

# SANBAG County-Wide Transit Efficiency Study

Transit Agency Coordination/Optimization Plan

May 23, 2016

Prepared for:



Prepared by:



**SANBAG**  
**Transit Agency Coordination/Optimization Plan**  
**Task 3.4, including:**

**Task 3.1—Identify Implementation Steps**

**Task 3.2—Implementation Plan Schedule**

**Task 3.3—Inter-Agency Agreements**

**May 23, 2016**

*Prepared for:*  
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(Please see previous chapters of the *SANBAG County-Wide Transit Efficiency Study* for other Appendix sections.)

## 8.0 TRANSIT AGENCY COORDINATION/OPTIMIZATION PLAN

The purpose of this chapter is to provide an implementation plan for the cost savings and service coordination/optimization strategies which were favored by the San Bernardino Associated Governments (SANBAG) and the transit agencies, discussed in Chapters 5.0 and 7.0. The *Agency Assessment Report* previously conducted a functional analysis of how the transit agencies operate their services, and identified areas for potential coordination or optimization to reduce costs or improve service. The *Coordination and Optimization Alternatives Report* concluded that a “cooperative agreements” approach to organizational coordination offered all of the potential cost savings and service coordination benefits identified in this study without entailing the challenges of functional or agency consolidation. Now, this final phase of the study provides the “how” and “when” for implementing agreements to achieve the cost reduction and service coordination benefits.

This Plan chapter is organized as follows:

**Section 8.1** will review the methodology used to identify the key implementation steps, and will identify the action items for each agency to pursue to implement cooperative agreements or Memoranda of Understanding.

**Section 8.2** will provide the overall Implementation Plan Schedule and sub-tasks for the selected strategies covered by the agreements.

**Section 8.3** will provide the draft agreements and memoranda of understanding (MOU) containing the terms requested by the agencies, for action by the agencies.

### 8.1 Identification of Implementation Steps

#### 8.1.1 Methodology

In order to identify the implementation steps needed to establish cooperative agreements or Memoranda of Understanding, the study started with Table 7-5, “*Cost Savings and Coordination Strategies, Lead Agency(s), Purchasing/Participating Agency(s), and Comments/Approaches*” (see Chapter 7.0). That table was developed from the Workshop with SANBAG and the transit agencies during the previous phase of the study. A total of fourteen different strategies were identified in the table, with a variety of follow-up approaches or actions listed, ranging from technical assistance provided by one agency to another, to development of a cooperative agreement or MOU which would lead to a joint procurement.

Next, a matrix was developed identifying each strategy, the lead agency, participating agencies, type of implementation approach needed, the MOU template (where applicable), and other implementation notes. This matrix is shown in **Table 8-1**.

**Table 8-1. Summary of Cooperative Agreements, MOUs, and Other Actions Needed for Implementation Plan**

No.	Strategy	Lead Agency	Omnitrans	VVTA	MBTA	MT	NTS	Vtrans	SCRRA	Item Needed	MOU Template	Notes
1	ADA Taxi Voucher Program	Vtrans/ Omnitrans				MT		Vtrans		Technical Assistance	-	Vtrans/Omnitrans to provide technical assistance/program template
2	Use of Taxi's to supplement ADA Paratransit Service	Omnitrans	Omnitrans			MT				Technical Assistance	-	Omnitrans has this provided via new ADA service Contract. MT to obtain technical info from Omni, consider procurement for taxi services
3	Bus Heavy Overhaul	Omnitrans	Omnitrans	VVTA	MBTA	MT				Coop Agmt	Professional Services MOU	MOU for service provision and/or Coop Agreement to conduct joint procurement
4	Bus Parts	Omnitrans	Omnitrans	VVTA	MBTA					Coop Agmt	Professional Services MOU	Coop Agmt for Possible Joint Procurement
5	CNG Fuel Procurement	Omnitrans	Omnitrans	VVTA						Technical Assistance	-	VVTA has fuel commitment until 2018, interested in participation after that. Omnitrans provides info on fuel hedging contract
6	CNG Station Maintenance	Omnitrans	Omnitrans	VVTA	MBTA					Coop Agmt	Professional Services MOU	Coop Agmt for Possible Joint Procurement
7	Project Development /Construction Mgmt	SANBAG	Omnitrans	VVTA	MBTA	MT	NTS	Vtrans		Coop Agmt	Proj Dev/Const. MOU	Individual Coop. Agmts, also includes real estate/facility development
8	Regional Marketing	SANBAG	Omnitrans	VVTA	MBTA	MT	NTS	Vtrans		Agency Participation	Professional Services MOU	SANBAG consultant to develop marketing toolkit and Marketing Plan with agency participation
9	Mutual Aid Agreements	Omnitrans	Omnitrans	VVTA		MT				MOU	Mutual Aid MOU	MOUs for service breakdowns, emergencies
10	Inter-Agency Transfer Agreements	Omnitrans	Omnitrans	VVTA	MBTA	MT			SCRRA	MOU	Inter-Agency Transfer MOU	MOUs between Omni/VVTA, Omni/MT, MBTA/Sunline, possibly Omni/SCRRA and SCRRA/VVTA
11	Service Planning Assist	SANBAG		VVTA	MBTA	MT	NTS			MOU	Professional Services MOU	Initial assessment of need by SANBAG; potential MOUs between SANBAG and each participating agency
12	Grant Application Assistance	SANBAG	Omnitrans	VVTA	MBTA	MT	NTS	Vtrans		Technical Assistance	Professional Services MOU	Tech assist on case by case basis; extensive assist may require MOU
13	Civil Rights Planning Assistance	SANBAG		VVTA	MBTA	MT		Vtrans		Technical Assistance	Professional Services MOU	On-Call consultant available to assist-should needs go above and beyond scope, MOU may be required
14	Training/Staff Development	SANBAG	Omnitrans	VVTA	MBTA	MT	NTS	Vtrans		Technical Assistance	-	SANBAG or Omni to conduct inventory to assess needs and one would lead bringing in outside trainers

Out of the fourteen different strategies, seven strategies call for development of one or more cooperative agreements or MOUs between the agencies. A set of “Cooperative Agreement Deal Points Worksheets” were then developed, listing each strategy and the study team’s initial list of deal points which would likely need to be addressed in the Agreements. The team also identified issues and options for the transit agencies to consider in developing their deal points for the Agreements. Space was provided on the worksheets for “Agency Direction” for each deal point item on the worksheet.

Sets of the Worksheets, tailored to each agency based on the strategies each agency is participating in, were then developed and distributed. Follow-up meetings or conference calls were then conducted with each agency to obtain their direction on the deal points and timelines, as well as any other items the study team did not anticipate. These completed worksheets then became the “Term Sheets” for incorporation into the Cooperative Agreements or MOUs. Draft templates for the Agreements were provided as part of the Financial Review (Chapter 5.0) and served as a starting point for the form of the basic Agreements.

### 8.1.2 Required Actions to Implement Selected Strategies

This section discusses the actions each agency would need to pursue to implement the selected cost-savings and service coordination strategies, by strategy. Itemized implementation tasks and an estimated schedule are provided in Section 8.2 Meeting Summaries, including the completed “Term Sheets” listing the deal points for each agency on each strategy, are provided in Appendix E.

#### 8.1.2.1 ADA Taxi Voucher Program

**Strategy** – This strategy entails the establishment of a Taxi Voucher program to encourage use of taxi service rather than Americans with Disabilities Act (ADA) paratransit service by some clients. Valley Transportation Services (VTrans) established a Taxi Voucher program in 2015, wherein the Federal Transit Administration (FTA) Job Access and Reverse Commute (JARC) and New Freedom grants, and SANBAG Measure I Valley Consolidated Transportation Services Agency (CTSA) funding, are used to subsidize half the cost of the taxi ride, thereby providing the incentive. It should be noted that service under this program is not ADA service per se, as the fare is typically more than twice the bus fare for the comparable trip. With the recent SANBAG decision to transfer Valley-area CTSA status to Omnitrans<sup>1</sup>, Omnitrans may also have a role.

**Agencies Participating** – VTrans has established a program in San Bernardino Valley; Mountain Transit (MT) is interested in investigating the potential for such a program in their service area.

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<sup>1</sup> SANBAG Board Meeting Agenda, November 4, 2015.

**Actions Needed** – VTrans has agreed to provide technical assistance to MT on this program and share their program template. Presumably, Omnitrans would also agree to assist if the taxi voucher program transfers to Omnitrans. If the program appears to offer a viable mobility option for the MT service area, MT would need to explore potential funding sources for the taxi voucher match, possibly JARC, New Freedom, or SANBAG Measure I grants. MT would also need to develop and conduct a procurement for a taxi provider for the service. If successful, MT would award the contract and implement the program for the MT service area.

#### 8.1.2.2 Use of Taxis to Supplement ADA Paratransit Service

**Strategy** – This strategy would involve using taxis in lieu of traditional ADA Paratransit vehicles to provide ADA Paratransit service during periods of low demand or high cost to provide ADA service. Taxis could potentially also be used to supplement ADA service during peak demand periods when ADA paratransit vehicle resources are stretched.

**Agencies Participating** – Omnitrans and MT are interested in this strategy. Victor Valley Transit Authority (VVTA) had originally indicated interest in participating but declined due to lack of acceptable taxi resources in the VVTA service area.

**Actions Required** – There are at least two potential approaches to implementing this strategy. Omnitrans included language in their recently-reprocured ADA Paratransit Services contract, encouraging the Contractor to obtain and utilize taxi service for low-demand periods (Omnitrans, 2015). The contract language states, in part:

*The Contractor is permitted to provide some portion of Paratransit service in its own or subcontracted vehicles. To improve efficiency, proposing Contractors are encouraged to consider subcontracting some portion of peak, late night, and possibly base service to taxi, per trip type operators (example Medicaid CONTRACTOR) or other transit operators . . .*

The resulting contract with MV Transportation, Inc., includes a designated subcontracted taxi provider, American Cab dba Pomona Valley Yellow Cab.

The second approach for utilizing taxi service would be for a transit agency to conduct a separate procurement for such services, specifying minimum taxi provider performance standards, regulatory compliance requirements, etc. This latter approach may be appropriate for MT, which self-performs its ADA Paratransit service. The recent Omnitrans contract document may be useful for defining some of those terms.

#### 8.1.2.3 Bus Heavy Overhaul

**Strategy** – Under this strategy, participating agencies would develop a cooperative agreement to enter into a joint procurement for bus heavy overhaul services, principally engines and transmissions, in order to seek lower per-unit overhaul costs. Omnitrans recommended that all of the strategies that involve a goods or services procurement be covered by a single master cooperative agreement for procurement with each agency. Then, as specific procurements are undertaken, the agencies participating would use the master MOU as the basis for the specific procurement.



**Agencies Participating** – Omnitrans will serve as lead agency, with VVTA, Morongo Basin Transit Authority (MBTA), and MT participating in the heavy overhaul procurement, subject to the resulting per-unit overhaul costs being lower than each agency currently incurs.

**Actions Required** – Each participating agency will need to provide its projected engine and transmission overhaul needs, by year, for the number of years to be covered by the cooperative agreement, as well as historical overhaul trends. Each agency will also need to provide any overhaul specifications desired to be included in the procurement. Effectiveness and efficiencies from the strategy are dependent on sufficient economies of scale that must be identified. Omnitrans will compile this information and issue a FTA-compliant joint procurement document, specifying estimated overhaul quantities and engine/transmission types by year, overhaul performance standards, warranty terms, and other requirements. Upon receipt of the proposals/bids, each agency will participate in the evaluation and review the results to determine if it is in their interest to participate. The procurement document will specify that each participating agency will enter into a separate contract with the selected vendor and pay the vendor directly for the services provided, if it is in their interest to do so.

#### 8.1.2.4 Bus Parts Procurement

**Strategy** – Under this strategy, participating agencies would develop a cooperative agreement to enter into a joint procurement for bus parts, in order to seek lower overall parts costs. This would also be done under the master procurement MOU.

**Agencies Participating** – Omnitrans will serve as lead agency, with MBTA participating, subject to the resulting overall parts costs being lower than each agency currently incurs. Originally VVTA had expressed interest but due to their contracted operation model and the national purchasing contracts their contractor can obtain, VVTA did not feel their continued participation in this strategy is warranted.

**Actions Required** – Each participating agency will need to project its estimated bus parts needs, by year, for the number of years to be covered by the cooperative agreement. It may be beneficial for each agency to identify a list of, e.g., 25 or 50 major parts consumed and their quantities, which can be used as a yardstick to evaluate bidder costs. As with heavy overhauls mentioned above, effectiveness and efficiencies from this strategy are dependent on sufficient economies of scale that must be identified. With VVTA no longer participating, this strategy may lack sufficient economies of scale to be worth pursuing.

Omnitrans would compile this information and issue a FTA-compliant joint procurement document, specifying estimated parts needs and volumes, by year, parts delivery/availability performance standards, quality standards, warranty terms, and other requirements. Upon receipt of the proposals/bids, each agency would participate in the evaluation and review the results to determine if it is in their interest to participate. The procurement document will specify that each participating agency will enter into a

separate contract with the selected vendor and pay the vendor directly for the parts purchased, if it is in their interest to do so.

#### 8.1.2.5 CNG Fuel Procurement

**Strategy** – This strategy would use a fuel hedging contract for procurement of compressed natural gas (CNG), wherein a target price is established and the transit agency essentially purchases price protection insurance from a fuel-futures firm. If the price from the transit agency's regular supplier exceeds the target price over a period of time, the insurer (fuel-futures firm) pays the agency the difference. If, on the other hand, fuel prices drop below the target price, the agency must make up the difference. Thus, this approach is more of a budget certainty strategy than a cost savings strategy.

A group purchase contract directly-negotiated with one of the current fuel providers was also considered but due to the differing availability of natural gas pipelines and service territories of the two area natural gas providers, this option was deemed less feasible than a fuel-futures purchase contract. In addition, Omnitrans will be on LNG for the next few years, until they complete conversion to CNG.

**Agencies Participating** – Omnitrans re-entered fuel hedging about a year ago when the agency was able to obtain its target price; however the agency was not in a hedging contract as of November 2015 due to dropping prices of fuel generally. The agency evaluates current market conditions and re-confirms its decision whether to stay in the hedging program or drop out on an annual basis. VVTA has a long-term arrangement with a supplier through 2018 but is interested in learning more about the program and possibly participating after that.

**Actions Required** – In the near term, Omnitrans has agreed to provide technical information and assistance on the fuel hedging contract process to VVTA. In 2018, depending on fuel market conditions at that time, the two agencies may choose to jointly pursue a fuel hedging contract.

#### 8.1.2.6 CNG Station Maintenance

**Strategy** – Under this strategy, two or more agencies would pool the cost of CNG station maintenance services to reduce costs. As with the other joint procurements for goods or services, this one could be covered under the master procurement MOU.

**Agencies Participating** – Omnitrans, VVTA, and MBTA have all expressed interest in a joint contract for CNG station maintenance. In May, 2015, Omnitrans awarded a two-year base term (with three one-year options) fuel supply agreement with Applied LNG Technologies (ALT)<sup>2</sup>. However, Omnitrans plans to convert to CNG in the next two years, and, in October, 2015, authorized release of a request for proposal (RFP) to design, build, and provide one-year's maintenance on CNG fueling stations at their East Valley and West Valley yards<sup>3</sup>. This conversion will result in the need to obtain on-going

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<sup>2</sup> Omnitrans Board Agenda, May 6, 2015.

<sup>3</sup> Omnitrans Board Agenda, October 7, 2015.

CNG station maintenance. That change would provide an excellent opportunity for a joint procurement of CNG maintenance services at that time. VVTA currently obtains CNG station maintenance as part of its operations and maintenance contract with Transdev, but would like to reduce costs through shared maintenance resources. MBTA's CNG station maintenance is provided through their current supply contract with Clean Energy, with a fixed-cost for monthly inspections and a time-and-materials basis for special call-outs and required repairs.

**Actions Required** – The three agencies interested in this strategy should meet or conference in the near future to identify their agency timelines under current CNG maintenance contracts and Omnitrans' planned conversion to CNG, and determine when it makes sense to conduct a joint procurement for CNG station maintenance. Based on Omnitrans' planned conversion to CNG by approximately the end of 2016 and the one year's maintenance included, Omnitrans staff estimated they would be ready to consider a joint procurement for CNG maintenance in the fourth quarter of CY 2016. The agencies should also identify the types of maintenance and repair activities they want covered (e.g., monthly inspections, emergency response services and repairs), maximum response times during system outages, contract term, etc.

#### 8.1.2.7 Project Development/Construction Management

**Strategy** – In this strategy, SANBAG would make available its staff and/or on-call consultants to help the other transit agencies conduct development and construction management projects. Such effort could include project management services for new maintenance facilities, transit centers, bus stop programs, or other capital or real estate projects, on a case-by-case basis.

**Agencies Participating** – Most of the transit agencies indicated an interest in having project development/construction management services available in this manner. MT is in need of these services now to develop projects for new/expanded facilities at both their operating and maintenance yards. MT may need an initial needs assessment, followed by an evaluation of the space requirements those needs entail, then a site search and evaluation/selection, and finally project development and eventually construction. VVTA anticipates a need for this type of support to study new or expanded facilities for the Barstow services they recently merged with VVTA's operations. Barstow is in leased facilities now and does not have on-site fueling. MBTA currently has an arrangement for similar support through the City of Twentynine Palms but would like to have the SANBAG service as a backup. Omnitrans indicated they might have a need for such services on large projects, if the SANBAG project management support is via direct staff, and would do so on a project-by-project basis.

**Actions Required** – SANBAG and the transit agencies should identify candidate projects for which such services could be needed as proposed in the agencies' short range transit plans (SRTPs) and comprehensive operational analyses (COAs) and as discussed above. Each agency with capital projects requiring project development or construction management services in the next three to five years and interested in utilizing SANBAG's resources would enter into a cooperative agreement with SANBAG, specifying the type of support services requested, estimated durations, agreed-upon rate structures, and other project specifics. The agencies may want to establish a Master

MOU to facilitate the types of services needed, then enter into an Addendum to the MOU for each specific project being undertaken. SANBAG would determine the best way to support the transit agency's project needs (in-house staff or consultants) in each case. SANBAG/agency would solicit a scope, cost, and schedule proposal from the on-call consultants, unless SANBAG will directly perform the support. Upon agreement on the proposal, SANBAG would issue a Task Order and project support would begin.

#### 8.1.2.8 Regional Marketing

**Strategy** – Under this strategy, the transit agencies would participate in a regional marketing program led by a SANBAG consultant. The goals of the program would be to establish a unified county-wide transit message, promote transit and ridesharing alternatives to single-occupant autos, and improve transit information to regional commuters who cross multiple transit jurisdictions or systems. Specific tactics include development of a regional marketing plan which identifies markets and strategies to reach those markets, and development of an annual “tool kit” of campaigns, social media content, flyers, and materials which can be customized to each transit agency while providing consistent county-wide transit themes.

**Agencies Participating** – SANBAG has volunteered to lead this effort and all agencies have expressed interest in participating.

**Actions Required** – SANBAG staff has indicated that they will seek special funding from the Transit Committee and SANBAG Board to fund this effort. Once funded, SANBAG will need to select on-call consultant assistance or conduct a procurement for such services, tasking the consultant with leading the Marketing Plan and Marketing Tool Kit development, and specifying a term for this engagement (perhaps three years), with initial program development and launch in the first year and then updates to the tool kit strategies in the following two years. A steering committee comprised of representatives from each transit agency would be formed to provide guidance and direction to the consultants.

#### 8.1.2.9 Mutual Aid Agreements

**Strategy** – This strategy would establish mutual aid agreements between Omnitrans and VVTA, and between Omnitrans and MT, to assist with out-of-area service breakdowns and other emergencies.

**Agencies Participating** – Omnitrans, VVTA, and MT desire these agreements.

**Actions Required** – The three agencies held several meetings and worked out the key deal points of a Mutual Aid Agreement by mid-September, 2015. The study team used these deal points to send draft MOUs to Omnitrans, VVTA, and MT on September 29, 2015. The agencies finalized the MOUs and took them to their respective Boards for approval in the December 2015 – January 2016 timeframe. Principally, the need is for Omnitrans to provide vehicle repair, transportation services, and/or staff/supervisory support in the event of a breakdown or accident of a VVTA or MT bus in the Omnitrans service area. Key issues being addressed in the MOUs include notification and support approval methods, the types of services to be provided, and a pricing or cost recovery structure. These types of services require the participating agencies to have the

supported agency's service route descriptions on hand to provide to emergency service drivers, and some dispatch familiarization with the mutual aid response process. Omnitrans will also need to make arrangements with its ADA Paratransit/OmniGo service provider, since only that contractor operates the smaller size vehicles appropriate for MT's territory.

#### 8.1.2.10 Inter-Agency Transfer Agreements

**Strategy** – This strategy would develop updated inter-agency transfer agreements between Omnitrans and VVTA, between Omnitrans and MT, and between MBTA and Sunline Transit Agency (Coachella Valley). In addition, there is a desire to update the transfer agreements between Omnitrans, VVTA, and MT, with Metrolink, especially considering that all services will connect at the new San Bernardino Transit Center once the extension of Metrolink service to that new center is complete.

**Agencies Participating** – This strategy will involve Omnitrans, VVTA, MT, MBTA, Sunline, and Metrolink, through various different MOUs.

**Actions Required** – The agencies will need to reach agreement on key deal points in this type of agreement, including transfer and monthly pass validity between systems, how to value transfers between services of differing base fares, and how to handle pricing and collection of any fare differentials. Administrative issues such as how to count and report fares of other systems' passengers, and billings for any inter-agency costs, may also need to be addressed. Finally, the resulting arrangements need to be communicated to the riding public. Two parties who have not been involved in the Transit Efficiency Study up to this point will need to be included in the discussions on some of the MOUs, specifically Sunline Transit Agency and Metrolink. (Note: As of May, 2016, substantial or final agreement had been reached between Omnitrans, VVTA, and MT on these new MOUs, and work was in progress on the MBTA – SunLine MOU.)

#### 8.1.2.11 Service Planning Assistance

**Strategy** – This strategy involves making service planning technical assistance available to the smaller transit agencies that lack in-house planning staff. This service is envisioned to be provided by SANBAG staff or an on-call consultant under the terms of a Professional Services MOU between SANBAG and each participating agency. The service involved would be near-term "tactical" service planning, such as addressing service problems that arise in between the 5-year S RTP development cycles.

**Agencies Participating** – SANBAG, VVTA, MBTA, MT, and Needles Transit Services (NTS) are potential participants in this program.

**Actions Required** - SANBAG would initially seek input from interested agencies on their specific service planning needs, then decide the best way to support those needs via hiring of in-house staff or tasking a consultant. The Transit Efficiency Study will assist with ascertaining initial service planning needs through the Key Deal Points Worksheets discussed with the transit agencies. The assigned resource would confer with the agency requesting the service to determine the best way to address the need, and may prepare a service assessment report with findings and recommended actions to address current service problems. The process could then be on-going, with periodic

reviews of system performance and identification of recommended further service adjustments as required.

8.1.2.12 **Grant Application Assistance**

**Strategy** – This strategy involves on-going support to the transit agencies in developing grant applications for formula and discretionary grant funding programs. SANBAG has agreed to continue providing this assistance on an as-needed basis.

**Agencies Participating** – All of the transit agencies indicated interest in this area on an as-needed basis.

**Actions Required** – No action is required at this time for the current level of SANBAG staff support. In the event a grant application process pursued by one of the transit agencies becomes more involved and requires on-call consultant assistance, SANBAG would enter into a Professional Services MOU with the transit agency to provide those services.

8.1.2.13 **Civil Rights Planning Assistance**

**Strategy** – This strategy involves on-going support to the transit agencies to maintain and update their Title VI programs for service and fare changes and ensure on-going compliance with Title VI regulations. SANBAG has agreed to continue to provide the support of their specialized on-call consultant to the transit agencies for this subject area.

**Agencies Participating** – SANBAG, VVTA, MBTA, MT, and VTrans have all indicated interest in this area.

**Actions Required** - No action is required at this time for the current level of SANBAG staff support. In the event a Title VI analysis required by one of the transit agencies becomes more involved and requires on-call consultant assistance, SANBAG would enter into a Professional Services MOU with the transit agency to provide those services.

8.1.2.14 **Training/Staff Development**

**Strategy** – This strategy involves pooling training needs and resources among the transit agencies to bring specialized transit training and staff development programs to San Bernardino County. SANBAG and Omnitrans have both offered to lead this area.

**Agencies Participating** – All of the transit agencies indicated an interest in this area.

**Actions Required** – SANBAG or Omnitrans would conduct a training needs inventory to assess current agency needs and one agency would take the lead in bringing in outside trainers, as needed, or possibly directly hosting some training topics. As part of the meetings/interviews with the transit agencies conducted for this phase of the Transit Efficiency Study, the study team inquired of agencies as to training needs they are currently aware of and documenting that in the Deal Points Worksheets.

## 8.2 Implementation Plan Schedule

This section provides an overall implementation schedule for the development of the MOUs and other activities needed to pursue the cost-savings and service coordination strategies. This schedule is based on the timing information provided by the agencies during their individual agency meetings/conference calls to complete the dealpoint worksheets.

**Table 8-2** provides the timeline and task/sub-task breakdowns for each strategy being pursued by the agencies. Times are estimated to the nearest calendar quarter.

### 8.2.1 ADA Taxi Voucher Program

This strategy is already in use by VTrans. VTrans has agreed to provide information to MT, with MT then exploring potential funding and procurement of a taxi provider if viable. This strategy can proceed in the near future once MT is ready.

### 8.2.2 Use of Taxi's to supplement ADA Paratransit Service

Omnitrans would share its contract language and strategy on use of taxi's to supplement ADA paratransit service with MT. If viable, MT would conduct a procurement for a taxi provider to supply the supplemental service. Possibly this procurement could be done jointly with the taxi voucher service provider, and could begin when MT is ready.

### 8.2.3 Bus Heavy Overhaul

This strategy would be implemented following creation of a master MOU on joint procurements among the participating agencies. Agencies would identify the projected overhaul needs over the following five years, recent overhaul history, and desired overhaul specifications, and provide that information to Omnitrans. Participating agencies would agree to conduct a joint procurement of heavy overhaul services. The RFP document would spell out contract requirements such as term of the agreement, overhaul specifications, warranty terms, shipping, and pricing structure. Based on discussions with the agencies, it is feasible that this process could be completed in the next year, with resulting contract awards to vendors in the first quarter of calendar year (CY) 2017.

### 8.2.4 Bus Parts

As with Bus Heavy Overhaul, this strategy would be an activity under the master MOU for joint procurement. If sufficient potential economies are deemed to exist, participating agencies would agree with Omnitrans on a joint procurement. In this case, an invitation for bid (IFB) process would be used, estimated quantities of high-use parts to be procured by the agencies, and providing specifications including salient characteristics describing part fit/form/function, an approved-equals process, warranty terms, shipping, and pricing structure. Based on discussions with the agencies, it is feasible that this process could be completed in the next year, with resulting contract awards to vendors in the last quarter of CY 2016.

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**Table 8-2. Timeline Schedule for Implementation of Cost Savings and Service Coordination Strategies**

No.	Strategy	CY 2015		CY 2016				CY 2017				CY 2018			
		Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4
<b>1</b>	<b>ADA Taxi Voucher Program</b>														
1.1	Vtrans to share information with MT														
1.2	MT to explore potential JARC/Other Funding														
1.3	MT conducts procurement for Taxi Provider														
1.4	MT Awards contract, implements program														
<b>2</b>	<b>Use of Taxi's to supplement ADA Paratransit Service</b>														
2.1	Omnitrans to share information with MT														
2.2	MT conducts procurement for Taxi Provider														
2.3	MT Awards contract, implements program														
<b>3</b>	<b>Bus Heavy Overhaul</b>														
	Agencies enter into Master MOU on joint procurement														
3.1															
3.2	Agencies project overhaul needs over 5 years														
3.3	Participating Agencies enter MOU Addendum														
3.4	Agencies provide overhaul qtys/specs to Omnitrans														
3.5	Omnitrans conducts FTA-compliant procurement														
3.6	Each Agency awards separate contract to vendor														
<b>4</b>	<b>Bus Parts</b>														
	Agencies enter into Master MOU on joint procurement														
4.1	(per above)														
4.2	Agencies determine if sufficient economies exist														
4.3	Participating Agencies enter MOU Addendum														
4.4	MBTA provides qtys on high-use parts to Omnitrans; Omnitrans identifies parts to include in procurement														
4.5	Omnitrans conducts FTA-compliant procurement														
4.6	Each Agency awards separate contract to vendor														
<b>5</b>	<b>CNG Fuel Procurement</b>														
5.1	Omnitrans provides VVTA info on fuel hedging														
5.2	Omnitrans provides VVTA annual updates on hedging														
5.3	Omnitrans and VVTA enter Coop. MOU to try joint fuel hedging procurement														
5.4	Omnitrans conducts Market review of Hedging in 2018														
5.5	If conditions are favorable, Agencies conduct procurement for hedging contract and award														

**Table 8-2. Timeline Schedule for Implementation of Cost Savings and Service Coordination Strategies (Cont.)**

No.	Strategy	CY 2015		CY 2016				CY 2017				CY 2018			
		Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4
<b>6</b>	<b>CNG Station Maintenance</b>														
6.1	Agencies enter into Master MOU on joint procurement (per above)														
6.2	Agencies meet to review timelines under current contracts/initiatives														
6.3	Omnitrans completes its CNG Conversion/1 yr maint.														
6.4	Participating Agencies enter MOU Addendum														
6.5	Agencies provide maint. Reqmts to Omnitrans														
6.6	Omnitrans conducts procurement for CNG Maint Svcs														
6.7	Each agency enters separate contract with vendor														
<b>7</b>	<b>Project Development /Construction Mgmt</b>														
7.1	Agencies identify project needs in next 3 - 5 years														
7.2	Each participating agency enters into Master MOU with SANBAG for Proj Dev/CM Services														
7.3	Agencies create a MOU Addendum with SANBAG for each project, spelling out needs/reqmts					TBD									
7.4	SANBAG/Agency solicit scope, cost, schedule proposal from on-call consultants if not to be performed in-house					TBD									
7.5	SANBAG awards Task Order, project support begins					TBD									
<b>8</b>	<b>Regional Marketing</b>														
8.1	SANBAG obtains Board funding for Regional Marketing Program														
8.2	Regional Marketing Steering Committee formed from Agencies														
8.3	SANBAG selects or procures on-call mktg consultant														
8.4	Consultant develops Marketing Plan under Steering Committee direction														
8.5	Consultant develops annual marketing tool kits														
8.6	Agencies implement tool kit strategies as budgets allow														

**Table 8-2. Timeline Schedule for Implementation of Cost Savings and Service Coordination Strategies (Cont.)**

No.	Strategy	CY 2015		CY 2016				CY 2017				CY 2018			
		Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4
<b>9</b>	<b>Mutual Aid Agreements</b>														
9.1	Agencies work out key deal points on Mutual Aid MOUs														
9.2	Agencies obtain Board approvals on MOUs														
9.3	Agencies provide training on Mutual Aid procedures to Dispatch and Supervisory staff														
9.4	Omnitrans makes arrangements with paratransit contractor														
9.5	Mutual Aid Assistance becomes available as needed														
<b>10</b>	<b>Inter-Agency Transfer Agreements</b>														
10.1	Agencies reach agreement on key deal points														
10.2	Sunline Transit Agency and Metrolink asked to participate														
10.3	Inter-Agency Transfer Agmts drafted														
10.4	Agencies ratify Inter-Agency Transfer Agreements														
10.5	Agreement content summarized for operator and public dissemination														
10.6	Administrative procedures established														
10.7	Inter-Agency Transfer Agreements implemented														
<b>11</b>	<b>Service Planning Assist</b>														
11.1	Agencies identify service planning needs														
11.2	SANBAG identifies best way to meet need(s)														
11.3	Agencies enter into Professional Svcs MOU w/SANBAG														
11.4	SANBAG/Agency solicit scope, cost, schedule proposal from on-call consultants														
11.5	SANBAG awards Task Order, service planning support begins														
<b>12</b>	<b>Grant Application Assistance</b>														
12.1	No action needed - SANBAG to provide continuing support														
12.2	If specific grant project becomes too demanding, Professional Services MOU may be used														

**Table 8-2. Timeline Schedule for Implementation of Cost Savings and Service Coordination Strategies (Cont.)**

No.	Strategy	CY 2015		CY 2016				CY 2017				CY 2018			
		Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4
<b>13</b>	<b>Civil Rights Planning Assistance</b>														
	No action needed - SANBAG to provide continuing support through a specialized on-call consultant														
13.1															
13.2	If specific Title VI project becomes too demanding, Professional Services MOU may be used														
<b>14</b>	<b>Training/Staff Development</b>														
	SANBAG or Omnitrans conduct training needs inventory														
14.1															
	SANBAG or Omnitrans schedules training resources for regional transit training provided on-site at a central agency, possibly annually														
14.2															
14.3	Training is scheduled based on training resource and agency staff availability			TBD											

### **8.2.5 CNG Fuel Procurement**

As discussed previously, this strategy would use fuel hedging contracts to provide participating transit agencies with fuel price certainty over a set term. Omnitrans and VVTA are currently the two parties potentially interested in this strategy. VVTA is locked into a long-term fuel contract through 2018, so in the near term, Omnitrans would just provide technical information on how their past fuel hedge contracts work. In approximately the fourth quarter of 2017, if fuel pricing conditions merit entering a fuel hedge contract, the participating agencies would enter a joint agreement to potentially conduct this financial transaction. Market conditions would continue to be monitored in the second quarter of 2018, and if favorable, the parties would jointly procure and award a fuel hedge contract to a financial institution.

### **8.2.6 CNG Station Maintenance**

This strategy would be another activity under the master MOU for joint procurement. The timing is affected by Omnitrans' current plan to convert to CNG from LNG over the next year, followed by first-year maintenance included with that procurement contract. Thus, the agencies should meet initially in early 2016 to review their respective needs and timelines, so as to identify a mutually-acceptable timeframe to begin the joint procurement. In approximately the fourth quarter of CY 2016, the participating agencies would enter into a MOU Addendum for this activity, and in early CY 2017 they would collaborate on maintenance requirements. Omnitrans would conduct the joint procurement beginning approximately second quarter of CY 2017, with contract awards in the third or fourth quarter of 2017, for service initiation in early CY 2018.

### **8.2.7 Project Development/Construction Management**

This strategy involves setting up a master MOU between SANBAG and each participating agency for project development/construction management services. The agencies would identify their anticipated project needs over the next three to five years that could involve SANBAG assistance, to aid SANBAG in planning resource utilization. Then, each agency with a specific project requiring SANBAG services would enter into an MOU Addendum for that project, identifying the specific resources and requirements, length of engagement, cost reimbursement, etc. Once executed, SANBAG would assign in-house resources or utilize on-call consultants via a Task Order assignment. Based on conversations with the agencies, execution of the master MOU should be feasible by the second quarter of CY 2016, with subsequent addenda for specific projects then created as needed by the agencies.

### **8.2.8 Regional Marketing**

This strategy would begin with SANBAG seeking Board funding for a Regional Marketing Program, as described earlier. If funded, a Regional Marketing Steering Committee would be formed, comprised of representatives from each agency. SANBAG would procure a marketing consultant, under Steering Committee guidance. That consultant would then develop a Marketing Plan and annual marketing tool kits. It is anticipated that this process could be completed by the second quarter of CY 2017, allowing the agencies to implement the tool kit strategies as budgets allow.

#### **8.2.9 Mutual Aid Agreements**

Substantial progress has already been made on development of mutual aid agreements between Omnitrans and VVTA, and between Omnitrans and MT, as noted earlier. The agreements have been approved by the respective agency boards. With that action completed, the agencies should ensure their respective dispatch and supervisory staffs are trained on mutual assistance procedures and arrangements are made with Omnitrans' paratransit contractor.

#### **8.2.10 Inter-Agency Transfer Agreements**

For this strategy, the study team obtained copies of all existing inter-agency transfer agreements and discussed the terms of those agreements during the working meetings with each agency. The team used the existing arrangements as a starting point to draft updated transfer agreements and circulated those among the agencies for review. As noted earlier, several of these inter-agency transfer agreements have already been approved. A draft updated agreement between MBTA and Sunline Transit Agency was approved for discussion by MBTA and under review by Sunline as of May, 2016. Metrolink was contacted regarding possible updates to its agreements with Omnitrans, VVTA, and MT, but chose not to make any changes at this time due to the pending release of its new mobile ticketing application with impact to fare validation procedures.

#### **8.2.11 Service Planning Assistance**

This strategy involves SANBAG either directly hiring planning staff to assist the smaller transit agencies which lack dedicated planning resources, or providing such resources via an on-call consultant. The process starts with SANBAG working with the transit agencies to identify planning needs, and then determining the best way to meet those needs. Participating agencies would enter into a Professional Services MOU with SANBAG for these resources. SANBAG and/or each transit agency would then develop a scope of work, schedule, and budget for the work the agency needs performed, and SANBAG would either hire and assign staff under the terms of the MOU or award a task order to an on-call consultant. Based on discussions with the agencies, this process should be able to be completed, leading to resources ready to start work for transit agencies, by the third quarter of CY 2016.

#### **8.2.12 Grant Application Assistance**

SANBAG has agreed to continue providing grant application assistance to the transit agencies through existing staff, so no further action is currently required. If a specific grant project becomes too demanding, a Professional Services MOU with SANBAG might be required.

#### **8.2.13 Civil Rights Planning Assistance**

SANBAG has agreed to continue providing grant application assistance to the transit agencies through SANBAG's specialized on-call consultant, so no further action is currently required. If a specific civil rights policy or study project becomes too demanding, a Professional Services MOU with SANBAG might be required.

#### 8.2.14 Training/Staff Development

SANBAG and Omnitrans have both volunteered to help sponsor training programs for the region's transit agency staff. SANBAG or Omnitrans would conduct a training needs inventory and then work to bring appropriate resources to the region. During the study team's individual meetings with transit agencies, the following subject areas were identified as areas of interest for training:

**MBTA:** The most pressing topics include Operations Supervisor, Management Development, Vehicle Maintenance Procedures, as well as Employee Relations/Employee retention.

**MT:** MT identified areas of training desired for staff, including training on FTA transit regulations, such as the Charter Regulations and how to handle special service requests, and management development on other FTA rules and regulations.

**Needles Transit Services:** Participation in training events via Skype or Go-To-Meeting would be preferred given the distance to San Bernardino Valley. NTS had no immediate training needs identified.

**Omnitrans:** Omnitrans is more than happy to host training events on various topics for all interested agencies. Omnitrans indicated a specific interest in hosting Maintenance and Operations Training (for mechanics and bus drivers), as well as procurement process training.

**VVTA:** VVTA would prefer specific hands-on training sessions (rather than webinars or similar computer screen-based training). Preferences include training for Service Planning, ADA Compliance, Advanced Technologies, and Fare Collection Systems.

**VTrans:** No new training needs are foreseen at this time. In the past, some non-profits wanted safety training. The focus was vehicle operations-related training. VTrans partnered with MT and used one of their consultants to provide the training. They trained two agencies on vehicle operations and wheelchair lifts.

### 8.3 Inter-Agency Agreements

This section provides the draft and/or final cooperative agreements, MOUs, and Professional Services Agreements developed to pursue the cost-savings and service coordination strategies, based on SANBAG and transit agency input on desired deal points for each agreement.

Out of the 14 different strategies, seven require one or more cooperative agreements for implementation in the near term, with the possibility of an additional agreement between Omnitrans and VVTA regarding entering fuel hedging contract in late 2017, as VVTA's long-term fuel contract approaches its end, depending on market conditions at that time. **Table 8-3** provides a listing of the agreements/MOUs needed by strategy, and their status as of May, 2016, identifying the agencies involved. For the procurement-related strategies for which Omnitrans has volunteered to act as lead agency, a Master Procurement MOU has been created to cover all joint procurements the participating agencies agree to conduct in the future.

As of the date of this final report submittal, all of the draft agreements had been developed for agency review in each of the strategy categories. Many of these draft agreements have been approved by both agencies involved (shown by green shading); some are awaiting approvals by one of the two agencies in each case (shown by yellow shading). Per SANBAG staff direction at a March 30, 2016 project status meeting, the study team is to submit the MOUs in their present status as of the submittal of the final Transit Agency Coordination/Optimization Plan (this report) and SANBAG staff will assume responsibility to finalize the remaining MOUs. The latest versions of the actual MOUs are provided in Appendix F.






**Table 8-3. Summary of Cooperative Agreements, MOUs, and Status, by Strategy**

No.	Strategy	Agreements/MOUs Needed	Status as of 5/12/16
1	ADA Taxi Voucher Program	None	-
2	Use of Taxi's to supplement ADA Paratransit Service	None	-
3	Bus Heavy Overhaul	<b>Master Procurement MOU between Omnitrans and:</b>	
		• VVTA	Edits added per Omni, sent to VVTA for review 3/07/16; VVTA Legal o.k. as of 3/14/16; Omni Legal o.k. as of 3/10/16
		• MT	Edits added per Omni, sent to MT for review 2/19/16, approved by MT staff and Legal 2/25/16; Omni Legal o.k. as of 3/10/16
		• MBTA	Edits added per Omni, sent to MBTA for review 2/19/16; responded to MBTA comments 3/07/16. MBTA approved as revised 3/7/16; Ok per Omnitrans staff contact on 5/12/16
4	Bus Parts	<b>Master Procurement MOU between Omnitrans and:</b>	
		• MBTA	Edits added per Omni, sent to MBTA for review 2/19/16; responded to MBTA comments 3/07/16. MBTA approved as revised 3/7/16; Ok per Omnitrans staff contact on 5/12/16
5	CNG Fuel Procurement	None at this time. Fuel purchase hedging agreement between Omnitrans and VVTA possible in 2017.	-
6	CNG Station Maintenance	<b>Master Procurement MOU between Omnitrans and:</b>	
		• VVTA	Edits added per Omni, sent to VVTA for review 3/07/16; VVTA Legal o.k. as of 3/14/16; Omni Legal o.k. as of 3/10/16
		• MBTA	Edits added per Omni, sent to MBTA for review 2/19/16; responded to MBTA comments 3/07/16. MBTA approved as revised 3/7/16; Ok per Omnitrans staff contact on 5/12/16
7	Project Development /Construction Management	Master MOU or Project-Specific MOU between SANBAG and:	
		• VVTA	Edits added per VVTA, sent to both agencies for review 2/17/16, further edits added at VVTA request and sent 2/24/16. VVTA approved final version 2/29/16. Waiting SANBAG's review.
		• MT	Approved by MT 2/17/16, waiting for SANBAG review
		• MBTA	Addressed MBTA comments, sent to both agencies for further review 2/17/16, approved by MBTA 2/24/16; waiting SANBAG review
		• NTS	Per email notification on 5/10/16, City has declined to participate in this agreement at this time
8	Regional Marketing	None	-
9	Mutual Aid Agreements	<b>MOU between Omnitrans and:</b>	
		• VVTA	Completed
		• MT	Completed
10	Inter-Agency Transfer Agreements	<b>MOUs between:</b>	
		• Omnitrans and VVTA	Edits added per Omni, sent to VVTA for review 2/19/16. Approved 2/25/16. MT, VVTA, Omni all agree on \$1.00 transfer discount 3/3/16. Omni legal approved with edits 3/10/16, VVTA o.k. with edits 3/10/16
		• Omnitrans and MT	Edits added per Omni, sent to MT for review 2/19/16. Approved by MT 2/24/16. MT, VVTA, Omni all agree on \$1.00 transfer discount 3/3/16. Omni legal approved with edits 3/10/16.
		• VVTA and MT	Approved by MT; Edited by VVTA; Draft Final sent to agencies 2/17/16
		• MBTA and Sunline Transit Agency	Addressed MBTA comments, sent back for further review 2/17/16; MBTA approved release to Sunline 3/7/16; sent to Sunline 3/8/16; Sunline requested ridership data 4/21/16; ridership data provided 4/25/16; waiting for Sunline's response
		• Omnitrans and SCRRRA	Draft Completed (On Hold Pending SCRRRA Mobile Ticketing)
		• VVTA and SCRRRA	On Hold Pending SCRRRA Mobile Ticketing

**Table 8-4. Summary of Cooperative Agreements, MOUs, and Status, by Strategy  
(Continued)**

No.	Strategy	Agreements/MOUs Needed	Status as of 5/12/16
11	Service Planning Assist	MOUs between SANBAG and:	
		• VVTA	Edits added per VVTA, sent to both agencies for review 2/17/16; VVTA asked if chgs were made 2/19/16, response sent 2/19/16. Waiting for SANBAG review
		• MT	Approved by MT 2/17/16, waiting for SANBAG review
		• MBTA	Addressed MBTA comments, sent to both agencies for further review 2/17/16, approved by MBTA 2/24/16. Awaiting SANBAG review
		• NTS	Per email notification on 5/10/16, City has declined to participate in this agreement at this time
12	Grant Application Assistance	None	-
13	Civil Rights Planning Assistance	None	-
14	Training/Staff Development	None	-

 - First set of edits completed  
 - Approved by both agencies  
 - On Hold at Agency Request

# **Appendix A References**

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Omnitrans. 2015. *Contract Agreement between MV Transportation, Inc., and Omnitrans for Purchased Transportation Services*. June, 2015.

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# **Appendix E**

## **Agency Meeting Summaries & Term Worksheets**

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# **Appendix F**

## **Draft Agreements/MOUs**

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