



# SamTrans Business Plan Update

Board Presentation

August 2, 2017



## Overview: Our Story

### Current and Aspirational

As our community has changed, mobility has been and continues to be redefined.

The District's role needs to evolve and be redefined from bus and paratransit agency to mobility leader.

## Our Story: Mobility Leader

### Vision Statement:

**“The District is a mobility leader, providing safe transportation choices and a sustainable future that meets the needs of our customers and diverse communities.”**

3

## Our Story: Mobility Leader

### Before the District established its current vision it was a mobility leader:

1976: Formed SamTrans, Redi-Wheels

1988: Transportation Authority

1992: Caltrain

1999-2005: BART

2004: Transportation Authority renewed

**We do it all: Bus, paratransit, rail, roads, highways, shuttle. We are a complete mobility provider.**

4

## Overview: Timeframes

- **Immediate: FY 2018 (July 1, 2017)**
  - Actions begun in the last two years expected to bear results in FY18
- **Near-Term: FY 2019 (July 1, 2018)**
  - Actions underway expected to bear results in FY19
- **Ongoing and Beyond: Business Plan – a framework for the reinvented SamTrans**

5

## 2015-2019 Strategic Plan

### Priorities

1. Expand mobility options for our customers (Service)
2. Promote fiscal health (Financial)
3. Become a more effective organization (Organization)



6

## Financial – Immediate (FY18 – July 1, 2017)

- **Balanced budget (use of reserves)**
- **Additional expenditures for service, organizational benefits**
- **Began program of ongoing service evaluation, including cuts that allow financial flexibility (Cut 3 routes)**

7

## Financial – Near-term (FY19 – July 1, 2018)

- **New Base-Budgeting processes**
  - **Transparency of recurring, additional expenses**
  - **Budget Book**
- **Continue service changes provide financial flexibility**
- **Identify additional, new revenues sources**
- **Increased contribution for Caltrain**

8

## Financial – Near-term (FY19 – July 1, 2018)

- **SMC half-cent sales tax measure**
  - November 2018 ballot -- \$80M/year (estimate)
  - Reserves depleted by 2024 (fiscal cliff)
  - **Public Education Campaign**
    - Extensive Board, Community input/outreach
    - Advisory Committee County partnership
    - Board Subcommittee Consultants
  - **Concept**
    - 50% SamTrans/Caltrain
    - 50% local/regional (TA Model)

9

## Organization – Immediate (FY18 – July 1, 2017)

- Hiring continues to keep pace with attrition rate, challenges remain
- Filled critical vacancies in FY17, including CFO, Directors of IT, C&P, Safety and Security, Bus Transportation, Treasury; Deputy Director of Facilities, ITS, Bus Maintenance, additional positions in HR; Deputy CEO/GM (In Recruitment)

10

## Organization – Immediate (FY18 – July 1, 2017))

### District and HR Actions

District Action #1: Compensation and Benefits Study

District Action #2: Rewards and Recognition Program

District Action #3: Inter-Departmental Collaboration

District Action #4: Employee Development  
Opportunities

District Action #5: Employee Communications and  
Feedback

HR Action #1: Robust Onboarding Program

HR Action #2: SamTrans Leadership Program

11

## Organization -- Near-term (FY19 – July 1, 2018)

- Evaluate recommendations of  
Compensation and Benefits Study
  - Review job classifications and job  
families, compensation
  - Consider performance-based  
compensation
  - Develop evaluation and advancement  
paths and protocols, including career  
ladders, critical skill needs

12

## Service – Immediate (FY18 – July 1, 2017)

- Ongoing comprehensive review of service, pilots
- Reconfigure to redeploy assets from underutilized service
- Combine overlapping services
- Revamp ridership maps
- Update schedules: Simplification
- Establish effective metrics

13

## Service – Immediate (FY18 – July 1, 2017)

- New Service Pilots
  - SFO, Rtes 61, 78
- Route Eliminations
- Pilot Zero-Emission, All-Electric Buses
- Expand paratransit fleet
- Dumbarton Corridor Study
- Caltrain Electrification
- Youth Mobility Coordinator, Ambassadors
- Senior Mobility, Veterans Initiative
- Marketing Initiatives

14

## Service – Near-term (FY19 – July 1, 2018)

- TNC partnership
- Fare Study
- Express Bus Study
- Shuttle program re-evaluation, development
- ECR Services, Signal priority
- 101 Managed Lanes Project
- Mobile Ticketing
- Dumbarton Corridor short-term improvements
  - Engineering and Design
- Caltrain Electrification

15

## SamTrans Business Plan

Chapters – A starting point for discussion

1. Introduction
2. Executive Summary/Framework for the Future
3. Summary of Goals/Vision as Identified in the Strategic Plan
4. Agency Existing Conditions
  - Current financial conditions and projections
  - Current service offerings and near-term changes
  - Current organizational conditions and near-term changes

16



## SamTrans Business Plan

### 5. External Existing and Evolving Conditions

- Customer Base -- changes in ridership and changes in rider demographics
- Market forces/marketplace of services (TNCs, etc.)

### 6. Operational Initiatives

- Customer experience – Ease of Use
- Pilots/demonstrations
- Metrics/performance measures

17

## SamTrans Business Plan

### 7. Organizational Initiatives

- Innovation – Attitude and Leadership
  - The Transit District of Silicon Valley
  - Incubator
  - Embracing marketplace of ideas
- Workforce development and retention
- Metrics/performance measures

### 8. Financial Initiatives

- Grow ridership
- Metrics/performance measures
- Expand range of opportunities

18

## SamTrans Business Plan

### Next Steps

- Initial Board Presentation – August 2, 2017
- Work Plan/Schedule
- Fall Board Retreat
- January Board Meeting
  - Progress Report
    - Update FY18-19 initiatives
    - Discuss framework for future initiatives

19

## SamTrans Business Plan

### Discussion

20