

WHEELS



strategic plan



Prepared by:



Moore Iacofano Goltsman, Inc.
January 2006

LIVERMORE AMADOR VALLEY TRANSIT AUTHORITY

WHEELS STRATEGIC PLAN



JANUARY 2006

TABLE OF CONTENTS

1 . 0	I N T R O D U C T I O N	1
1.1	Brief Process Overview	1
1.2	Strategic Plan Organization	2
2 . 0	S T R A T E G I C P L A N F R A M E W O R K	3
2.1	Mission, Vision and Values	5
2.2	Strategic Plan Goals	7
2.3	Overview of Strategic Plan Goals and Strategies	8
2.4	Strategic Plan Goals, Strategies, and Performance Indicators	9
3 . 0	S T R A T E G I C P L A N I M P L E M E N T A T I O N	18
3.1	Relationship of Strategic Plan, Business Plan and Budget, and Annual Workplan	19
3.2	Aligning the Budget with the Strategic Plan	21
3.3	Wheels Strategic Planning Cycle	22
3.4	Decision-Making Criteria	24
4 . 0	S T R A T E G I C O B J E C T I V E S	25



0323

Wheels

Make The Switch.

Get on the best Wheels Network in the City Area.

1.800.2.JOIN.WV

1.0 INTRODUCTION

The purpose of the Wheels Strategic Plan is to establish an overall vision and mission for Wheels, and develop a series of goals and strategies to guide the future development of Wheel's services, programs and organization. The Plan provides a framework through which Wheels' administrative, operational and communication processes can be reexamined. Through this process, Wheels staff will be able to craft the Agency's direction and strategic business plan.

1.1 PROCESS OVERVIEW

The core of the strategic planning effort is reflected in this document. The information collected throughout the process has been developed, refined, and organized into the framework of the following pages. The result is an easy-to-use reference for understanding, prioritizing, measuring, and monitoring the goals set forth in the strategic plan.

The strategic planning process began with a series of individual in-person interviews conducted by Daniel Iacofano from Moore Iacofano Goltsman (MIG), Inc., with each of the Wheels Board members to obtain their thoughts and ideas regarding the future direction of the organization. These interviews were held prior to a series of workshops that Wheels held as a part of the strategic planning process.

The first two workshops were held with key Wheels staff members, and the final session was held with Wheels Board members. All three sessions were held at the Wheels offices in Livermore, California, and were facilitated by Daniel Iacofano.

The first workshop, held on May 11, 2005, brought key staff members together for a half-day strategic planning session. The purpose of this session was to: identify issues, challenges and opportunities; clarify the organization's mission statement, vision, and values; and begin to develop a strategic framework to guide the future direction of the organization.

On June 8, 2005, a second half-day workshop was held with key Wheels staff to build upon and refine the work that had begun during the first session. The purpose of this session was to identify and clarify goals and develop strategies and actions for achieving these goals.

The third session was a Board Workshop held on June 24, 2005. This full-day workshop enabled the Wheels Board to review and add to the strategic planning discussions begun by staff. The session began with an environmental scan, i.e. a summary of planning issues, challenges, and future opportunities facing Wheels. Following this discussion, Board members discussed the organization's fundamental and overall mission. Then participants identified organizational values. This then set the stage for a discussion regarding their vision for the future of Wheels. Board members then focused on the heart of the strategic plan framework by reviewing and refining preliminary goals, strategies and actions that had been previously developed during the staff workshops.

Information gathered during these three sessions was used to develop a draft Strategic Plan Framework, which was subsequently reviewed by Wheels staff and Board members for comment and revision. An additional strategic planning session in September was also held to gather input from drivers and other contract staff. The final Strategic Plan was discussed by the Wheels Board in their October, November and December meetings. This plan document reflects the comments and direction of the Board from these sessions.

1.2 STRATEGIC PLAN ORGANIZATION

The heart of the strategic plan is the **Strategic Planning Framework**. It represents a set of guiding principles and forms the basis of overall strategic direction for Wheels. Drawing on the input from previous work sessions, the framework is organized around the Mission, Values and Vision of Wheels. Building upon these elements, the Strategic Planning Framework also consists of Goals and Strategies designed to implement the Wheels Vision and Mission.

This version of the Strategic Plan includes an initial set of desired outcomes and indicators that Wheels can use to assess performance and progress toward achieving these outcomes.

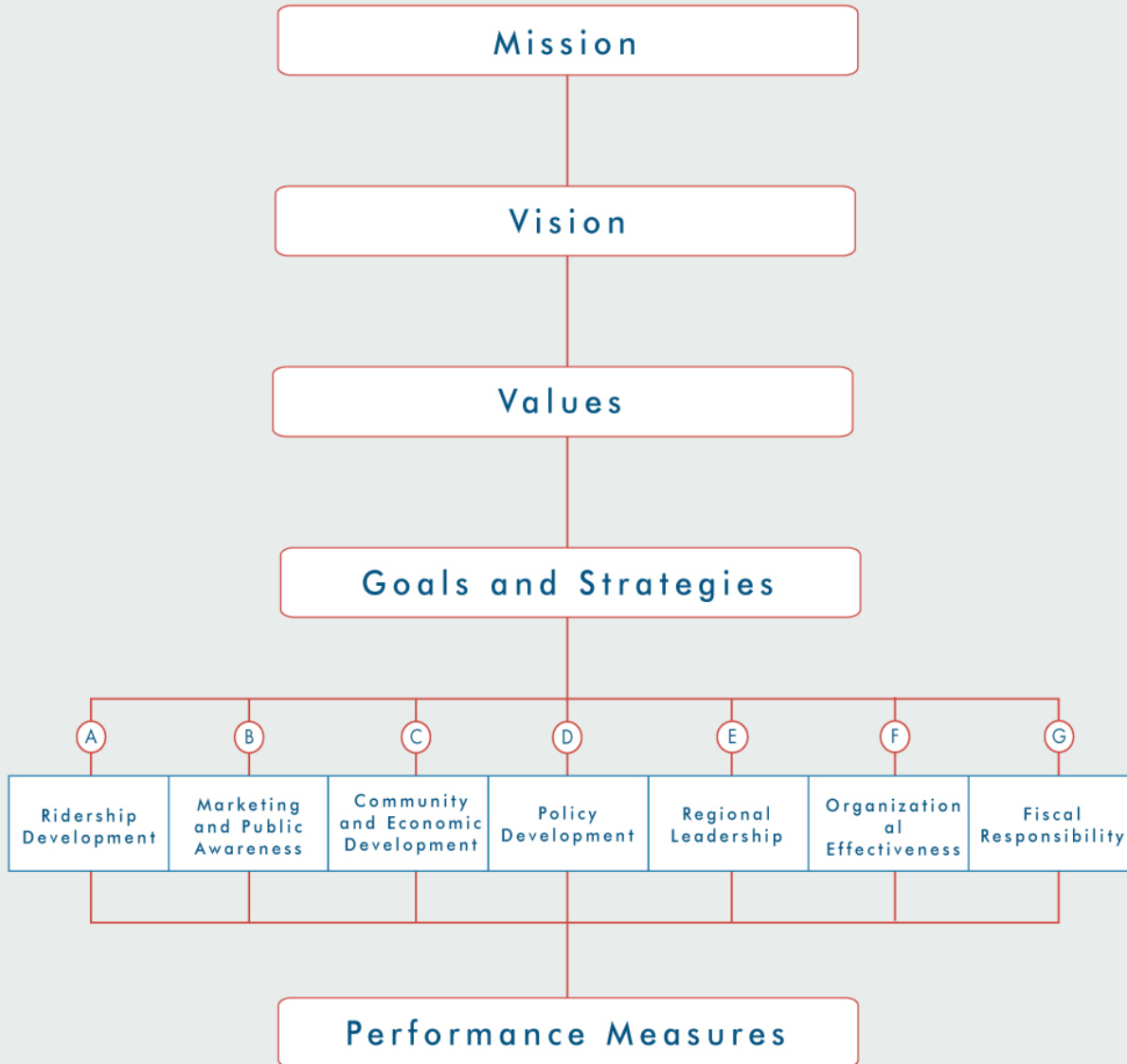
2.0 STRATEGIC PLAN FRAMEWORK

The **Strategic Plan Framework** on the following page describes the relationship among the Strategic Plan elements.

- The **Mission** describes the purpose of Wheels and its role within the Tri-Valley community.
- **Values** describe the norms and qualities of Wheels and are the basis from which each Wheels staff member should be operating.
- Reflecting both its mission and values, the **Vision** guides Wheels toward the future.
- The **Goals and Strategies** describe the direction that Wheels will be moving in seven focus areas: Ridership Development, Marketing and Public Awareness, Economic Development, Policy Development, Regional Leadership, Organizational Effectiveness, and Fiscal Responsibility.



Strategic Plan Framework



2.1 MISSION, VISION AND VALUES

MISSION

The **Mission** of Wheels describes the main functions of Wheels and its role within the Tri-Valley community. The Mission gives the overall “charge” and purpose of the organization. All Wheels activities relate to one or more aspects of the mission statement:

The mission of the Livermore Amador Valley Transit Authority is to provide equal access to a variety of safe, affordable and reliable public transportation choices, increasing the mobility and improving the quality of life of those who live or work in and visit the Tri-Valley area.

VISION

Wheels’ Vision is a narrative description of the ideal Wheels environment. The Vision reflects the priorities and values of the staff and management:

An essential link in the regional transportation system, LAVTA strives to be a well-recognized, highly respected, integrated public agency utilizing appropriate tools and technologies to provide cost-effective, exceptional transport service in response to the needs and priorities of those who live or work in and visit the Tri-Valley area

VALUES

The **Values** of Wheels describe the basic behaviors, attributes, principles and beliefs that guide all Wheels staff. The Values have been developed in consultation with Wheels staff and the Board of Directors. These principles are the bedrock of Wheels staff attitudes toward their work, their mission and their relationships.

We Value...

- | | |
|-----------------------|---|
| Integrity | <i>We act ethically and with integrity in all we do.</i> |
| Quality | <i>We do high quality work and maintain high standards in order to exceed customer expectations.</i> |
| Accountability | <i>We are accountable and responsible for our actions.</i> |
| Community | <i>We are a viable part of the community we serve and view quality transit service as an essential aspect of community life.</i> |
| Service | <i>We focus on our customers by providing friendly, personable service.</i> |
| Cooperation | <i>We partner with other regional and local agencies to ensure full access to a comprehensive range of community mobility options</i> |
| Environment | <i>We view public transit as a means of improving air quality and conserving our natural resources.</i> |
| Stewardship | <i>We are prudent and resourceful stewards of the public dollars with which we have been entrusted.</i> |

2.2 STRATEGIC PLAN GOALS

The **Goals** provide direction for achieving the Wheels Vision and Mission. Strategies and objectives are identified for each goal area.

- A. **Ridership Development**
Increase ridership to fully attain community benefits achieved through optimum utilization of the transit system.
- B. **Marketing and Public Awareness**
Improve visibility, image and awareness of Wheels.
- C. **Community and Economic Development**
Utilize transit as an essential community and economic development tool for local communities.
- D. **Policy Development**
Provide staff and partner agencies with clear policies on how to effectively address the challenges and opportunities facing Wheels.
- D. **Regional Leadership**
Achieve a position of regional leadership from which Wheels can pursue initiatives enabling it to more effectively serve its customers.
- E. **Organizational Effectiveness**
Strengthen organizational capabilities and resources to improve overall performance and customer satisfaction.
- F. **Fiscal Responsibility**
Maintain fiscal responsibility to ensure the financial sustainability of existing and new transit services.

Each **Goal** has a set of **Strategies** which are designed to support forward movement and progress toward achieving the Wheels Mission and Goals, and position Wheels to meet future challenges. Each Strategy is supported by a set of Objectives (Measurable Actions). Progress on implementation of the Strategic Plan will be measured through a set of outcome-based Performance Measures.

2.3 OVERVIEW OF STRATEGIC PLAN GOALS AND STRATEGIES

GOALS	STRATEGIES
A. Ridership Development	<p>A1 Expand routes and services to provide timely, seamless service deliverability</p> <p>A2 Increase accessibility</p> <p>A3 Optimize existing routes and services to increase productivity</p> <p>A4 Improve connectivity with regional transit systems</p> <p>A5 Explore innovative fare policies and pricing options</p>
B. Marketing and Public Awareness	<p>B1 Continue to build the Wheels brand image, identity and value for customers</p> <p>B2 Improve the public image and awareness of Wheels</p> <p>B3 Increase two-way communication between Wheels and its customers</p> <p>B4 Improve public's awareness and understanding of available transit services</p>
C. Community and Economic Development	<p>C1 Promote Wheels to new businesses and residents</p> <p>C2 Integrate transit into local community and economic development plans</p>
D. Policy Development	<p>D1 Review JPA policies to better position Wheels for current and future conditions</p> <p>D2 Incorporate transit-friendly design in the site development process</p> <p>D3 Incorporate environmental sustainability issues in current policies</p>
E. Regional Leadership	<p>E1 Advocate for regional, state and federal policies that support Wheel's goals</p> <p>E2 Support staff initiatives that can enhance Wheels' leadership role</p> <p>E3 Encourage partnerships with transit and other local public agencies to advance goals and objectives of Wheels</p>
F. Organizational Effectiveness	<p>F1 Implement organization-wide change initiatives</p> <p>F2 Engage contract staff</p> <p>F3 Establish metrics with action plans for improvement</p> <p>F4 Strengthen human and technical resources throughout the organization</p>
G. Fiscal Responsibility	<p>G1 Integrate fiscal review processes into all decisions</p> <p>G2 Establish a reserve policy</p> <p>G3 Establish long term facilities and capital improvement program</p>

2.4 STRATEGIC PLAN GOALS, STRATEGIES AND PERFORMANCE INDICATORS

The following pages describe each of the seven Strategic Goals, their related strategies and how Wheels' progress toward achieving those Goals will be monitored through Performance Measures, including desired outcomes and success indicators.

A. RIDERSHIP DEVELOPMENT

GOAL: Increase ridership to fully attain community benefits achieved through optimum utilization of the transit system

Attracting more riders to transit will help to better manage congestion, improve air quality and increase the public's return on investment in transit facilities and operations. As a goal, an increase in transit ridership is viewed as critical means for achieving these and other important community purposes, rather than an end in of itself. This perspective comes from understanding that transit services are provided as a way to help solve problems and address issues that would be significantly harder to resolve if these services were not available. It also requires placing the transit services offered by Wheels within the larger context of the overall regional transportation system, whose effective and efficient performance is the ultimate objective, rather than that of transit alone.

Bringing about an increase in transit ridership will require improving existing services while also exploring the feasibility of providing new and different services, such as Bus Rapid Transit. This approach is intended both to appeal to the current ridership while also developing and packaging new services to attract additional riders. This requires better understanding of the commuting needs of the public, including new residents, while also working closely with local cities to anticipate future growth patterns and determine how transit fits into their future development plans. Ultimately, Wheels will strive to meet future growth needs of the Tri-Valley in an environmentally responsible manner.

STRATEGIES

- A1** Expand routes and services to provide timely, seamless service deliverability
- A2** Increase Accessibility
- A3** Optimize existing routes and services to increase productivity
- A4** Improve connectivity with regional transit systems
- A5** Explore innovative fare policies and pricing options

PERFORMANCE MEASURES

Desired Outcome

- Wheels ridership is increased because services complement and serve emerging land use patterns and resident needs

Success Indicators

- Ridership increased by 3% per year (or no less than the annual growth rate of the overall population of the Tri-Valley.)
- Number of community partnerships for expanded transit services
- Percentage of communities in new growth areas having access to public transit

B. MARKETING AND PUBLIC AWARENESS

GOAL: Improve visibility, image and awareness of Wheels.

A re-invigorated marketing and public awareness program is seen as an essential part of the effort to increase transit ridership. This marketing program will be designed to raise overall public awareness of Wheels while also improving the image of transit in general. It will do this by positioning the transit experience as a positive one for both the individual commuter and the community at large. This effort to improve the perception of transit will enable Wheels to reach out to the discretionary transit rider, while also enhancing the experience of the transit dependent. Reinforcing the image of transit as an approachable, inviting, and reliable form of transportation will also complement and support other key strategic goals.

In this regard, creating a memorable brand that promotes a positive image for Wheels, one that conveys Wheels as an important solution for people living and working in the Tri-Valley region, is an essential step. It will also be important for all who work at Wheels to live up to this new image and the heightened visibility it is intended to generate. For this reason, the message conveyed by the brand image must be consistent with the mission, values and vision of Wheels and permeate throughout the organization.

STRATEGIES

- B1 Continue to build the Wheels brand image, identity, and value for customers**
- B2 Improve the public image and awareness of Wheels**
- B3 Increase two-way communication between Wheels and its customers**
- B4 Improve public's awareness and understanding of available transit services**

PERFORMANCE MEASURES

Desired Outcome

- Wheels is recognized as a safe, clean and reliable service that is essential to quality of life in the Tri-Valley

Success Indicators

- Increase in percentage of Tri-Valley residents with a positive image of Wheels
- Increased public awareness of Wheels services and contributions
- Awareness of Wheels by current and new residents of the Tri-Valley

C. COMMUNITY AND ECONOMIC DEVELOPMENT

GOAL: Utilize transit as an essential community and economic development tool for local communities.

To the extent that transit can successfully reduce congestion, improve air quality, and enhance mobility for the individual commuter, it contributes to both the real and perceived quality of life within a community. As regions and individual communities compete to attract new businesses and workers, while retaining their existing economic base, the presence of a smooth and efficient local transit network becomes a vital community and economic development tool.

Working pro-actively to anticipate future growth patterns, Wheels can more effectively facilitate the integration of transit into future land use development. Asking each city how transit can fit into the future vision of their city can facilitate the development of more transit-friendly communities, while also contributing directly to the economic development plans of these cities. Wheels can then tailor routes and services to support the development vision of each city, rather than provide one standard solution for all cities. At the same time, it can work with these cities to encourage the design and development of communities that make transit a more attractive choice for commuters. In the near-term, it can also re-configure routes and services in response to current densities and ridership demand, rather than provide geographic area wide coverage regardless of need.

STRATEGIES

- C1 Promote Wheels to new businesses and residents**
- C2 Integrate transit into local community and economic development plans**

PERFORMANCE MEASURES

Desired Outcome

- Commuter and business use of transit as a promotional tool

Success Indicators

- Increase in business quantity and quality along key transit corridors
- Number of employers using access to public transit as tool for attracting employees
- Increase in number of transit-friendly development projects

D. POLICY DEVELOPMENT

GOAL: Provide staff and partner agencies with clear policies on how to effectively address the challenges and opportunities facing Wheels.

Many of the policies that underlie the joint powers authority, which established Wheels in 1986, should be re-examined in light of the overall environment that exists today, as well as new future opportunities. Current policies created at the time of Wheels' formation were aligned with the realities of that time, but over the past 19 years conditions have changed significantly. As a result, some existing policies may be constraining Wheels' capacity to provide improved services and attract new riders, even while the reasons underlying those policies may no longer apply. For this reason, reviewing JPA policies should be one of the first actions undertaken as a result of this strategic plan.

Policy development should also more closely examine the potential benefits to be realized from integrating transit and land use planning, while laying out a clear path for doing so. Such integration will certainly require that Wheels form even closer working relationships with local cities and other public agencies responsible for land use decisions.

Among policy issues to be considered are the criteria used for allocating transit routes and services in the Tri-Valley area. Should Wheels continue a geographic/coverage based service regardless of demand or rationalize allocation of transit services according to the need and ridership demand in each individual community? The outcome to this question may depend on the role transit is anticipated to play in the future community and economic development plans of each city, as well as which of these alternative service allocation methods, or mix of alternatives, can best meet the mobility needs of all who live and work in the Tri-Valley area.

Related to this is the need for an updated service development policy. For instance, should a different fare policy apply to new premium services? Also, should funds generated by fees placed on new developments be funneled to fund transit services to these new communities, or support overall transit services to both established and new communities. The resolution of these and other critical policy choices will provide a firm foundation for implementation of the overall strategic plan, and in coming years ease the decision-making process by both the Board and staff when evaluating changes in service and other critical issues.

STRATEGIES

- D1** Review JPA policies to better position Wheels for current and future conditions.
- D2** Incorporate transit-friendly design in the site development process
- D3** Incorporate environmental sustainability issues in current policies

PERFORMANCE MEASURES

Desired Outcome

- Clear and effective policies that facilitate implementation of Wheels strategic directions

Success Indicators

- Increased speed in implementation of plans, projects, and programs
- Increase in partnerships and collaborative planning efforts with local cities and other public agencies
- Increased city and agency understanding and support for Wheels policies
- Easily reached consensus among Wheels policy makers when evaluating changes in service.

E. REGIONAL LEADERSHIP

GOAL: Strengthen Wheels' leadership position within the region to enhance opportunities for customer service.

Wheels provides transit services in the Tri-Valley area but also functions as an integral part of the regional transit and transportation system. The capacity of Wheels to effectively and efficiently serve its customers is dependent upon the health and effectiveness of the overall transportation system.

By forming close working partnerships with municipalities and other transit agencies, Wheels can provide leadership in support of initiatives designed to improve the capacity of the transportation system to serve the commuting public. The development and management of a high-quality comprehensive transportation system throughout the region requires coordination and integration between all the agencies and organizations involved in the movement of people. Wheels is well positioned to facilitate this integration among all the regional mobility players. To effectively carry out this role, Wheels will need to anticipate future growth patterns, both within the Tri-Valley area and in the larger region. It will also need to develop an understanding of how each city in the Tri-Valley area will manage its future growth and plan transit services accordingly. By following this integrated transportation/land use planning approach within its own service area, Wheels can more effectively encourage its application by other transportation service providers.

Strategies

- E1 Advocate for regional, state and federal policies that support Wheels' goals**
- E2 Support staff initiatives that can enhance Wheels' leadership role**
- E3 Encourage partnerships with transit and other local public agencies to advance goals and objectives of Wheels**

PERFORMANCE MEASURES

Desired Outcome

- High-quality comprehensive transportation system is developed as a result of Wheels leadership initiatives

Success Indicators

- Development of joint plans among regional and local entities involved in transportation planning and provision
- Increased availability of transit options across jurisdictional boundaries
- Increased customer understanding and use of trip connections (local to regional bus, bus to rail, etc.)

F. ORGANIZATIONAL EFFECTIVENESS

GOAL: Strengthen organizational capabilities and resources to improve overall performance and customer satisfaction.

Creating greater cohesion within the Wheels organization will enable it to perform more effectively as a single, seamless entity. At the same time Wheels must also retain the operational flexibility and control provided by contracting out transit driver and other services. Critical to Wheels' ability to achieve an optimum balance between these two seemingly competing directives is fostering a collaborative environment throughout the organization. Success in this will be dependent upon the ability of all participants to receive and share timely, accurate and useful information. This is especially true for information regarding both organizational and individual performance. Defining clear goals and criteria for how these goals will be measured is an essential first step.

STRATEGIES

- F1 Implement organization-wide change initiatives**
- F2 Engage contractor staff**
- F3 Establish metrics with action plans for improvement**
- F4 Strengthen human and technical resources throughout the organization**

PERFORMANCE MEASURES

Desired Outcome

- Employees at all levels of the organization understand and uphold Wheels goals and directions

Success Indicators

- Percentage of employees with awareness and understanding of Wheels organizational and performance goals
- Alignment of organizational and individual performance indicators
- Number of employees trained in Wheels customer satisfaction techniques
- Number of employees able to access information needed to perform job duties
- Alignment of Wheels budget with strategic planning goals
- Staff perception of organizational effectiveness
- Public perception of organizational effectiveness

G. FISCAL RESPONSIBILITY

GOAL: Maintain fiscal responsibility to ensure the financial sustainability of existing and new transit services.

To continue to provide high-quality affordable transit services, Wheels must maintain its financial stability. To maintain existing transit services it must operate within the limits of current funding sources. As it investigates the feasibility of offering new services such as BRT and/or expanding existing programs, it must explore new funding sources while minimizing Wheels' exposure to financial risk. For this reason, assessing the feasibility of new projects must include the projected financial impacts on the rest of the organization. Financial sustainability also suggests the need to establish financial reserves to address different contingencies that may arise in the future.

STRATEGIES

- G1 Integrate fiscal review processes into all decisions**
- G2 Establish a reserve policy**
- G3 Establish long term facilities and capital improvement program.**

PERFORMANCE MEASURES

Desired Outcome

- Continued financial viability while expanding service offerings and options

Success Indicators

- Percentage of new or expanded services meeting productivity targets
- Increase in new funding support through grants and partnerships
- Maintenance of designated amounts in a reserve fund
- Percentage of facility and maintenance improvements funded through outside grants or other funding
- Productivity targets applied consistently by staff (e.g., cost/passengers, passengers/hour, cost/hour, etc.)

3.0 STRATEGIC PLAN IMPLEMENTATION

Successful implementation of the strategic plan is dependent upon translating its various strategies into detailed programs, budgets, and actions designed to achieve the goals identified in the strategic plan. The following pages introduce the strategic plan implementation process by presenting an overview of the following topics:

- The relationship of the Strategic Plan, Business Plan and Budget, and Annual Work Plan.
- Aligning the Budget with the Strategic Plan
- The Strategic Planning Cycle
- Decision-Making Criteria

3.1 RELATIONSHIP OF STRATEGIC PLAN, BUSINESS PLAN AND BUDGET, AND ANNUAL WORKPLAN

All other planning processes undertaken by Wheels, and the plans generated by these processes, should draw upon, reflect and align with its Strategic Plan, including especially the business plan and annual work plan. The relationship between these different plans, as illustrated by the chart on the next page, is defined by their different roles and functions.

The **Strategic Plan** establishes the long-term goals of the organization. It looks ahead three to five years and charts a route toward its ideal future as described by its Vision and Mission

The **Business Plan and Budget** looks ahead 12 to 18 months. It provides a more detailed picture of the route first laid out in the Strategic Plan. It also explains how this route will be navigated by addressing in depth how the technical, financial, and human resources of the organization will be allocated to achieve the goals identified in the Strategic Plan.

The **Annual Work Plan** encompasses all the tasks drawn from the Strategic Plan which can be achieved within the forthcoming 12 months, and which are funded in the Business Plan and Budget. It also includes more detailed action plans for each department within the organization, and shows how results from these individual departmental/staff plans collectively contribute to achieving the overall organizational goals identified in the Strategic Plan.



Relationship of Wheels Strategic Plan, Business Plan and Annual Work Plan



3.2 ALIGNING THE BUDGET WITH THE STRATEGIC PLAN

The specific goals identified with the fiscal year budget for Wheels should correspond with the goals of the Strategic Plan. Following the adoption of a new strategic plan, a transition period may be necessary during which goals or the terms used to define goals are not fully equivalent. To ensure, however, that the Strategic Plan becomes an operational reality for Wheels, planning for the next fiscal year should be organized around the goals of the new Strategic Plan. Doing so will mean there is a clear connection between the goals of the Strategic Plan and the resources allocated by Wheels for the achievement of those goals.

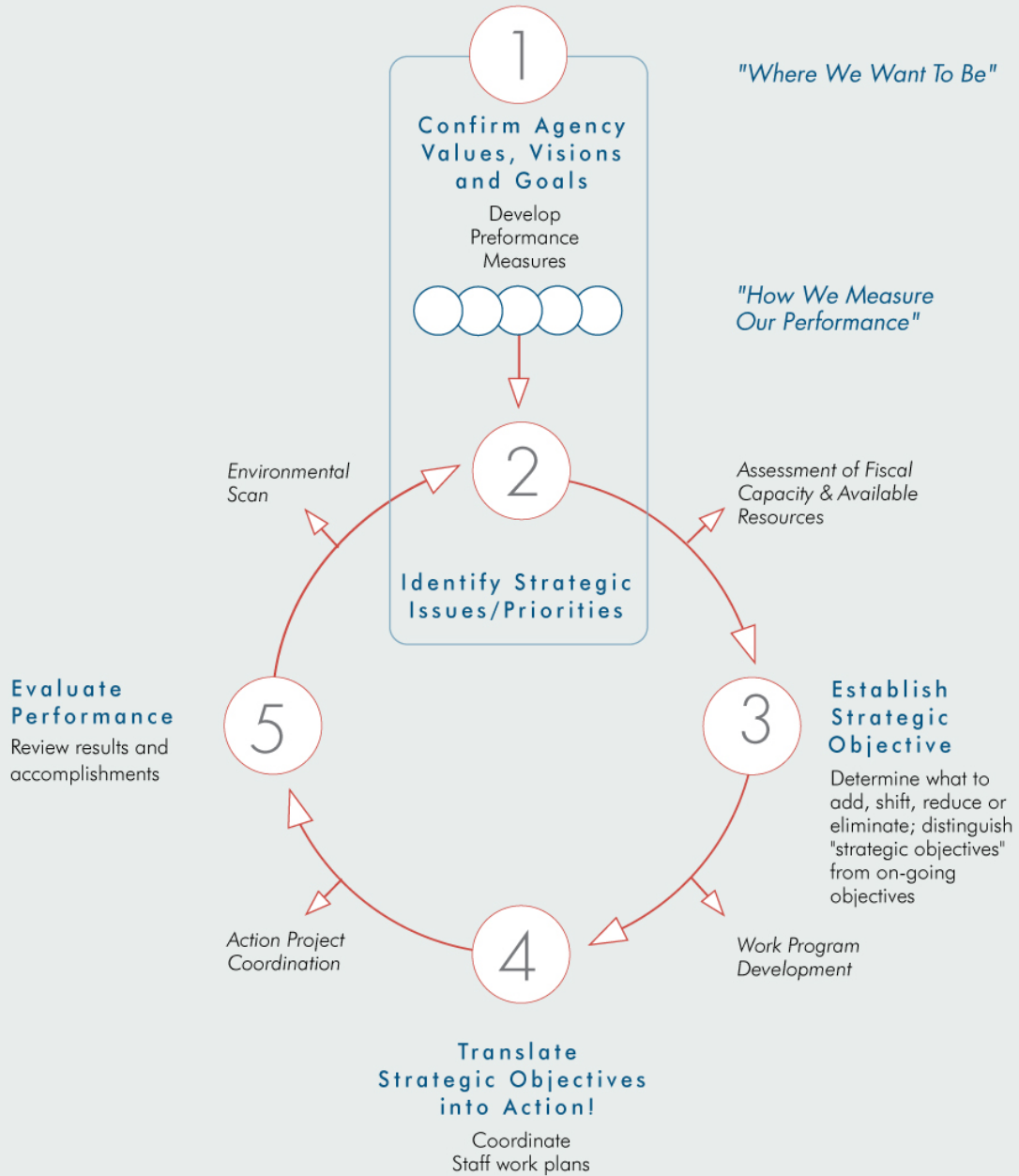
3.3 WHEELS STRATEGIC PLANNING CYCLE

The relationship between the Strategic Plan, Business and Budget Plan, and Annual Work Plan suggests a top-down approach moving from large general goals at the top to more specific actions at the bottom. This relationship is part of a larger ongoing and iterative planning cycle, in which results from implementation of the strategic plan will inform future updates of the Strategic Plan. The chart on the following page identifies the key steps in this ongoing Strategic Planning Cycle.

- The first two steps in the planning cycle – confirm agency values, visions, and goals; and identify strategic issues/priorities – lay out the milestones in the development of the strategic plan.
- Implementation of the strategic plan begins with an assessment of fiscal capacity and available resources, as required to develop the business plan and budget.
- This allocation of technical, financial and human resources is required in order to establish the strategic objectives necessary for implementation of the strategic plan in the upcoming 12 to 18 months.
- Completion of the business plan and budget sets the stage for work program development, as defined by the resulting annual work plan.
- In turn, the annual work plan enables the respective departments and staff to translate the strategic plan into actions for the coming year.
- Action undertaken by the individual departments and staffers will generate results that need to be evaluated and monitored, determining the extent to which the organization is successfully following the direction established during strategic planning.
- Results generated by completion of these actions will impact both the external and internal environment of the organization, setting the stage for an environmental scan and the updating of the strategic plan.



Strategic Plan Cycle



3.4 DECISION MAKING CRITERIA

The Strategic Plan is designed as a tool to facilitate decision-making. It provides a framework for analysis of new opportunities, proposals, or issues. Thinking strategically means that no programmatic choice or problem resolution should be made in isolation but considered in light of the overall strategic direction of the Wheels organization.

To facilitate a strategic decision-making process, the following criteria should be kept in mind. When considering proposed programs, projects or initiatives ask if they consistent with or aligned with the following criteria:

- The mission, values, and vision of Wheels as expressed in the Strategic Plan

The overall purpose of Wheels and its ideal future as described by the vision laid out in the Strategic Plan can help clarify critical choices facing the organization. Which choice is more likely to help make that vision a reality?

- The goals and objectives defined by the Strategic Plan

Can the opportunity or proposal under consideration be directly linked to a goal or objective in the Strategic Plan? If not, will the pursuit of this new initiative require that resources be taken away from other initiatives that more directly serve strategic goals and objectives?

- Current priorities and commitments

Does the proposed initiative reflect a continuation of existing priorities and commitments, or does it represent a new agenda for the organization? Are past investments by Wheels in technology and other assets compatible with this new commitment?

- Board adopted policies

Does the opportunity under consideration follow from past Board adopted policies or does it represent the potential for setting a new organizational precedent? If it is the latter, is the Board willing to re-visit its current policy?

- Cost effectiveness

From the perspective of ensuring the financial sustainability of Wheels which choice is the most prudent in terms of costs, revenue generation, and funding potential?

Keeping these criteria in mind will help ensure a greater degree of congruence and consistency between critical decision-opportunities and the long-term direction of Wheels as established in its Strategic Plan.

4.0 STRATEGIC PLAN OBJECTIVES

The tables on the following pages document the range of strategies and objectives developed through the strategic planning process for each of the seven goals. The results can be used to help guide implementation of the Wheels Strategic Plan.

The Strategic Plan Objectives are organized according to the seven goal areas:

- A. Ridership Development
- B. Marketing and Public Awareness
- C. Community and Economic Development
- D. Policy Development
- E. Regional Leadership
- F. Organizational Effectiveness
- G. Fiscal Responsibility

A. RIDERSHIP DEVELOPMENT

GOAL: Increase ridership to fully attain community benefits achieved through optimum utilization of the transit system

Strategy and Objectives	Time Frame*	Lead Responsibility/ Principal Partners
A1. Expand routes and services to provide timely, seamless service deliverability		
a. Identify opportunities in terms of new planned developments, including locations of future transit hubs, and by anticipating future growth patterns.	Ongoing	Planning
b. Survey the public, including new residents, to determine how and where to improve transit services.	Ongoing	Planning
c. Explore the feasibility of providing new innovative services, such as Bus Rapid Transit.	Short Term	Planning
d. Ask each city how transit fits their future vision of their city; then tailor routes and services accordingly, rather than provide one standard solution for all cities.	Short Term	Planning
e. Re-configure routes & services in response to current densities & ridership demand rather than provide geographic area wide coverage regardless of need.	Ongoing	Planning
f. Use AVL technology to determine who is getting on where, and revise the route system accordingly.	Ongoing	Planning
g. Support regional efforts to expand the HOV lane network in the Tri-Valley area.	Ongoing	Planning
h. Expand Route 10 services in conjunction with BRT study, including implementation of a 24-Hour Route 10 service (Regional "Owl Service").	Short Term	Same as A1c
i. Improve connections with BART by enhancing and emphasizing the BART/Bus Feeder system, as well as planning and implementing new services such as the Dublin/Pleasanton BART station.	Medium Term	Planning
j. Work with County Connections to serve San Ramon.	Medium Term	Planning
A2. Increase Accessibility		
a. Implement Rider Boards to let riders know the amount of wait time before the arrival of the next bus.	Short Term	Capital & Grants/IT/Marketing
b. Provide improved route information assistance through cutting edge technology and quality customer service.	Ongoing	Marketing/IT
c. Target non-riders through trip planning for major employers and other destinations.	Medium Term	Marketing
d. Provide transit stops near shopping center parking lots and other major destinations to entice shoppers and other non-riders.	Ongoing	Planning

A2. Increase Accessibility (continued)		
e. Expand the park and ride program where feasible.	Ongoing	Planning
f. Minimize the time to transfer to BART and other transit systems.	Ongoing	Planning
g. Ensure that fares remain affordable for transit-dependent populations.	Ongoing	Planning
h. Explore ways to improve paratransit services, including more cost-effective alternatives that satisfy ADA requirements.	Short Term To Medium Term	Capital & Grants/ Planning/Marketing
i. Provide bike riders with bike lockers at the transit center and along the BRT line when implemented.	Medium Term	Capital & Grants

A3. Optimize existing routes and services to increase productivity		
a. Expand the park and ride program where feasible.	Ongoing	Planning

A4. Improve connectivity with regional transit systems		
a. Coordinate Wheel' schedules with regional transit agencies.	Ongoing	Planning

A5. Explore innovative fare policies and pricing options		
a. Consider special promotions in concert with local events.	Ongoing	Planning/Marketing

* SHORT= <2 YRS. MED= 2-5 YRS. LONG= >5 YRS

B. MARKETING AND PUBLIC AWARENESS

GOAL: Improve visibility, image and awareness of Wheels.

Strategy and Objectives	Time Frame*	Lead Responsibility/ Principal Partners
B1. Continue to build the Wheels brand image, identity, and value for customers		
a. Create a memorable brand that creates a positive image for Wheels, one that conveys Wheels as an important solution for people living and working in the region.	Ongoing	Marketing
b. Establish a brand identity that reflects the values of the Wheels organization.	Ongoing	Marketing
c. Keep the Wheels brand fresh, personal, and strong in the minds of residents and businesses in the LACTA service area.	Ongoing	Marketing
d. Evaluate the suitability of the Wheels brand and determine if a new name should be created.	Medium Term	Marketing
e. Design a logo that is the sum total of the Wheels image, including what it stands for and the convictions and feelings of its staff and riders.	Medium Term	Marketing
f. Design driver uniforms that are consistent with the image Wheels wants to convey.	Short Term	Marketing/ MV Management
g. Ensure the message conveyed by the brand is consistent with the vision and mission of Wheels and that it permeates throughout the organization.	Ongoing	Marketing
B2. Improve the public image and awareness of Wheels		
a. Survey residents to confirm what they know about Wheels and their current perception of the organization and its services.	Short Term	Marketing
b. Piggyback on APTA regional marketing but be selective and tailor it to fit the needs and characteristics of the Wheels service area.	Ongoing	Marketing
c. Implement a “approachable” program.	Medium Term	Marketing
d. Engage operator staff to convey positive messages to the riding public.	Short Term	Marketing/ MV Management

B3. Increase two-way communication between Wheels and its customers.		
a. Increase the number and variety of channels for receiving public feedback.	Ongoing	Marketing
b. Provide quality customer service training to all staff.	Short Term	Marketing/ MV Management
c. Utilize feedback provided by transit drivers as an important means for determining how to improve customer service.	Ongoing	Marketing
d. Develop effective ways to respond to public feedback; letting them know they have been heard and how their feedback is being used to improve service.	Short Term	Marketing

B3. Improve public's awareness and understanding of available transit services.		
a. Ensure that residents and business owners of the Tri-Valley are aware of services currently provided by Wheels.	Ongoing	Marketing

* SHORT= <2 YRS. MED= 2-5 YRS. LONG= >5 YRS

C. COMMUNITY AND ECONOMIC DEVELOPMENT

GOAL: Utilize transit as an essential community and economic development tool for local communities.

Strategy and Objectives	Time Frame*	Lead Responsibility/ Principal Partners
C1. Promote Wheels to new businesses and residents		
a. Survey local business leaders and other stakeholders to identify how transit can better serve their needs and that of their employees.	Short Term	Marketing
b. Develop and implement outreach program to promote the many ways transit benefits local businesses.	Ongoing	Marketing
c. Establish a speakers bureau.	Medium Term	Marketing
d. Work closely with local chambers of commerce.	Short Term	Marketing
C2. Integrate transit into local economic development plans		
a. Work with local cities to determine how transit can best contribute to their economic development plans and future economic growth.	Ongoing	Planning
b. Identify examples of transit's role in economic development for possible application in the Tri-Valley.	Ongoing	Planning

* SHORT= <2 YRS. MED= 2-5 YRS. LONG= >5 YRS

D. POLICY DEVELOPMENT

GOAL: Provide staff and partner agencies with clear policies on how to effectively address the challenges and opportunities facing Wheels.

Strategy and Objectives	Time Frame*	Lead Responsibility/ Principal Partners
D1. Review JPA policies to better position Wheels for current and future conditions		
a. Determine whether to continue a geographic/coverage based service regardless of demand or to rationalize allocation of transit services according to need and ridership demand.	Short Term	General Manager/ Planning/ Capital & Grants
b. Assess whether funds generated by fees placed on new developments should only fund transit services to these new communities or support overall transit services to both established and new communities.	Medium Term	General Manager
D2. Incorporate transit-friendly design in the site development process		
a. Support transit-oriented development by providing cities information on what land use designs work best, rather than issuing policy directives.	Short Term	Planning/ General Manager
b. Work with cities, local developers, and other public agencies to incorporate transit planning into the early design stages of a project, rather than the later CEQA stages.	Medium Term	Planning/ General Manager
c. Confirm whether more densely developed communities are providing a greater number of transit riders; identify other factors such as demographics, culture, or other land use elements that also influence ridership levels.	Medium Term	Planning/ General Manager
d. Create a site plan review checklist based on transit-friendly design and development criteria.	Medium Term	Planning/ General Manager
e. Provide input on transit-friendly development to local cities development review processes.	Medium Term	Planning/ General Manager
D3. Incorporate environmental sustainability issues in current policies		
a. Utilize sustainable practices and materials where feasible.	Ongoing	Planning/ General Manager

* SHORT= <2 YRS. MED= 2-5 YRS. LONG= >5 YRS

E. REGIONAL LEADERSHIP

GOAL: Strengthen Wheels' leadership position within the region to enhance opportunities for customer service.

Strategy and Objectives	Time Frame*	Lead Responsibility/ Principal Partners
E1. Advocate for regional, state and federal policies that support Wheel's goals		
a. Anticipate regional growth patterns, which will help Wheels to more accurately determine its most effective role among other regional players.	Medium Term	Planning
b. Develop an understanding of how each city will manage its future growth and plan transit services accordingly.	Short Term	Planning
c. Participate and implement Trans Link.	Medium Term	Capital & Grants/ IT/Marketing
d. Improve inter-operator coordination and scheduling.	Ongoing	Planning
e. Upgrade vehicle fleet for improved air quality.	Short/Medium Term	Capital & Grants/ Maintenance
f. Share equipment and resources by initiating joint vendor procurement with other nearby operators.	Ongoing	Capital & Grants/Finance
g. Work with other transit provider organizations and/or private sector to provide shuttle services where feasible.	Medium Term	Planning
h. Support the planning and development of HOV/Rapid Bus Lanes in the Tri-Valley area.	On-going	Planning
E2. Support staff initiatives that can enhance Wheels' leadership role		
a. Solicit ideas and proposals from staff.	Ongoing	General Manager/All staff
b. Grant key staff the authority to represent Wheels in its interactions with cities and other public agencies.	Ongoing	General Manager
E3. Encourage partnerships with transit and other local public agencies to advance goals and objectives of Wheels		
a. Solicit ideas and proposals from staff.	Ongoing	General Manager/ All staff

* SHORT= <2 YRS. MED= 2-5 YRS. LONG= >5 YRS

F. ORGANIZATIONAL EFFECTIVENESS

GOAL: Strengthen organizational capabilities and resources to improve overall performance and customer satisfaction.

Strategy and Objectives	Time Frame*	Lead Responsibility/ Principal Partners
F1. Implement organization-wide change initiatives		
a. Clarify the organizational values, vision, mission, goals, and priorities of Wheels.	This Process	Board of Directors
b. Establish a master plan that clarifies the future direction of Wheels, including 5 to 10 year objectives.	This Process	Board of Directors
c. Develop an organizational culture that is consistent with and reinforces the message Wheels wants to convey to the public.	Ongoing	Board of Directors/ General Manager
F2. Engage contractor staff		
a. Increase meaningful interactions with drivers, among other steps, to minimize the we/they divide between contractor staff and contractee.	Short Term	General Manager/ MV Management
b. Involve contractor staff in development of the strategic plan; solicit ideas through a driver's workshop.	Short Term	General Manager
c. Re-structure the contract with drivers to create a more cohesive organizational environment between contractor staff and Wheels employees.		?
d. Provide drivers with a regular channel to offer both positive and negative feedback, which can be used to quickly respond to problems.	Short Term	General Manager/MV Management
e. Provide transit passes to Board members so they can see what it is like on the buses for both drivers and riders.	Short Term	Board of Directors
F3. Establish metrics with action plans for improvement		
a. Define clear goals/criteria for how contractor staff performance will be measured.	Done	Capital & Grants
b. Select key performance measures to monitor overall organizational effectiveness in serving the public and meeting long-term goals.	This Process	Board of Directors/ General Manager

* SHORT= <2 YRS. MED= 2-5 YRS. LONG= >5 YRS

F4. Strengthen human and technical resources throughout the organization		
a. Continue to maintain and upgrade IT to keep pace with new development and service changes.	Ongoing	IT/Capital & Grants
b. Maintain a staff/employee recognition program.	Medium Term	Board of Directors/General Manager
c. Establish a recognition program for contract drivers.	Done	MV Management/ .Board of Directors
e. Invest in staff professional development, including training in customer service and AVL.	Ongoing	Board of Directors/General Manager
f. Keep staff lean by using consultants and contractors to maintain flexibility while continuing to maintain sufficient professional staff to manage contracts successfully.	Ongoing	General Manager
g. Improve internal communications by implementing an email newsletter.	Short Term	Marketing

* SHORT= <2 YRS. MED= 2-5 YRS. LONG= >5 YRS

G. FISCAL RESPONSIBILITY

GOAL: Maintain fiscal responsibility to ensure the financial sustainability of existing and new transit services.

Strategy and Objectives	Time Frame*	Lead Responsibility/ Principal Partners
G1. Integrate fiscal review processes into all decisions		
a. Redesign routes as needed to ensure the greatest return on investment using densities of both source areas and destinations.	Ongoing	Planning
b. Ensure that transit services remain affordable for customers.	Ongoing	Board of Directors/Finance
c. Stay within available funding limits to support existing transit services, while pursuing funding grants to finance new potential services such as BRT.	Ongoing	Finance/Capital Grants
G2. Establish reserves policy		
a. Establish financial reserves for different contingencies.	Short Term	Finance
G3. Establish long term facilities and capital improvement program		
a. Conduct analysis of service area growth and build-out, including determining whether one or two facilities will be needed in the future.	Short Term	Finance
b. Forecast service areas, projected ridership, etc. to project future facility needs.	Done	Planning
c. Identify and acquire available land for future transit needs before it disappears.	Done	General Manager

* SHORT= <2 YRS. MED= 2-5 YRS. LONG= >5 YRS

