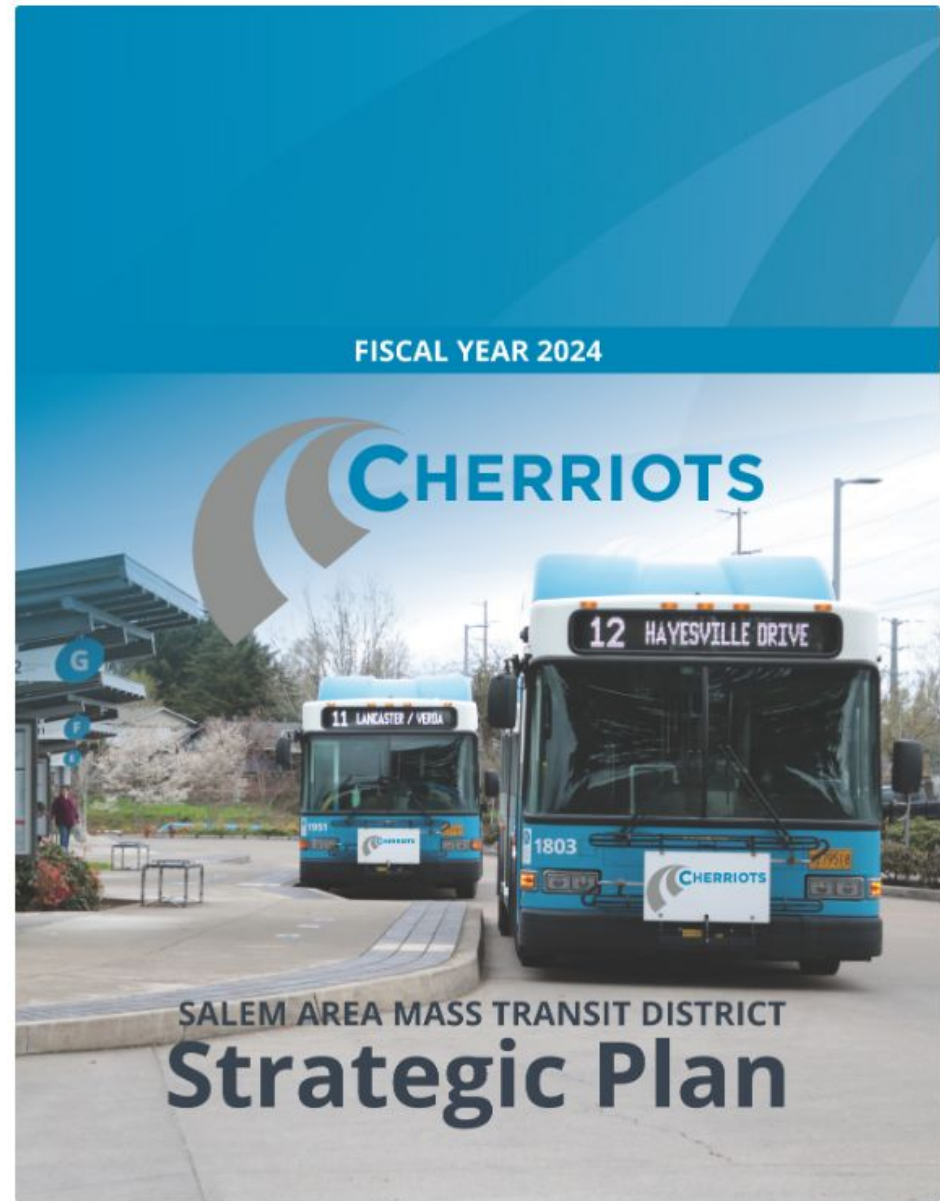


Strategic Plan FY24 Q2 Report

February 22, 2024



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 2024 Success Outcomes

CHERRIOTS CORE AREA OF SERVICE / OPERATIONS



COMMUNITY VALUE

Community Value Score: 85



CUSTOMER SATISFACTION

Local NPS: 55



CULTURE OF OWNERSHIP

Increase baseline Employee Engagement score of 62 by 5 percentage 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

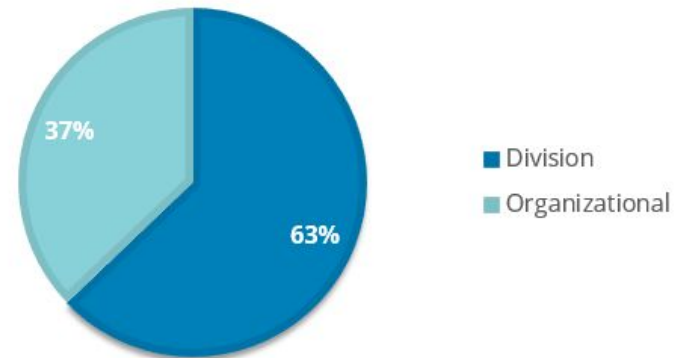
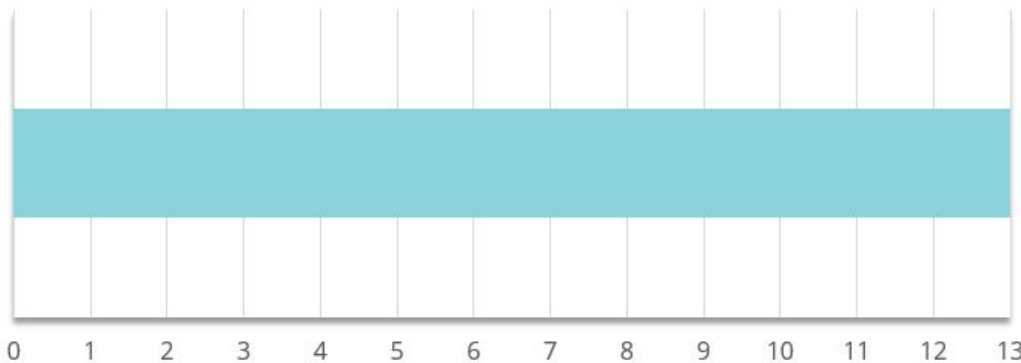
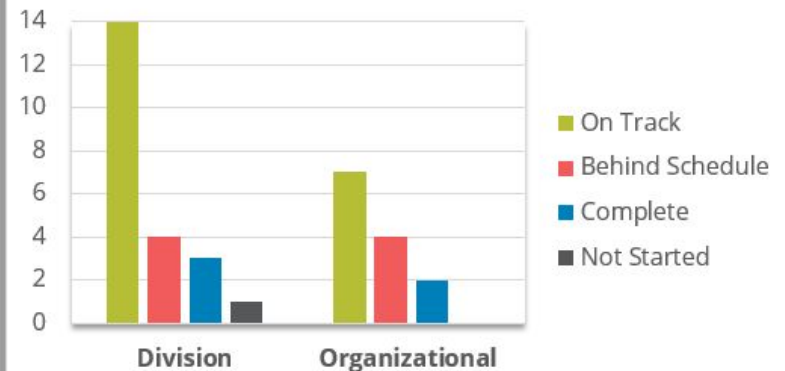


2024 Organizational Tactics

Community Value	Customer Satisfaction	Culture of Ownership	Financial Sustainability
<ul style="list-style-type: none"> -Initiate Development of Climate Action Plan -Integration of Battery ELectric Buses -Access -Community Value Survey 	<ul style="list-style-type: none"> -Customer Satisfaction Survey -E-fare Implementation -Cherriots Intelligent Transportation System (CITS) -Clean and Safe Passenger Amenities 	<ul style="list-style-type: none"> -Merit-based Performance Management System -Management and Resource Tracking Instrument (MARTI) -Diversity, Equity, and Inclusion -Employee Engagement Survey 	<ul style="list-style-type: none"> -The Finance Story

Quarterly Tactic Dashboard

22 DIVISION TACTICS

COMBINED TACTICS

13 ORGANIZATIONAL TACTICS

Q2 TACTIC STATUS


Organizational Tactic Highlights





Diversity, Equity, and Inclusion (DEI)

Description: Organizations that focus on DEI report enhanced engagement, lower turnover, and higher performance. 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 have a fair opportunity to attain their career aspirations.

Owner: Chief Human Resource Officer

Team

Members: Human Resources Team

Q1 MILESTONES

- ✓ Other organizational initiatives such as FMLA/OFLA Transition, Tyler Munis ERP Implementation, and Paid Leave Oregon Go Live, will impede HR's ability to promote this tactic during Q1

Q2 MILESTONES

- ✓ A new series of listening sessions will be launched during In-Service Training. The topic will likely be Unconscious Bias

Q3 MILESTONES

- ✓ The DEI Committee will be designed with its purpose and high level goals outlined
- * One goal is the eventual creation of employee resource groups

Q4 MILESTONES

- ✓ A DEI Committee will be promoted and launched and the committee will be open to all employees on a voluntary basis during its first year with the expectation of meeting quarterly.



Community Value Surveys

Description: Conduct an annual community value survey to gauge the community value success outcome, which is the percent of the community that sees value in the agency. The survey tool includes an assessment of the community's perception of safety, transit facility amenities and functions, and other aspects of agency operations. Incorporate survey findings into promotion, education, and information marketing and communication planning.

Owner: Patricia Feeny

Team

Members: ELT, Bobbi Kidd

Q1 MILESTONES

- ✓ Contract with new survey services provider
- ✓ With vendor, develop/ revise survey instrument

Q2 MILESTONES

- ✓ Execute Community Value survey
- ✓ Receive results from contractor
- ✓ Present results to ELT and Board of Directors

Q3 MILESTONES

- ✓ Coordinate presentations to CAC Team Cherriots
- ✓ Review/analyze survey and evaluate results for agency promotion and storytelling

Q4 MILESTONES

- ✓ Schedule any presentations not scheduled in Q3
- ✓ Incorporate results into communication and marketing campaigns



The Finance Story

Description: As stewards of public funds, community trust, and the environment, tell the Cherriotics financial story with transparency, honesty, and integrity. Include the more than a decade of accolades from the Finance Officers Association, consistently operating within our adopted budget and the value public transportation provides the community.

Owners: Patricia Feeny

Team

Members: Finance Team

Q1 MILESTONES

- ✓ Incorporate FY 24 Budget into narratives, plans, and presentations
- ✓ Draft/Re-draft Finance tools (narrative and PPT to reflect current budget, less emphasis on COVID funding)

Q2 MILESTONES

- ✓ Presentation to Team Cherriotics and other groups, as identified

Q3 MILESTONES

- ✓ Integrate Finance Story into milestone or other noteworthy events

Q4 MILESTONES

- ✓ Reassess story tools and adjust; Incorporate updated audit, Budget, ACFR

Looking Ahead





TransDASH

Value Over Volume

<https://www.transproconsulting.com/2021/10/28/transdash-changing-the-conversation-from-volume-to-value/>

Quarter 3

- Employee Engagement Survey prep
- FY 25 Strategic Planning finalization
- Finalizing Strategic Plan dashboard
- TransDASH: National Quarterly Results Presentation is in March which will include our updated Community and Customer Survey results!

