

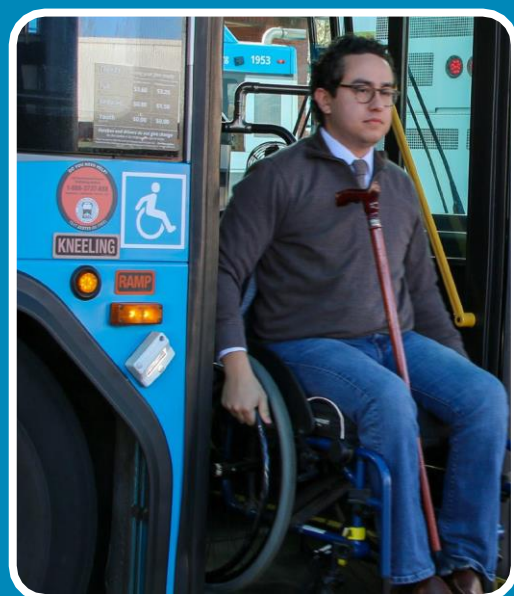
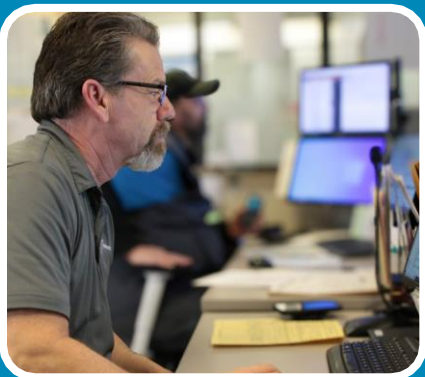
SALEM AREA MASS TRANSIT DISTRICT



CHERRIOTS

2025

Strategic Plan





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For their numerous contributions to the development of this forward facing strategic plan, the following individuals are thanked.

BOARD OF DIRECTORS



**Joaquín Lara
Midkiff**
(he/him/his)
Director
Subdistrict 1



Ramiro Navarro Jr.
(he/him/his/el)
Director
Subdistrict 2



Sadie Carney
(she/her)
Treasurer
Subdistrict 3



**Maria Hinojos
Pressey**
(she/her/ella)
President
Subdistrict 4



Ian Davidson
(he/him/his)
Vice President
Subdistrict 5



Sara Duncan
(she/they)
Secretary
Subdistrict 6



Bill Holstrom
(he/him/his)
Director
Subdistrict 7



EXECUTIVE LEADERSHIP TEAM

Allan Pollock

General Manager

David Trimble

Deputy General Manager

Shofi Ull Azum

Chief Planning and Development Officer

Art Boulanger

Chief Information Officer

Tom Dietz

Chief Operations Officer

Patricia Feeny

Chief Communication Officer

Denise LaRue

Chief Financial Officer

Jaél Rose

Chief Human Services Officer

PROJECT MANAGER

Bobbi Kidd

Strategic Initiatives Administrator

Welcome Letter

Cherriots Board President Hinojos Pressey
and General Manager Pollock

We are excited to share with you our updated Strategic Plan, which reflects our dedication to progress but also addresses the evolving needs of our riders and the environment.

The insights gathered from recent customer and community surveys have been instrumental in shaping our strategic initiatives. The feedback from riders and community members highlighted areas of

excellence and opportunities for improvement, guiding us toward service enhancements and new projects aimed at meeting their expectations. We are particularly encouraged by the stellar survey results, affirming our direction and inspiring us to aim even higher.

Our agency believes in the power of diversity, equity, and inclusion (DEI), and this plan further intensifies our focus on creating an environment where every individual feels valued and respected. We are committed to policies and practices that promote inclusivity at every level, ensuring that our services and employment opportunities reflect and celebrate the diversity of our community.

Our commitment to a sustainable and innovative future has never been stronger. Central to our strategic vision is the profound commitment to sustainability. We are proud to introduce the transition to battery electric buses, a major leap toward reducing our carbon footprint and championing cleaner, more efficient public transportation options. This initiative includes the electrification of an entire bus route, setting a precedent for environmental stewardship while ensuring our services remain reliable and accessible to all.

Understanding the importance of time and convenience, we are excited to announce the addition of a new express route designed to significantly reduce travel times and enhance connectivity of two major arteries within our community. This new service, coupled with



Allan Pollock
General Manager



Maria Hinojos Pressey
Board President

the advent of cutting-edge technology in our operations, will not only improve efficiency but elevate the overall rider experience.

From real-time tracking to advanced fare systems, we are embracing innovations that bring our services into the modern age, making public transit an appealing option.

As always, safety remains our top priority. In our continuous effort to ensure a secure transit environment for all, we are launching a comprehensive security camera project on all our properties. This initiative will enhance monitoring, deter potential threats, and provide peace of mind to our riders, reinforcing our commitment to creating a safe and welcoming space for everyone.

In closing, we want to express our deepest gratitude to our riders, Team Cherriots, and community partners for their unwavering support and engagement. Together, we are not just envisioning a better future for public transportation; we are actively building it. We invite you to join us in this exciting new chapter, as we work hand in hand to make Cherriots a public transportation leader in innovation, sustainability, and inclusivity.

Allan Pollock
General Manager

Maria Hinojos Pressey
Board President

Handwritten signatures of Allan Pollock and Maria Hinojos Pressey in black ink.

Vision & Mission

Vision and Mission statements guide Cherriots direction and purpose. The vision statement describes the desired future state of the organization, answering the question: “Where are we going?”

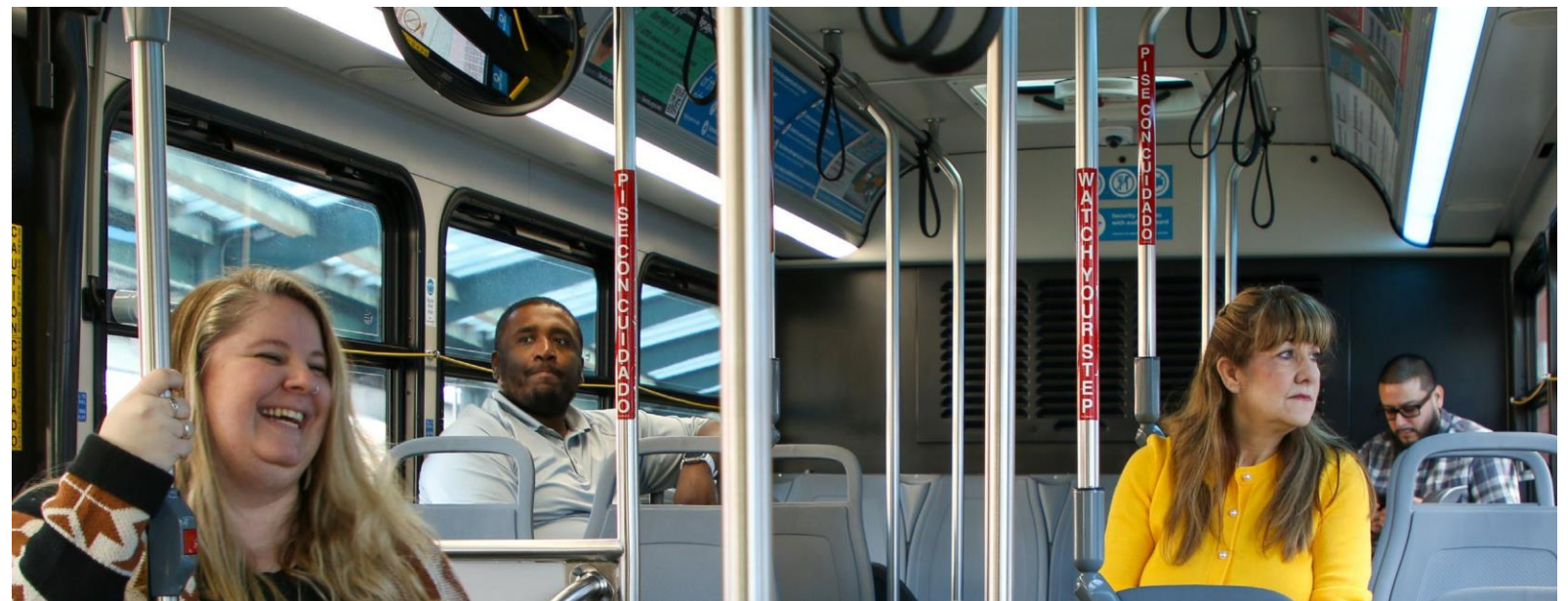
The mission statement describes the fundamental purpose of Cherriots, answering the question: “What do we do?” Together, the Vision and Mission Statements articulate what success looks like for Cherriots and serve as a source of inspiration and motivation for both the workforce and the agency’s stakeholders.

Vision

We Deliver Valued Mobility Options
that Inspire Community Pride.

Mission

Creating Community Connections.



Cherriots Values

Our values are the guiding principles that define the beliefs, behaviors, and norms that shape Cherriots culture and drive decision-making within the agency.

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.

2025 SUCCESS OUTCOMES

For the 2025 fiscal year, we have once again identified measurable outcomes that signal success for Cherriots' customers, the Salem-Keizer community, and our workforce. These aspirational goals align with our four core areas, service, and operations: Community Value, Customer Satisfaction, Culture of Ownership, and Financial Sustainability. Together, Cherriots team members will strive to achieve the outcomes outlined below and will make public our progress with quarterly performance updates.

COMMUNITY VALUE



Maintain a Community Value score over 84



CUSTOMER SATISFACTION



Maintain Customer Satisfaction Net Promoter Scores

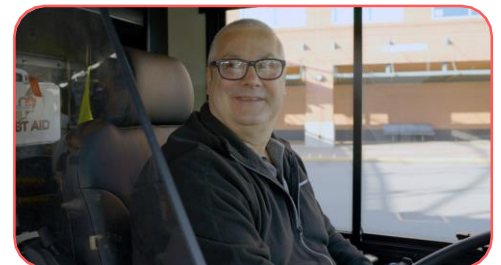
- Fixed Route: No less than 52
- LIFT: No less than 51



CULTURE OF OWNERSHIP



Increase our Employee Engagement score over the previous year by 5 percentage points or 69



FINANCIAL SUSTAINABILITY



- Year 1: Expenditure/Revenue Reporting
- Year 2: 3-Year Rolling Budget Forecast
- Year 3:** Delivery of Full Capital Program Budget and Successful Completion of Triennial Review



2025 ORGANIZATIONAL TACTICS

COMMUNITY VALUE



1. Establish Zero Emissions Infrastructure Roadmap
2. Share the Cherriots Story

CUSTOMER SATISFACTION



1. Cherriots Intelligent Transportation System Implementation
2. Conduct a Comprehensive Operational Analysis
3. Improve Safety and Security

CULTURE OF OWNERSHIP



1. Implement an Emerging Leaders Program
2. Implement a Mentor/Mentee Plan
3. Successful Negotiation of a Collective Bargaining Agreement
4. Implement a Merit Based Performance Management System
5. Complete Implementation of a Reward and Recognition Program
6. Improve Project Performance and Management
7. Improve Technology Services

FINANCIAL SUSTAINABILITY



1. Develop a Long Range Financial Plan
2. Establish Employee Facing Human Resource and Finance Employee Portal
3. Enhance the Capital Investment Plan
4. Successful Completion of Triennial Review



Establish Zero Emissions Infrastructure Roadmap

Fully develop a roadmap for achieving 100% zero-emission fleet. Integrate Zero Emission Fleet Transition and Vehicle Acquisition Plans to inform an official Board of Directors Resolution.



Owner
Tom Dietz



Team Support
Operations/ Technology and Infrastructure/Administration



Goals Identified for 2025

- Identify and publish long-range plan for fuel type(s) in the fleet.
- Identify and publish long-range plan for infrastructure at Operations Headquarters.
- Develop budget for the infrastructure and/or vehicles.
- Submit for CIP requests.

Share the Cherriots Story

Promote engaging narratives about Cherriots' impact on individuals and communities, highlighting personal experiences, improvements, and benefits of using public transit.



Owner
Patricia Feeny



Team Support
Marketing, Customer Experience Specialist,
SES Committee, PR Consultant




Goals Identified for 2025

- Research and create the core narrative.
 - Collect impactful stories, testimonials, videos, social media posts and data.
 - Update agency timeline of milestones and events.
 - Create a formal solicitation for public relations consultant.
 - Collaborate with consultant to create a Cherriots Story rollout plan.
- Use a mix of communication channels to effectively tell the story: social media, website, community newsletters and eblasts, agency newsletters, board meetings, public events, news media, print materials, digital ads, and community partnerships (United Way, Salem for Refugees for example).

Cherriots Intelligent Transportation System Implementation

Control of on-street activities with a central system. CITS will allow Cherriots to monitor on-time performance, passenger capacity, farebox recovery, and vehicle health. CITS will also allow Cherriots to push customer-facing data to riders, such as arrivals and departures, schedule changes, detours, delays, and general system information.



Owner
Tom Dietz



Team Support
Operations/Planning/IT



Goals Identified for 2025

- Complete Factory Acceptance Testing.
- Complete Pilot Fleet Installation.
- Complete Full Fleet Installation.
- Complete System Acceptance.
- Enter Warranty Period.

Conduct a Comprehensive Operational Analysis (COA)

Complete procurement package for RFP and begin COA with selected vendor. Work with vendor to develop the schedule and work plan.



Owners

Shofi Ull Azum,
Chris French



Team Support

Finance Department, Communications Department,
Project Management Office, Operations Department



Goals Identified for 2025

- Complete procurement package for COA solicitation.
- Solicitation process and vendor selection.
- Board approval of proposed vendor.
- Project Kick-off meeting with vendor.
- Develop project schedule and milestones.
- Consultant lead evaluation of Cherrits services to determine service efficiency, effectiveness, and customer experience improvements.
- Develop service enhancement recommendations.

Improve Safety and Security

Establish a baseline to better understand rider, employee and community perceptions of safety and security and to develop goals and implement changes and actions to improve perceptions and actual occurrences.



Owner
David Trimble



Team Support
Executive Leadership Team, Safety & Security




Goals Identified for 2025

- Gather more data from the public, business leaders and employees and ask for suggestions for improvement.
- Assess current department staffing and evaluate resources to manage the growing trends.
- Look for grant opportunities (pilot programs) to increase security visibility.
- Complete Phase 1 of the DW Gate/Fence project.
- Develop workplan and funding strategy for Phase 2 of the DW Gate/Fence project.
- Identify ways to make more robust the Agency Safety Plan.
- Develop new mandatory training opportunities for staff at different levels of the organization.

Implement an Emerging Leaders Program

Building leadership skills set, business savvy, and knowledge for current individual contributors in a cohort (group) setting through a formalized, onsite training program. This program may be a mix of guest speakers, currently employed seasoned professionals, online classes, etc.



Owner
Jaél Rose



Team Support
Jessica Harrington, Deborah Grant

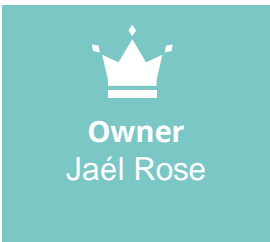


Goals Identified for 2025

- Determine eligibility criteria and educational facilitator(s).
- Establish curriculum and timeframe (< 12 months).
- Market and announce the competitive application process for participants.
- Select 6-8 successful candidates per cohort.
- Program launch.

Implement a Mentor/Mentee Plan

Work with an Executive Coach to guide Executive Leadership Team members partnering with someone outside of their division to guide the mentee on the Cherriots Way, personal and professional development, business best practices, and where both Mentors and Mentees can partner together on a project.



Goals Identified for 2025

- Identify an Executive Coach to facilitate a formal mentorship program with Executive Leadership Team and mentees which will include training for the mentors.
- From there create a project charter that outlines eligibility criteria, expectations, goals, timeframes, activities, program project.
- Market and announce the eligibility criteria and open the program to staff.
- Once mentee candidates have been evaluated and selected, begin the Mentor/Mentee Program with Mentors, Mentees, guided by the Executive Coach.
- Annual evaluation/reflection of strengths and areas of improvement for continued success and determine if the Initiative will be continued with a new group.

Successful Negotiation of a Collective Bargaining Agreement

Open negotiations for the collective bargaining agreement to cover the next three (3) years.



Owner
Jaél Rose



Team Support
Allan Pollock, David Trimble, Denise LaRue, Tom Dietz



Goals Identified for 2025

- Create proposed draft.
- Reach tentative agreement.
- Conduct negotiations.
- Achieve fully ratified and executed contract.

Implement a Merit Based Performance Management System

A merit-based, pay-for-performance, system will correlate performance with wage-increases by building a program based on a transparent compensation philosophy. A merit-based performance management system will also align individual performance, with team performance, and ultimately the District's overall success.



Goals Identified for 2025

- Develop a compensation philosophy based on market trends, the District's position within the market, valuing roles, and then develop a plan to get there.
- Define the eligibility criteria that an employee must meet in order to be eligible for an annual wage increase (increase minimums and maximums) - these must be specific and measurable. This will be memorialized through a document that explains the process, eligibility criteria, and calculation. The document will be published in an easily-accessible location (Portal).
- Announce the program and provide an overview in the following order - ELT --> SLT + Supervisors (meeting) --> remainder of organization (GM Roundtable).
- Through multiple sessions, train supervisory staff and non-represented staff on the purpose and goals of the performance review process, how to track and analyze performance metrics, how to use the self-appraisal tool, how to use the performance review tool, the criticality of timeliness, and candor.

Complete Implementation of a Reward and Recognition Program

Fully roll out the reward and recognition program for Transportation, Maintenance, Facilities, and Contracted Services.



Owners
Tom Dietz
Jaél Rose



Team Support
Operations




Goals Identified for 2025

- Roll out communication plan for the reward and recognition program.
- Solicit feedback from staff.
- Compile results of feedback and present to Executive Leadership Team.
- Roll out the Million Mile Driver Program.
- Roll out the employee of the quarter program.
- Roll out the employee of the year program.

Improve Project Performance and Management

Create and implement a robust, success outcomes-based project management plan that touches every division and department in the organization. The plan will focus on improvements to reporting, progress and the overall quality of our project processes.



Owner
David Trimble



Team Support
PMO Department

Goals Identified for 2025

- Implement project control plan - Go live is July 1, 2024.
- Procure project management software through competitive solicitation.
- Revise implemented project control plan from testing phase.
- Implement final version of the project control plan.
- Develop project management plan.
- Finalize Capital Investment Plan (CIP) and conduct annual updates.
- Finalize the new format of the CIP and outline process for annual revision.
- Train all stakeholders on project management plan.
- Streamline the process for reporting out on project performance and for quarterly reporting.

Improve Technology Services

Assess and prioritize technology needs across all divisions and departments and pursue various technology solutions to business challenges.



Owner
Art Boulanger



Team Support
Executive Leadership Team, Technology Division



Goals Identified for 2025

- Perform a study for evolution toward a cloud-first strategy and approach to include a potential cloud migration plan.
- Ensure that all hardware and software is supported and develop a Capital Investment Plan to replace hardware and software systems throughout the District.
- Monitor and Audit all technology systems on a periodic basis.
- Develop a committee to work with the Project Management Office to ensure all stakeholders have to opportunity to discuss technology solutions to their business challenges.
- Ensure all hardware and software in production have corresponding, up-to-date maintenance or service agreements are in place and adequately funded.

Develop a Long Range Financial Plan

Develop a long range financial plan, creating a long-term outlook, identify potential risks, and stimulate "big-picture thinking".



Owners
Denise LaRue



Team Support
Tim Reedy, Dorrene Edwards, Peggy Greene Melissa Kidd



Goals Identified for 2025

- Achieve organizational alignment. This will be achieved by meeting with stakeholders in the District to ensure agreement regarding long term goals.
- Update/create financial policies.
- Forecast long-term revenues and expenses.
- Analyze external economic environment and identify risks.
- Analyze fiscal environment and identify risks.
- Determine long-term financial impact of priorities and goals.
- Complete 5-year long range financial plan, complete with the assumptions used to develop the plan. Present to key District stakeholders to ensure alignment.

Establish Employee Facing Human Resource and Finance Employee Portal

Human Resources and Finance will partner to ensure that MARTI becomes a tool that empowers employees to access both financial information and employee information.



Owners
Denise LaRue
Jaél Rose



Team Support
Tim Reedy, Dorrene Edwards, Peggy Greene,
Jessica Harrington, Deborah Grant

Goals Identified for 2025

FINANCE

- Develop training checklists of the needs an employee would need to access financial information based on their role.
- Develop short training videos demonstrating the specific tasks an employee would need to complete based on their role.
- Provide in person training for each new hire based on their role.
- Provide in person training for each recently promoted employee based on their new roles.
- Provide ongoing support along with short training videos to strengthen the skills of any employee to access necessary data.

HUMAN RESOURCES

- Identify and/or enter the RFP process for a Tyler Munis Consultant to guide us to use the functionality that is needed for MARTI (applicant tracking, performance management, talent management, etc.) that is currently not functional and for which no training is currently provided.
- Empower employees to use the self-service function through training modules on Open Enrollment which requires getting this set up through MARTI along with a consultant.
- For new hires (and newly promoted supervisory personnel) ensure training on ESS/MSS takes place.
- MARTI Bytes - provided 2-3 minute videos, once per quarter, to highlight a specific self-service functionality that is then sent out to employees and is available on the Portal.

Enhance the Capital Investment Plan

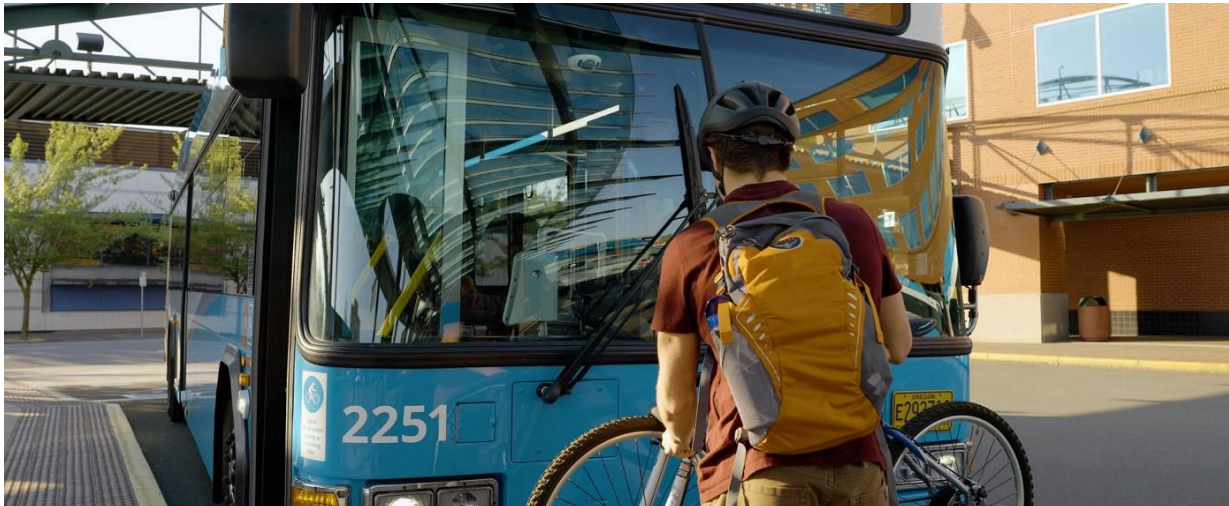
Develop a Capital Investment Plan (CIP) that applies best practices for every stage of the CIP process. Plan includes capital and operating projects, major construction projects, and capital purchases.



Owners
David Trimble
Denise LaRue



Team Support
PMO and Finance

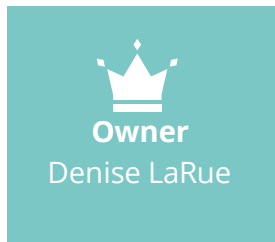


Goals Identified for 2025

- Update the list of capital projects, operating projects, and capital purchases for the next five years.
- Update our screening and prioritization process to ensure alignment with organizational success outcomes.
- Develop high-level timetables and cost information for each item.
- Create a funding strategy for larger-scaled projects through use of grant or other funding sources.
- Develop a classification, itemization, and explanation for project expenditures.
- Finalize and update the new Capital Investment Plan report and prepare for distribution to the Budget Committee.

Successful Completion of Triennial Review

Work with entire District to ensure a successful Triennial Review Audit.



Goals Identified for 2025

- Hold a Triennial Review work group kick off meeting.
- Prepare and submit the initial review documents to the review team by the due date.
- Facilitate the onsite review with the review team.
- Respond to all inquiries and findings in a timely manner.

Bringing the Plan to Life

Ingraining the Strategic Plan in our Everyday



The Salem-Keizer community is a growing region with changing transportation needs. When we started the development of this strategic plan, several community stakeholders provided input about what they most valued in relation to the services Cherriots provide. It was clear from responses that the community values the services Cherriots provides, and they seek transportation services that support both local employment opportunities and larger community needs. Moving people and connecting communities is what they value, and is what Cherriots strives to deliver.

For Cherriots to successfully meet the needs of our customers, we must continue to obtain a comprehensive understanding of what they value. To achieve this higher level of understanding, Cherriots has and continues to seek feedback on community values, services and mobility needs. This is evident in our cadence of surveys and commitment in asking our customers, community, and employees what they value and then making the necessary plans to deliver world-class customer experience.

Since the adoption of the refreshed Cherriots Strategic Plan in 2021, Cherriots has conducted three Community Value Surveys, three Customer Satisfaction Surveys, and three Employee Engagement Surveys. Cherriots has completed dozens of Organizational and Divisional tactics including adopting a Long Range Transit Plan, implemented a public-facing performance dashboard, focused initiatives on safe and clean passenger amenities, increased organizational and coaching opportunities for employees, and launched a Diversity, Equity, and Inclusion Plan.

This also means that our future budgeting process must continue to prioritize our resources around what both our community and customers tell us they value to ensure community members and visitors to the Mid-Willamette Valley get where they need to be, when they need to be there.

Commitment to Excellence through Transparency

The Cherriotics Executive Leadership Team commits to monitoring the progress achieved over the course of each year around achieving the commitments identified in the work plan. To present results in a manner that can be viewed by employees, customers, the Board of Directors, and the Salem-Keizer community. We commit to reporting results on a quarterly basis around the following schedule:

Quarter Begins		Quarter Ends	Management Reports Performance Results to Board	Establish Next FY25 Success Outcomes
Q1	July 1	September 30	November	
Q2	October 1	December 31	February	
Q3	January 1	March 31	May	
Q4	April 1	June 30	August	January - May 2025

Board reports will be presented the second month following each quarter

We encourage your engagement as we continue this journey in creating community connections.



Creating Community Connections



SALEM AREA MASS TRANSIT DISTRICT
Cherriots.org