

SALEM AREA MASS TRANSIT DISTRICT  
BOARD OF DIRECTORS

**SUPPLEMENTAL AGENDA PACKET**

**Work Session:**

TransPro Dashboard .....	<b>1</b>
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**Board of Directors Meeting:**

C.1 FY 2022 Needs Assessment Presentation .....	<b>9</b>
Approval of a Three-Year Labor Agreement with the Amalgamated Transit Union (ATU) 757 for the period of July 1, 2022 through June 30, 2025 .....	<b>35</b>
G.1 Strategic Plan Adoption Presentation .....	<b>37</b>
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555 Court St NE, Suite 5230, Salem, OR 97301 | 503-588-2424 PH 503-566-3933 FAX | [Cherriots.org](http://Cherriots.org)

# TransDASH

*Value Over Volume*

A National Transit Dashboard for  
Measuring & Communicating the Value  
of Transit to Your Community and The Nation

BD | 1







**For Nearly  
50 Years**

Public transit ridership has been declining while taxpayer revenue to support transit has steadily increased.



Transit today  
is about  
delivering  
**VALUE**  
rather than  
simply  
**Volume**



## Public transit represents



Climate



Health



Volume



Congestion



Quality



Community Relevance



Productivity



Access



Equity



Economic Impact

# Finally, there's a new national tool for measuring Public Transit VALUE



### The Public Transportation Industry's National Performance Dashboard

It's a new era in public transportation!

Transit has always delivered community value, but without recognition or appreciation for its community service beyond a ridership number.

With TransDASH digital dashboard transit leaders finally have the platform needed to measure performance and report community value.

Registered TransDASH agencies now have access to a national transit dashboard system that tells their real community value story.

[Request TransDASH Demo](#)



#### TransDASH was designed by TransPro to:

- > Monitor meaningful performance outcomes
- > Be accessed from the agency's own website
- > Track historic agency performance
- > Compare agency performance to national peers
- > Deliver reports for Boards and stakeholders

[National Dashboard](#)

[Agency Dashboard](#)



Created by public transit leaders nationwide

# Working group consensus

## TransDASH Prioritized Goals



Smart Outcomes that measure  
Value *Not just Volume*

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Community centric value first with  
national metric comparison

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Communications & Reporting tools

## TransDASH Outcomes

### Customer Value



- ✓ Volume
  - ✓ **Satisfaction**
  - ✓ **Connectivity**
- 

### Community Value



- ✓ Congestion
  - ✓ **Community Relevance**
  - ✓ Health
  - ✓ **Climate**
  - ✓ **Equity**
- 

### Taxpayer Value



- ✓ Productivity
- ✓ Economic Impact



Landing Page

Scorecard

Strategic Areas

Download PDF



### Mission:

Creating community connections.

### Vision:

We deliver valued mobility options that Inspire community pride.

### Values

C H E R R I O T S

### Agency News



Example Text 1

### Community Value

April 1 - June 30, 2022



Points Earned    Goal Points  
35

### Customer Satisfaction

April 1 - June 30, 2022



Points Earned    Goal Points  
30

### Culture of Ownership

April 1 - June 30, 2022



Points Earned    Goal Points  
20

### Financial Sustainability

April 1 - June 30, 2022



Points Earned    Goal Points  
15



Landing Page

Scorecard

Strategic Areas

Download PDF

### Community Value

Metrics  < >

### Outcome News

< >

*Example Text 1*

#### Community Relevance



Actual

Goal



#### Connectivity Index



Actual

Goal



#### Net Greenhouse Gas Emission Benefit



Actual

Goal



#### Connectivity Disparity Index

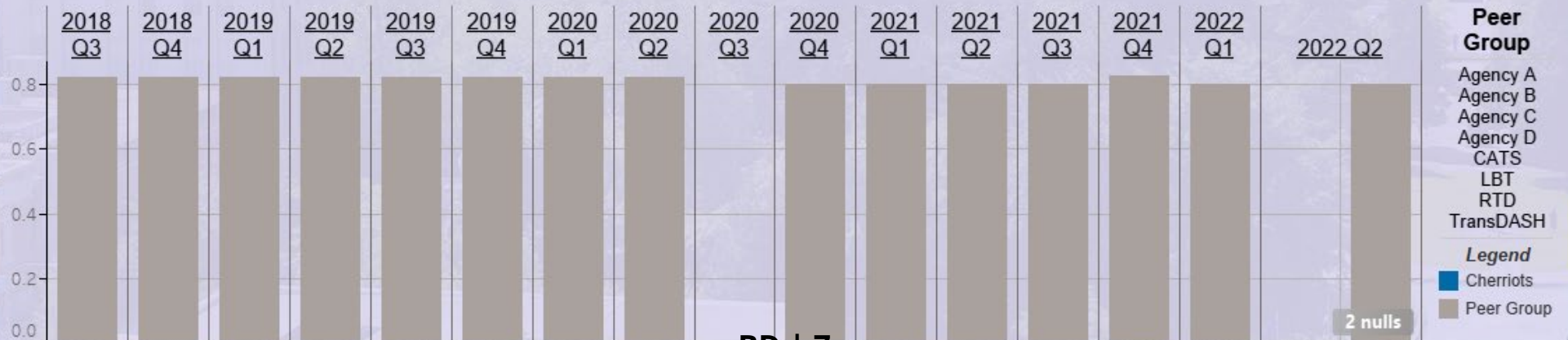


Actual

Goal



#### Cherriots Community Relevance - Overall Performance Over Time



TransDASH provides your team:

- Relevant Comparative Outcomes
- Reporting Tools
- Local & National Perspectives
- Digital & Current Data
- Peer Benchmarks

- ✓ Full access to a National Performance Dashboard
- ✓ Ability to compare agency peer performance vs peer group
- ✓ Ability to compare agency performance seasonal performance (Q1 vs Q1 only)
- ✓ Digital presentation of agency specific Outcomes
- ✓ Digital presentation of agency Key Performance Indicators (compared to peers, seasonal, historic performance)
- ✓ Participation in a virtual National Quarterly Performance presentation showing industry performance trends and agency leaders by Outcomes and KPIs
- ✓ Participation in an in-person Annual National Performance presentation showcasing industry results and agency leaders by Outcomes and KPIs
- ✓ Comparative reporting of agency performance vs agency goals
- ✓ Digital presentation of agency specific Outcomes
- ✓ Development of agency specific quarterly Performance Scorecard
- ✓ Leadership team workshop to align on agency Success Outcomes

# FY22 Needs Assessment

Identifying current unmet  
transit needs





# Why a Needs Assessment?

Biennial service planning process –

- What challenges are riders and non-riders facing now?
- What can we do to improve in the near future?

# Defining unmet transit needs

Any need in the region for additional public transportation services to meet existing basic mobility needs currently not being met –

- By existing bus service
  - “Buses don’t come often enough”
  - “I work late on Saturdays and can’t get home”
- By alternative services
  - “I need to get to Portland, but POINT is too expensive”
  - “I like the flexibility of TNCs, but not the price”

# Criteria to consider – Can Cherriots meet the need?

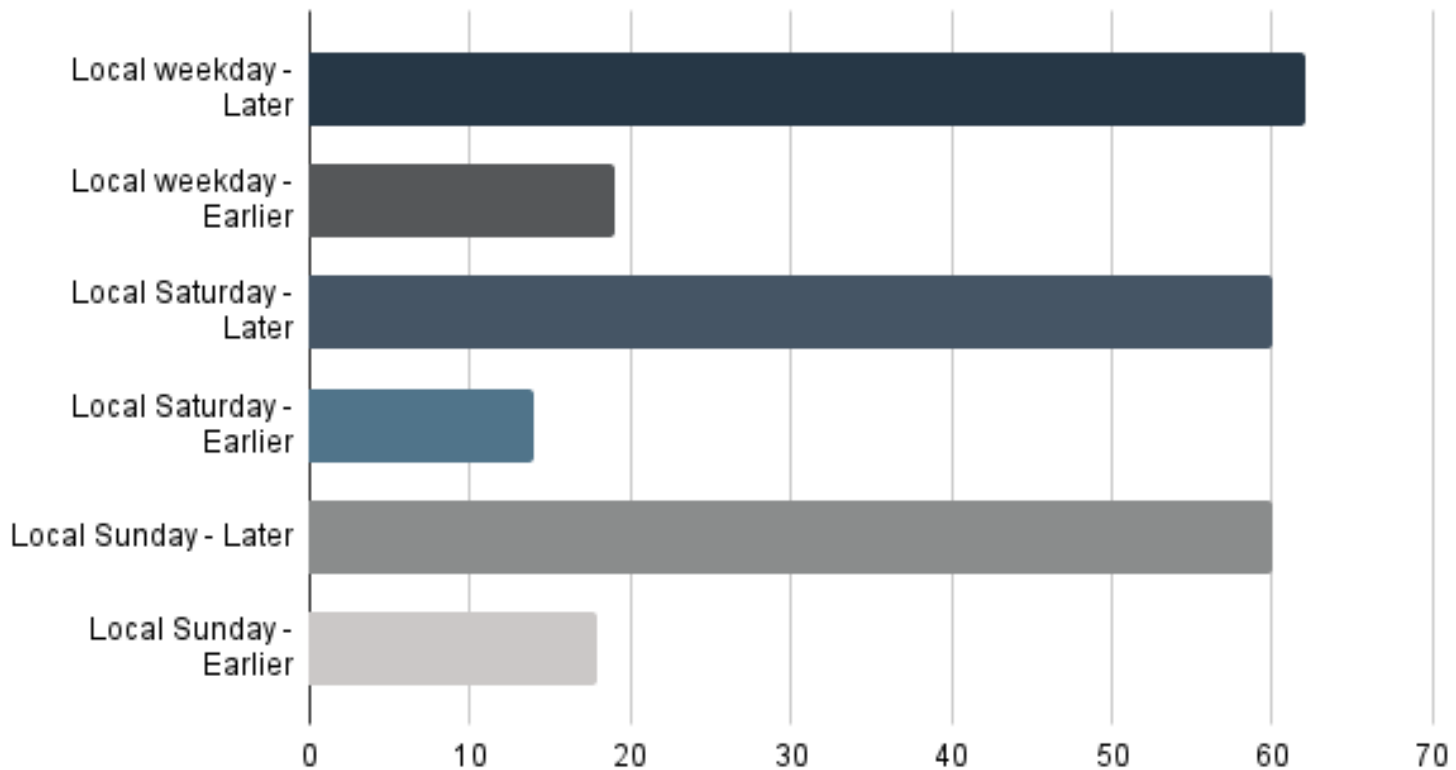
- Consistency with design standards
- Safety and compliance with local, state, and federal laws and regulations
- Productivity and efficiency targets
- Impact on performance targets for the overall system
- Available funds



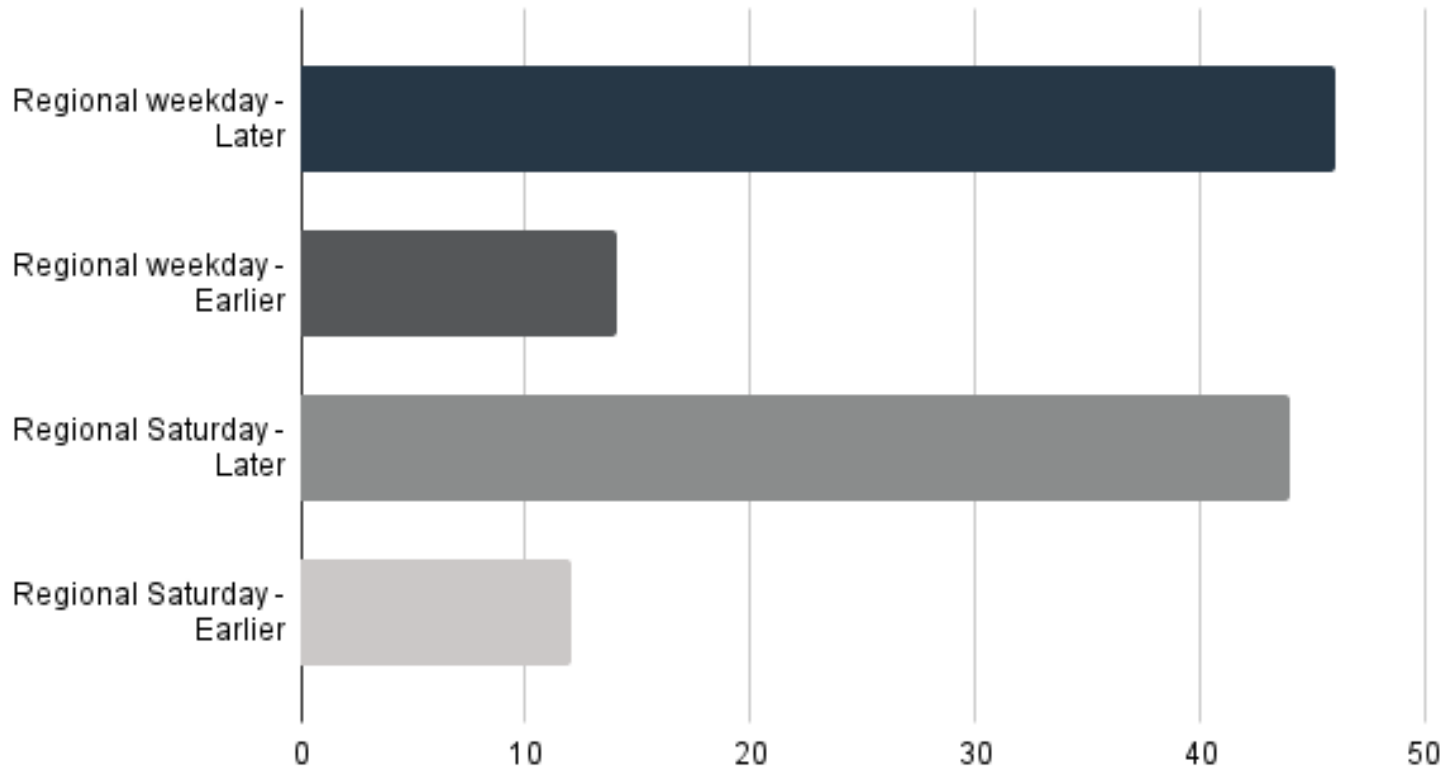
# Who we asked and how

- 2021 Rider Survey
  - Conducted on-board buses in fall 2021
  - Rider focused
- LRTP General Public Survey
  - Conducted online and in-person in winter 2021/2022
  - Riders, non-riders, community stakeholders
- Service Idea Tracking Sheet
  - Comments received by Planning staff since 2018
  - Frontline employees, riders, non-riders
- A combined total of 2,366 comments

# What we heard – Span of service for Cherriots Local

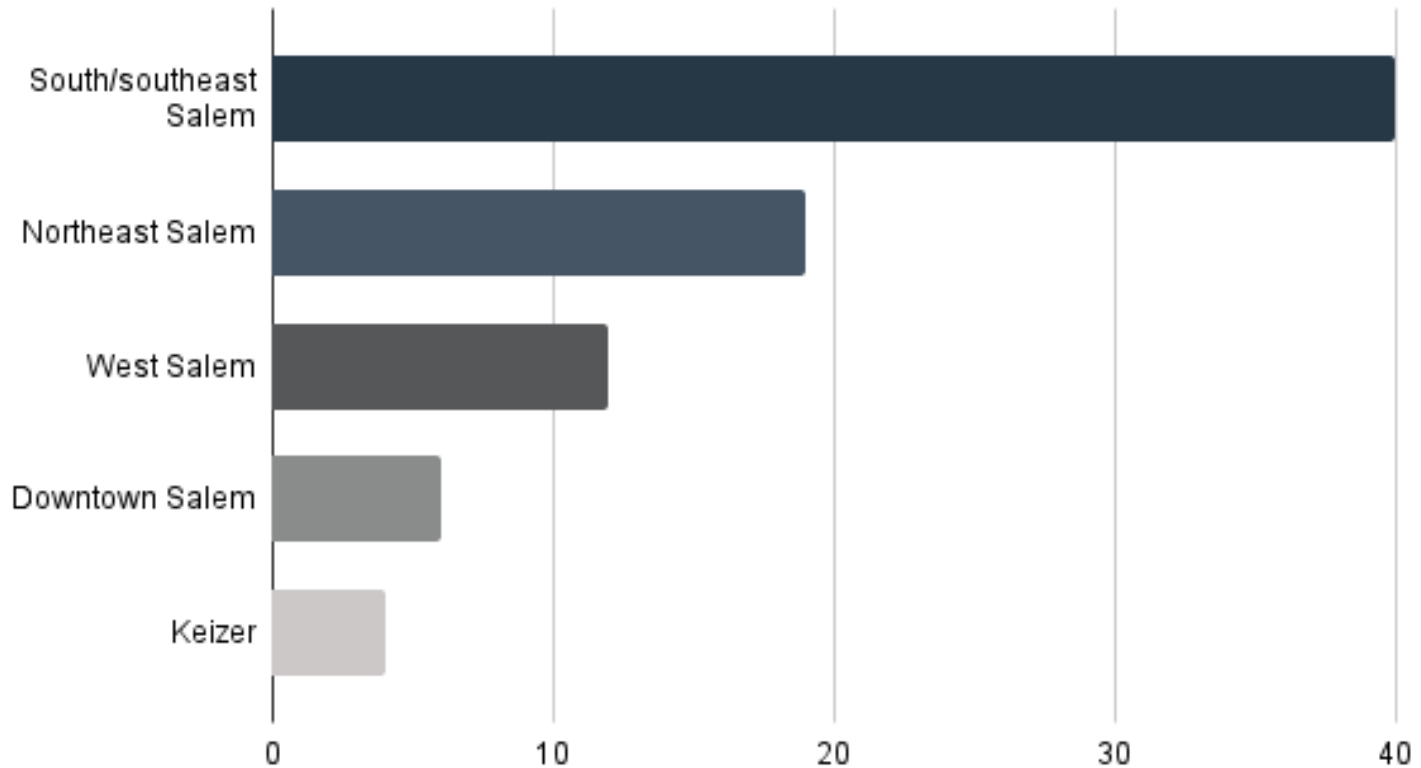


# What we heard – Span of service for Cherriots Regional

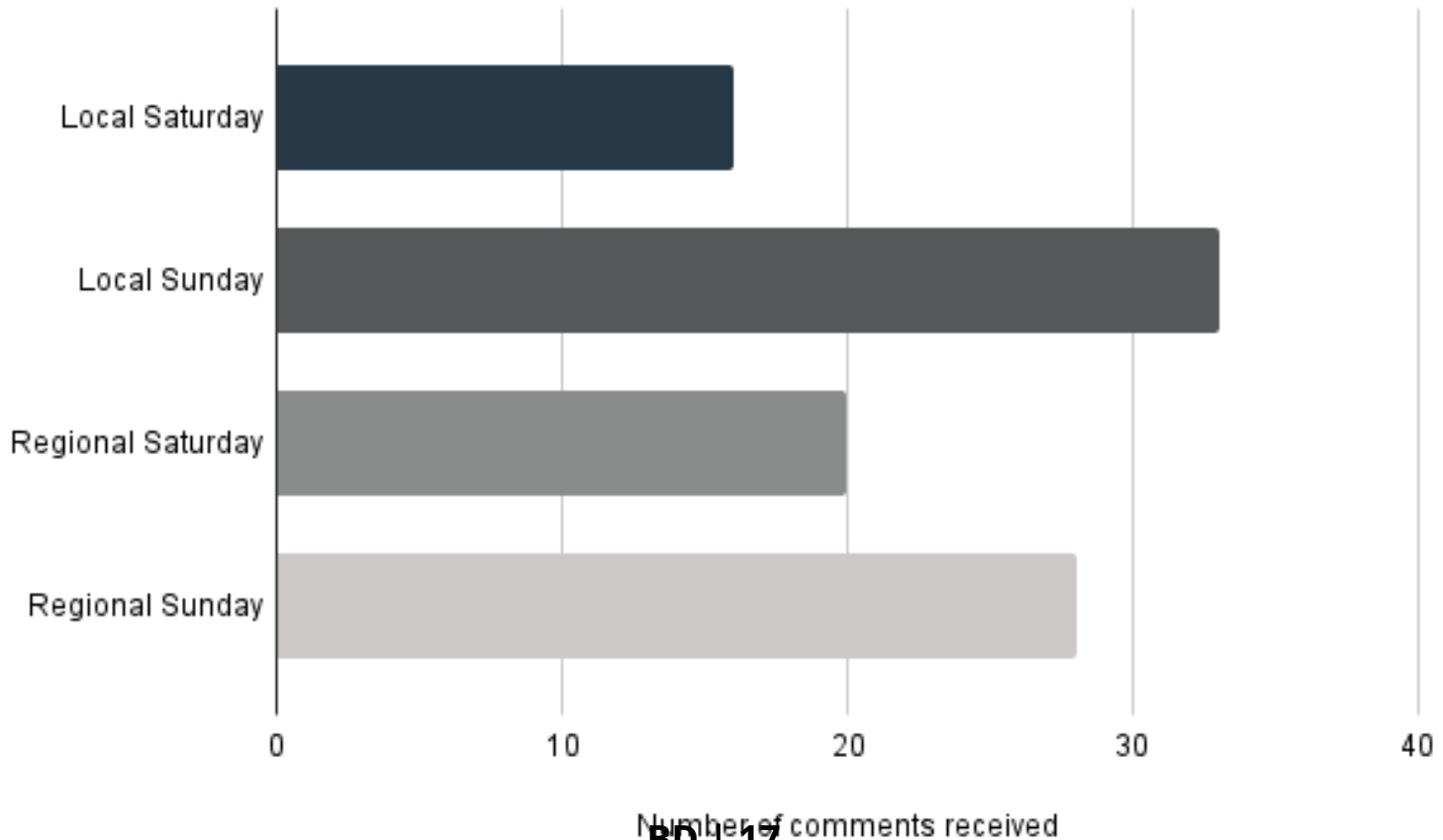




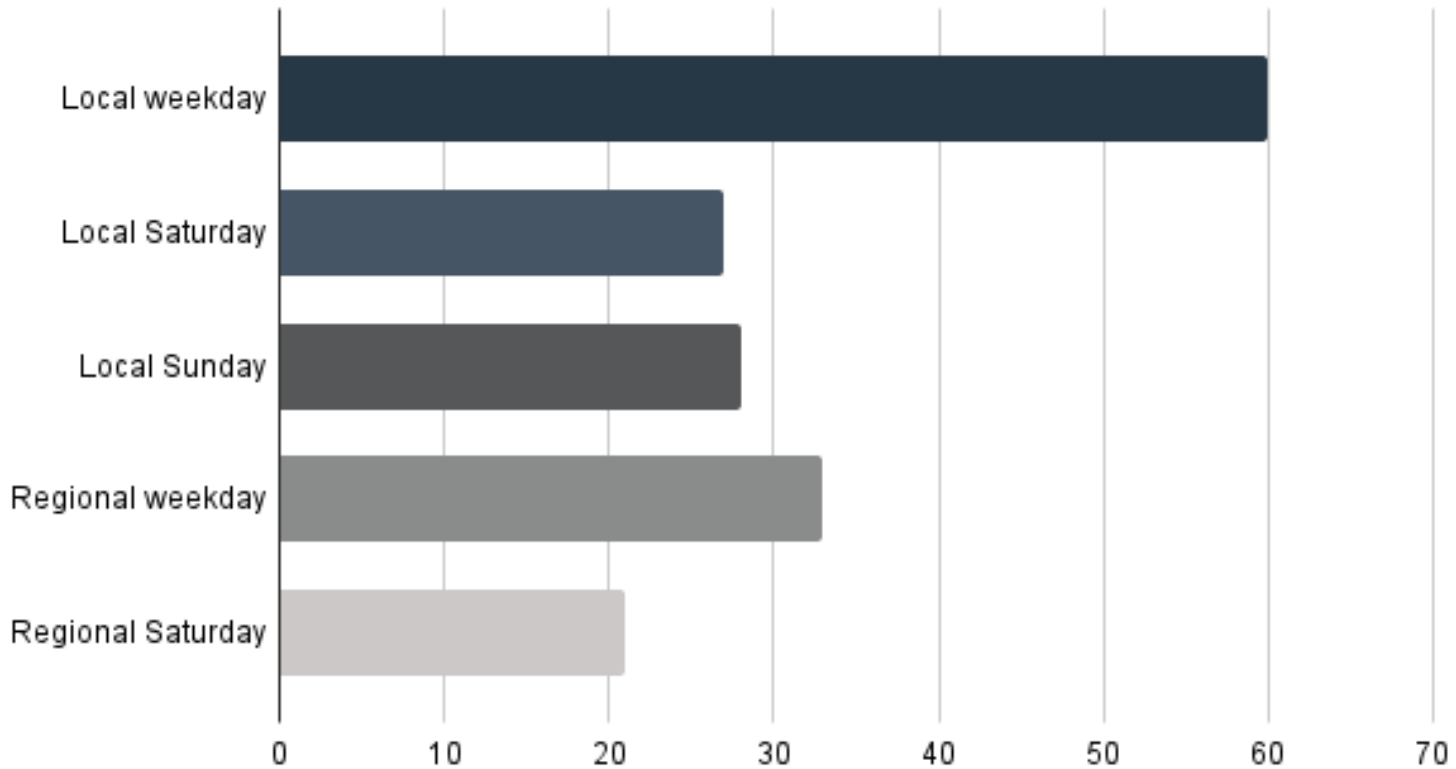
# What we heard – New service areas for Cherriots Local



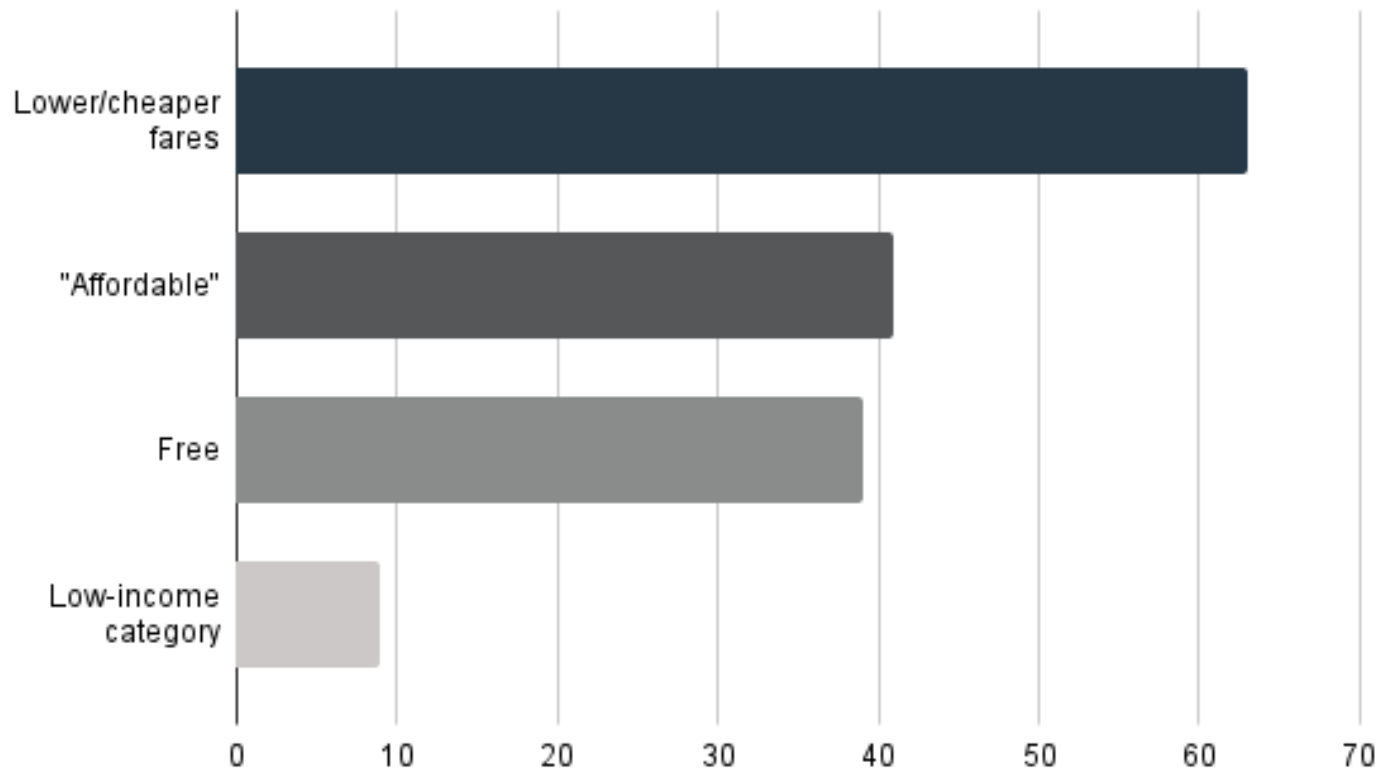
# What we heard – Weekend service expansions



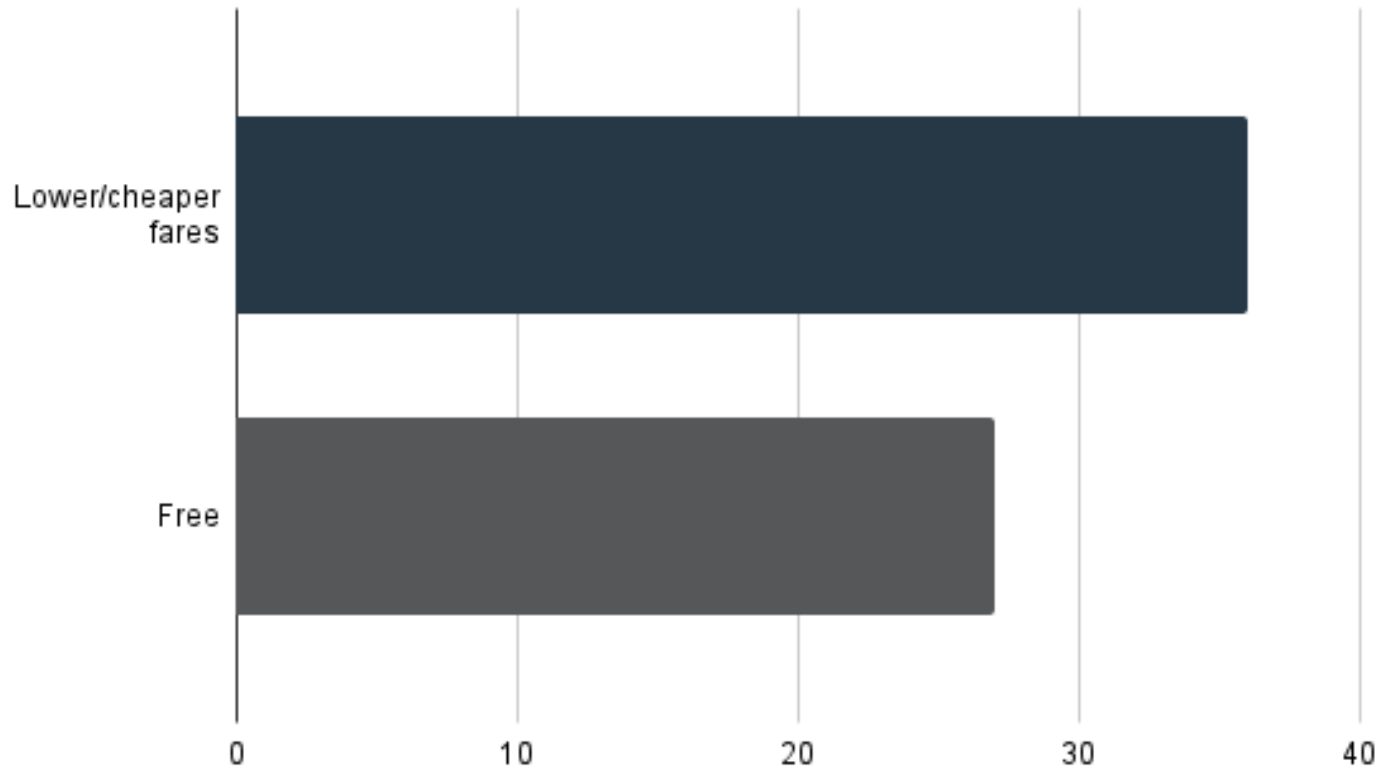
# What we heard – Frequency improvements



# What we heard – Fare structure for Cherrriots Local

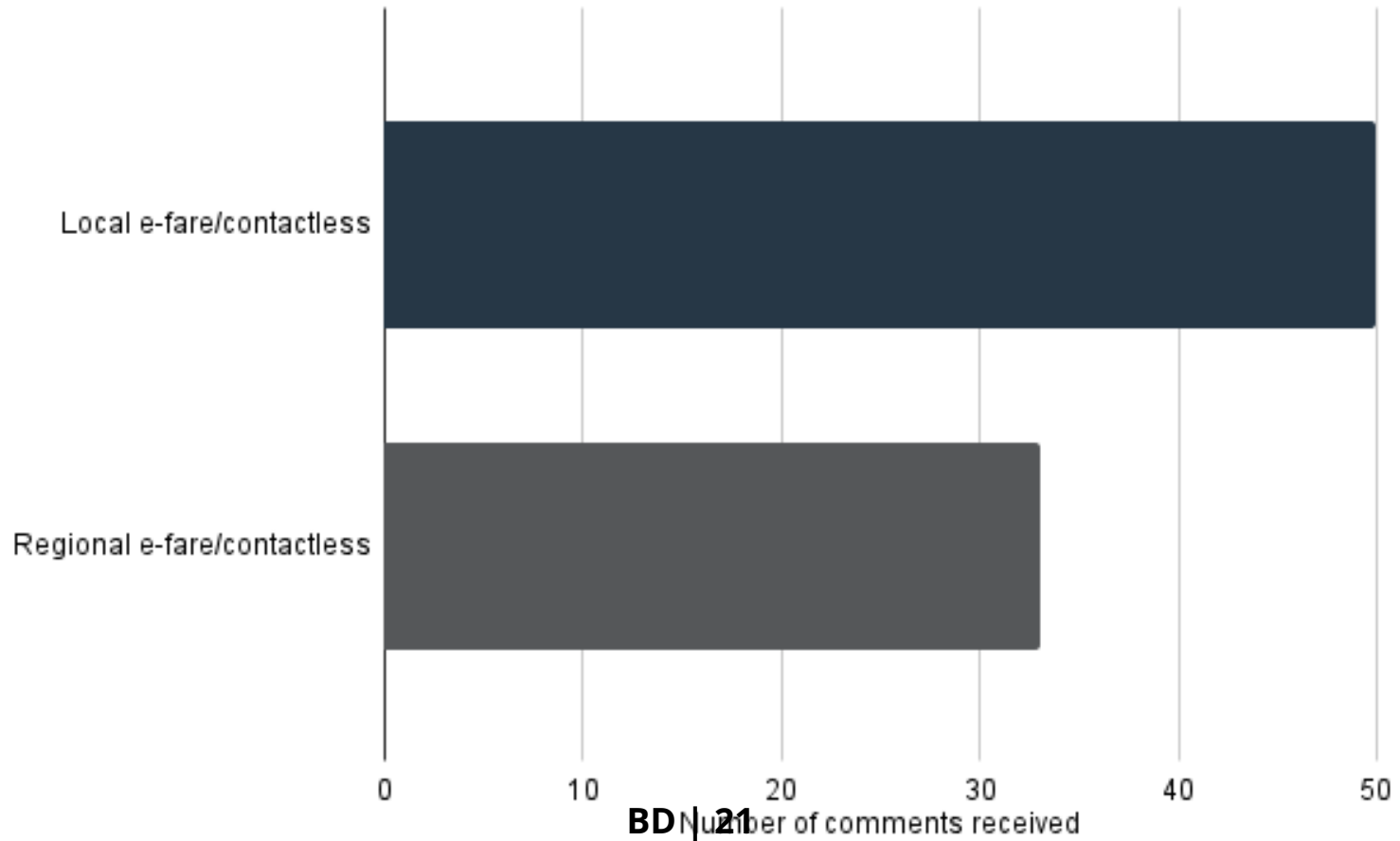


# What we heard – Fare structure for Cherriots Regional

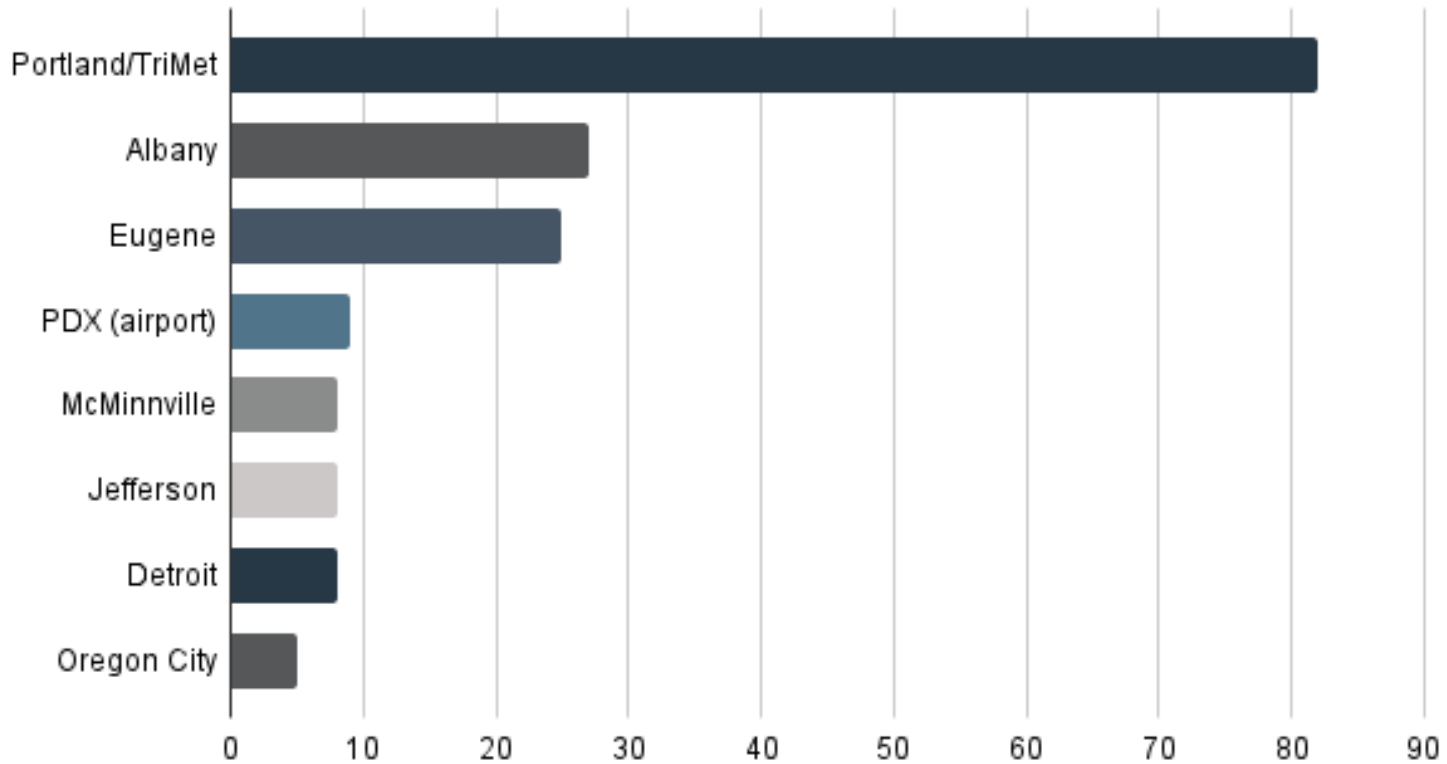




# What we heard – Fare Technology

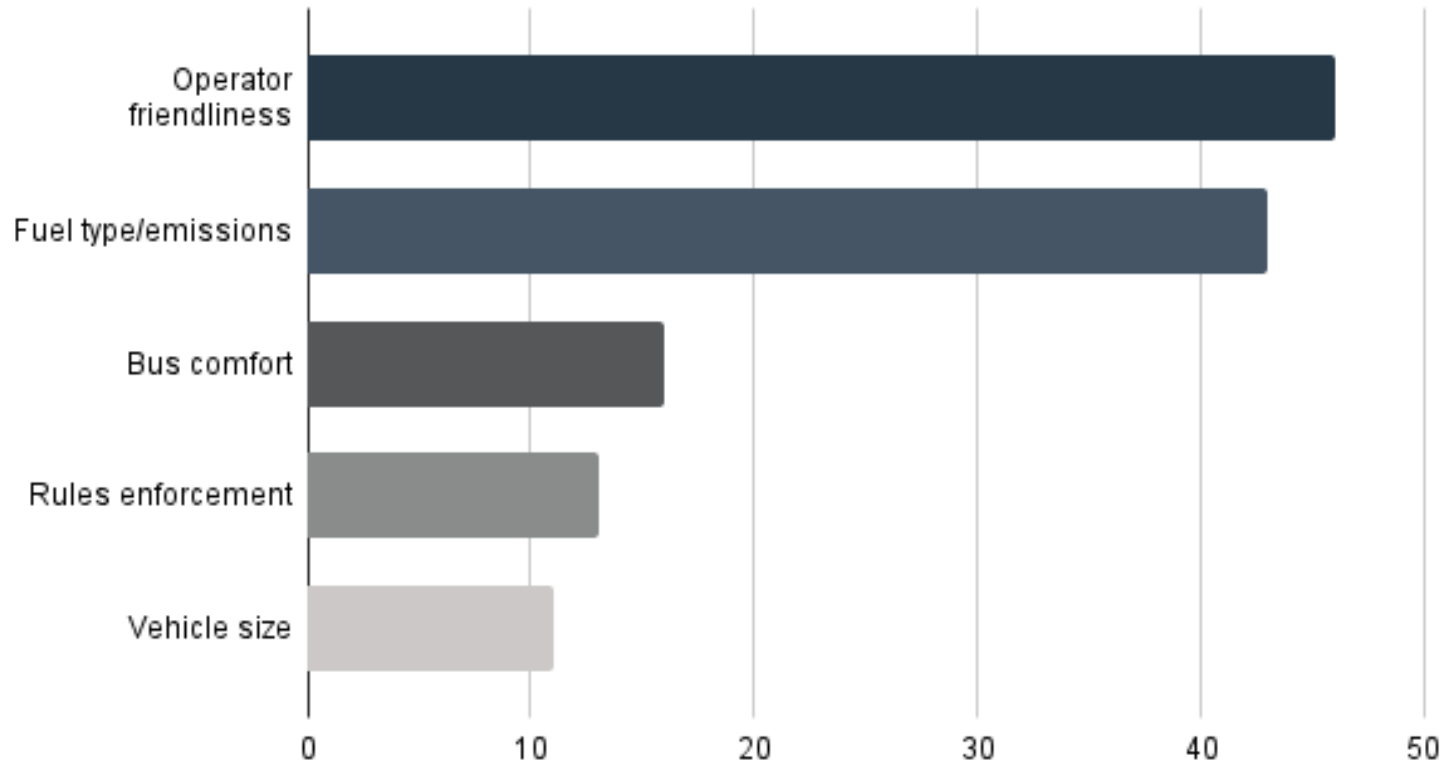


# What we heard – Intercity requests



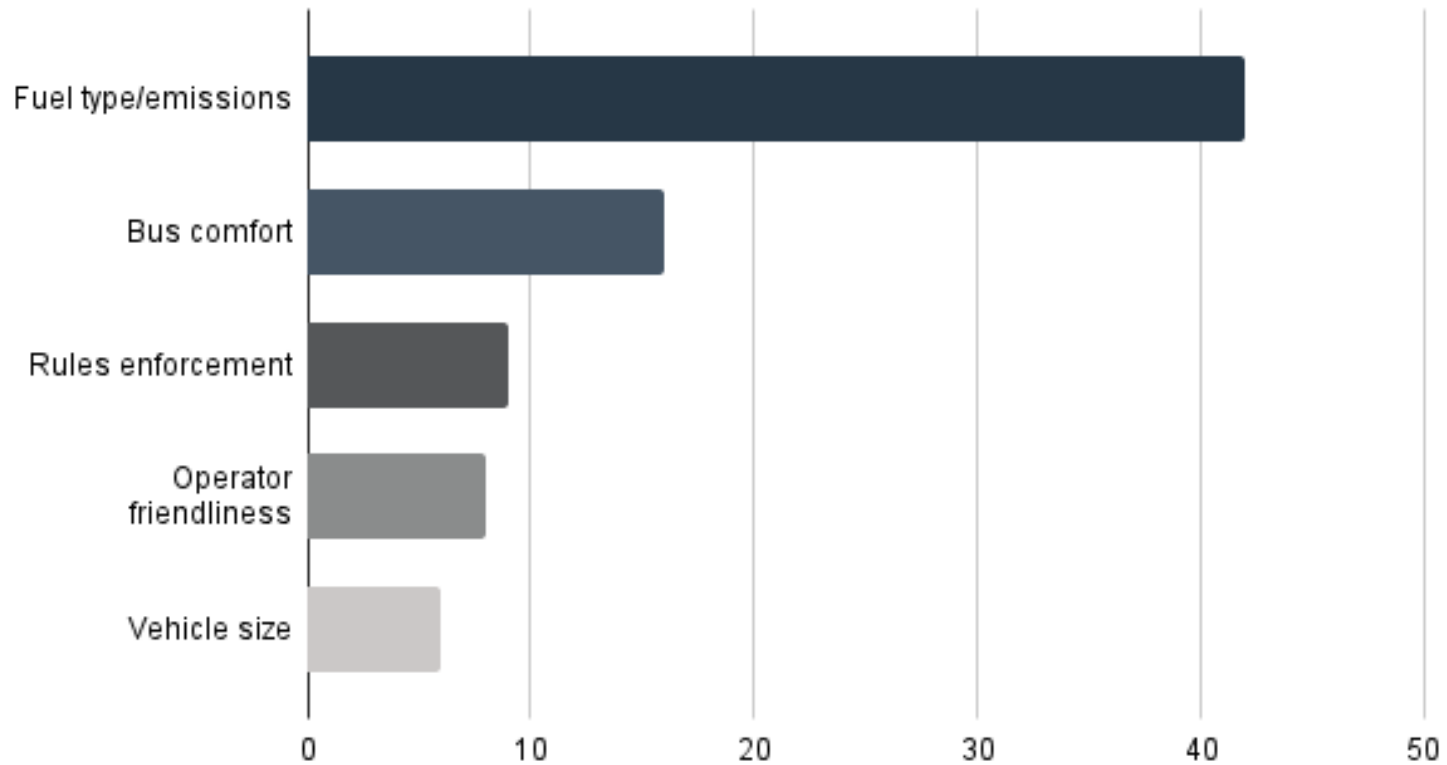
Number of comments received

# What we heard – Local service operations



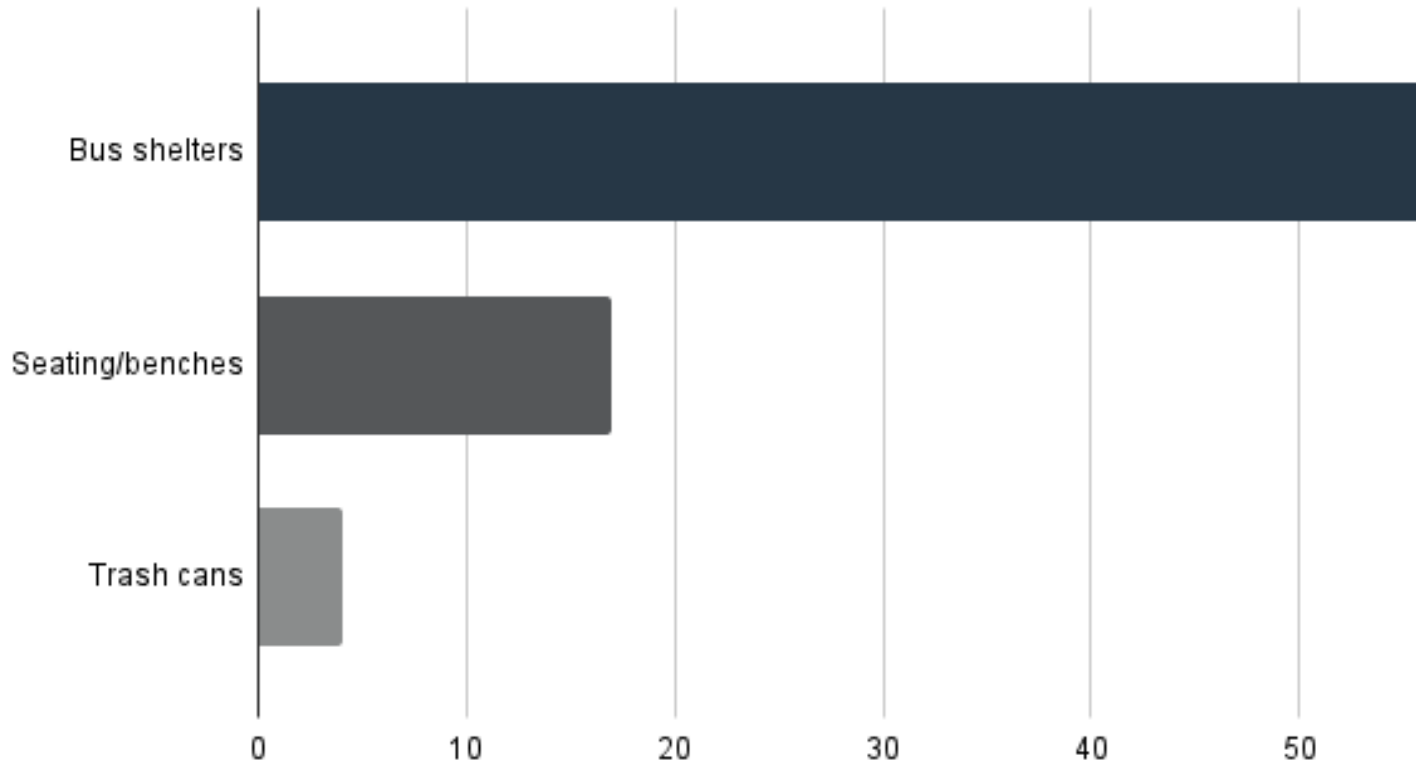
Number of comments received

# What we heard – Regional service operations



Number of comments received

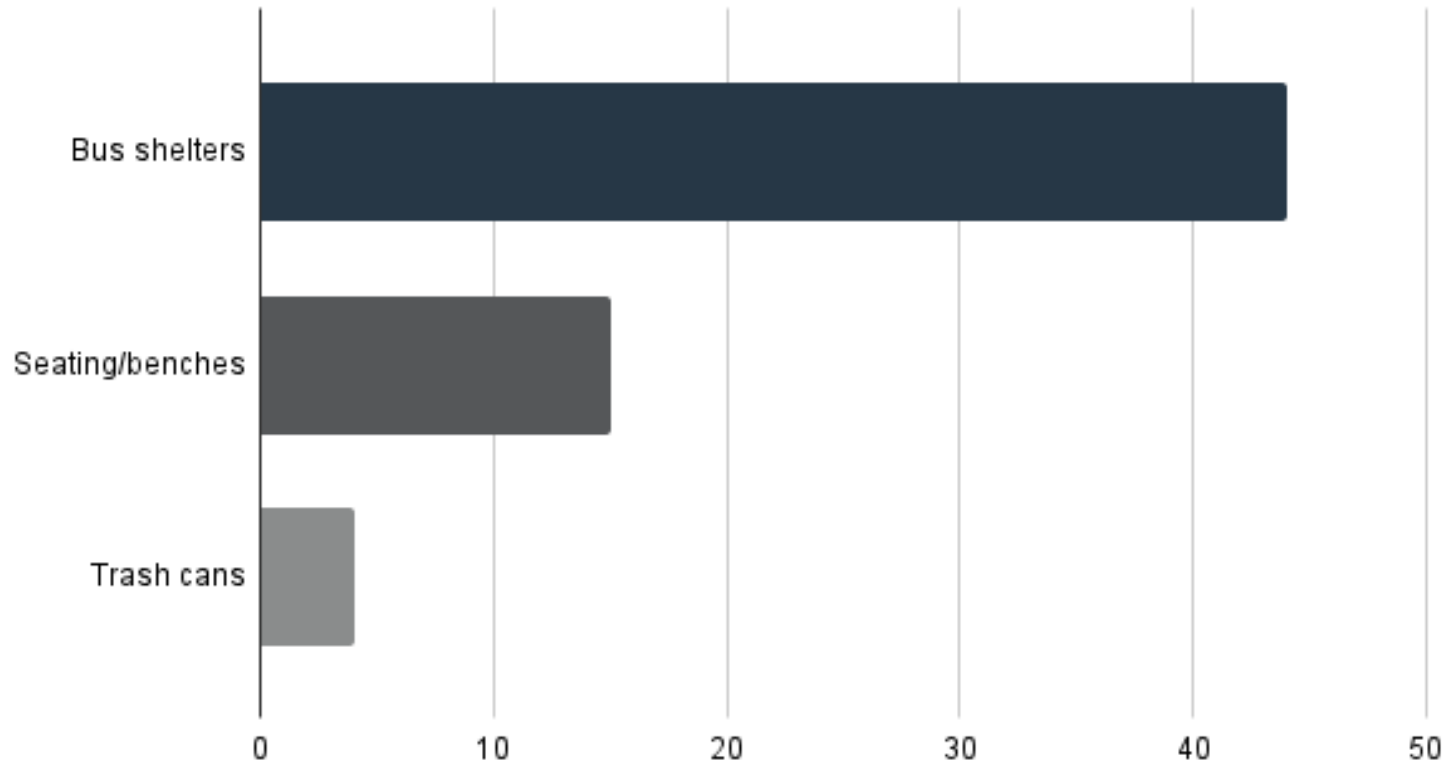
# What we heard – Local system bus stop amenities



Number of comments received

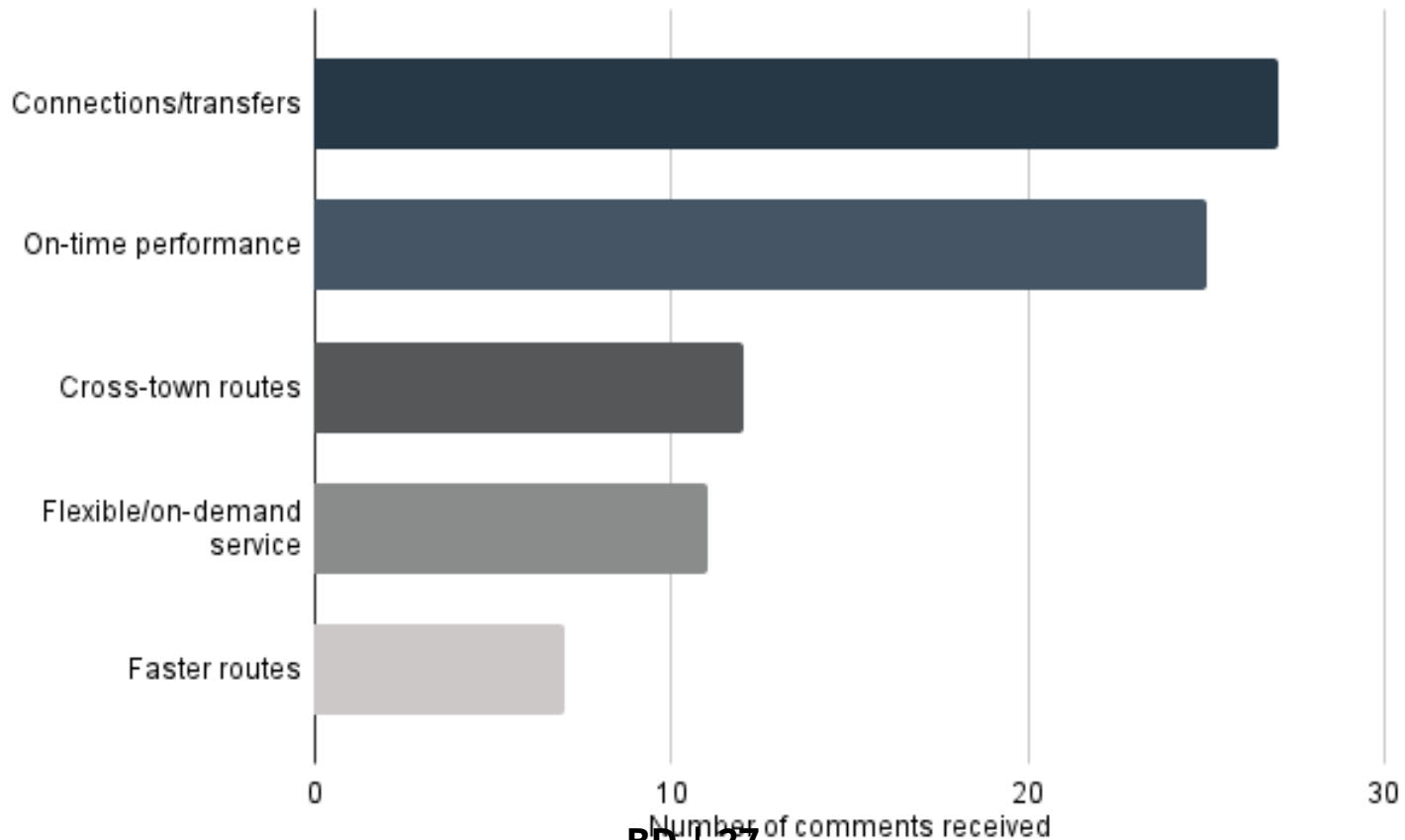


# What we heard – Regional system bus stop amenities

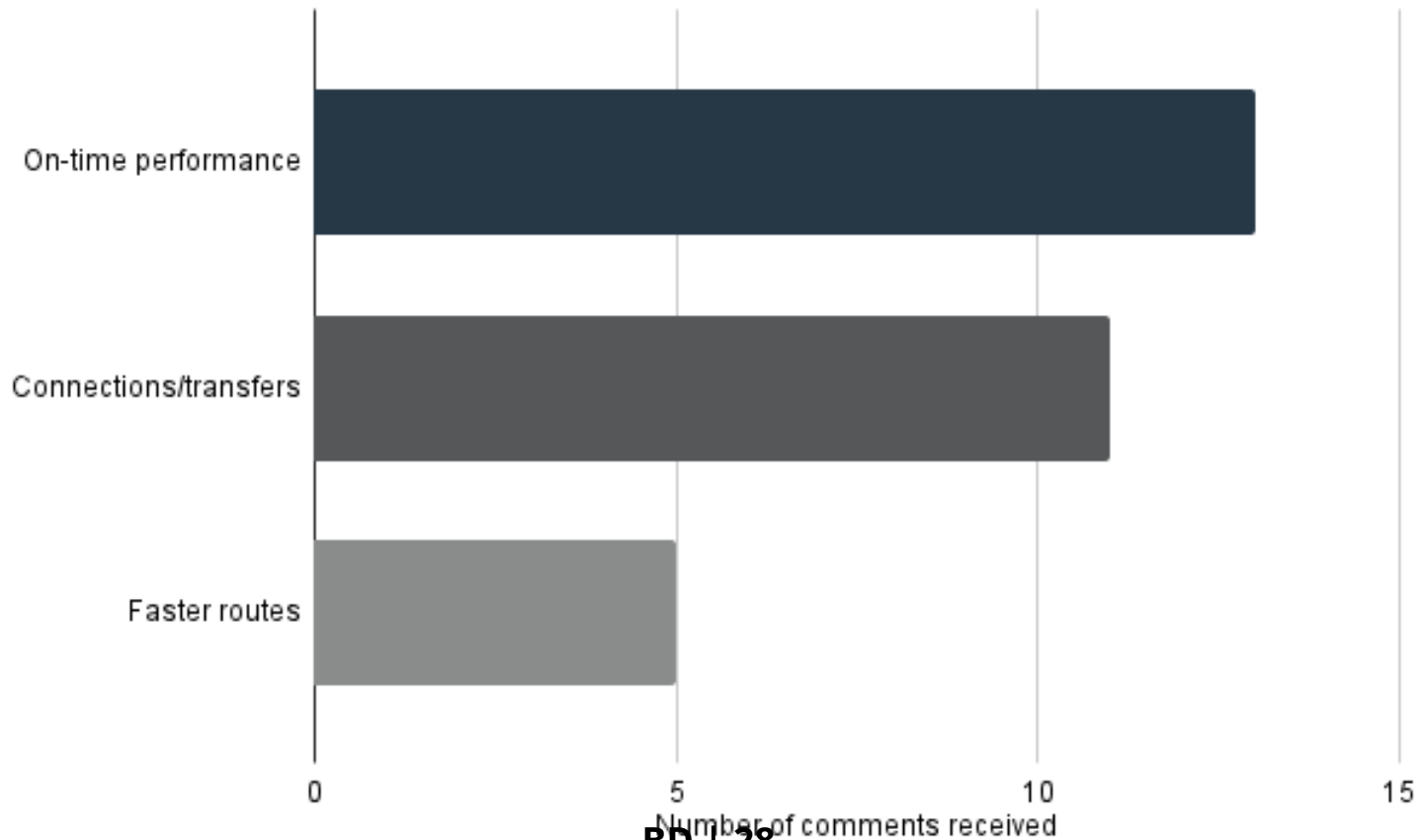


Number of comments received

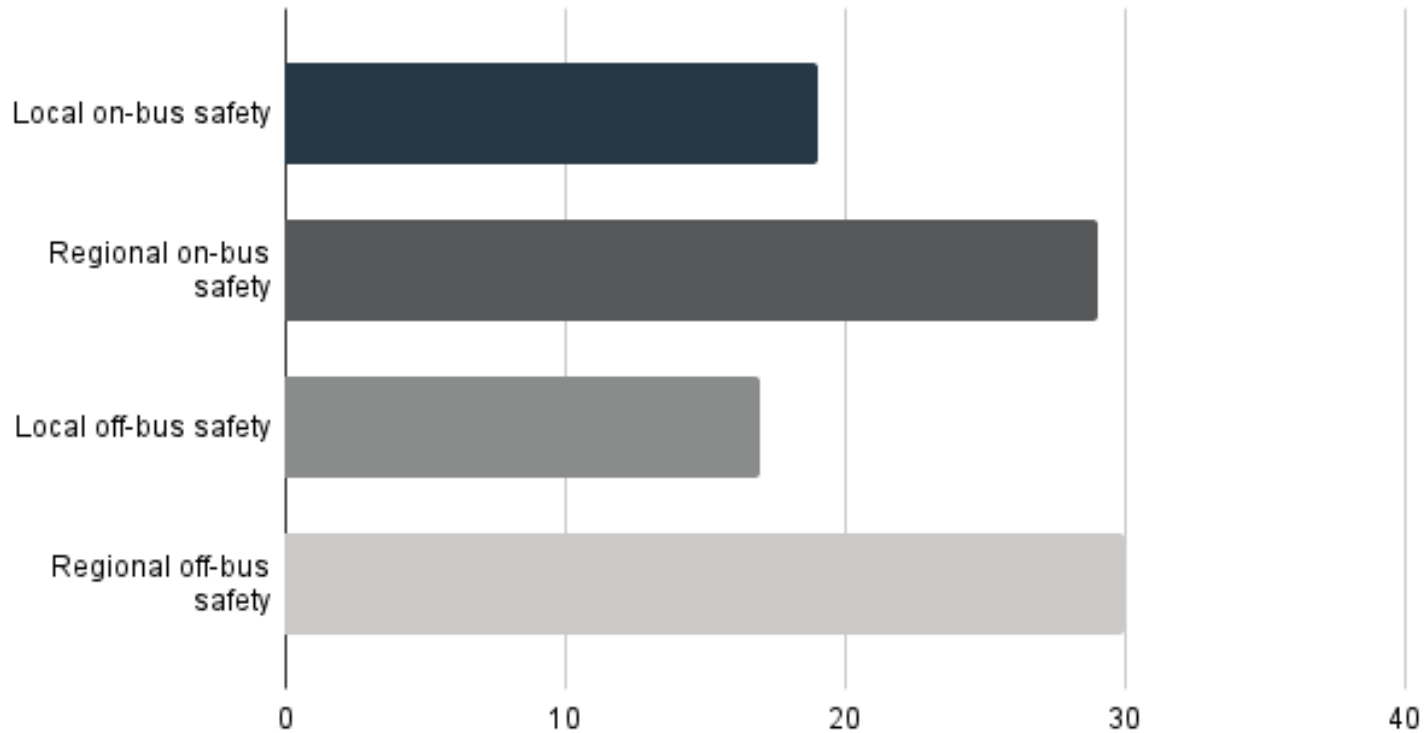
# What we heard – Local system service planning



# What we heard – Regional system service planning

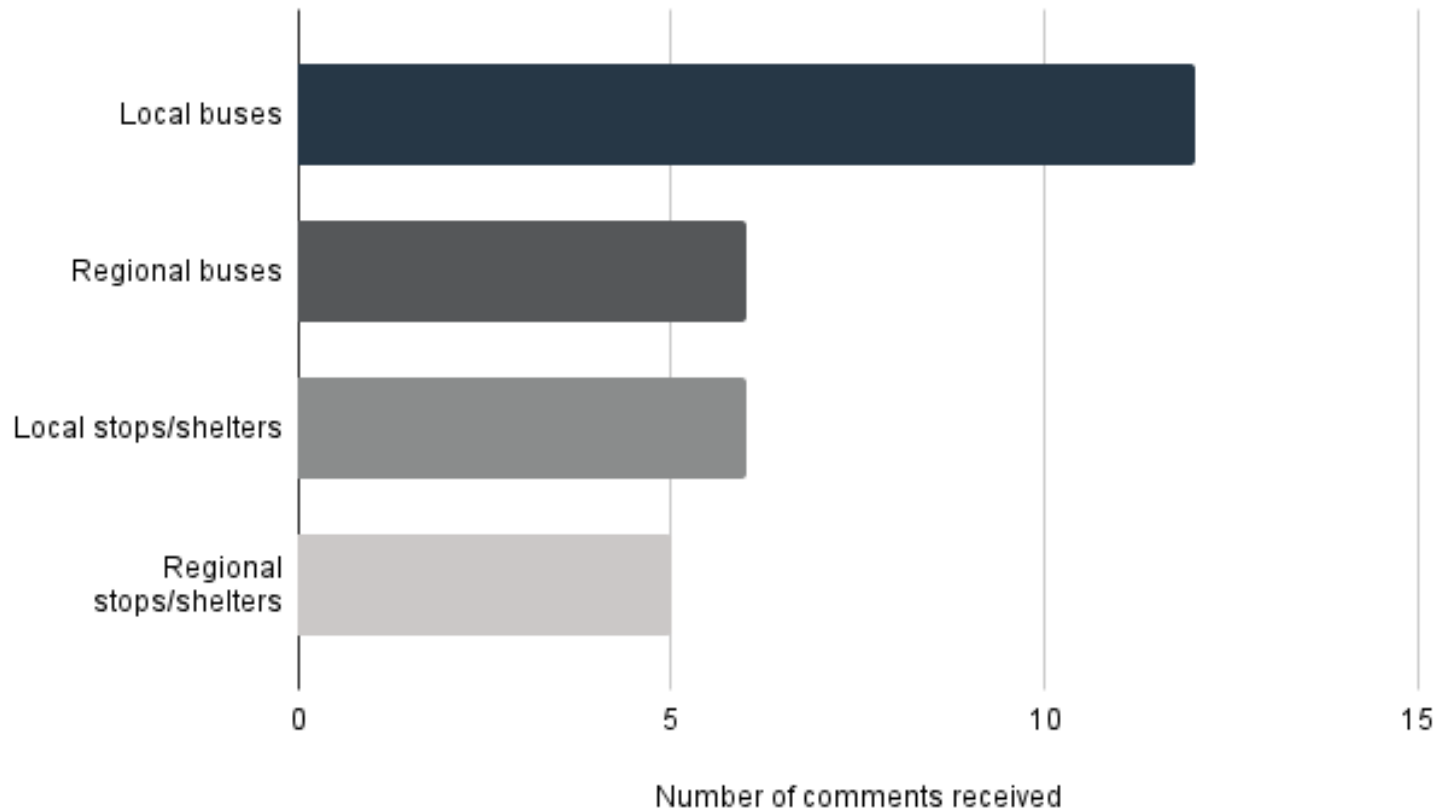


# What we heard – Local and regional system safety



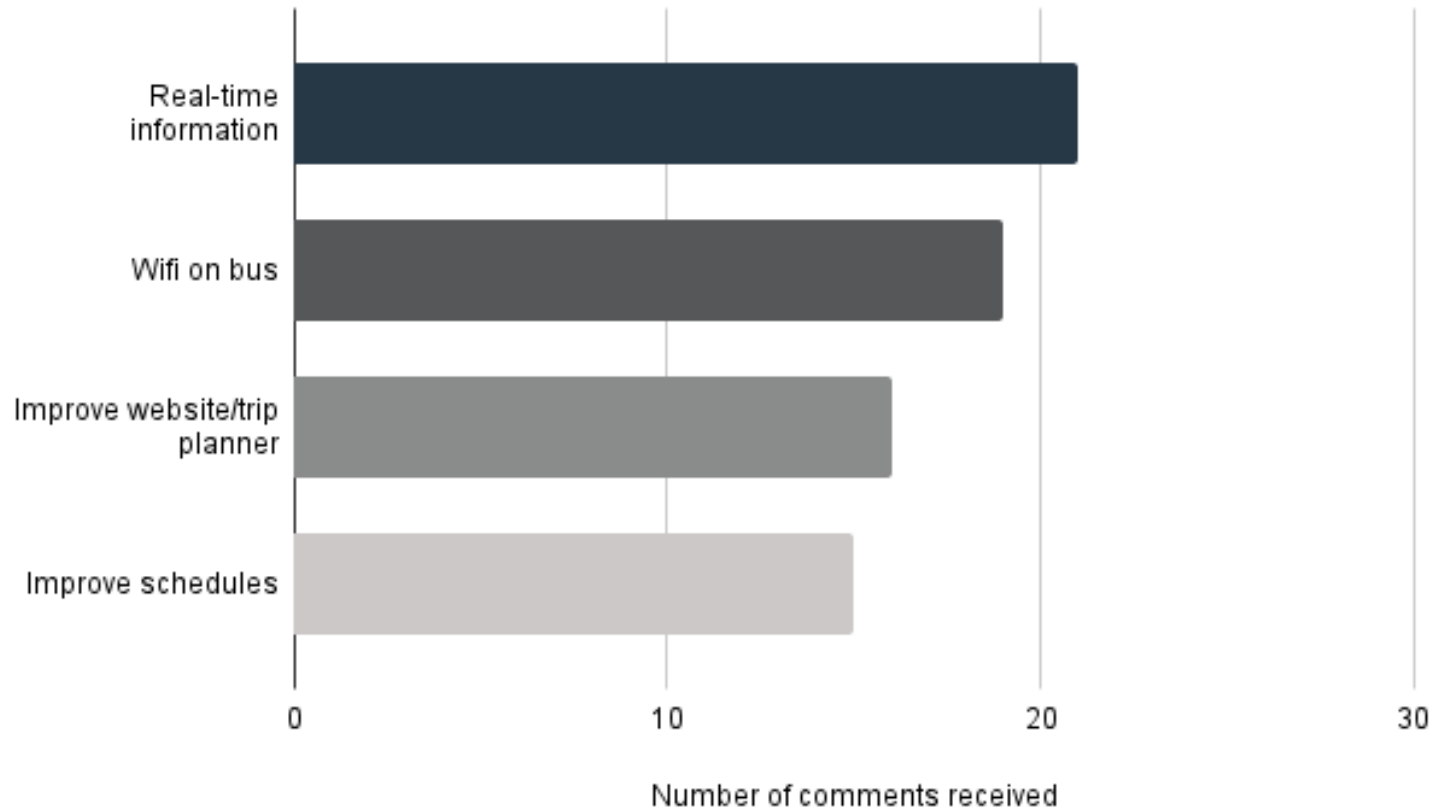
Number of comments received

# What we heard – Local and regional system cleanliness





# What we heard – Rider info and technology



# Next steps

- Determine FY24-25 STIF funding available
- Prioritize identified unmet needs within funding budget
- Begin service planning and STIF application processes

# Questions?





## BOARD MEETING MEMO

Agenda Item SUPPLEMENT

**To:** Board of Directors

**From:** David Trimble, Deputy General Manager

**Thru:** Allan Pollock, General Manager

**Date:** August 25, 2022

**Subject:** Approval of a Three-Year Labor Agreement with the Amalgamated Transit Union (ATU) for the period of July 1, 2022, through June 30, 2025

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### ISSUE

Shall the Board approve a three-year labor agreement with the Amalgamated Transit Union (Local 757) for the period of July 1, 2022, through June 30, 2025?

### BACKGROUND AND FINDINGS

The current labor agreement between the Amalgamated Transit Union (757) and Salem Area Mass Transit District (SAMTD) expired on June 30, 2022. Pursuant to requirements of the labor agreement, SAMTD staff and union representatives began meeting on December 9, 2021, to begin negotiations on the successor labor contract agreement.

After eight months of negotiations, the District and the Union jointly requested mediation assistance in resolving the remaining financial issues of the contract. The first mediation session was held on June 28, 2022. The second mediation session was held on July 11, 2022, when the parties came to a Tentative Agreement. Subsequently, through a voting process, the bargaining unit members ratified the agreement on Wednesday, August 17, 2022.

The agreement includes a 6.0% wage increase for ATU members in the first year of the contract (which upon Board approval will be retroactive back to July 1, 2022), and two additional annual increases of 5% on July 1, 2023, and on July 1, 2024. Additionally, the agreement includes small increases in longevity pay for those employees covered in this agreement who have 10 years of seniority or more. The agreement also includes some moderate increases for shoe and boot allowances, as those required items have increased in price in recent years.

The District and the ATU came to Tentative Agreements on over 28 operational Articles for the successor labor agreement. These included items such as work rule language changes and clarifications, work assignments and procedures for transit operators, and updating or omitting outdated contract language.

Based on the ATU members' ratification, this action seeks the Board's approval to execute a three-year successor labor agreement with the ATU with all new terms of the agreement to be retroactive to July 1, 2022.

### **FINANCIAL IMPACT**

Financial impacts of the cost of Year 1 of this agreement will be covered in the FY2022-2023 Budget. All subsequent year's costs will be incorporated through the annual budget process.

### **RECOMMENDATION**

Staff recommends that the Board approve the three-year labor agreement with the ATU 757 for the period of July 1, 2022, through June 30, 2025.

### **PROPOSED MOTION**

I move that the Board approve the three-year labor agreement with ATU 757 for the period of July 1, 2022, through June 30, 2025.



FISCAL YEAR 2023



SALEM AREA MASS TRANSIT DISTRICT  
**Strategic Plan**



**Salem Area Mass Transit District**

# **Strategic Plan Adoption**

**Board of Directors Presentation  
August 25, 2022**



# Organizational Alignment

Key Questions Success Planning Seeks To Answer

SUCCESS



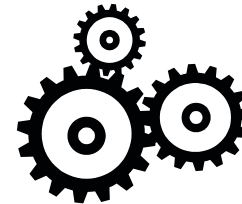
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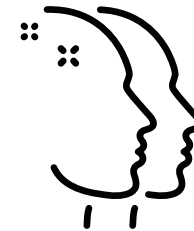
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03



- Work Plan  
- Milestones  
- Budget

04

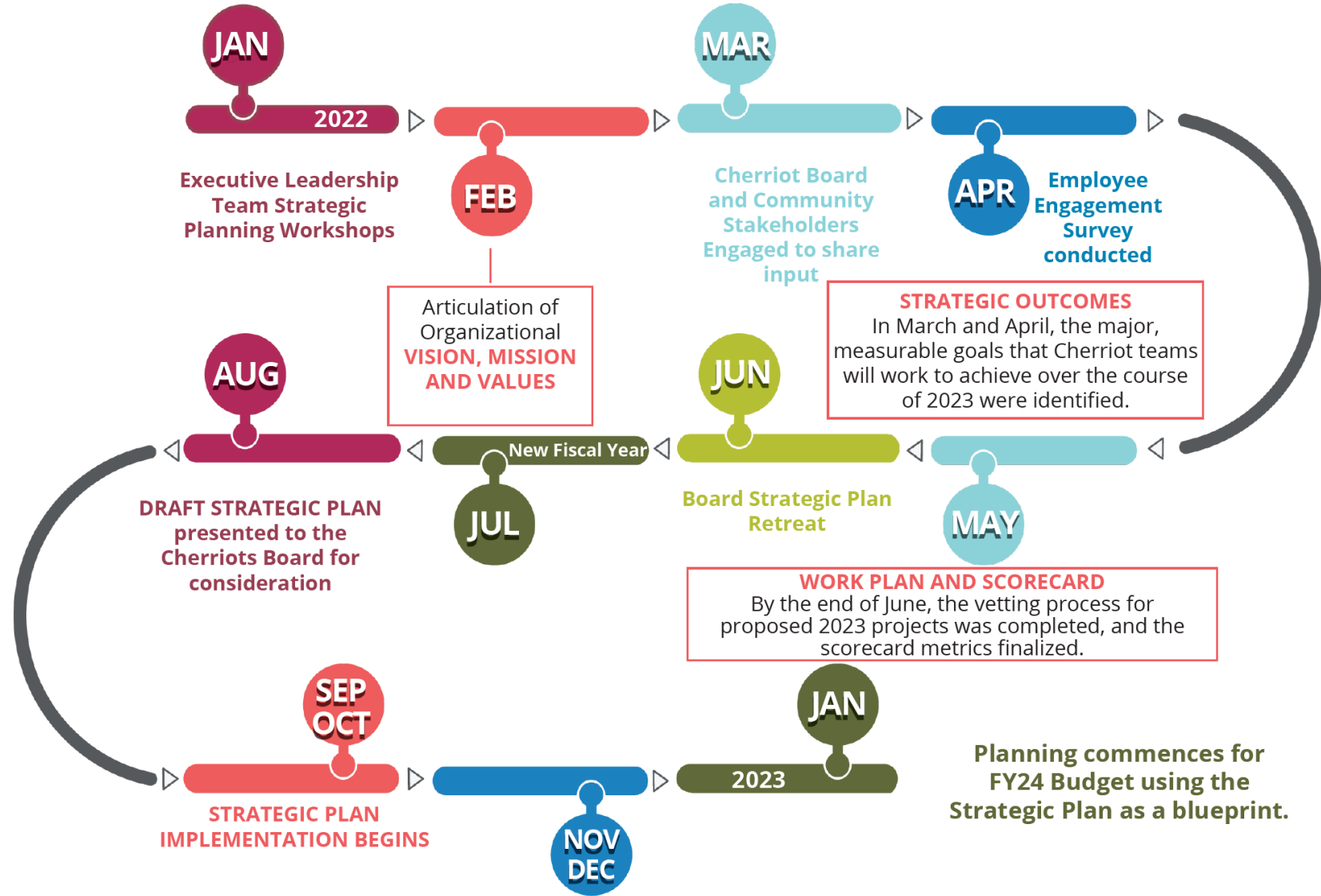


- Performance  
Metrics  
- Monitoring

# 4 Key Questions

1. How do you define **success**?
2. What will you **do** to deliver that success?
3. What **metrics** will you track to ensure what your doing will allow you to be successful?
4. **Who** is responsible for the delivery of those activities and performance it enhances?

# The Journey



# Mission Statement

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**Creating Community Connections**

# Vision Statement

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**We Deliver Valued Mobility Options that  
Inspire Community Pride.**



## Cherriots Values

### **C** COMMUNICATION

I promote an open, respectful dialogue with our customers, community partners, and my teammates.

### **H** HUMILITY

I will serve others with compassion and empathy.

### **E** EXCELLENCE

I will deliver a world class customer experience.

### **R** RESPECT

I will honor my team and community with my words, actions, and behaviors.

### **R** RESOURCEFUL

I will adapt to find efficient and innovative ways to overcome challenges and be willing to take initiative to achieve success.

### **I** INCLUSIVE

I recognize and honor diversity and will act with integrity, promoting decisions and actions that are equitable and align with being an inclusive agency.

### **O** OWNERSHIP

I am empowered to take actions that contribute to good stewardship and community trust.

### **T** TRANSPARENCY

I invite trust by fostering honesty and credibility in the eyes of others.

### **S** SAFETY

I own my role in ensuring Cherriots provides a safe, clean, and secure experience.

# Success Outcomes



**Community Value**



**Customer Satisfaction**



**Culture of Ownership**



**Financial Sustainability**



# Success Outcomes



CHERRIOTS CORE  
AREA OF SERVICE /  
OPERATIONS



## COMMUNITY VALUE

Establish a baseline for the % of community that see value in the agency.



## CUSTOMER SATISFACTION

Establish a baseline Customer Net Promoter Score (NPS).



## CULTURE OF OWNERSHIP

Increase baseline Employee Engagement Score (59%) by 5 points.



## FINANCIAL SUSTAINABILITY

Year 1: Expenditure/Revenue Reporting  
Year 2: 3-Year Rolling Budget Forecast  
Year 3: Delivery of Full Capital Program Budget





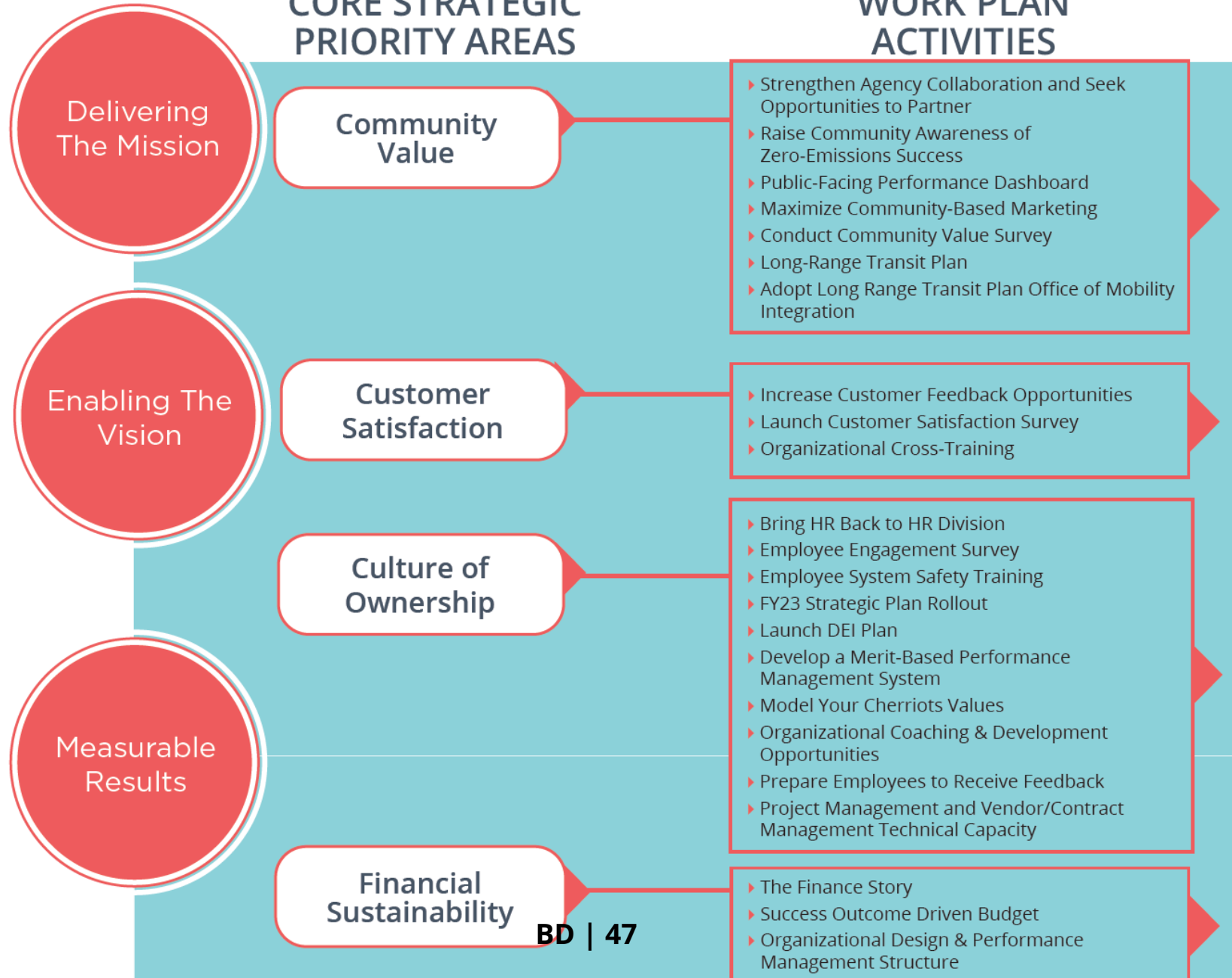
# Work Plan & Tactics

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// The plan outlines a road map for specific initiatives and programs the Cherriots team will undertake during the coming year..”

# Work Plan



# Scorecard

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// What helps bring a strong strategy to life is a mechanism to monitor performance...The Cherriots QR is a quarterly performance scorecard that captures performance in key metrics..."

# Scorecard

- ✓ The Cherriots QR is built on a 100 point system, with each of the four core strategic areas assigned a weighted point value, and their own set of related metrics.
- ✓ Each metric's goal, definition, and information source are clearly denoted.
- ✓ The first round of Cherriots QR results will be reported in April 2023, and thereafter will be updated on a quarterly basis on our website.

CherriotsQR 			
	Metric	Goal	Score
<b>Community Value</b> 	Community Perception of Value	Establish Baseline	12
	Community Perception of Access	Establish Baseline	8
	Actual Access to Community Services	Establish Baseline	8
	Community Awareness of Cherriots	Establish Baseline	5
	Community Perception of Financial Stewardship	Establish Baseline	2
			<b>35</b>
<b>Customer Satisfaction</b> 	Customer Net Promoter Score	Establish Baseline	12
	Overall Customer Satisfaction	Establish Baseline	10
	Overall On-Time Performance	Establish Baseline	2
	Customer Impression Metric	Establish Baseline	2
	Customer Impression Metric	Establish Baseline	4
			<b>30</b>
<b>Culture of Ownership</b> 	Employee Engagement	64%	8
	Overall Employee Satisfaction	64%	6
	Understanding of Mission and Vision	90%	3
	Employee Impression of Internal Communication	46%	3
			<b>20</b>
<b>Financial Sustainability</b> 	Financial Performance by division	Expenditures At or Under Budget	6
	Budget Compliance with Strategic Plan	Build FY24 Budget Reflecting the Strategic Plan	6
	Overall Customers/Revenue Hour	Maintain Budgeted Cost Per Hour	3
			<b>15</b>
			<b>100</b>



# Moving from Development to Implementation

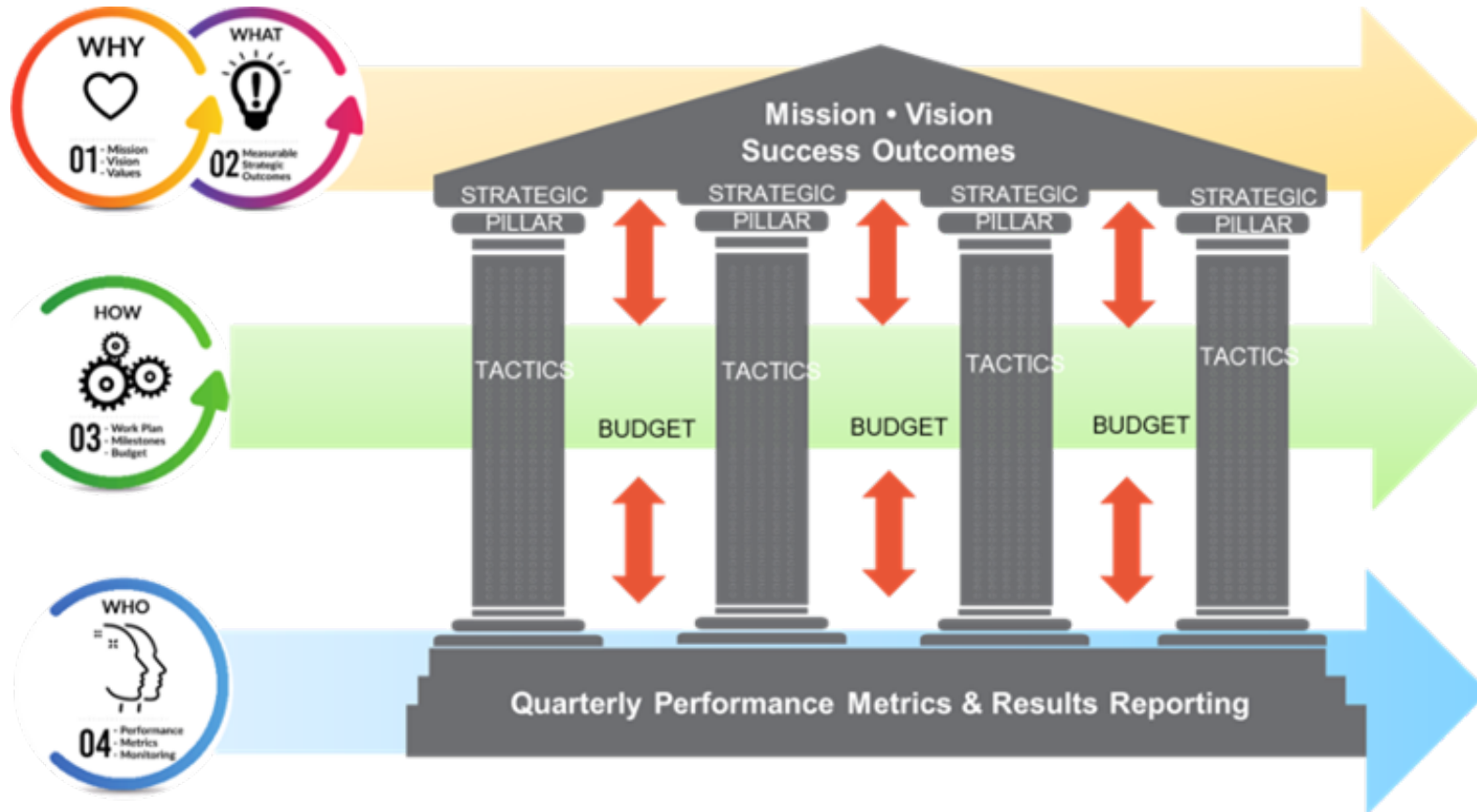
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// The Cherriots Executive Leadership Team commits to monitoring progress achieved over the course of the next year. To present results in a manner that can be viewed by its customers, the Board of Directors and the Salem-Keizer community, the team commits to reporting results on a quarterly basis around the following schedule:

# Bringing the Strategic Plan to Life

	Quarter Begins	Quarter Ends	Management Reports Performance Results to Board	Establish Next FY24 Success Outcomes
Q1	Jul 1	September 30	October 27	
Q2	Oct 1	December 31	January 26	
Q3	Jan 1	March 31	April 27	
Q4	Apr 1	June 30	July 27	January - May 26

# Strategic Plan Implementation – Board’s Role



- ### Board of Directors
- Vision oversight
  - Progress monitoring toward achieving defined outcomes
  - General Manager Evaluation

- ### Executive Team
- Develop work plans
  - Quarterly progress measurement toward achieving success
  - Budget and resource alignment

# Strategic Plan Implementation – Board’s Role (cont’d)

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## 1. Hold Meetings that Matter



**More Strategic:** *Mid- or long-term organizational*



**Less Tactical:** *Short-term problem-solving*

- 2. Communicate the Cherriots story as it relates to the strategic plan, and how the agency is working to provide greater community value. For example, the importance of responding to surveys to set accurate baselines.**
- 3. Be present and engage in the community, sharing that Cherriots is accountable to the community and each other.**



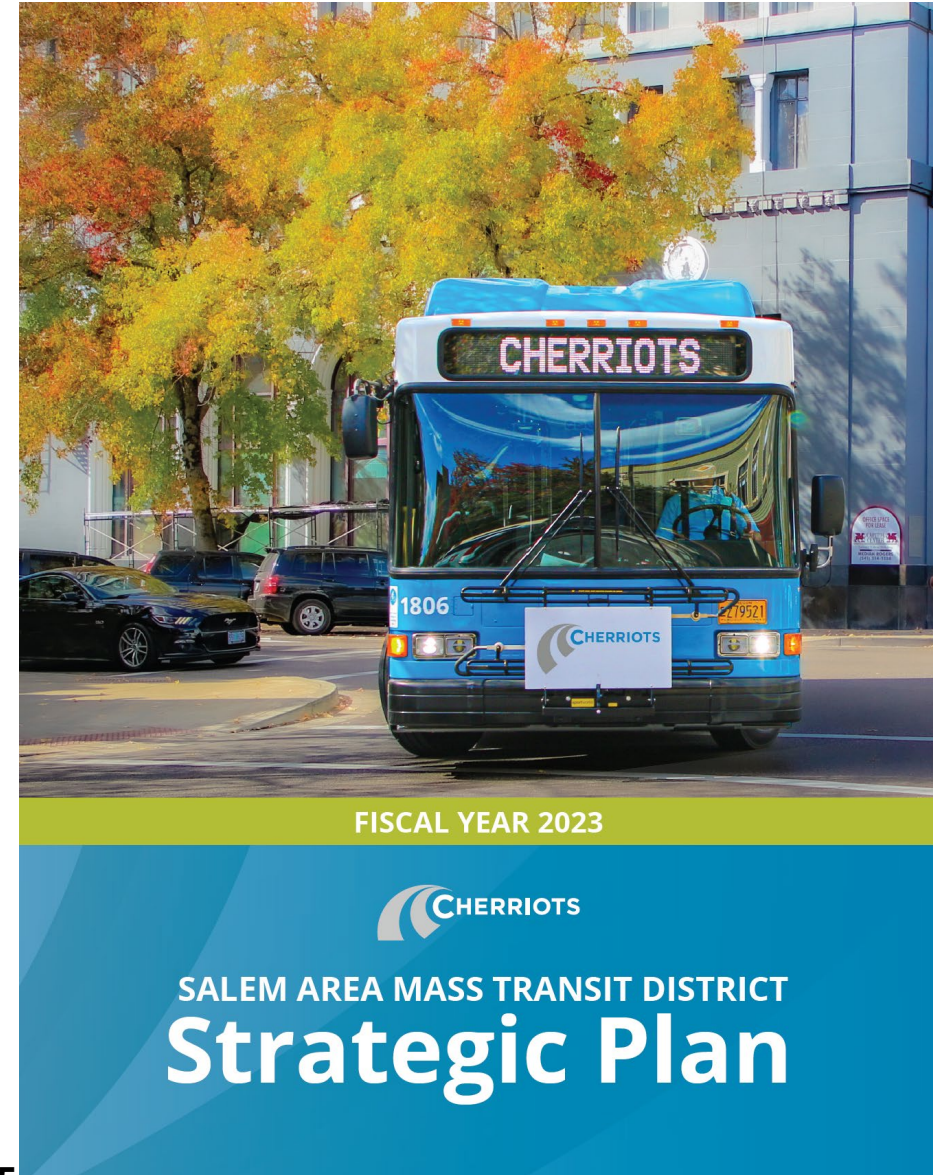
# Board of Directors' Role

The screenshot shows a dashboard with a navigation bar at the top containing 'Landing Page', 'Scorecard' (highlighted), 'Strategic Areas', and 'Download PDF'. Below the navigation is a header section with the CHERRIOTS logo on the left, 'Mission: Creating community connections.' and 'Vision: We deliver valued mobility options that Inspire community pride.' in the center, and 'Values' with the CHERRIOTS logo on the right. An 'Agency News' section is partially visible. The main content area features four performance cards for the period 'April 1 - June 30, 2022':

Strategic Area	Points Earned	Goal Points
Community Value	0%	35
Customer Satisfaction	0%	30
Culture of Ownership	0%	20
Financial Sustainability	0%	15

# Final Documents

- ✓ Full Strategic Plan
- ✓ Executive Summary
- ✓ One-page Community Facing Summary
- ✓ One-page Internal Facing Summary
- ✓ Electronic Version of the Plan





# Thank You & Acknowledgements

## EXECUTIVE LEADERSHIP TEAM

**Allan Pollock**

General Manager

**David Trimble**

Deputy General Manager

**Denise LaRue**

Chief Financial Officer

**Christina Conner**

Chief Human Resources Officer

**Steve Dickey**

Director of Technology and Program Management

**Tom Dietz**

Director of Operations

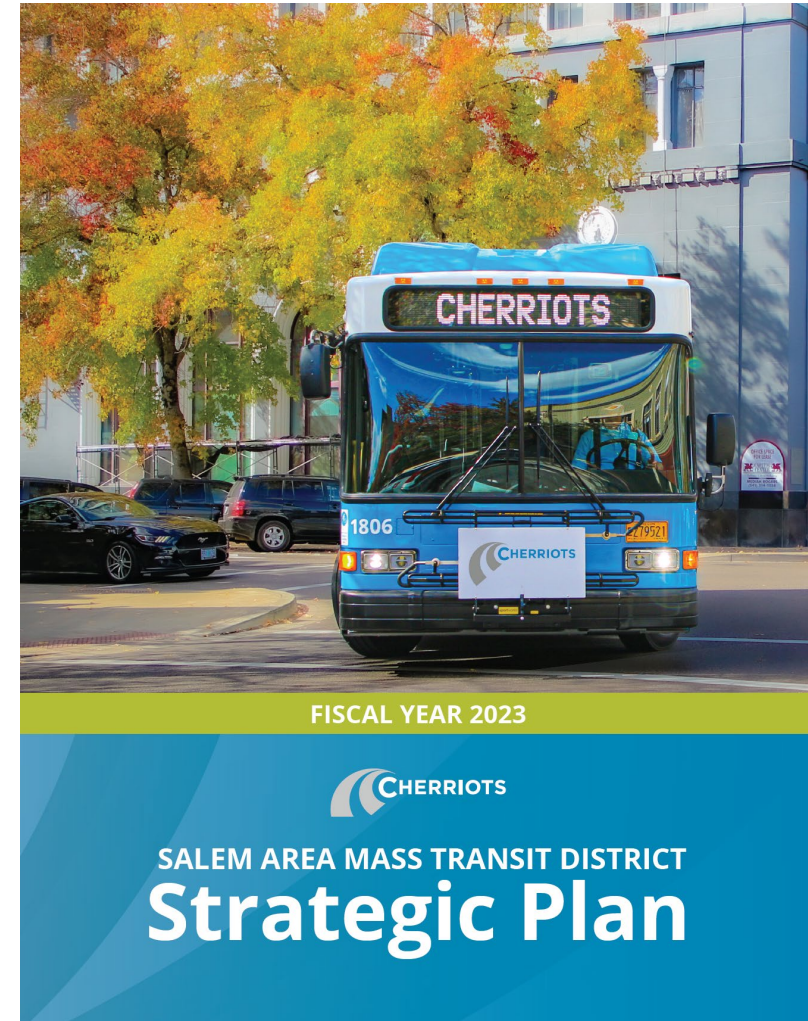
**Patricia Feeny**

Director of Communication

## PROJECT MANAGER

**Bobbi Kidd**

Strategic Initiatives Administrator





**Date:** August 16, 2022

**Subject:** Talking Points (Highlights) from CAC Meeting on August 16, 2022

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Meeting highlights from the Citizens Advisory Committee Meeting held on August 16, 2022:

- Staff Director Dickey gave an update presentation on the South Salem Transit Center project. The approved site selection and revisited the timeline was shared. Director Dickey also described the next steps in this process.
- A new member application was discussed and voted on. The CAC will welcome Sue Coffin to the Committee at the October meeting.
- The Committee discussed how to proceed on the work plan. Members will send their interest to staff as to then set sub-committee assignments.
- The Committee discussed a renewed approach on the Youth Member position. Changing the age requirement was the topic that seemed the most popular approach. Staff will email the Committee with a copy of the By-Laws, Work Plan, and Application.
- Staff asked the Committee to begin thinking about the make-up of the Committee. Are there other voices that should be at the table? How can we invite those voices to join us?
- The next regular meeting of the CAC will be on October 17, 2022 and the Executive Committee will continue to meet monthly.