

## STAFF REPORT

SUBJECT: LAVTA Draft Strategic Plan

FROM: Christy Wegener, Executive Director

DATE: September 8, 2025

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### Action Requested

Staff recommend the Board receive an update on the Draft Strategic Plan Framework and Implementation Plan and provide feedback.

### Background and Discussion

In early 2025, LAVTA initiated the update to its Strategic Plan, which was last updated in 2011. The 2025 Strategic Plan update is being led by consultant Moore Iacofano Goltsman (MIG) with an internal project management team (PMT) comprised of the LAVTA executive team.

After project kickoff, MIG worked to review LAVTA's prior strategic plans as well as recent planning documents, organizational assessments, and financial reports. Both a staff and Board workshop were held in the month of May 2025 to gain input on updating LAVTA's Mission, Vision, Values and Goals. Further work has continued this summer on establishing priority projects within each goal area as well as timelines for completion and key performance indicators.

The draft framework was presented to both LAVTA Committees at their August meetings. Feedback received has been incorporated into the revised draft framework. Principal MIG consultant Daniel Iacofano will present the updated framework as well as the implementation plan to the Board at the September meeting.

### Next Steps

The PMT will incorporate the Board's feedback, and will then solicit external stakeholder input and will incorporate any additional comments into the final framework. The Board will consider Strategic Plan adoption at the October or November meeting.

### Recommendation

Receive an update on the Draft Strategic Plan Framework and Implementation Plan.

### Attachments:

1. Draft Strategic Plan Framework and Implementation Plan

# LAVTA Strategic Plan 2025



# STRATEGIC PLANNING PROCESS . . .






# LAVTA Strategic Planning Process

M I G  
August 2025





# STRATEGIC PLAN FRAMEWORK

Mission

Vision

Core Values

Goals

Objectives

Performance Measures

Implementation Actions



# Elements of the Strategic Plan



## **MISSION**

The purpose and associated responsibilities of LAVTA.



## **VISION**

LAVTA's preferred future—where we strive to be.



## **VALUES**

Shared beliefs that reflect what LAVTA considers significant and important.



## **GOALS**

Statements of direction toward LAVTA's desired future.



## **ONGOING RESPONSIBILITIES**

Work being performed by LAVTA staff on a regular, ongoing basis.



## **OBJECTIVES**

Specific and measurable statements of action that LAVTA wants to achieve.



## **PERFORMANCE MEASURES**

Specific measurements of progress toward goals and objectives.



## **IMPLEMENTATION PLAN**

Identifies a timeframe for completing actions, responsible parties, and required resources.





# Mission

The mission of the Livermore Amador Valley Transit Authority (Wheels) is to enhance mobility through access to safe, customer oriented, reliable, and affordable public transportation.





A photograph of three people standing in front of a building entrance, framed by a large arch of colorful balloons. The person on the left is a man with grey hair, wearing a light blue shirt and a yellow safety vest. The person in the middle is a woman with short blonde hair, wearing sunglasses, a blue shirt, and a yellow safety vest. The person on the right is a woman with dark hair, wearing sunglasses, a light blue shirt, and a yellow safety vest. The background shows a modern building with large glass windows and a curved facade. The entire image is overlaid with a semi-transparent dark blue filter.

# Vision

LAVTA is an essential link in the Bay Area transportation network, providing an attractive, high quality, and reliable alternative to the private automobile for all those who depend upon it and all those who choose to use it.



# Values

## We Value...

- **Community.** We are an integral part of the community we serve and seek community involvement in developing and fostering transit service as an essential aspect of community quality of life.
- **Cooperation.** We partner with other regional and local agencies to ensure full access to a comprehensive range of community mobility options.
- **Environment.** We view public transit as a means of improving air quality and conserving our natural resources.
- **Integrity.** We act ethically and with integrity in all we do.
- **Respect.** We treat all persons with dignity, respecting life, property, and the environment; capitalizing on the wealth of viewpoints that reside in our multi-faceted community; all contributions are valued.
- **Service Quality.** We do high quality work and maintain high standards in order to exceed customer expectations by providing friendly, personable and equal opportunity service.
- **Stewardship.** We are prudent and resourceful stewards of the public dollars with which we have been entrusted.
- **Transparency.** We are accountable and responsible for our actions in the eyes of the public.

# Goal Areas

## **1. SERVICE DEVELOPMENT**

Improve the quality of transit service, reliability, on-time performance, and rider experience to meet community needs and grow ridership

## **2. MARKETING AND COMMUNICATIONS**

Provide excellent service to all external and internal customers including accurate and up-to-date information to riders on all aspects of LAVTA services and capabilities.

## **3. ADVOCACY AND PARTNERSHIPS**

Maintain and expand partnerships with local and regional transit providers, local businesses, funding agencies, and all City partners.

## **4. OPERATIONAL EFFECTIVENESS**

Streamline LAVTA's operational effectiveness through the application of innovative technology and proven best practices in public transit operations.

## **5. ORGANIZATIONAL AND FINANCIAL MANAGEMENT**

Maintain LAVTA's organizational health by ensuring a balanced budget, sound fiscal practices and a positive culture and work environment.





# Goal 1

## Service Development

Improve the quality of transit service, reliability, on-time performance, and rider experience to meet community needs and grow ridership





# Goal 1: Service Development

1. Assess LAVTA's service area network, monitor ridership trends, evaluate routes, and make recommendations for meeting current demand and community priorities. (on-going)
2. Ensure connectivity to the regional transit system. (on-going)
3. Improve accessibility for all riders with disabilities. (on-going)
4. Adjust fare structure to align with the costs of service delivery. (0-2 yrs).
5. Develop recommendations to potentially modify the Go-Tri-Valley service. (0-2 yrs)



# Goal 1: Service Development

6. Update LAVTA's transit service standards. (2-5 yrs)
7. Develop and implement new services to support high priority transit markets. (2-5 yrs)
8. Determine how to distribute LAVTA fixed route transit resources to meet demand and coverage expectations; consider whether changes in levels of service may be required throughout the LAVTA service area. (2-5 yrs)



# Goal 1: Performance Measures

- Total ridership
- On-time performance
- Rider satisfaction
- Adherence to the BART transfer window
- Reduction of valid ADA-related complaints
- Service area coverage







## Goal 2

# Marketing and Communications

Provide excellent service to all external and internal customers including accurate and up-to-date information to riders on all aspects of LAVTA services and capabilities.



## Goal 2: Marketing and Communications

1. Continue to improve customer information for enhanced access and accuracy. (on-going)
2. Resolve all customer complaints and incident investigations in a timely manner. (on-going)
3. Implement a comprehensive public information campaign to ensure awareness of LAVTA's services and capabilities. (0-2 yrs)
4. Facilitate the integration of electronic fare systems and transition to digital fare media. (0-2 yrs)
5. Identify high priority trip markets. (2-5 yrs)



## Goal 2: Performance Measures

- Reduction of complaints and increased satisfaction with the complaint resolution process
- Increased rider satisfaction
- Timely distribution of public information
- Accuracy of public information
- Successful transition to Clipper 2







## Goal 3

# Advocacy and Partnerships

Maintain and expand partnerships with local and regional transit providers, local businesses, funding agencies, and all City partners.



# Goal 3: Advocacy and Partnerships

1. Participate and advocate for LAVTA's interests in regional business development, MTC-led initiatives and committees. (on-going)
2. Continue to build and grow relationships with adjacent cities and counties, and State and Federal delegations. (on-going)
3. Collaborate with regional transit providers to pursue transit-friendly regional policies, joint purchasing programs, etc. (on-going)
4. Advocate for the upcoming regional transit funding measure. (0-2 yrs)



# Goal 3: Advocacy and Partnerships

5. Build support for an expanded transit priority traffic control system throughout the Tri-Valley. (2-5 yrs)
6. Implement all MTC-led initiatives and regional projects, etc. (5+ yrs)
7. Implement capital improvements at bus stops and transfer centers to improve passenger safety and convenience. (5+ yrs)





## Goal 3: Performance Measures

- Increased number of plans that reflect LAVTA's priority objectives
- Replacement of BART feeder bus funding
- Number of funding earmarks (State and Federal)
- Passage of the regional transit measure
- Expanded signal priority system throughout the LAVTA service area
- Number of capital projects completed on-time and within budget





# Goal 4 Operational Effectiveness

Streamline LAVTA's operational effectiveness through the application of innovative technology and proven best practices in public transit operations.



# Goal 4: Operational Effectiveness

1. Ensure fixed route and paratransit contractor compliance. (on-going)
2. Design schedules to reflect accurate running times. (on-going)
3. Update assumptions made in the Zero Emission Bus transition plan and make recommendations for modifications. (0-2 yrs)
4. Develop and implement a capital improvement plan identifying major projects and their timeframe for implementation. (2-5 yrs)
5. Determine a realistic timeframe for completing the Zero Emission Bus transition and Atlantis Facility. (2-5 yrs)



# Goal 4: Operational Effectiveness

6. Deploy new technology to improve safety, maintenance, and fleet reliability. (2-5 yrs)
7. Identify and implement improvements to bus operations by implementing transit signal priority and other improvements. (2-5 yrs)





# Goal 4: Performance Measures

- Reduction of accidents
- Improvements to fleet reliability (fewer breakdowns and service calls)
- Contractor compliance with stated terms and conditions
- Missed trips/loss of service
- Number of capital projects completed on time and within budget
- Completion of updated zero-emission plan
- Total amount of funding for the Atlantis facility





# Goal 5 Organizational and Financial Management



Maintain LAVTA's organizational health by ensuring a balanced budget, sound fiscal practices and a positive culture and work environment.



# Goal 5: Organizational and Financial Management

1. Pursue and apply grant funding for high priority LAVTA initiatives. (on-going)
2. Produce a balanced budget every year. (on-going)
3. Deliver a “satisfactory” audit report every year. (on-going)
4. Align the Agency’s budget with the goals and objectives of the 2025 Strategic Plan. (0-2 yrs)
- 5 Tie staff work products to strategic plan objectives. (0-2 yrs)
6. Create and implement policies that establish a positive culture and working environment, making LAVTA an employer of choice. (2-5 yrs)
7. Create and implement an Agency-wide succession plan. (2-5 yrs)



# Goal 5: Performance Measures

- Balanced budget
- “Satisfactory” audit results
- Alignment of the Strategic Plan and Agency budget
- Implementation of new staff workplans tied to the Strategic Plan
- Level of competitive grant funding obtained
- Increased employee satisfaction





# LAVTA Strategic Plan Next Steps . . .



## Immediate Next Steps . . .

1. Adjust Strategic Plan Framework based on Board Committee feedback.
2. Review the Strategic Plan Framework with the full Board on September 8.
3. Prepare Draft Strategic Plan document mid-September and post on the LAVTA website for public review and comment.
4. Bring the final Draft Strategic Plan document to the Board for final review, approval, and adoption on October 6.





# LAVTA Strategic Plan 2025





A blurred photograph of a bus in motion, with the word 'LAVTA' displayed on its destination sign. The image is overlaid with a dark blue semi-transparent rectangle containing the title text.

# Implementing the LAVTA Strategic Plan





## LAVTA Strategic Plan Implementing Actions . . .

The LAVTA Executive Management team identified a series of actions that will be undertaken to support implementation of the Goals and Objectives identified in the Strategic Plan.

Implementation action steps will be undertaken upon adoption of the Strategic Plan by the LAVTA Board of Directors.



# Implementing Goal 1: Service Development

1. Purchase and install new service planning technology.
2. Train staff on the new technology and ensure utilization of both new and existing technology.
3. Engage LAVTA Management Team to work with staff on setting new service standards and identifying strategies for service enhancements that will enable LAVTA to achieve the new standards.
4. Integrate service enhancement strategies into staff member workplans.



## Implementing Goal 2: Marketing and Communications

1. Enhance staff computer skills in the use of communications and graphics software to improve organizational efficiency.
2. Allocate budget for and initiate two transit marketing campaigns over the next two years for the purpose of building LAVTA ridership and building awareness of LAVTA services.
3. Implement public information distribution process for all new and existing LAVTA services.



## Implementing Goal 3: Advocacy and Partnerships

1. Determine how best to allocate additional funding stemming from local funding initiatives.
2. Hire a manager of administrative services and reposition existing staff to improve organizational efficiency and cross-departmental effectiveness.
3. Reconfigure LAVTA office space to accommodate potential additional staff hires.





## Implementing Goal 4: Operational Effectiveness

1. Update individual staff workplans to ensure that all Strategic Plan objectives have an identified staff lead and support staff assigned.
2. Identify a funding source for preparing the Capital Improvements Plan.



## Implementing Goal 5: Financial and Organizational Management

1. Align staff workplan goals and objectives with the goals and objectives of the Strategic Plan.
2. Update all staff position descriptions to encompass the work identified in the Strategic Plan.
3. Identify and hire additional staff or contractors to support LAVTA program and project managers as needed.



# LAVTA Strategic Plan 2025

