



STRATEGIC PLAN

August 2018

INTRODUCTION



This Strategic Plan tells the Cherriots story.

For the Board of Directors, the plan serves as a guide for decision-making and planning for the future.

The plan also informs our community partners, stakeholders, and the general public about the District's goals and objectives.

While providing an overview of the District's operations, services, and programs, the plan translates the words of the Cherriots guiding principles – vision, mission, and values – into actions.

We have a vision and a mission and we know where we want to go – this is how we get there.

This plan is divided into these sections:

1. Leadership Message
2. Guiding Principles
3. Strategic Priorities
4. Connecting People With Places: Looking Ahead
5. Board of Directors and Executive Leadership

Cherriots Board of Directors and the Executive Leadership Team meet annually to review the Strategic Plan, with attendant work plan, and update as appropriate.

1 LEADERSHIP MESSAGE



Dear Friends of Cherriots:

For Oregon, this is an exciting and momentous time for public transportation.

In 2017, the state Legislature established a new dedicated source of funding for expanding public transportation service. Keep Oregon Moving, HB 2017, changes the transit landscape in our state. This is a historic, once-in-a-generation investment in Oregon's transportation system that will pay dividends for decades to come.

Most notably for us, the additional funding better positions Cherriots to help transform the region. Our vision is to make a positive difference by enhancing community livability through innovative and sustainable regional transportation options. We will live our vision by adding new service during the next several years, including weekend, later evening, and holidays; working with employers to grow the Group Pass Program; developing a plan for a youth bus pass program; and establishing programs that ensure our sustainable business and service delivery practices.

Equally important, the Mid-Willamette Valley needs a strong and robust Cherriots that is a partner in economic growth for the region. We do that by increasing access to jobs, shopping, and educational opportunities. We do that by providing businesses with access to a larger workforce. And we do that by assuring people that they will be able to access recreational, social, faith-based, and other activities, without the need of a car.

This plan identifies the strategic priorities and goals that support the District's vision, mission, values, and its brand promise to deliver a world-class customer experience. It identifies the actions that, based on the community's desire for enhanced public transportation, we will be taking during the next several years.

The Board will use this document to guide its decision-making and its work with community partners to improve community livability in the Mid-Willamette Valley.

Sincerely,

Robert Krebs
President

Allan Pollock
General Manager

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GUIDING PRINCIPLES



A strong public transit system is the backbone of environmentally friendly and economically thriving communities. The Cherriots vision, mission, and values represent the guiding principles for long-range transit planning.

Vision

Making a positive difference by enhancing community livability through innovative, sustainable regional transportation options.

Mission

Connecting people with places through safe, friendly, and reliable public transportation services.

Values

Safety – We emphasize safety by providing safe, secure, and clean public areas and work sites.

Service Excellence – We serve the public, each other, and our community partners with friendliness, courtesy, empathy, respect, and dignity. We recognize that our customers, internal and external, are why we exist, and we take pride in the positive impact we make in their daily lives.

Communication – We promote an open and respectful culture that values candor. Cherriots listens to its customers, community partners, and employees, actively engaging them in conversations.

Innovation – We encourage and respect new ideas from employees, partners, and the public. The District embraces innovation, environmentally responsible technology, and best practices.

Accountability – We hold ourselves accountable as stewards of public funds, community trust, and the environment. Cherriots will honor this commitment with transparency, honesty, and integrity.

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STRATEGIC PRIORITIES



The Cherriots strategic plan has five priorities that reflect how the District realizes and practices its vision, mission, and values.

Provide an Exceptional Customer Experience

The foundation of an exceptional customer experience is to receive a safe, friendly, and reliable ride. Cherriots will focus on the fundamentals. The District will provide clean and accessible bus stops, deliver reliable bus service, and assure customers can easily access the information they need in-person from customer service staff or online at **Cherriots.org**.

Cherriots continually looks for ways to attract new customers and expand the availability of public transit. To improve the customer experience, Cherriots will implement new technologies and strategies, including an electronic fare system and real-time bus tracking with computer-aided dispatch and automatic vehicle location (CAD/AVL).

Targeted outreach campaigns will make potential Cherriots customers aware of the advantages of public transit and that it is an attractive alternative to personal vehicles.

Team Cherriots: Culture of Excellence

There's the "Nordstrom Way," the "Ritz-Carlton Way," and the "Southwest Airlines Way." Cherriots is committed to attaining a similar reputation for service excellence the Cherriots Way: Every Interaction, Every Customer, Every Day.

The culture of excellence mindset will extend to all community members, stakeholders, and fellow employees. Everyone on Team Cherriots will intuitively know their responsibilities for supporting a positive experience for both internal and external customers. Rather than "just doing a job," their work will be purposeful and meaningful because they are living the brand promise to deliver a world-class customer experience.

As an employer of choice, Cherriots fosters a culture where people feel valued, trusted, and heard in an environment where they know they can make a difference. By practicing servant leadership, Cherriots ensures its employees feel good about working for the District and want to continue to work here.

Enhance Community Engagement

Good relationships with community partners are essential. Cherriots cannot respond to changing transit needs without the public's participation and confidence.

Cherriots will continue to build positive relationships with organizations, individuals, neighborhoods, decision-makers, businesses, and others. These relationships, both formal and informal, are the essential building blocks for effective transit growth. Building public trust and building understanding of the value of Cherriots is key to growing and delivering a robust public transit system.

Cherriots, as a taxpayer-funded special district, is committed to transparency and encourages public participation. Cherriots and the Board receive guidance and advice from three external committees: Special Transportation Fund Advisory Committee, Citizens Advisory Committee, and Statewide Transportation Improvement Fund Advisory Committee. The District will make good-faith efforts to keep the public informed with timely, accurate, and engaging communication. Cherriots has developed and is now executing a Community Communication Plan. The District also has formalized its public outreach mobilization plan, which assigns specific roles and responsibilities to the Board and Senior Leadership Team.

Ensure Organizational Viability

Enhancing community livability with transportation services is a long-term ambition that requires responsible growth and cost-effective operations. Through its actions, Cherriots will demonstrate good stewardship of financial, capital, and human resources. Building public trust and understanding of the value of Cherriots is key to growing and delivering a robust public transit system.

Whether it's maintaining a balanced budget, planning for future facility needs, or investing in workforce development, Cherriots will continue to look ahead and adjust its strategy. The organization will meet community needs with cost-effective services.

Be an Environmentally Responsible Organization

Riding the bus is one of the easiest ways to go green. A bus emits an estimated 33 percent lower greenhouse gas emissions per passenger mile than the average single-occupancy vehicle. But Cherriots is going a step further by improving the sustainability of its daily, in-house operations.

Cherriots has committed to the American Public Transportation Association's core sustainability principles: make sustainability a strategic objective; identify a sustainability champion; establish an employee outreach program; and conduct a sustainability inventory.

Cherriots formed a Sustainability Committee and its members established a purpose statement: To create a culture of environmental stewardship and promote sustainability in the community we serve by the incorporation of sustainable concepts into all functions of District activities. Cherriots will continue to investigate ways to improve the energy efficiency of its transit facilities and vehicles. District plans call for documenting current sustainable practices and developing policies for sustainable products and services purchasing. The District will also establish a Board-adopted environmental sustainability policy statement.

Because of Cherriots commitment to sustainable business practices, Marion County recognized the District as an EarthWISE Certified Business and honored it with a Mid-Valley Green Award.

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CONNECTING PEOPLE WITH PLACES: LOOKING AHEAD



Cherriots will soon change the region's public transit service for the better.

Thanks to the state transportation package, Oregon House Bill 2017, Cherriots has a new funding source through a statewide employee payroll tax that took effect July 1, 2018. The funding will allow Cherriots to significantly expand its service, including weekend, holiday, and later evening.

Gearing-up with new buses and technology

Cherriots recently placed more than \$8.4 million in orders for new buses. It's the District's largest equipment purchase in 15 years. The new buses, which are replacing vehicles driven past their recommended useful life, are expected to improve the fleet's reliability and on-time performance.

Before beginning any vehicle purchase process, Cherriots meets with the District stakeholders to analyze vehicle needs. During the analysis, staff considers low and no emissions vehicles as additions to the fleet to ensure alignment with the District's commitment to being an environmentally responsible organization.

Twenty new, 40-foot-long and 35-foot-long buses for Cherriots fixed-route service are expected to arrive in time for the launch

of expanded service in 2019. In addition, Cherriots purchased five new vehicles for its Cherriots LIFT service, and three new buses for Cherriots Regional.

Cherriots customers can look forward to several technology upgrades that will improve their transit experience: the first step is computer-aided dispatch and automatic vehicle location (CAD/AVL) systems, which will allow all buses to be tracked in real time. The technology allows customers with smart-phone transit apps to know when their bus will arrive. Once the CAD/AVL solution is fully implemented, staff can track buses and make adjustments to help them arrive at the bus stop on time.

Additionally, customers will be able to pay their fare electronically with a smart phone or fare-card. The customer's smart phone essentially functions like a day or monthly pass and doesn't charge for additional rides. The improvements in technology will create a more convenient and efficient experience for the customer.



Building connections

Cherriots will not only add more bus service in the next few years, it will continue to improve connectivity with other transit agencies. The effort builds on the transit agency's goal of helping Mid-Willamette Valley residents travel to cities throughout the region.

Thanks to Route 1X, a service jointly operated by Cherriots and the South Metro Area Regional Transit (SMART) in Wilsonville, the trip between Salem and the Portland metropolitan area is covered. Each workday, hundreds of rides are taken on Route 1X to make the commute up and down the I-5 corridor.

Cherriots is currently involved in a study with transit agencies in Canby and Woodburn to improve bus service along the 99E corridor between Salem and Oregon City.

Cherriots also has talked with Yamhill County Transit and Albany Transit System about coordinating bus schedules and closing gaps in service so that customers can reach more destinations.

Growing region, changing transit needs

The West Salem Transit Center and the Keizer Transit Center allow several routes to come together at a convenient location to make easy and comfortable transfers between routes for customers.

The transit agency is in the process of developing a new transit center in south Salem in the 5200 block of Commercial Street. These transit centers allow Cherriots to design routes that better serve neighborhoods and provide convenient connections to popular destinations.

Cherriots is improving bus stops throughout its entire system to remove barriers that make it difficult for people to access the bus, especially for people with disabilities, those who use assisted mobility devices, and families with young children.

Within the boundaries of the Salem-Keizer area, Cherriots established its core network to encourage the development of transit-friendly communities.

A core network is a set of transit corridors where Cherriots has committed to providing stable service with a focus on frequency and reliability. By establishing a sense of permanency and a commitment to provide high-quality service in these areas for the long term, the core network signals to customers, business owners, city staff, and local government where to locate and build if they want to center themselves and their businesses around transit service.



Cherriots Regional, Polk County Flex

For commuters headed to Salem, as well as those needing a ride between small communities in Marion and Polk counties, Cherriots Regional provides local residents an alternative to driving their own car.

The District has adopted service improvements for Cherriots Regional such as providing more frequent service to some communities. The Polk County Flex, for example, is an option for customers who are only traveling to destinations within Dallas, Independence, and Monmouth.

Cherriots Regional takes passengers as far west as Dallas and as far east as the Santiam Canyon. Other destinations include Woodburn, Mt. Angel, Silverton, Stayton, Monmouth, and Independence.



District area partners include Tillamook County Transportation District, Yamhill County Transit, Canby Area Transit, South Metro Area Regional Transit, and Woodburn Transit System. They connect with Cherriots and Cherriots Regional to provide service to Grand Ronde, Lincoln City, McMinnville, Amity, Woodburn, Wilsonville, and Canby.

Cherriots LIFT

Origin-to-destination paratransit service provides rides to those who are unable to access regular bus service. Cherriots LIFT picks up customers at their homes, or other specified locations, and takes them to their destinations. The service meets Americans with Disabilities Act requirements to provide complementary paratransit service to eligible people within Salem and Keizer. To comply with ADA, Cherriots LIFT operates the same hours and within the same service area as the District's fixed-route buses.

Cherriots Shop and Ride

Shop and Ride includes both a shopper shuttle and origin-to-destination service for seniors and individuals with disabilities. The shopper service takes customers to designated stores in Salem and Keizer where they can buy groceries and household items. With the destination service, customers can reserve rides to go anywhere within the Salem-Keizer urban growth boundary.



Travel Training

Cherriots provides a free travel training program to turn tentative travelers into confident transit users. This instructional program, which is available on an individual basis or in a group setting, is open to everyone.

The training covers topics such as planning trips, transferring between buses, paying bus fare, and boarding the bus using a mobility device. Travel trainers are available to ride along with customers who are unsure of their ability to use public transit.



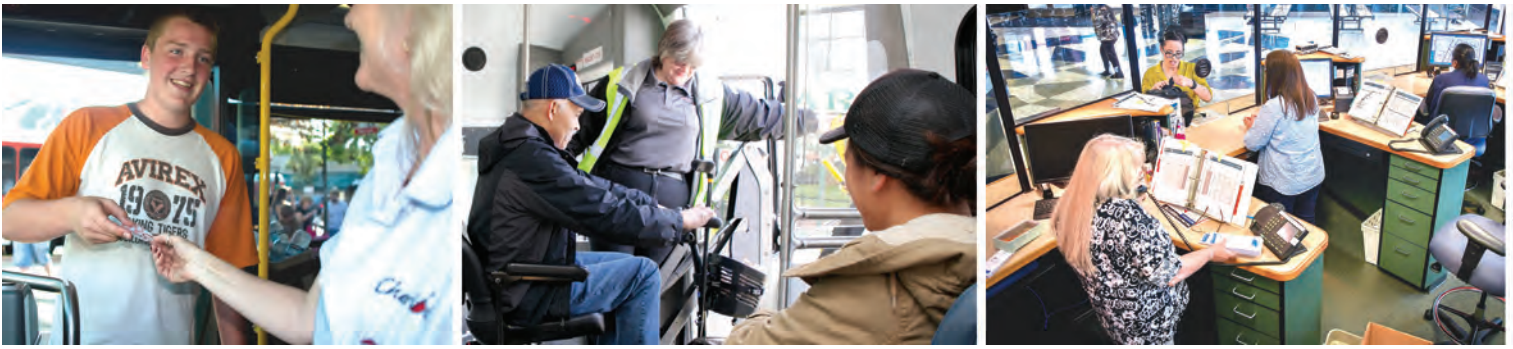
Cherriots Trip Choice

When it comes to sustainable transportation in the Mid-Willamette Valley, the Cherriots buses are just one solution. Carpools, vanpools, bikes, and walking shoes are also important.

That's where Cherriots Trip Choice comes in. In addition to carpool and vanpool ride matching, Cherriots Trip Choice supports biking, walking, and other initiatives to reduce traffic on the roads in the Mid-Willamette Valley.

Cherriots Trip Choice plans to increase its outreach programs in Marion, Polk and Yamhill counties. Outreach programs will also educate youth and those with limited English proficiency about their transportation options.





About the District

Founded in 1979, Cherriots is the operating name for the Salem Area Mass Transit District. Cherriots is a special district funded predominantly by local property taxes, state funds, and Federal Funds. The District's workforce includes nonrepresented employees and members of Amalgamated Transit Union Local 757, which represents transit operators and maintenance workers.

The population of the Salem and Keizer urbanized area is about 236,000 and the population of the overall Cherriots service area is about 410,000. Cherriots provides local, regional, and paratransit services in Marion and Polk counties. Fixed-route service is provided by 64 buses, powered by compressed natural gas or biodiesel fuel. Regional service is provided by 12 buses; paratransit service with 43 vehicles; and shopper shuttle service with five vehicles.

In Fiscal Year 2017, annual Cherriots ridership among all services was just over 3.2 million, averaging 13,000 rides per day. Cherriots expects its ridership will steadily increase with expanded bus service and growth in the region.

Governance

The Cherriots Board of Directors establishes priorities, evaluates the performance of the transit system, and adopts budgets. The seven-member, publicly elected Board also works with community members to improve bus service and address transit-related issues.

Three external committees provide advice to the Board: Special Transportation Fund Advisory Committee, Citizens Advisory Committee, and Statewide Transportation Improvement Fund Advisory Committee.

With recent changes in Oregon law, seats on the Board will become governor-appointed positions starting in July 2019.

Rebranding to Ensure Relevance

Even though the Cherriots brand was firmly established, it had become outdated. The goal was not to eliminate or diminish the brand value that had been developed over the years, but to update it to stay relevant.

The old brand did not reflect Cherriots evolution or help tell its story. Cherriots provides a complex group of mobility services and programs. Research, however, confirmed that among the general public there was a low level of awareness that these services were all connected to the District.

This brand revitalization will create a stronger connection between the Cherriots name and visual identity. Through the brand refresh, Cherriots will be able to tell its story more broadly so that people will know about the resources, support, and services the District brings to the community.



The Future

The future holds much promise and opportunity. In order for Cherriots to provide a world-class customer experience, it must adapt to today's complex and ever-changing mobility landscape.

Technology is transforming how people view mobility. The ability to use a mobile device to schedule and pay for a trip is changing the way people move about their community.

The Cherriots of the future is more than a bus system. It will be a mobility integrator where a customer's journey is planned and paid for through a single technology application, regardless of service provider, as the person moves through the Mid-Willamette Valley.

The concept of shared modes, linking a total trip that might include bikesharing, carsharing, TNC's (transportation network companies), and the bus, is becoming the norm.

In fact, a recent study by the American Public Transportation Association identified these key findings:

- That the more people use shared modes, the more likely they are to use public transit, own fewer cars, and spend less on transportation overall.
- Shared modes complement public transit, enhancing urban mobility.
- Shared modes will continue to grow in significance, and public entities should identify opportunities to engage with them to ensure that benefits are shared widely and equitably.
- The public sector and private operators are eager to collaborate to improve paratransit service using emerging approaches and technology.

Cherriots will lead the effort between public and private entities to ensure there is a robust, coordinated network of mobility options throughout the Mid-Willamette Valley.

In order for a multimodal lifestyle to be successful in the Mid-Willamette Valley, a robust public transportation service is critical.

Cherriots is making strategic decisions to move in that direction.



Aspiring Transit Operator

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BOARD OF DIRECTORS AND EXECUTIVE LEADERSHIP



Fiscal Year 2018-2019

Board of Directors

Steve Evans, Vice-President	Subdistrict 1
Colleen Busch, Secretary	Subdistrict 2
Kathy Lincoln	Subdistrict 3
Doug Rodgers	Subdistrict 4
Jerry Thompson	Subdistrict 5
Robert Krebs, President	Subdistrict 6
Marcia Kelley, Treasurer	Subdistrict 7

Executive Leadership Team

Allan Pollock	General Manager
David Trimble	Chief Operating Officer
Steve Dickey	Director of Transportation Development
Paula Dixon	Director of Administration
Patricia Feeny	Director of Communication
Al McCoy	Director of Finance/CFO

