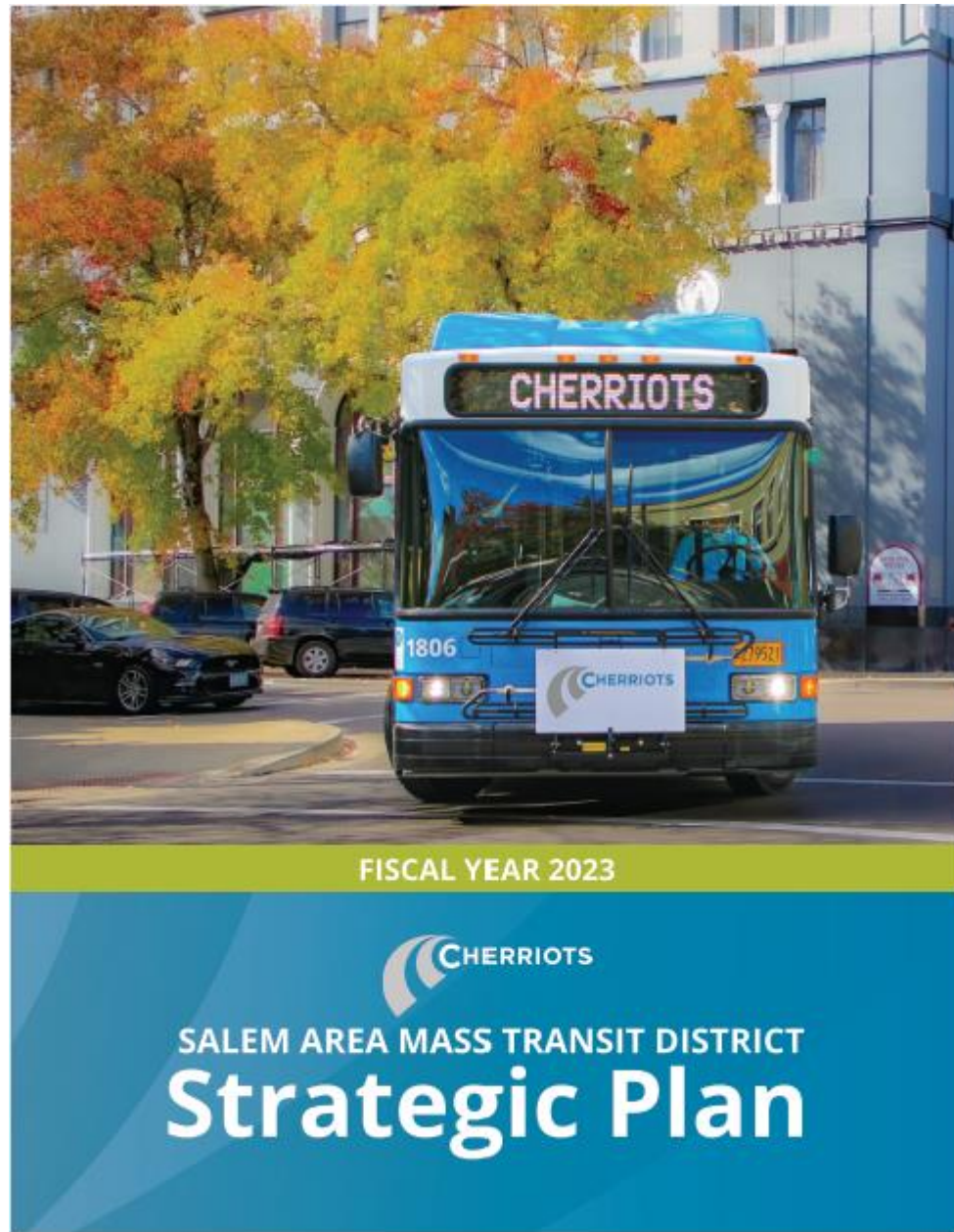


# Strategic Plan FY 23 Q3 Report

May 25th, 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



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 3 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	22	0
Complete	0	0	0	0
Revised and On Track	0	0	1	0
<b>Total Milestones</b>	<b>23</b>	<b>23</b>	<b>23</b>	<b>23</b>

# Organizational Tactic Highlights





## 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.



## Employee Engagement Survey

The employee engagement survey will gauge employee perception of the current state of Cherriots culture, benefits, compensation, training, communication, etc. This information will aid in the effort to increase Cherriots baseline employee engagement score of 59% by five points.

**Owners:** Christina Conner

**Team Members:** HR Division

### Q1 MILESTONES ....

- ✓ Present concept to staff with an explanation of why this information is important and useful.
- ✓ Develop survey questions.
- ✓ Create survey strategy.

### Q2 MILESTONES ....

- ✓ Deploy survey.

### Q3 MILESTONES ....

- ✓ Review and interpret results.
- ✓ Share findings and action items.

### Q4 MILESTONES ....

- ✓ Revisit survey process listed in Q1 on an annual basis.
- ✓ Compare results to past trends to evaluate the effectiveness of employed tactics.





## Success Outcome Driven Budget

Align the annual budget with defined success outcomes. Division heads should develop and implement project plans for the next fiscal year that aligns with the desired outcomes in the Strategic Plan. Revise report formats to summarize department, division, and organizational financials in a user-friendly format that clearly demonstrates alignment with agency outcomes. Develop data visualizations that are more accessible to a variety of audiences. Streamline financial reporting.

**Owners:** Denise LaRue

**Team Members:** Controller, Communication Division, Tim Reedy, Kathleen Smidt, Peggy Greene

### Q1 MILESTONES ....

- ✓ Convene to discuss what the defined success outcomes would look like from a budgetary standpoint.

### Q2 MILESTONES ....

- ✓ Build success outcomes into the existing budget program.
- ✓ Begin to discuss how this will look in Tyler Munis to incorporate into the design of the new ERP System.

### Q3 MILESTONES ....

- ✓ Work with Directors to break out the expense estimation for the 2024 budget.

### Q4 MILESTONES ....

- ✓ Work to get budget committee approval on 2024 budget, designed for tracking success outcomes.

# TransDASH

The screenshot shows a dashboard with a navigation bar at the top containing four tabs: "Home Page" (highlighted in purple), "Overview", "Strategic Areas", and "TransDASH".

Below the navigation bar, the "Home Page" section features a video player on the left. The video is titled "TransDASH - Salem Cherrriots" and shows a man in a suit and sunglasses speaking. A red play button is overlaid on the video. A "Copy link" icon is in the top right corner of the video player, and a "Watch on YouTube" button is in the bottom left corner.

To the right of the video player is a "Welcome to TransDASH: Cherrriots" section. It features the Cherrriots logo, which consists of three curved grey lines to the left of the word "CHERRIOTS" in blue. Below the logo, the text reads: "This is Cherrriots official public-facing performance dashboard, powered by TransDASH." and "Click on one of the Strategic Areas below to learn more about how Cherrriots plans to achieve success."

At the bottom of the dashboard, there are four strategic area cards, each with a background image and text:

- Community Value**: Background image of a building.
- Customer Satisfaction**: Background image of a blue Cherrriots bus.
- Culture of Ownership**: Background image of a man in a suit.
- Financial Sustainability**: Background image of a white Cherrriots bus.



# TransDASH

- Completed end of Quarter 3 data submission
- National Quarterly Results Presentation is on May 31st
- TransDASH dashboard has gone live on our internal portal
- Goal is to get the dashboard public by end of Q4

# General Updates

- Updating Strategic Plan documents in preparation for FY 24
- TransPro will be onsite in June to present survey results at the board meeting
- 25 Division Tactics underway as well



# Plans for Q4

- Continue achieving progress on Organizational and Division Tactics
- Q4 data uploaded to TransDASH in July
- FY23 recap/lessons learned
- FY24 Strategic Plan kickoff



