



AGENDA

Meeting of the Connect Transit Board of Trustees

February 25, 2014

4:30 P.M.

Board Room

Connect Transit Operations Facility
351 Wylie Drive, Normal, IL 61761

- A. Call to Order
- B. Roll Call
- C. Public Comments
- D. Consent Agenda
 - 1. Approval of Minutes of Previous Meeting of January 28, 2014 and Special Meeting of February 1, 2014.
 - 2. Disbursements for Month of January, 2014
 - 3. Financial Report for Month of January, 2014
 - 4. Income Statement with Approved Budget as of January 31, 2014
 - 5. Capital and Self Insurance Reserve Fund Balances for month of January, 2014
 - 6. Monthly Statistical Report for month of January, 2014
- E. Old Business
- F. New Business
 - 1. Approval of 2014 Three (3) Year Strategic Plan
- G. General Manager's Report
- H. Trustees' Comments
- I. Executive Session ó 5 ILCS 120/(c)(11) ó Pending Litigation
5 ILCS 120/(c) (1) ó Collective Bargaining
- J. Adjournment



January 2014

Financial and Statistical Reports

Disbursements to be Approved
February 25, 2014

Payee	Goods Purchased	Amount
A.T.U. - C.O.P.E.	Payroll Deduction	\$ 184.27
ABC Bus Companies	Bus Parts	\$ 751.00
Advocate Medical Group	Drug Testing	\$ 212.00
Ally	Car Lease	\$ 82.00
Amalgamated Transit Union Local 752	Payroll Deduction	\$ 4,964.80
AmerenIP	Electric Charges	\$ 335.03
Andrew Johnson	Car Allowance	\$ 1,025.12
Assurance Agency, Ltd.	Insurance	\$ 46,491.00
Bellas Landscaping	Snow Removal	\$ 9,655.00
Brian Sprouse	Tool Reimbursement	\$ 150.00
Brinks US	Armored Services	\$ 486.88
CDS Office Technologies	Office Supplies	\$ 330.42
Central Illinois Trucks Inc.	Bus Parts	\$ 599.97
Chicago CartoGraphics	New Maps/Rider Guides	\$ 350.00
Chris Wold	Expense Reimbursement	\$ 50.00
City of Bloomington	Utilites	\$ 577.35
Clark Baird Smith, LLP	Legal Service	\$ 967.50
Comcast Cable	Internet	\$ 399.85
Comcast Spotlight	Commercial Advertising	\$ 3,000.00
Corn Belt Energy Corp.	Utilites	\$ 4,969.97
Cummins Crosspoint	Bus Parts	\$ 8,827.82
Dennison Corporation	Outside Repair	\$ 5,364.56
Dish Network	Television Service	\$ 108.00
DNDC of Illinois	Telephone	\$ 137.50
Don Owen Tire Service, Inc.	Bus Parts	\$ 115.00
Ecolane USA, Inc.	Text Messaging Services	\$ 3,000.00
Ecology Action Center	Event Registration	\$ 77.00
Eitan Weltman	Debt Payment	\$ 612.42
Employee	Medical Reimbursement	\$ 693.01
Employee	Medical Reimbursement	\$ 866.24
Employee	Medical Reimbursement	\$ 1,116.08
Engraving Express	Signs	\$ 27.50
Evergreen FS	Fuel	\$ 72,303.95
Fastenal Company	Bus Parts	\$ 483.62
Fleet-Net Corporation	Software & Tech Support	\$ 1,892.50
Four Seasons Association	Payroll Deduction	\$ 536.00
Frontier	Telephone	\$ 942.24
G&K Services	Cleaning Uniforms & Rugs	\$ 938.34
GE Capital C/O Ricoh USA Program	Copiers	\$ 431.00
Gillig LLC	Bus Parts	\$ 2,547.33
Goranson Consulting, Inc	Strategic Planning	\$ 4,000.00
Health Alliance Medical Plans	Insurance	\$ 74,221.00
Heart Technologies, Inc.	Computer & Server Fee	\$ 2,140.80

Henson Disposal	Garage Overhead	\$	164.50
ICMA Retirement Trust - 457	Pension Plan	\$	34,993.36
Idaho Child Support Receipting	Child Support	\$	190.00
Illinois Cooperative Association	Annual Fee for Radios	\$	22,624.80
Illinois Department of Revenue	Payroll Deduction	\$	19,661.06
Illinois Oil Marketing Equipment, Inc.	Maintenance	\$	400.00
Illinois State Disbursement Unit	Child Support	\$	3,102.84
Illinois State University	Internet	\$	347.84
James Staley	Tool Reimbursement	\$	450.00
Jason Garmon	Tool Reimbursement	\$	450.00
Jeff Erdman	Tool Reimbursement	\$	450.00
John H. Germeraad, Trustee	Debt Payment	\$	960.00
Judd Fink	Tool Reimbursement	\$	450.00
KOI Computers	Office Equipment	\$	149.00
Lincoln National Life Insurance Co.	Dental Insurance	\$	3,173.52
Martin Glaze	Expense Reimbursement	\$	69.60
MCS Office Technologies	Web Site Hosting -	\$	35.00
Miller Janitor Supply	Maintenance Supplies	\$	504.52
Mohawk Mfg. & Supply Co.	Bus Parts	\$	320.79
Motion Industries, Inc.	Storm Water	\$	126.55
Mutual of Omaha	Life, AD&D,STD & LTD	\$	6,718.67
Napa Auto Parts	Bus Parts	\$	340.90
New Flyer Industries Canada UIC	Bus Parts	\$	4,558.05
Nicor Gas	Utilites	\$	2,931.75
NMHG Financial Services	Garage Maintenance Equipment	\$	813.63
Oberlander Alarm Systems, Inc.	Security Alarm Serv Fee	\$	191.00
Office Collection Section-IDOR	Debt Payment	\$	232.61
Orkin Pest Control	Pest Control	\$	78.65
Paige Williams	Expense Reimbursement	\$	22.96
Payroll - Net		\$	301,820.05
Petty Cash	Reimbursement	\$	61.30
Ricoh USA, INC	Copier	\$	100.60
Rilco, Inc.	Oil, Anitfreeze	\$	532.39
Roy Rickert	Expense Reimbursement	\$	35.84
Schwulst & Roseberry, P.C.	Debt Payment	\$	500.00
Southtown Wrecker Service, Inc.,	Towing	\$	285.00
Star Uniform	Uniforms	\$	522.60
The Encompass Gas Group, Inc	Welding Supplies	\$	64.79
Town of Normal	Utilites	\$	9.20
Transit and Paratransit Company	Operator Guides	\$	255.00
Truck Centers, Inc.	Bus Parts	\$	1,379.70
U.S. Postal Service	Stamps	\$	322.00
Verizon Wireless	Mobile Data Terminals for SS	\$	551.46
Visa	Office Supplies	\$	300.92
Visa	Publications	\$	40.00
Visa	Safety/Training	\$	13.00
Visa	Travel & Meetings	\$	3,917.74

Visa	Trustee Expense	\$	2,990.80
Voith Transmissions, Inc.	Bus Parts	\$	644.17
VSP Of Illinois	Vision Insurance	\$	591.03
WGLT	Radio Advertising	\$	750.00
Winkle Environmental Service	Cleaning Supplies	\$	85.00
			<hr/>
		\$	677,248.26

Capital Account

CDW Direct	Computer Software	\$	8,386.54
Cummins Crosspoint	Engine Rebuild	\$	25,218.60
P. J. Hoerr, Inc.	Generator	\$	79,841.70
			<hr/>
		\$	113,446.84
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		\$	790,695.10
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Bloomington Normal Public Transit Income Statement With Approved Budget

Fiscal Year: 2014 Period 7

Division: 98 Operating Profit/Loss

As of: 01/31/2014

	Jul-2013 Thru Jan-2014		Approved Budget
	January - 2014	Year To Date	
Operating Revenue			
Passenger Fares	\$58,385.19	\$459,276.22	\$742,300.00
ISU Contract Fare	\$39,701.20	\$277,908.40	\$476,415.00
Other Contract Fares	\$9,945.83	\$69,620.85	\$150,000.00
Advertising Revenue	\$0.00	\$0.00	\$15,000.00
Miscellaneous Revenue	\$344.92	\$4,132.22	\$2,000.00
Total Operating Revenue	\$108,377.14	\$810,937.69	\$1,385,715.00
Operating Expenses			
Operators Wages	\$332,506.39	\$2,291,218.48	\$4,130,570.00
Maintenance Wages	\$66,207.69	\$418,433.42	\$877,297.00
Administration Wages	\$50,485.53	\$308,752.88	\$701,655.00
Employer Payroll Tax Expense	\$38,809.07	\$231,408.26	\$466,778.00
Retirement Plan	\$14,524.25	\$107,335.64	\$250,000.00
Group Insurance	\$83,830.31	\$494,034.38	\$896,002.00
Uniform Expense	\$917.41	\$16,106.71	\$15,500.00
Professional Services	\$7,967.50	\$51,357.46	\$94,800.00
Outside Repair-Labor	\$9,099.95	\$57,919.69	\$78,400.00
Contract Maintenance Services	\$14,668.63	\$63,821.38	\$96,000.00
Custodial Services	\$243.15	\$2,655.05	\$6,400.00
Employee Recruiting/Testing/Temp Help	\$212.00	\$19,784.83	\$26,200.00
Fuel	\$88,620.00	\$683,278.52	\$1,203,420.00
Lubricants	\$965.79	\$4,821.28	\$23,000.00
Tires	\$5,475.53	\$34,502.49	\$81,100.00
Bus Repair Parts	\$10,782.76	\$94,545.53	\$120,000.00
Other Materials & Supplies	\$1,767.35	\$31,043.59	\$30,500.00
Shelters/Signs/Shop Tools	\$191.00	\$8,138.75	\$37,000.00
Computer and Office Supplies	\$9,760.17	\$83,477.77	\$136,500.00
Utilities	\$13,359.11	\$67,588.07	\$125,500.00
Corporate Insurance	\$16,310.00	\$128,116.48	\$182,378.00
Dues/Subscriptions/Fees	\$0.00	\$20,158.00	\$28,000.00
Printing/Marketing/Training	\$15,540.82	\$94,685.03	\$243,000.00
Total Operating Expenses	\$782,244.41	\$5,313,183.69	\$9,850,000.00
Operating Assistance			
Operating Deficit	(\$673,867.27)	(\$4,502,246.00)	(\$8,464,285.00)
Illinois Downstate Operating Assistance	\$508,236.03	\$3,448,312.58	\$6,386,250.00
FTA 5307 Operating Assistance	\$162,979.00	\$1,035,675.80	\$2,078,035.00
Total Operating Assistance	\$671,215.03	\$4,483,988.38	\$8,464,285.00

Connect Transit
Local Capital and Self-Insurance Fund Balance
January 2014

Self-Insurance Fund:	The Illinois Funds- Cash Balance	
01/01/14	Beginning Balance	\$ 106,839.16
01/31/14	Additions - Interest Income	\$ 1.27
01/31/14	Ending Balance	<u>\$ 106,840.43</u>

Local Capital Reserve:	The Illinois Funds- Cash Balance	
01/01/14	Beginning Balance	\$ 2,086.73
01/31/14	Additions - Interest Income	\$ 0.02
01/31/14	Ending Balance	<u>\$ 2,086.75</u>

Local Capital	Commerce Bank - Cash Balance	
01/01/14	Beginning Balance	\$ 2,614,759.69
01/03/14	Cummins Crosspoint	\$ (25,502.94)
01/10/14	Dell Marketing	\$ (9,062.26)
01/17/14	CDW Direct	\$ (8,386.54)
01/17/14	Deposit - Bloomington	\$ 45,053.01
01/23/14	Deposit - Normal	\$ 30,848.66
01/24/14	Cummins Crosspoint	\$ (25,218.60)
01/24/14	P.J. Hoerr, Inc.	\$ (79,841.70)
01/31/14	Deposit - Bloomington	\$ 45,053.01
01/31/14	Additions - Interest Income	\$ 331.01
01/31/14	Ending Balance	<u>\$ 2,588,033.34</u>

FTA & IDOT Capital	The Illinois Funds- Cash Balance	
01/01/14	Beginning Balance	\$ 43,595.17
01/31/14	Additions - Interest Income	\$ 0.52
01/31/14	Ending Balance	<u>\$ 43,595.69</u>

Total Reserve Capital Account \$ 2,633,715.78

Breakdown of the Local Capital Reserve Fund- Cash Balance:

Local Capital #1	Local Capital #2
<u>\$ 43,595.69</u>	<u>\$ 2,590,120.09</u>

Breakdown of Local Funding in Local Capital #2 (Earmarked Funds):

	FY14 Received 1/31/2014	FY14 Receivable 1/31/2014
Bloomington	\$ 315,371.07	\$ -
Normal	\$ 215,940.62	\$ -
Total YTD	<u>\$ 531,311.69</u>	<u>\$ -</u>

Local Capital Reserve Fund Balance - Account Value		
01/31/14	Cash Balance	\$ 2,633,715.78
01/31/14	Loans to Operating	\$ 2,970,139.22
01/31/14	Reserve fund for underground storage tank (Cap. I)	\$ (40,000.00)
01/31/14	Ending Balance	<u>\$ 5,563,855.00</u>
Local Capital #1	Local Capital #2	
<u>\$ 3,595.69</u>	<u>\$ 5,560,259.31</u>	



	Jan 2014					Jan 2013					% Change				
	Customers	Revenue Miles	Revenue Hours	Boardings per Revenue Hour		Customers	Revenue Miles	Revenue Hours	Boardings per Revenue Hour		Customers	Revenue Miles	Revenue Hours	Boardings per Revenue Hour	
Connect Transit															
Green A (2 buses)	21,056	9,846	710	29.66		24,096	9,902	739	32.62		-12.6%	-0.6%	-3.9%	-9.1%	
Red B (2 buses)	18,024	9,275	729	24.73		18,942	9,618	758	24.97		-4.8%	-3.6%	-3.9%	-1.0%	
Purple C (2 buses)	9,325	8,177	724	12.88		11,286	9,826	753	14.99		-17.4%	-11.3%	-3.9%	-14.0%	
Pink D (1 bus)	6,080	4,473	342	17.77		6,691	4,674	356	18.80		-9.1%	-4.3%	-3.9%	-5.5%	
Blue E (1 bus)	5,201	5,242	374	13.92		5,234	5,438	389	13.46		-0.6%	-3.6%	-3.9%	3.4%	
Brown F (2 buses)	8,687	10,249	755	11.50		8,733	10,656	783	11.15		-0.5%	-3.8%	-3.6%	3.1%	
Yellow G (2 buses)	14,829	10,354	744	19.93		17,113	10,420	774	22.10		-13.3%	-0.6%	-3.9%	-9.8%	
Orange H (2 buses)	14,165	9,892	741	19.11		16,294	10,418	771	21.13		-13.1%	-5.0%	-3.9%	-9.6%	
Lime I (2 buses)	15,862	12,450	724	21.90		18,264	12,844	753	24.25		-13.2%	-3.1%	-3.8%	-9.7%	
Teal J (1 bus)	2,681	5,731	338	7.92		2,035	9,552	380	5.36		31.7%	-40.0%	-10.8%	47.8%	
Aqua K (1 bus)	5,659	5,864	373	15.16		6,585	6,204	388	16.96		-14.1%	-5.5%	-3.9%	-10.6%	
Heartland Exp (1 bus)	700	280	44	15.87		36	55	3	13.53		1844.4%	412.8%	1557.9%	17.3%	
ISU Tri Towers (2 buses)	26,322	2,979	280	94.01		22,218	2,766	260	85.45		18.5%	7.7%	7.7%	10.0%	
ISU College Station (2 buses)	5,946	4,536	343	17.36		7,564	4,212	318	23.78		-21.4%	7.7%	7.7%	-27.0%	
Nite Ride (3 buses)	3,206	3,309	246	13.02		3,249	3,158	228	14.23		-1.3%	4.8%	7.9%	-8.5%	
Total Fixed Route	157,743	103,197	7,468	21.12		168,340	109,743	7,654	22.00		-6.3%	-6.0%	-2.4%	-4.0%	
Demand Response															
Connect Mobility	4,401	21,364	1,769	2.49		4,122	20,204	1,435	2.87		6.8%	5.7%	23.3%	-13.4%	
Connect Late Night	646	3,068	200	3.23		672	3,782	219	3.07		-3.9%	-18.9%	-8.7%	5.3%	
Total Demand Response	5,047	24,432	1,969	2.56		4,794	23,986	1,654	2.90		5.3%	1.9%	19.0%	-11.6%	
SYSTEM TOTALS	162,790	127,629	9,437	17.25		173,134	133,729	9,308	18.60		-6.0%	-4.6%	1.4%	-7.3%	



		Month: Jan 2014			
		Target	FY2014	FY2013	% Change
Effectiveness	Total Boardings per Revenue Hour	15.0	17.2	18.6	-7.3%
	Total Boardings per Capita	1.0	1.3	1.3	-6.0%
	Total Boardings per Revenue Mile	1.0	1.3	1.3	-1.5%
Safety	Total Preventable Accidents (Fixed Route and Demand Respons ^e)	0.0	1	2	-50.0%
	Preventable Accidents per 100,000 Miles	0.0	1	3	-52.3%
Efficiency	Farebox Recovery Ratio	13.3%	13.8%	15.6%	-11.7%
	Average Fare	\$ 0.68	\$ 0.66	\$ 0.69	-3.4%
	Cost per Revenue Hour	\$ 74.22	\$ 82.89	\$ 81.68	1.5%
	Cost per Customer	\$ 5.10	\$ 4.81	\$ 4.39	9.4%
	Operating Assistance Investment per Customer	\$ 4.42	\$ 4.14	\$ 3.70	11.8%
	Total Customers		162,790	173,134	-6.0%
Base Statistics for Calculations	Total Revenue Hours		9,437	9,308	1.4%
	Total Revenue Miles		127,629	133,729	-4.6%
	Total Bloomington-Normal Population (per the 2010 US Census)		129,107	129,107	0.0%
	Total Operating Expense		\$ 782,244.00	\$ 760,196.00	2.9%
	Total Operating Revenue (includes all directly-generated revenue such as Universal Access)		\$ 108,032.00	\$ 118,936.00	-9.2%

Analysis & Interpretation



Statistics	FY14 YTD					FY13 YTD					% Change				
	Customers	Revenue Miles	Revenue Hours	Boardings per Revenue Hour		Customers	Revenue Miles	Revenue Hours	Boardings per Revenue Hour		Customers	Revenue Miles	Revenue Hours	Boardings per Revenue Hour	
Connect Transit															
Green A (2 buses)	160,818	70,009	5,081	31.65		171,804	70,047	5,111	33.61		-6.4%	-0.1%	-0.6%	-5.8%	
Red B (2 buses)	129,474	66,289	5,217	24.82		134,976	66,280	5,242	25.75		-4.1%	0.0%	-0.5%	-3.6%	
Purple C (2 buses)	81,199	64,043	5,181	15.67		88,210	67,599	5,215	16.91		-7.9%	-5.3%	-0.7%	-7.3%	
Pink D (1 bus)	46,675	32,039	2,449	19.06		47,087	32,159	2,466	19.10		-0.9%	-0.4%	-0.7%	-0.2%	
Blue E (1 bus)	39,317	37,490	2,676	14.69		35,947	37,441	2,688	13.37		9.4%	0.1%	-0.5%	9.9%	
Brown F (2 buses)	67,287	73,367	5,404	12.45		65,269	73,204	5,432	12.01		3.1%	0.2%	-0.5%	3.6%	
Yellow G (2 buses)	116,990	73,308	5,326	21.97		126,497	71,802	5,355	23.62		-7.5%	2.1%	-0.5%	-7.0%	
Orange H (2 buses)	108,614	71,150	5,305	20.48		116,603	71,821	5,339	21.84		-6.9%	-0.9%	-0.6%	-6.3%	
Lime I (2 buses)	126,521	89,171	5,186	24.40		131,121	89,652	5,217	25.13		-3.5%	-0.5%	-0.6%	-2.9%	
Teal J (1 bus)	19,280	49,229	2,459	7.84		15,000	66,453	2,635	5.69		28.6%	-25.9%	-6.7%	37.7%	
Aqua K (1 bus)	48,805	42,206	2,673	18.26		51,005	42,690	2,685	19.00		-4.3%	-1.1%	-0.5%	-3.9%	
HCC Express (1 bus) (NC/WH)	5,640	2,436	384	14.70		179	328	16	11.22		3050.8%	643.6%	2303.9%	31.1%	
ISU Tri Towers (2 buses)	151,947	20,216	1,890	80.40		107,729	19,790	1,836	58.69		41.0%	2.2%	3.0%	37.0%	
ISU College Station (2 buses)	39,131	30,780	2,308	16.96		65,035	30,132	2,235	29.10		-39.8%	2.2%	3.2%	-41.7%	
Nite Ride (2 buses)	26,964	24,955	1,875	14.38		27,261	24,890	1,808	15.08		-1.1%	0.3%	3.7%	-4.6%	
Total Fixed Route	1,168,662	746,688	53,412	21.88		1,183,723	764,267	53,281	22.22		-1.3%	-2.3%	0.2%	-1.5%	
Demand Response															
Connect Mobility	32,481	159,746	10,806	3.01		28,072	132,814	9,846	2.85		15.7%	20.3%	9.7%	5.4%	
Connect Late Night	3,968	21,393	1,489	2.66		4,355	23,066	1,762	2.47		-8.9%	-7.3%	-15.5%	7.8%	
Total Demand Response	36,449	181,139	12,295	2.96		32,427	155,880	11,608	2.79		12.4%	16.2%	5.9%	6.1%	
SYSTEM TOTALS	1,205,111	927,827	65,707	18.34		1,216,150	920,147	64,889	18.74		-0.9%	0.8%	1.3%	-2.1%	



		Month: 2014 YTD			
		Target	FY2014	FY2013	% Change
Effectiveness	Total Boardings per Revenue Hour	15.0	18.3	18.7	-2.1%
	Total Boardings per Capita	1.0	9.3	9.4	-0.9%
	Total Boardings per Revenue Mile	1.0	1.3	1.3	-1.7%
Safety	Total Preventable Accidents (Fixed Route and Demand Response)	0.0	8	9	-11.1%
	Preventable Accidents per 100,000 Miles	0.0	74	83	-10.4%
Efficiency	Farebox Recovery Ratio	13.3%	15.2%	15.5%	-1.9%
	Average Fare	\$ 0.68	\$ 0.67	\$ 0.65	3.5%
	Cost per Revenue Hour	\$ 74.22	\$ 80.86	\$ 78.37	3.2%
	Cost per Customer	\$ 5.10	\$ 4.41	\$ 4.18	5.4%
	Operating Assistance Investment per Customer	\$ 4.42	\$ 3.74	\$ 3.53	5.8%
Base Statistics for Calculations	Total Customers		1,205,111	1,216,150	-0.9%
	Total Revenue Hours		65,707	64,889	1.3%
	Total Revenue Miles		927,827	920,147	0.8%
	Total Bloomington-Normal Population (per the 2010 US Census)		129,107	129,107	0.0%
	Total Operating Expense		\$ 5,313,182.00	\$ 5,085,627.00	4.5%
	Total Operating Revenue (includes all directly-generated revenue such as Universal Access)		\$ 806,805.00	\$ 786,941.00	2.5%

Analysis & Interpretation

CONNECT TRANSIT
Strategic Plan
Management Report
February 2014

TABLE OF CONTENTS

<u>Section</u>	<u>Pages</u>
EXECUTIVE SUMMARY	3-4
NEXT STEPS	12
ATTACHMENTS	
SOAR vs SWOT	5
Mission/Vision	6
Strengths	7
Opportunities	8
Aspirations	9
Results	11

EXECUTIVE SUMMARY

VISION

To be the reliable and safe transportation connecting communities

MISSION

To provide:

- **Independence** through transportation to live, learn, work and play
- **Added economic value** through transportation opportunities, to our community, that is environmentally and economically sustainable
- **Service** to our customers that is safe, affordable, reliable, accessible and valued

STRATEGIC GOALS

FUNDING

- *Sustainable funding development*
- *Continued responsible stewardship of funds received*
- *Stable funding sources*
- *Ongoing review of fare structure*
- *Planning for improvements*
- *Environmentally sustainable service*

EXPANDED SERVICES (Customer focus)

- *Amenities*
- *More frequent services*
- *Park and ride/regional potential*
- *Incorporating value-added technology*
- *Maximize what we currently have*

AWARENESS AND EDUCATION

- *Improve digital presence*
- *Community outreach*
- *Market research*

KEY RELATIONSHIPS/PARTNERSHIPS

- *Advocacy/governmental affairs*
- *Expanded strategic relationships*
- *Leverage partnerships with key community groups*
- *Partnerships with other transportation providers*

MEASURING RESULTS THROUGH QUARTERLY UPDATES

FUNDING:

- *What are we doing to develop sustainable funding sources?*
- *Where are we in planning and developing new funding sources?*

EXPANDED SERVICES (Customer Focus)

- *What are we doing to build our customer value?*

AWARENESS AND EDUCATION

- *What have we done to raise awareness of Connect Transit and how do we move the meter?*

KEY RELATIONSHIPS/PARTNERSHIPS

- *What are our current relationships and how are they helping us reach our goals?*
- *Who do we approach next and how do we demonstrate how Connect Transit positively impacts them?*

SWOT vs SOAR

SWOT

Strengths

- * Organizational Resources and capabilities
- * Basis for developing differentiating advantage

Weaknesses

- *Absence of strength; lack of resource or capability

Opportunities

- *External circumstances that support profit and growth
- *Unfulfilled customer needs, new technology, favorable legislation

Threats

- *External circumstances that hinder profit and growth
-

SOAR

Strengths

- *What are we doing really well?
- *What do our strengths tell us about our skills?

Opportunities

- *How do we collectively understand outside threats?
- *How can we reframe to see the opportunity?
- *What is the enterprise asking us to do?
- *How can we best partner with others?

Aspirations

- *Considering Strengths and Opportunities, who should we become?
 - *How can we make a difference for our organization and for its stakeholders/customers?
-

Results

- *How do we tangibly translate our Strengths, Opportunities and Aspirations?
-

VISION and MISSION

VISION

To be reliable and safe transportation connecting communities

MISSION

To provide:

- *Independence through transportation to live, learn, work and play*
- *Added economic value, through transportation opportunities, to our community that is environmentally and economically sustainable*
- *Service to our customers that is safe, affordable, reliable, accessible and valued*

STRENGTHS

Relationships

- **Have support of community**
- **Strong political support -
Local, state and federal**
- **Our universal agreements
e.g. State Farm**
- **Strong relationship with
Higher Education
Heartland community College
Lincoln
Illinois State University**
- **Uptown Station**

Management/Staff

- **Have positively engaged
Board and dedicated, loyal
management staff**
- **Strong, transit-experienced
General Manager**
- **Good, cohesive Management
Team
Collaborative/open/inclusive/
honest/respectful**
- **Our Drivers
Tenure/experience
Customer centric**
- **Our Mechanics**

General Corporate

- **Our new brand and image**
- **Route restructuring and
resulting bond developed
with the community
through the process**
- **Very adaptable**
- **Reliable dependable system**
- **Infrastructure in place
Policies and procedures
Standards**
- **Currently have sufficient
funding for ooperations**

Facilities/Equipment

- **Facilities are in good shape**
- **Our buses
Comfortable, safe, easy to use**
- **It's a safe system**
- **Reliable, dependable system**
- **Technology is being
embraced**
- **Operations are solid**

Customers/Riders

- **Engaged core ridership in
the community**
- **Increased ridership
2.1 million annual passenger
trips**
- **Seniors ride free (with ID)**
- **Affordable fares**

OPPORTUNITIES

First Step – identifying constraints/mandates/regulations/needs

- **Relationship with union/workforce**
- **Funding**
- **Transit system vs transit authority**
- **Aging population**
- **Younger, potential first time drivers (licensure/care)**
- **Expanding service area**
- **Geographic layout of the community**
- **Alternative fuels (California is an example)**
- **Improvement, evolution, enhancement of transfer points**
- **Marketing/image**
- **Image of “who rides”**
- **New government mandates (i.e. safety, etc.)**
- **Safety (personal)**
- **Key relationships/partnerships**
- **Downtown Bloomington revitalization/development**
- **Bloomington-Normal industry trends**
- **Community trends (being dialed in)**
- **Affordable Care Act – impact on part-time employees**

ASPIRATIONS

1. FUNDING

- Sustainable funding development
- Continued responsible stewardship of funds received
- Stable funding sources
 - Federal/state/local governments sources
- Ongoing review of fare structures
 - Increase fare box revenues
 - Increase non-fare revenues
 - i.e. advertising, real estate, corporate sponsorship, etc.)
- Planning for improvements
 - Bus Rapid Transit/Demand Response Transit
 - Regional Service
 - Alternate Fuels
 - Environmentally sustainable service

2. EXPANDED SERVICES (Customer focus)

- Amenities
 - i.e. shelters, value-added technology)
- More frequent services (hours/days)
- Park and ride/regional potential
- Incorporating value-added technology
- Maximize what we currently have

3. AWARENESS and EDUCATION

- Improve digital footprint presence
 - i.e. social media, website, etc.)
- Community outreach
 - i.e. bus buddies, how to ride a bus in B-N, etc)
- Market research
 - Management and use of data

4. KEY RELATIONSHIPS/PARTNERSHIPS

- Advocacy/governmental affairs
- Expanded strategic relationships
 - Schools
 - Local businesses
 - Local government
- Leverage partnerships with key community groups

- **i.e. Economic Development Council, Convention & Visitors Bureau, McLean County Chamber of Commerce**
- **Partnerships with other transportation providers**

RESULTS

FUNDING

- **What are we doing to develop sustainable funding sources?**
- **Where are we in planning and developing new funding sources?**

EXPANDED SERVICES (Customer Focus)

- **What are we doing to build our customer value?**

AWARENESS AND EDUCATION

- **What have we done to raise awareness of Connect Transit and how do we move the meter?**

KEY RELATIONSHIPS/PARTNERSHIPS

- **What are our current relationships and how are they helping us reach our goals?**
- **Who do we approach next and how do we demonstrate how Connect Transit impacts them?**

NEXT STEPS

To be successful and assure attention and progress is made toward achieving results, it is imperative that:

- 1. Board and Management commit to a quarterly report/review of status of the Aspirations**
 - a. Guarantees focus on strategic decisions**
 - b. Provides ongoing updates on the various Strategies which includes:**
 - i. accomplishments**
 - ii. current actions**
 - c. Provides for agreed upon restatement of Results if unexpected external environment leads to improved opportunity or impairment/postponement of action**
 - d. Provides process for accountability**
- 2. A score card, or updated summary of results/actions should be developed by Management for use by the Board/Management regarding measuring progress**
- 3. Assures Strategic Plan remains strategic and also does not get pushed aside or put on a shelf**