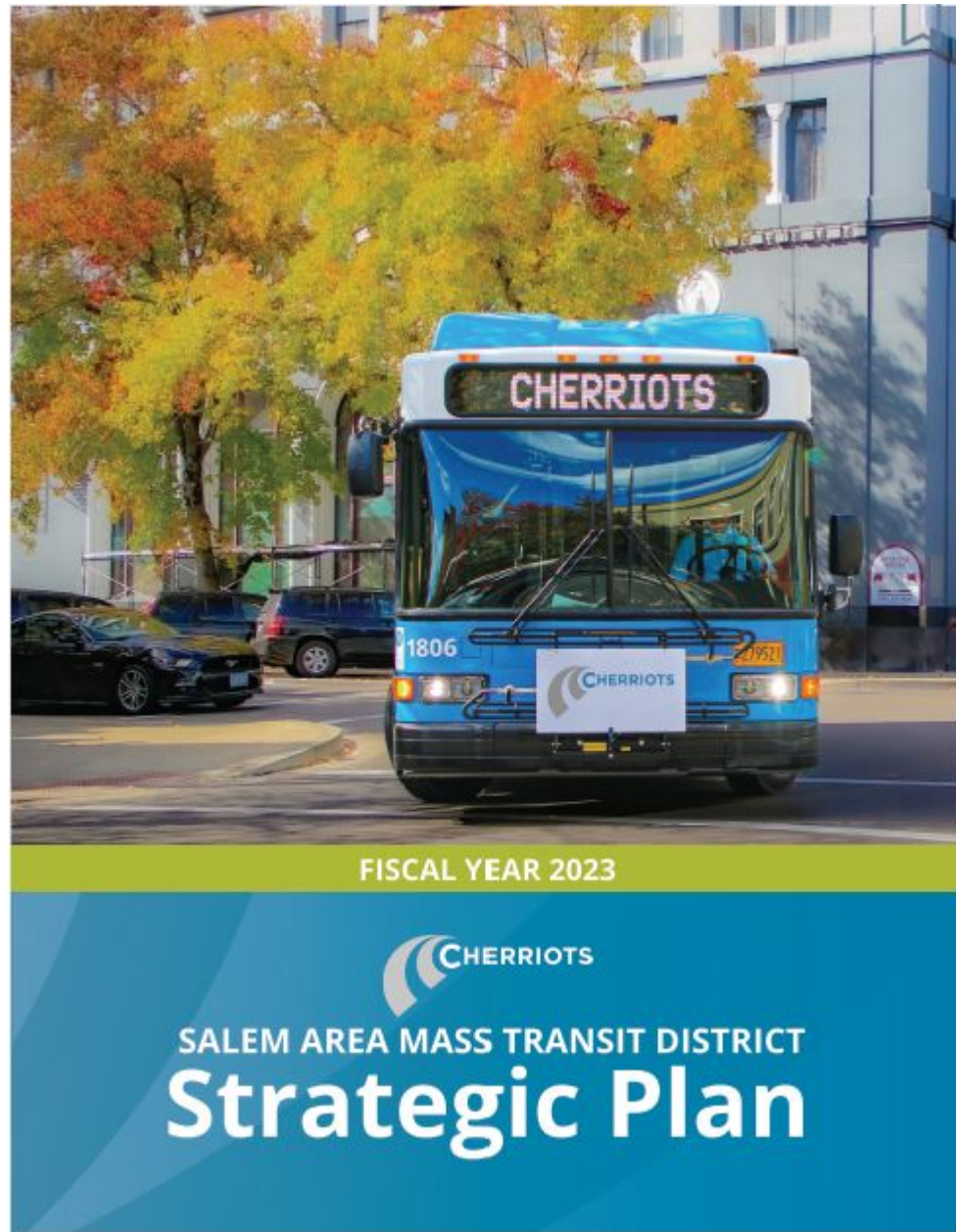


Strategic Plan FY 23 Q2 Report

February 23rd, 2023



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



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



Organizational Tactics



Quarter 2 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	1	0	0
In Progress	23	22	0	0
Complete	0	0	0	0
Revised and On Track	0	0	0	0
Total Milestones	23	23	23	23

At Risk Tastic

-Project Management and
Vendor/Contract
Management Technical
Capacity

Status	Q2 Status
Not Defined or At Risk	0
At Risk	1
In Progress	22
Complete	0
Revised and On Track	0
Total Milestones	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.



Conduct Community Value Surveys

Conduct a community value survey to establish a baseline for the community value success outcome, which is the percent of the community that sees value in the agency. The survey will also include an assessment of the community's perception of safety, transit facility amenities and functions, and other aspects of agency operations. Collaborate with all division heads to ensure the appropriate questions are asked. Develop a plan to improve the baseline community value score based on recommendations from the initial survey.

Owner: Patricia Feeny

Team Members: Melissa Kidd, Li

Q1 MILESTONES
♦♦♦♦

- ✓ Begin procurement process.
- ✓ Execute contract.

MILESTONES
♦♦♦♦

- ✓ Execu
- ✓ Establ data.



Launch Customer Satisfaction Survey

Support efforts to establish a baseline Net Promoter Score for local, regional and paratransit services, including an assessment of various elements such as satisfaction with existing transit facilities, the impression of safety, and other aspects of agency operations. Collaborate with all division heads to ensure the appropriate questions are asked. Engage frontline employees to learn more about their experiences and the overall customer experience. Develop a plan to improve the baseline customer impression metrics based on recommendations from the survey.

Owners: Patricia Feeny

Team Members: Melissa Kidd

Q1 MILESTONES
♦♦♦♦

- ✓ Begin procurement process.
- ✓ Execute contract.

Q2 MILESTONES
♦♦♦♦

- ✓ Execute survey.
- ✓ Establish baseline data.

Q3 MILESTONES
♦♦♦♦

- ✓ Report recommendations.
- ✓ Establish goals from baseline data.

Q4 MILESTONES
♦♦♦♦

- ✓ Execute second survey.
- ✓ Analyze and compare to baseline data.
- ✓ Report.



Long Range Transit Plan

Develop a framework that establishes goals, policies, and strategies to meet the long-term (20-year) transit service needs of the community. Provide specific strategies to improve access to jobs in existing and growing economic sectors, improve connections to Chemeketa Community College and local school districts, and close gaps in access to health care services across the region.

Owner: Chris French

Team Members: Planning Department, Communication Division, Transportation Department

Q1 MILESTONES

- ✓ Engage with staff, community and the Cherriots Board to provide feedback on what transit should look like in the Cherriots service area over the next 20 years.
- ✓ Complete the Strategies Engagement Report.

Q2 MILESTONES

- ✓ Complete the Long Range Transit Plan.
- ✓ Present to the Cherriots Board of Directors for adoption.

Q3 MILESTONES

- ✓ Update current policies to reflect the goals of the Long-Range Transit Plan through the filter of the Cherriots Strategic Plan.
- ✓ Develop an implementation plan to move Cherriots toward Long Range Transit Plan goals.

Q4 MILESTONES

- ✓ Future milestones will be determined by the work completed in Q2 and Q4.

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.



Model Your Cherriots Values

Launch a “Model Your Cherriots Values” internal campaign. This initiative will introduce our new values and describe how and why they were each selected. Understanding our values and how they impact the community and relate to us on a personal level will help create a culture of ownership at Cherriots.

Owners: Christina Conner

Team Members: HR Division

Q1 MILESTONES

- ✓ Present campaign concept to ELT, followed by SLT.
- ✓ Partner with Marketing to create a high-energy, organization-wide campaign.
- ✓ Solicit feedback from positive influencers within each department on what these values mean to them personally and how they will impact Cherriots standing within the community.

Q2 MILESTONES

- ✓ Revisit discussions of the new values on an ongoing basis through GM Roundtables, the Pulse Newsletter, New Employee Onboarding, etc.
- ✓ Consider employee engagement survey with this factor in mind.

Q3 MILESTONES

- ✓ Revisit discussions of the new values on an ongoing basis through GM Roundtables, the Pulse Newsletter, New Employee Onboarding, etc.

Q4 MILESTONES

- ✓ Consider employee engagement survey with this factor in mind.

CHERRIOTS VALUES



Communication

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



Humility

I will serve others with compassion and empathy.



Excellence

I will deliver a world class customer experience.



Respect

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



Resourceful

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



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.



Ownership

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



Transparency

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



Safety

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

TransDASH



TransDASH

- End of Quarter 2 data submission
- National Quarterly Results Presentation was on February 8th
- TransDASH presentation to the board on February 23rd

General Updates

- Update in Reporting Process- Board report will be the second month following every quarter
- Plan to begin rolling out the Cherriots Strategic Plan to the Community
- 25 Division Tactics underway as well



Plans for Q3

- Continue achieving progress on Organizational and Division Tactics
- Q3 data uploaded to TransDASH in April
- FY24 Strategic Planning underway



