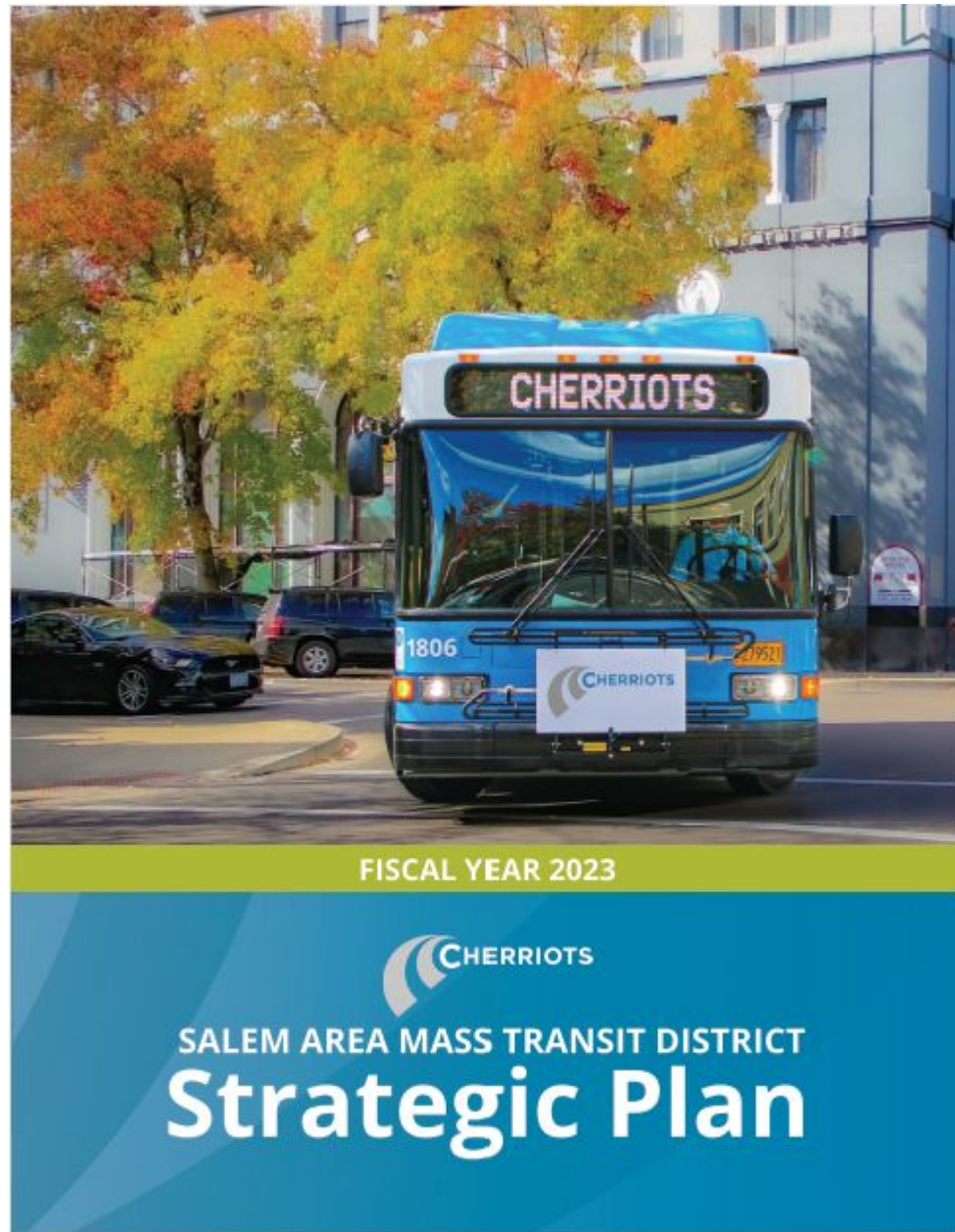


Strategic Plan FY 23 Q1 Report

October 27th, 2022



Guiding Principles

VISION

We Deliver Valued
Mobility Options
that Inspire
Community
Pride.

MISSION

Creating Community
Connections

VALUES

Communication
Humility
Excellence • Respect
Resourceful
Inclusive • Ownership
Transparency
Safety



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



Organizational Tactics



Community Value Tactics

Strengthen Agency Collaboration and Seek Opportunities to Partner

Raise Community Awareness of Zero-Emissions Success

Public-Facing Performance Dashboard

Maximize Community-Based Marketing

Conduct Community Value Surveys

Long Range Transit Plan

Adopt Long Range Transit Plan Office of Mobility Integration



Customer Satisfaction Tactics

Launch Customer Satisfaction Survey

Organizational Cross-Training

Increase Customer Feedback Opportunities



Culture of Ownership Tactics

Bring HR Functions Back to HR Division

Employee Engagement Survey

Employee System Safety Training

FY 23 Strategic Plan Rollout

Launch DEI Plan

Develop a Merit-Based Performance Management System

Model Your Cherriots Values

Organizational Coaching and Development Opportunities

Prepare Employees to Receive Feedback

Project Management and Vendor /Contract Management Technical Capacity



Financial Sustainability Tactics

The Finance Story

Success Outcome Driven Budget

Organizational Design and Performance Management Structure



Tracking Tactics

Cherriots Tactics Dashboard.2022.9.13 .XLSX

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Agency Tactical Milestones: Quarterly Overview

Status	Q1 Status	Q2 Status	Q3 Status	Q4 Status
Not Defined or At Risk	0	0	0	0
At Risk	0	0	0	0
In Progress	0	0	0	0
Complete	0	0	0	0
Revised and On Track	0	0	0	0
Total Milestones	22	22	22	22

Allan Pollock Tactical Milestones: Quarterly Overview

Our Mission
We Deliver Valued Mobility Options that Inspire Community

Our Vision
Creating Community Connections.

Our Values

https://docs.google.com/spreadsheets/d/1uZbG-wC21xVmseRcia6Ta7xPdKpC_9-3/edit#gid=1267704288



Quarter 1 Overview

Agency Tactic Milestones: Quarterly Overview				
Status	Q1 Status	Q2 Status	Q3 Status	Q4 Status
Not Defined or At Risk	0	0	0	0
At Risk	0	0	0	0
In Progress	23	0	0	0
Complete	0	0	0	0
Revised and On Track	0	0	0	0
Total Milestones	23	23	23	23



Organizational Tactic Highlights



FY 23 Strategic Plan Rollout



FY23 Strategic Plan Rollout

Develop a plan to roll out the Strategic Plan elements after adoption of the plan. Mission, vision, values, success outcomes, tactical work plans and performance scorecards will be introduced and incorporated into all aspects of the organization. Establish an annual cadence of reviewing the tactical work plan, scorecard metrics, and updating success outcomes.

Owners: Allan Pollock

Team Members: Bobbi Kidd, Communication Division, Executive Leadership Team

Q1 MILESTONES

- ✓ Develop versions of internal and external presentations.
- ✓ Develop rollout plan to ensure all employees receive the presentation.
- ✓ Develop list of external audiences for presentations.
- ✓ Develop and train speakers' bureau.
- ✓ Begin both internal and external rollouts.

Q2 MILESTONES

- ✓ Continue rollout of strategic plan presentations.
- ✓ Incorporate a Strategic Plan orientation as part of the Onboarding process.
- ✓ Build a plan to incorporate tactics, metrics, and outcomes into the annual budget process.

Q3 MILESTONES

- ✓ Implement and assess the new budget process.

Q4 MILESTONES

- ✓ Implement annual update presentation in conjunction with the budget process.

Public-Facing Performance Dashboard



Public-Facing Performance Dashboard

Develop a public-facing accountability dashboard that reports on the agency's KPIs and progress to achieving success measures. This dashboard will also serve as a platform for financial transparency across the community.

Owner: Bobbi Kidd

Team Members: Executive Leadership Team, Technology Services

Q1 MILESTONES

- ✓ Determine the agency KPIs that will be reported in the dashboard.
- ✓ Hold meetings with divisions to establish KPIs and information systems.
- ✓ Determine reporting cadence.

Q2 MILESTONES

- ✓ Develop the tool for which the data will be entered and shared.
- ✓ Determine the report structure and at what level should each KPI be shared (Community, Board, Organizational, Management).

Q3 MILESTONES

- ✓ Test the dashboard. Review and make adjustments.
- ✓ Share the dashboard with Cherriots team members. Provide informal informational sessions.

Q4 MILESTONES

- ✓ Make the dashboard public.

Launch DEI Plan



Launch DEI Plan

Studies have shown that organizations that focus on DEI (Diversity, Equity and Inclusion) report higher employee engagement, lower turnover, and higher performance, resulting in increased profitability. With the help of third-party consultant, Keene Independent Research, we will launch a Board-approved DEI strategy with the goal of weaving these concepts into the fabric of the organization. Focusing on DEI with respect to hiring and employee retention will aid in our efforts to build a culture of ownership. Employees will feel more and more like they belong, are respected for their individual voice, and that they have a fair opportunity to attain their career aspirations. Our primary goal is to build a culture of ownership, where employees feel respected and have opportunities for career development. By building a culture of ownership, we also hope to increase employee engagement and performance, and reduce employee turnover.

Owners: Christina Conner

Team Members: Executive Leadership Team

Q1

MILESTONES

- ✓ Launch a survey to help assess the organization's current state of equity.
- ✓ Share the survey results with the ELT, Board of Directors and SLT, and solicit feedback.

Q2

MILESTONES

- ✓ Partner with Keene to develop a training plan and materials which will help employees better understand DEI, and dispel any myths.
- ✓ Present DEI training and materials to ELT and SLT, and solicit feedback.

Q3

MILESTONES

- ✓ Conduct a series of training/information sessions to help employees better understand DEI.
- ✓ Share our vision for the future-state of Cherriots DEI Plan. HR and leadership to promote an open-door policy wherein employees are encouraged to ask questions about DEI without fear of judgment.

Q4

MILESTONES

- ✓ HR revisits the topic of DEI on an annual basis as a part of In-Service Training.
- ✓ HR presents the DEI Plan during New Hire Onboarding.

General Updates

- Rolling out to all Cherriots team members
- Strategic Plan Materials on Website (interactive virtual version)
- TransDASH Cherriots dashboard shell complete
- Division Tactics underway as well



Plans for Q2

- Complete rollout to team Cherriots
- Continue achieving progress on Organizational and Division Tactics
- Q2 data uploaded to TransDASH in January



