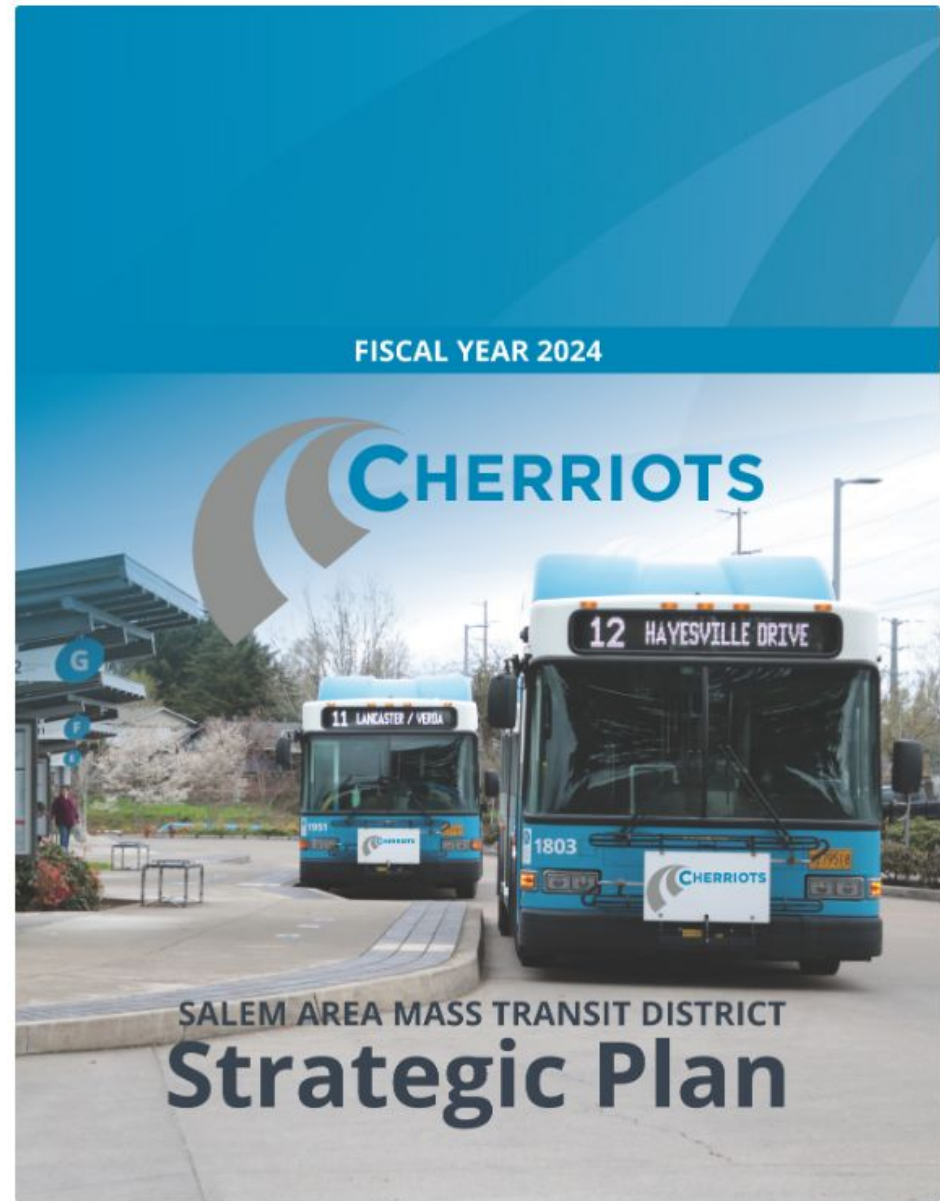


Strategic Plan FY24 Q3 Report

May 23, 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

Employee Engagement Score: 64



FINANCIAL SUSTAINABILITY

Year 1: Expenditure/Revenue Reporting

Year 2: 3-Year Rolling Budget Forecast

Year 3: Delivery of Full Capital Program Budget



Employee Engagement Score

To better understand and define employee engagement levels, four (4) key elements of the workplace experience are reflected:

- 1 Do employees feel they understand what success looks like for Cherriots and how they contribute to that success?
- 2 Do employees believe they have the resources/tools necessary to perform their duties?
- 3 Do employees feel their supervisors provide feedback on their performance?
- 4 Do employees believe they work in a safe environment where their perspective is invited?

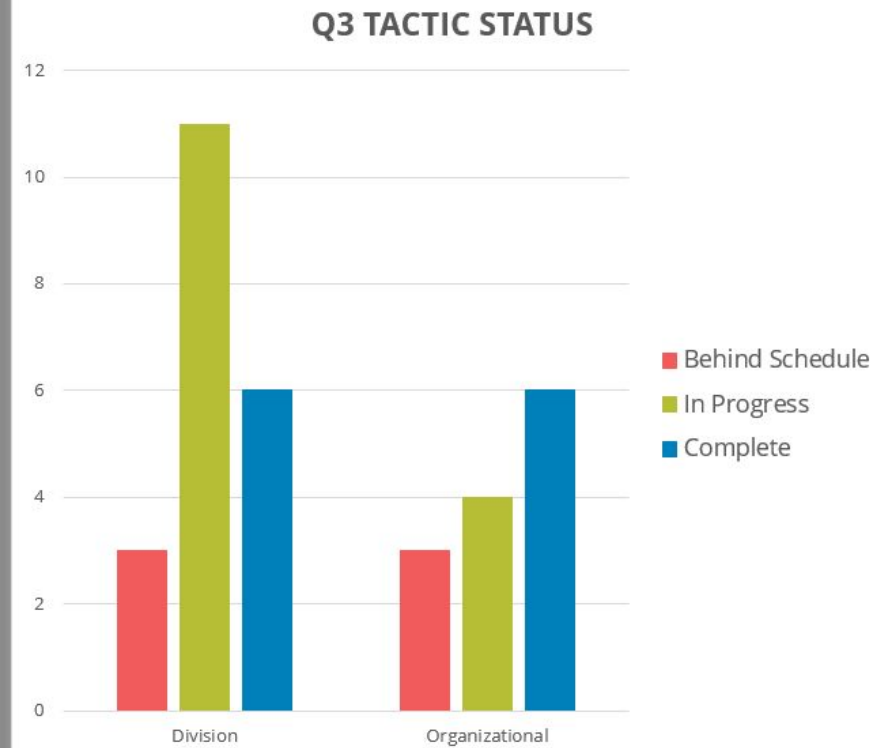
Organizational Tactics



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 ELeetric 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 |

Strategic Plan Quarterly Tactic Dashboard



Organizational Tactic Highlights





Employee Engagement Survey

Description: An employee engagement survey will gauge employee perception of the current state of Cherriots (culture, benefits, compensation, training, communication...etc). This information will serve as a baseline to set strategy in the effort to increase our overall employee engagement score.

Owner: Chief Human Resource Officer

Team

Members: Human Resources Division

Q1 MILESTONES

- ✓ The employee engagement survey results will be presented to the Senior Leadership Team

Q2 MILESTONES

- ✓ HR will solicit feedback from leaders and make recommendations on actions steps

Q3 MILESTONES

- ✓ The employee engagement survey results will be presented organization wide during In-Service Training with the corresponding action steps included

Q4 MILESTONES

- ✓ The employee engagement survey will be promoted and launched during April 2024



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.



Management and Resource Tracking Instrument (MARTI)

Description: The Management & Resource Tracking Instrument (MARTI) emphasizes Cherriots commitment to continuous improvement through more efficient business processes. Additionally, MARTI promotes our progression toward a paperless environment.

Owners: Chief Human Resource Officer and Denise LaRue

Team

Members: Human Resources Team and Finance Team

Q1 MILESTONES

Finance

- ✓ Provide training and support to each department manager to effectively and efficiently manage the Marti HUB and timesheets

Human Resources

- ✓ HR will market and launch the new HRIS, ATS & Employee Self Service (ESS) Go Live
- ✓ HR will partner with senior leadership to roll-out a phased training schedule for all employees with "super-users" receiving in-depth instruction

Q2 MILESTONES

Finance

- ✓ Provide training and support to each project manager to effectively manage projects within Marti

Human Resources

- ✓ HR will launch periodic sessions covering all divisions
- ✓ Training resources will be created including a recorded tutorial, tip sheets, and a Portal landing page

Q3 MILESTONES

Finance

- ✓ Provide training and support to each project manager to process procurements through Marti

Human Resources

- ✓ HR will continue to provide support for HCM modules
- ✓ Any remaining employees who did not attend a training session will be scheduled

Q4 MILESTONES

Finance

- ✓ Provide any necessary support for additional training as needed

Human Resources

- ✓ HR will continue to provide support for HCM modules

Looking Ahead



Quarter 4

- Wrapping up FY24 tactic work
- FY 25 Strategic Planning finalization/
Preparing for FY25 tactic work
- Employee Engagement Survey Result
Presentation and Analysis
- TransDASH Performance Summit in June

