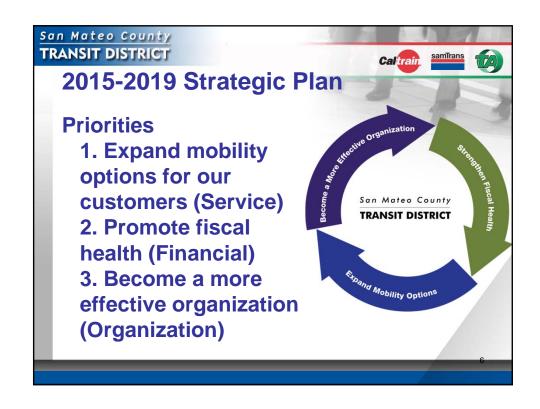








Overview: Timeframes Immediate: FY 2018 (July 1, 2017) Actions begun in the last two years expected to bear results in FY18 Near-Term: FY 2019 (July 1, 2018) Actions underway expected to bear results in FY19 Ongoing and Beyond: Business Plan – a framework for the reinvented SamTrans



San Mateo County TRANSIT DISTRICT I INANCIAI – Immediate (FY18 – July 1, 2017)







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

San Mateo County TRANSIT DISTRICT FINANCIAI - Near-term (FY19 – July 1, 2018) New Base-Budgeting processes Transparency of recurring, additional expenses Budget Book Continue service changes provide financial flexibility • Identify additional, new revenues sources Increased contribution for Caltrain

San Mateo County TRANSIT DISTRICT







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

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

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TRANSIT DISTRICT Organization – Immediate (FY18 – July 1, 2017)



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

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TRANSIT DISTRICT Organization – Immediate (FY18 – July 1, 2017)) District and HR Actions District Action #1: Compensation and Benefits Study District Action #2: Rewards and Recognition Program District Action #3: Inter-Departmental Collaboration District Action #4: Employee Development Opportunities District Action #5: Employee Communications and Feedback HR Action #1: Robust Onboarding Program HR Action #2: SamTrans Leadership Program

TRANSIT DISTRICT Organization -- Near-term (FY19 - July 1, 2018) • Evaluate recommendations of Compensation and Benefits Study • Review job classifications and job families, compensation • Consider performance-based compensation • Develop evaluation and advancement paths and protocols, including career ladders, critical skill needs

TRANSIT DISTRICT Service – Immediate (FY18 – July 1, 2017) Ongoing comprehensive review of service, pilots Reconfigure to redeploy assets from underutilized service Combine overlapping services Revamp ridership maps

Update schedules: Simplification

Establish effective metrics



TRANSIT DISTRICT Service - Near-term (FY19 - July 1, 2018) TNC partnership Fare Study Shuttle program re-evaluation, development ECR Services, Signal priority 101 Managed Lanes Project Mobile Ticketing Dumbarton Corridor short-term improvements Engineering and Design Caltrain Electrification



SamTrans Business Plan 5. External Existing and Evolving Conditions • Customer Base -- changes in ridership and changes in rider demographics • Market forces/marketplace of services (TNCs, etc.) 6. Operational Initiatives • Customer experience - Ease of Use • Pilots/demonstrations • Metrics/performance measures





