>
<td>Brand identity</td>
<td>Performance of transit service contractor</td>
</tr>
<tr>
<td>Recognized industry leadership</td>
<td></td>
</tr>
<tr>
<td>Public safety relationships</td>
<td></td>
</tr>
<tr>
<td>Advanced technology infrastructure</td>
<td></td>
</tr>
<tr>
<td>Safety culture</td>
<td></td>
</tr>
<tr>
<td>Broad community use of services</td>
<td></td>
</tr>
<tr>
<td>Public/private partnerships</td>
<td></td>
</tr>
<tr>
<td>Transit District governance</td>
<td></td>
</tr>
<tr>
<td>Security system</td>
<td></td>
</tr>
<tr>
<td>Mobility management programs</td>
<td></td>
</tr>
<tr>
<td>Local union relationships</td>
<td></td>
</tr>
</tbody>
</table>

**Opportunities**

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reduced sales tax approval threshold</td>
<td>Traffic congestion</td>
</tr>
<tr>
<td>Public/private partnerships</td>
<td>Local development/environmental regulations</td>
</tr>
<tr>
<td>Changing habits—new customer types</td>
<td>Unfunded mandates CARB/EPA/ADA</td>
</tr>
<tr>
<td>Bus on shoulder opportunities</td>
<td>Demographics; aging population &amp; workforce</td>
</tr>
<tr>
<td>Hwy 1 improvement projects</td>
<td>FTA vehicle spare ratio rule</td>
</tr>
<tr>
<td>WAVE electric trolley technology</td>
<td>Increased costs</td>
</tr>
<tr>
<td>Transportation Network Companies (TNCs)</td>
<td>Unpredictable federalization</td>
</tr>
<tr>
<td>Ft. Ord multimodal corridor planning</td>
<td>Transportation Network Companies (TNC’s)</td>
</tr>
<tr>
<td>Off-board fare collection</td>
<td>Section 13c – Federal Transit Act</td>
</tr>
<tr>
<td>Untapped customer base</td>
<td>Non transit-oriented development</td>
</tr>
<tr>
<td>Nonprofit status for mobility management</td>
<td>Potential labor work action</td>
</tr>
<tr>
<td>Expanded transit facilities</td>
<td>National Highway Trust Fund deficit</td>
</tr>
<tr>
<td>Labor contract negotiations</td>
<td>Gridlock in Congress</td>
</tr>
<tr>
<td>University/college transit services</td>
<td>Recreational marijuana laws</td>
</tr>
<tr>
<td>Enhance safety performance</td>
<td></td>
</tr>
<tr>
<td>Opportunities (cont’d)</td>
<td>Challenges (cont’d)</td>
</tr>
<tr>
<td>---------------------------------------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>State carbon cap and trade program</td>
<td></td>
</tr>
<tr>
<td>State transit funding</td>
<td></td>
</tr>
<tr>
<td>Autonomous Vehicle Technologies</td>
<td></td>
</tr>
<tr>
<td>Renewal of contract for private services</td>
<td></td>
</tr>
<tr>
<td>South County Maintenance/Operations Facility</td>
<td></td>
</tr>
<tr>
<td>TAMC sales tax revenues</td>
<td></td>
</tr>
<tr>
<td>Traffic congestion</td>
<td></td>
</tr>
</tbody>
</table>