STRATEGIC BUSINESS PLAN

Fiscal Years **2022 – 24**

FY23

CONTENTS

INTRODUCTION
CONNECTING OUR COMMUNITY

Everyone at Lane Transit District is proud to introduce the Strategic Business Plan for fiscal years 2023 – 2024. The goals and initiatives identified as priorities for LTD over the next two years are outlined within this document.

The plan introduces projects and programs that align with our mission of connecting the community and our vision for creating a more connected, sustainable, and equitable community in all that we do.

We Are Driving Community Value
Community is what makes our region so unique and desirable. Today, we understand the value of investing in people more than ever, especially our customers and essential workers who rely on us to connect them to jobs, medical appointments, grocery stores, and other key destinations, and our dedicated employees who have served courageously to provide service throughout the pandemic.

In developing this plan, five core strategic areas of our operations are highlighted. They include:
• Customer satisfaction
• Employee engagement
• Community value
• Financial health, and
• Sustainability

Each of the five elements are critical and interdependent to the service we provide – like the gears of a calibrated machine. Specific tactics and performance measures have been developed for each of these five strategic areas, ensuring our aligned focus on work that is vital to our success.

So strong is our commitment to value, we are introducing a performance scorecard that will monitor and measure how well we are achieving in each of the five key areas. The quarterly LTD Performance Scorecard shows us at LTD and members of our community if we are meeting expectations in our quest to deliver high-quality service and value to the community.

We encourage you to read this document and invite you to follow our work activities to see for yourself how well we are doing at connecting our community.

EXECUTIVE Summary

Development of the Plan

As you will discover in this plan, **Collaboration** is one of the core values that guide our work at LTD.

Our team demonstrated a commitment to this value in developing and implementing the Strategic Business Plan in the first year.

Lane Transit has completed its first year of implementation of the Strategic Business Plan. Despite the ongoing challenges of engaging during the coronavirus pandemic and adjusting to post-pandemic practices we successfully implemented and moved forward with several performance metrics and tactics identified in the Strategic Business Plan. As we strive to continually improve the service and value of Lane to customers and the community, we took some time to examine where we are and where we need to go in the 2023 Fiscal Year.

Here are just a few highlights of our targeted and inclusive approach to developing the plan: After a successful first year of implementing our first Strategic Plan the LTD team revisited their progress to determine priorities for FY23. In doing so we evaluated our progress on all tactics for FY22. This allowed us to identify those tactics that needed to be removed due to completion, those tactics that we needed to continue to work on, refine as well as the development of new tactics that have become a priority to team.

Through a virtual retreat LTD Directors reviewed:

Mission, Vision and Values
This was done to ensure that the Mission, Vision and Values still aligned with **WHY** LTD provides transit service to the community and presents a clear mission, vision and values with a strong direction for the present and future.

Strategic Areas of Focus
We re-evaluated each tactic to ensure that they were still priority areas for the new fiscal year and then evaluated the weighting of each one to confirm the priority of each area.

We also discussed new strategic areas of focus to determine if those were a priority area for the upcoming year.

New Work Plans
We worked collaboratively as a team to develop new work plans and align on how the projects and programs suggested would lead to the achievement of the success of the agency for the year. Creating a process that would guide us through each quarter of the fiscal year.
As we move forward in the implementation and future updates of our Strategic Business Plan, it will be critically important to continue building on these efforts to involve even more voices and perspectives. As you will see in our work plan and performance scorecard, community involvement will be central to our work and how we measure its impact.

LTD Stakeholder Survey results indicate:

The top three areas to improve LTD customer satisfaction include:

✓ More route coverage

✓ More frequent service

✓ More reliable service

»

The community recognizes LTD's role in providing equity and access – connecting low-income, minority, elderly, disabled, and others with special mobility needs to essential destinations and opportunities by providing affordable transportation options.

»

Over 80% of survey respondents believe it's very important for LTD to address sustainability, equity, community value, safety, customer satisfaction, and financial stewardship in the Strategic Business Plan.

" Lane Transit District's strategic plan was developed by staff, with input from community members and the Board. With a clear mission and vision, the strategic plan sets a strong direction for LTD's present and future. The strategic business plan is the Board's guide in setting policies that ensure the District's goals and activities support LTD's mission."

— Board Chair, Caitlin Vargas

MISSION, VISION & Values

Mission
Connecting our community.

Vision
In all that we do, we are committed to creating a more connected, sustainable, and equitable community.

Values
Organizational values are the guiding principles that represent how we – as individuals and as a team – behave on our way to the future.

As a way to ensure the success of Lane Transit District and because we care, we hold ourselves and our colleagues accountable for living and demonstrating our six core values:

Respect
We honor and dignify all individuals by listening intently to their unique contributions and needs — treating others with trust, care, kindness, and courtesy.

Integrity
We hold all that we say and do to a high standard of honesty, stewardship, ethics, fairness, and compassion.

Innovation
We persist in applying resourcefulness, creativity, and new technology alongside known best practices to best serve our community.

Equity
We commit to listening, learning, and including voices from the diverse identities and abilities of our employees and our community — and we take care to consider how our decision-making processes address historic inequities in transportation.

Safety
We create a safe environment for our employees, customers, and community – and are always willing to reach out to help, support, and assist others in ways that are safe to all involved.

Collaboration
We demonstrate cooperation and excellent team behaviors when working with others — both internally and with our partners in the District — by focusing on common purpose and win-win outcomes.

SUCCESS Outcomes

Through a collaborative process that was informed by and builds upon our past work, we have identified five overarching measurable success outcomes aligned with our five strategic areas of focus. These clear definitions of success will keep our team focused on ensuring that our work has impact in these critical areas, and provides the Board and our community with the ability to hold us accountable for meeting these key outcomes.

As part of the strategic planning process, our team also developed performance metrics and tactics aligned with each of the strategic areas that will enable us to make progress towards realizing these outcomes. This alignment of success outcomes, performance metrics, and tactics provides our staff with the ability to clearly connect their work activities to the success of the organization, empowering and inspiring them to produce results that matter.

(Detailed definitions for these success outcomes can be found in the Organizational Performance Scorecard section of this document beginning on page 46.)

CUSTOMER SATISFACTION
Our goal is to deliver outstanding customer service that increases the willingness of our customers to recommend our services to others.

Establish a Net Promoter score and increase by 5%.

EMPLOYEE ENGAGEMENT
Our goal is to attract and retain a high quality workforce through high levels of employee engagement.

An Employee Engagement Score of 65%*.

COMMUNITY VALUE
Our goal is to provide strong value to the community through the services we offer, whether or not they use our services directly.

Establishment of a baseline for the percentage of the community that believes we provide value and improve 5%.

FINANCIAL HEALTH
Our goal is to maintain LTD's strong financial position to sustain our operations for the future.

Achievement of 3-year rolling financial plan targets.

SUSTAINABILITY
Our goal is to do our part to preserve and protect the environment through a reduction in greenhouse gas emissions.

A reduction in Greenhouse Gas Emissions of 70%.

*The Employee Engagement Score will be a composite of three key indicators of engagement from the Employee Survey: understanding of how employee performance is linked to LTD's success, agreement that LTD leadership is invested in employee success, and agreement that employees are provided the tools needed to work successfully.

LTD STRATEGIC Business Plan

High level performance in each of the five primary strategic priority areas of LTD operations will pave the way for LTD to achieve our mission of Connecting Our Community. A tactical work plan as well as a performance scorecard have been developed in alignment with each primary strategic priority area.

Connecting Our Community
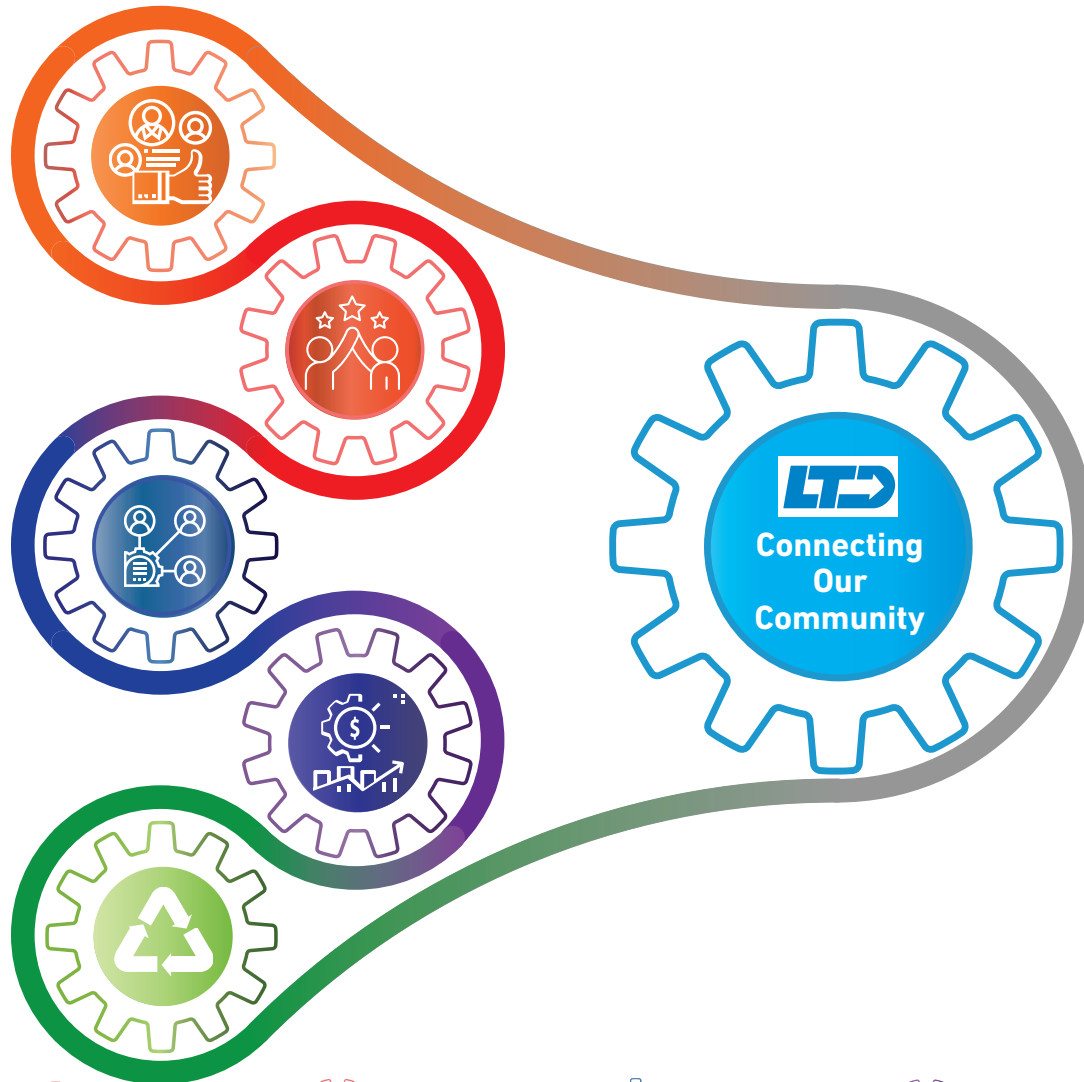
Customer Satisfaction	Employee Engagement	Community Value	Financial Health	Sustainability
Work activities and performance goals that align LTD teams on delivering outstanding customer service.	Initiatives and performance goals centered on attracting and retaining a high quality workforce.	Projects, programs, and performance goals aimed at providing strong value for the community.	Work plan tactics and performance goals focused on maintaining LTD's strong financial position.	Specific steps and performance goals to help LTD do its part to preserve and protect the environment.
Work Plan Tactics	**Work Plan Tactics**	**Work Plan Tactics**	**Work Plan Tactics**	**Work Plan Tactics**
8	9	7	5	3
Performance Metrics	**Performance Metrics**	**Performance Metrics**	**Performance Metrics**	**Performance Metrics**
8	5	4	3	4

WORK Plan

This section of the Strategic Business Plan outlines the detailed work plan teams will implement over the course of 2022 and 2023. Tactics included on the next several pages are in alignment with the five primary strategic areas identified as critical to LTD service.

Each tactic is a program, project or activity aligned to at least one of five primary strategic priorities:

1. Customer Satisfaction

2. Employee Engagement

3. Community Value

4. Financial Health

5. Sustainability

Each tactic has an owner who serves as project manager, and is responsible for oversight of a team charged with completing the tactic.

Tactic owners have developed the detailed tactic outlines presented on the following pages. Each worksheet provides scope of work and quarterly milestones. Some of the tactics continue over the second and third quarters of 2023.

You may notice some internal LTD jargon in the milestones for some of our tactics (e.g. Blue Cards) because these are meaningful for the LTD staff responsible for implementing and tracking these initiatives. While you may not understand every term, our intent is to provide enough information that you can get a good sense for what we are trying to accomplish with each tactic.

LTD leadership team will review progress of each tactic at least on a quarterly basis to ensure that projects are advancing as planned.
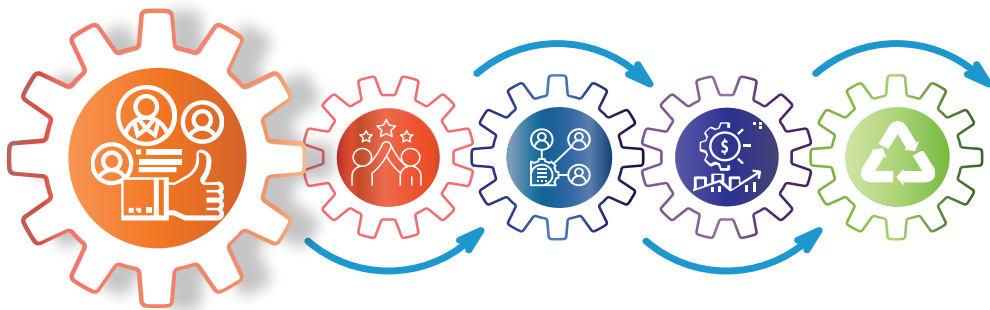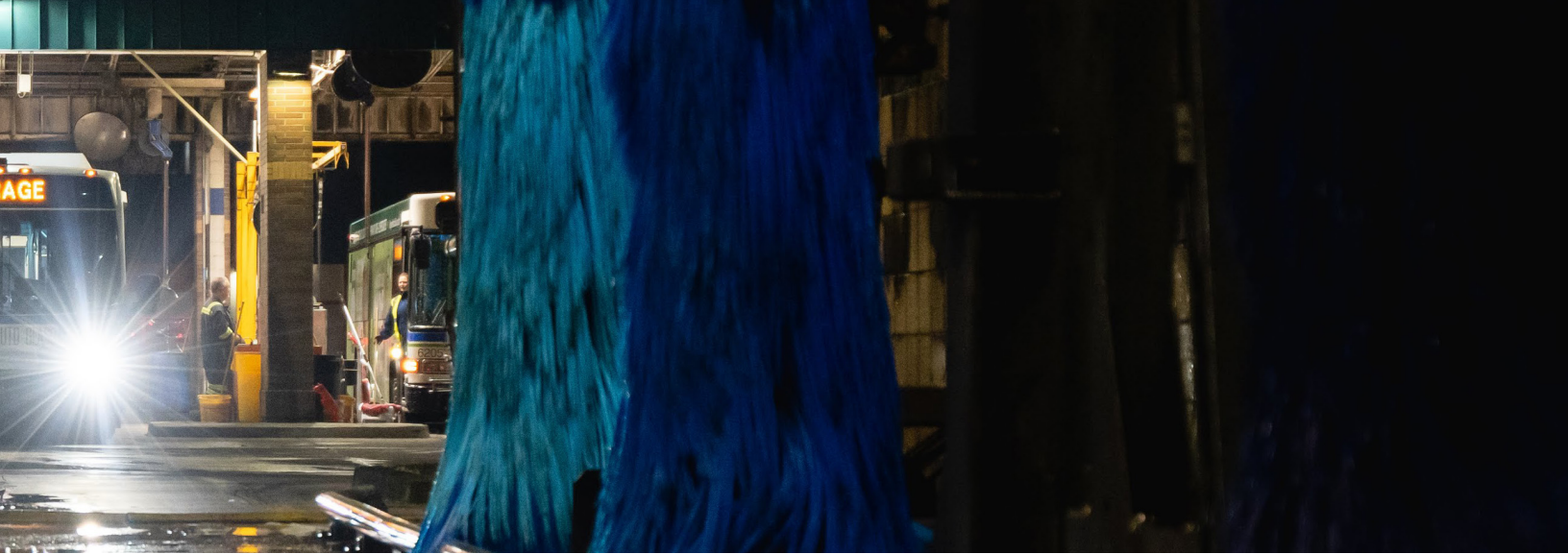
Customer Satisfaction Work Plan Tactics

Measure Customer Satisfaction – Fixed Route

Measure Customer Satisfaction – Paratransit

Improve Trip Efficiencies & Performance – Ridesource

Conduct Courtesy Training For Operations / Public Safety

Ridesource Comprehensive Operations Analysis (ROA)

Establish Baseline Analysis Of Equity Of LTD Services

Stabilize Running Times on LTD's Frequent Transit Network (FTN)

Eugene Station (ESM)

Customer Satisfaction Work Plan

MEASURE CUSTOMER SATISFACTION – FIXED ROUTE

DESCRIPTION
Complete annual Customer Satisfaction Survey (CSS) for fixed route to identify current perceptions and areas to improve satisfaction.

OWNER
Cosette Rees

2023 Quarterly Milestones

Q1	• Present report of survey; highlighting areas of strengths and weaknesses • Identify cost of needed improvement
Q2	• Amend goals and plan for customer satisfaction improvement
Q3	• Implement recommended plan
Q4	• Prepare for next wave of fixed route surveys to measure success

MEASURE CUSTOMER SATISFACTION – PARATRANSIT

DESCRIPTION
Periodic Customer Satisfaction Surveys (CSS) for non-emergency medical transportation (NEMT) and paratransit to identify and benchmark current perceptions and identify areas to improve satisfaction.

OWNER
Cosette Rees

2023 Quarterly Milestones

Q1
- Analysis of and report/presentation of first ABBG Paratransit Survey
- Develop goals and a plan for customer satisfaction improvement
- Identify priorities and cost of needed improvement
- Track implementation of improvements
- Develop and implement a periodic survey plan which incorporates ABBG, NEMT, and other surveys while minimizing survey fatigue

Q2
- Track implementation of improvements
- Track performance of improvements
- Prepare for 2022 ABBG survey
- Implement periodic NEMT survey

Q3
- Participate in annual ABBG survey
- Encourage and incentivize participation in the survey to improve results and representation

Q4
- Present report of survey findings; highlighting areas of strengths and weaknesses
- Amend goals and plan for customer satisfaction improvement
- Identify cost of needed improvement

IMPROVE TRIP EFFICIENCIES & PERFORMANCE – RIDESOURCE

DESCRIPTION
Identify best practices and implement procedures to optimize on-time performance and mitigate ride no-shows across the various programs provided through the RideSource Call Center (RSCC).

OWNER
Cosette Rees

2023 Quarterly Milestones

Q1 Complete analysis of on-time and no-show performance by program; identify areas of concern; perform root cause analysis

Q2 Develop solutions to address root causes for priorities identified in analysis

Q3
• Implement and evaluate interventions
• Monitor and continue analysis and improvement

Q4
• Implement and evaluate interventions
• Monitor and continue analysis and improvement

CONDUCT COURTESY TRAINING FOR OPERATIONS/PUBLIC SAFETY

DESCRIPTION
Develop, standardize and implement training for operations and public training.

OWNER
Jake McCallum

2023 Quarterly Milestones

Q1
• SWOT Analysis of EDLT Compliant System

Q2
• Develop a consistent system for addressing EDLT issues for Operators

Q3
• Provide the customer service/courtesy training to all supervisory and public safety personnel
• Training Schedule for for TS, Supervisors, Instructors and Public Safety

Q4
• Develop written procedures for operators and supervisors to implement training modules
• Ongoing training for TS, Supervisors, Instructors and Public Safety
• SOPs for Transit Operations Supervisor Position Duties

RIDESOURCE COMPREHENSIVE OPERATIONS ANALYSIS (ROA)

DESCRIPTION
The RideSource Call Center (RSCC) has experienced significant changes in programs and models over the past 10 years. This comprehensive look includes a cost/benefit analysis, and recommendations of how we can best use our resources to provide value to our community to ensure we are moving forward strategically and intentionally.

OWNER
Cosette Rees

2023 Quarterly Milestones

Q1
- Procure and award Consultant
- Agreement on SOW
- Kick Off Meeting

Q2
- Begin Comprehensive Operations Analysis

Q3
- Continue Comprehensive Operations Analysis

Q4
- Draft report and recommendations

ESTABLISH BASELINE ANALYSIS OF EQUITY OF LTD SERVICES

DESCRIPTION
Understand current use of LTD services by minoritized communities and evaluate their transportation needs.

OWNER
Tom Schwetz

2023 Quarterly Milestones

Q1
- Define Equitable Level of Service
- Develop metrics and processes on how to measure

Q2
- Assess existing conditions, such as fares, accessibility of LTD information, demographics of users
- Engage Diversity Council in gathering initial internal input

Q3
- Assess existing conditions, such as fares, accessibility of LTD information, demographics of users
- Develop strategies to gather in-depth travel patterns and needs of minoritized groups (i.e. survey, focus groups, and interviews)

Q4
- Gather information on travel patterns and service needs
- Identify resources to address access or service to minoritized groups or to advance equity based on need (e.g. translation services, mobility access, passes to increase access to public meetings, etc.)

STABILIZE RUNNING TIMES ON LTD'S FREQUENT TRANSIT NETWORK (FTN)

DESCRIPTION
Conduct analysis of schedule adjustments made between 2007 and 2022 (span of data available) to determine cost and extent of schedule increases at the route and system level. Based on that analysis, identify priority route segments on FTN Corridors for possible Transit Corridor Enhancements.

OWNER
Tom Schwetz

2023 Quarterly Milestones

Q1
- Conduct analysis of schedule adjustments made between 2007 and 2022 (span of data available) to determine cost and extent of schedule increases at the route and system level

Q2
- Identify priority route segments on FTN Corridors for possible Transit Corridor Enhancements.
- Share with EMT Priority Route Segments
- Identify potential treatments that can be applied to improve transit performance.

Q3
- Prioritize and program improvements in LTD's CIP

Q4
- Continue to monitor route running times on FTN

EUGENE STATION MODERNIZATION (ESM)

DESCRIPTION

Eugene Station Modernization Eugene Station is the central point of LTD's "hub and spoke" transit system. This project will maintain and improve both the buildings and exterior features of the station, enhancing both the customer and employee experience and updating the stations for better operation well into the future. Examples of possible improvements include (but aren't limited to): updating wayfinding signs, improving real-time signage, installing energy-efficient lighting fixtures and updating public restrooms.

OWNER

Cosette Rees

2023 Quarterly Milestones

Q1	• Begin NEPA Process
Q2	• Continue NEPA Process
Q3	• NEPA Process Complete – Documents for CE submitted including sustainable design measures
Q4	• Complete all architectural design phases with employee input to meet deliverables dates. Respond to input with a design promoting goals and objectives
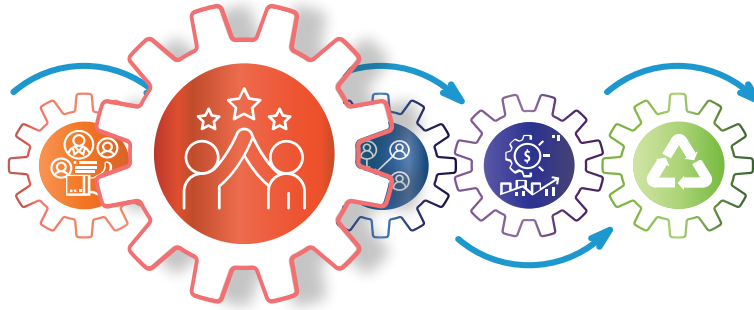
Employee Engagement Work Plan Tactics

Manage Employee Turnover

Implement Workforce Diversity Initiatives

Conduct Internal Customer Survey

Conduct Employee Events

Provide Development Opportunities

IT Process Improvement

 IT Task Scheduling & Communication

Transit Operators Employee Engagement

Operations Command Center (OCC)

MANAGE EMPLOYEE TURNOVER

DESCRIPTION
Minimize employee turnover while ensuring that employees are a good fit for the agency.

OWNER
Perry Adams/Human Resources

2023 Quarterly Milestones

Q1
• Establish Employee Turnover Base Rate by calculating employee turnover rate

Q2
• Prep/Schedule leadership training for all supervisors

Q3
• Conduct leadership training for all supervisors

Q4

IMPLEMENT WORKFORCE DIVERSITY INITIATIVES

DESCRIPTION
Establish metrics to report out on Workforce Diversity Initiatives (i.e. hiring demographics, internal/external promotions, etc.).

OWNER
Perry Adams

2023 Quarterly Milestones

Q1
- Director Diversity Training – Dr. Lake Consulting
- Establish metrics for measuring Workforce Diversity Initiatives
  - Internal promotion v. external hire
  - Employee turnover
  - Hiring demographics
  - Diversity of employees v. applicant pool
  - Diversity across the District – metrics uniform across different departments?
  - Diversity at Leadership level
  - Job Satisfaction
  - Job Retention – consistent across women and minorities?

Q2
- Metrics - Quarterly Report
- Pay Equity Analysis Conducted
- Schedule/Prep for Unconscious Bias Interview Training
- Diversity Training/Learning
- Diversity Council/Book Club Participation

Q3
- Metrics – Quarterly Report
- Diversity Training/Learning
- Diversity Council/Book Club Participation

Q4
- Metrics - Quarterly Report
- Diversity Training/Learning
- Diversity Council/Book Club Participation

CONDUCT INTERNAL CUSTOMER SURVEY

DESCRIPTION
Design and administer Internal Customer Surveys to establish baseline measures of internal satisfaction and responsiveness across departments.

OWNER
Jake McCallum

2023 Quarterly Milestones

Q1
- Share results of Survey with Employees
- Review recommendations with Departments
- Develop Action Plan based on recommendations

Q2
- Implement agreed-upon recommendations

Q3
- Review survey instrument from the previous year and revise
- Administer Survey
- Analyze and report results and recommendations to leadership and staff

Q4
- Develop communications plan to share results across the agency
- Review results and develop an action plan for the next fiscal year

CONDUCT EMPLOYEE EVENTS

DESCRIPTION
Provide opportunities for ongoing employee events to engage staff and create team-building.

OWNER
Perry Adams

2023 Quarterly Milestones

Q1
- Meet and Re-establish the Events Committee
- Establish Quarterly Event Training Calendar – Wellness Initiative
- Revisit COVID Protocols – Training/Events Gathering, such as annual Roadeo
- Inside the Bus Attendance Metric

Q2
- Deliver Quarterly Event Training Calendar – Wellness Initiative
- Revisit COVID Protocols – Training/Events Gathering
- Hold Quarterly Employee Appreciation Event
- Conduct Transit Operator Appreciation Day events
- Inside the Bus Attendance Metric

Q3
- Establish Quarterly Event Training Calendar – Wellness Initiative
- Deliver Quarterly Event Training Calendar – Wellness Initiative
- Hold Quarterly Employee Appreciation Event
- Inside the Bus Attendance Metric

Q4
- Deliver Quarterly Event Training Calendar – Wellness Initiative
- Hold Quarterly Employee Appreciation Event (Day of Caring/Volunteer Day?)
- Inside the Bus Attendance Metric

PROVIDE DEVELOPMENT OPPORTUNITIES

DESCRIPTION
Develop and promote Training and Learning Tools for on-the-job success.

OWNER
Perry Adams

2023 Quarterly Milestones

Q1
- Promote Learning Tools through Learning Management System (LMS), LinkedIn Learning, Employee Assistance Program (EAP) Training
- Meet with Directors to discuss job-sharing, mentoring programs for internal promotion opportunities

Q2
- Report out on Quarterly Metrics for Hours of Training Received
- Promote Learning Tools through LMS, LinkedIn Learning, Employee Assistance Program (EAP) Training
- Establish process for Diversity, Equity, and Inclusion (DEI) education & training

Q3
- Report out on Quarterly Metrics for Hours of Training Received
- Promote Learning Tools through LMS, LinkedIn Learning, EAP Training
- Establish process to ensure timely staff performance evaluations

Q4
- Report out on Quarterly Metrics for Hours of Training Received, EAP Training
- Meet with Directors to discuss job-sharing, mentoring programs for internal promotion opportunities

IT PROCESS IMPROVEMENT

DESCRIPTION
Implement an ITIL4.0-based process improvement strategy to transform IT to a service-based model.

OWNER
Cosette Rees

2023 Quarterly Milestones

Q1

- Team Members: Review feedback from stakeholders of IT Systems Changes 1 - 3 (ITIL4.0 Guiding Principle: Focus on Value)
- Review metrics on Change Areas 1 - 3 (ITIL4.0 Guiding Principle: Focus on Value)
- Look at IT Service System holistically and evaluate Changes 1 – 3 internally (ITIL4.0 Guiding Principle: Think And Work Holistically)
- Perform any additional integration and consolidation work to make Changes 1 – 3 work together seamlessly for organization (ITIL4.0 Guiding Principle: Optimize and Automate)
- Communicate systems service changes to organization and receive feedback on the whole effort before tackling the next batch of changes (ITIL4.0 Guiding Principle: Collaborate and Promote Visibility)

Q2

- Complete current state analysis of IT Service System (ITIL4.0 Guiding Principle: Start Where You Are)
- Engage organization stakeholders in discussion of IT service (ITIL4.0 Guiding Principle: Think And Work Holistically
- Select first area in Service System to change (ITIL4.0 Guiding Principle: Progress Iteratively With Change) – Change #1
- Gather metrics on Change Area #1 (ITIL4.0 Guiding Principle: Focus on Value)
- Determine appropriate changes to ManageEngine configuration to support Change #1 (ITIL4.0 Guiding Principle: Optimize and Automate)
- Communicate change to organization and receive feedback (ITIL4.0 Guiding Principle: Collaborate and Promote Visibility)
- Review metrics from before/after Change #1 (ITIL4.0 Guiding Principle: Focus on Value)

Q3

- Review feedback from stakeholders of IT Systems Change #1 (ITIL4.0 Guiding Principle: Focus on Value)
- Engage organization stakeholders in discussion of next IT service change (ITIL4.0 Guiding Principle: Think And Work Holistically
- Select second area in Service System to change (ITIL4.0 Guiding Principle: Progress Iteratively With Change) – Change #2
- Gather metrics on Change Area #2 (ITIL4.0 Guiding Principle: Focus on Value)
- Determine appropriate changes to ManageEngine configuration to support Change #2 (ITIL4.0 Guiding Principle: Optimize and Automate)
- Communicate change to organization and receive feedback (ITIL4.0 Guiding Principle: Collaborate and Promote Visibility)
- Review metrics from before/after Change #2 (ITIL4.0 Guiding Principle: Focus on Value)

Q4

- Review feedback from stakeholders of IT Systems Change #2 (ITIL4.0 Guiding Principle: Focus on Value)
- Engage organization stakeholders in discussion of next IT service change (ITIL4.0 Guiding Principle: Think And Work Holistically)
- Select third area in Service System to change (ITIL4.0 Guiding Principle: Progress Iteratively With Change) – Change #3
- Gather metrics on Change Area #3 (ITIL4.0 Guiding Principle: Focus on Value)
- Determine appropriate changes to Manage Engine configuration to support Change #3 (ITIL4.0 Guiding Principle: Optimize and Automate)
- Communicate change to organization and receive feedback (ITIL4.0 Guiding Principle: Collaborate and Promote Visibility)
- Review metrics from before/after Change #3 (ITIL4.0 Guiding Principle: Focus on Value)

IT TASK SCHEDULING & COMMUNICATION

DESCRIPTION
Implement a process by which to schedule IT work items and to clearly communicate IT Tasks, Processes, and Work to organization stakeholders so that effective trade-offs can be made for necessary tasks.

OWNER
Cossette Rees

2023 Quarterly Milestones

Q1
- Analyze current workflow and task state for each IT Component (Network, Systems, Applications, Data, ITS, Project Management)
- Choose a tool to effectively update and communicate the current state of IT Tasks/Workflow
- Determine ideal state of IT Tasks/Workflow
- Determine metrics for IT Task/Workflow/Timeline measurement
- Create first communication to organization of current state

Q2
- Develop plan to migrate from IT Current State to Desired State
- If Workflow tool is new to the organization, procure, install, and configure
- Enter current state of IT Tasks/Workflow into tool
- Create data procedures to support metrics

Q3
- Engage stakeholders to determine best approach for prioritizing and evaluating Task/Workflow requests and associated trade-offs
- Implement Prioritization approach for Task/Workflow requests and associated trade-offs in tool or system
- Review baseline metrics

Q4
- Communicate agreed-upon prioritization approach to stakeholders and demonstrate tool/system for introducing new tasks into system
- Implement full stakeholder engagement in system
- Review metrics from first three months of engagement
- Create any necessary changes to system to improve effectiveness
- Review system with stakeholders

TRANSIT OPERATORS EMPLOYEE ENGAGEMENT

DESCRIPTION
Improve Transit Operations, Training & Public Safety Department Employee Engagement Minimize employee turnover while ensuring that employees are a good fit for the agency.

OWNER
Perry Adams

2023 Quarterly Milestones

Q1 • Implement digital communications, processes, and tasks

Q2 • Create an interdepartmental communication plan

Q3 • Develop plan to update Operator Handbook

Q4 • Update Operator Handbook to reflect current information

OPERATIONS COMMAND CENTER (OCC)

DESCRIPTION

The Lane Transit District's Operations Department is the engine that keeps the District running. LTD's Glenwood headquarters will include modern operations dispatch, monitoring of cameras and transit system, operator report area, training/simulator classrooms, restrooms/showers, operator rest areas, employee lounge, and Wellness Center. These updates will improve safety and security, accessibility, customer service, and employee engagement. This project will support modern day transit operations by streamlining everyday operations, increasing employee development, training and moral.

Note: This tactic is considered to also be included in both the Customer Satisfaction and the Sustainability Work Plans.

OWNER

2023 Quarterly Milestones

Q1	• Ongoing NEPA and Design
Q2	• Ongoing NEPA and Design
Q3	• Ongoing NEPA and Design
Q4	• Design complete with 100% Construction Documents

Community Value Work Plan Tactics

Conduct Comprehensive Operations Analysis (COA)

Create Sustainable Services Stability Fund

Strengthen & Streamline Vendor & Partner Relations

Ensure DEI Participation in Bidding Opportunities

Communications: LTD As Transportation Leader

Establish Community Partnerships For Talent Pipeline

Succession Planning

CONDUCT COMPREHENSIVE OPERATIONS ANALYSIS (COA)

DESCRIPTION
The FY2025-27 COA is a comprehensive assessment and evaluation of LTD's fixed route transit services. The FY 2025-27 COA process will lead to a clear statement of transit goals and priorities that LTD will use to guide transit planning and operations over that 3-year period.

OWNER
Matt Imlach

2023 Quarterly Milestones

Q1
• Develop Statement of work

Q2
• Begin existing conditions analysis
• Mobilize and deploy communications plan
• Re-engage the Technical Advisory Committee (TAC)

Q3
• Begin existing conditions analysis
• Develop Public Involvement Plan for SPC, Board review/Engage Board and Committees to begin COA process

Q4
• Assess of ridership impacts and trends as a result of COVID-19
• Begin to evaluate increases to access or service to minoritized groups and to advance equity
• Engage Technical Advisory Committee (TAC)

CREATE SUSTAINABLE SERVICES STABILITY FUND

DESCRIPTION
Creation of a sustainable services stability reserve to ensure continued service in times of crisis (e.g. pandemics, fires, disasters, recessions, etc.).

OWNER
Christina Shew

2023 Quarterly Milestones

Q1
- Research best practices for creating and managing a sustainable services stability fund
- Design accounting model for sustainable services stability fund
- Design policy for sustainable services stability fund

Q2
- Obtain Budget Committee approval for the sustainable services stability fund and policy
- Obtain Board adoption of the sustainable services stability fund and policy
- Include sustainable services stability fund in the FY23 Budget and Long-Range Financial Plan (LRFP)

Q3
- Obtain Budget Committee approval for the sustainable services stability fund and policy
- Obtain Board adoption of the sustainable services stability fund and policy
- Include sustainable services stability fund in the FY23 Budget and Long-Range Financial Plan (LRFP)

Q4
- Implement the sustainable services stability fund and policy

STRENGTHEN & STREAMLINE VENDOR & PARTNER RELATIONS

DESCRIPTION
Improve vendor's overall understanding of LTD's processes of procurement and provide better outreach to vendors on the processes and bidding opportunities.

OWNER
Collina Beard

2023 Quarterly Milestones

Q1
- Research how best to reach out to vendors, what are other agencies doing, best practices, events that are coming up, and new ways of doing business since COVID
- Review and improve Strengths, Weaknesses, Opportunities, Threats (SWOT) analysis for internal use and external communication
- Research and reach out to other transit agencies on how they best perform Vendor Fairs

Q2
- Send out Vendor/Supplier survey to help better build our Vendor Fair
- Develop a Vendor Fair/Open House event for Procurement and Materials Management (how do to business with us, what our procurement processes are, Q&A)

Q3
- Hold a Vendor Fair before the new Fiscal Year to help educate vendors on upcoming procurements and our processes
- Continue outreach opportunities, events, reverse vendor shows to attend

Q4
- Review all forms of communication with vendors that we have worked on and streamline how we communicate. Example: All forms of communication with vendors is through our Procurement site? What did we learn from the Survey and Vendor Fair, how can we do better with our outreach?

ENSURE DEI PARTICIPATION IN BIDDING OPPORTUNITIES

DESCRIPTION
Increase bidding opportunities for Disadvantaged Business Enterprises (DBEs) by providing an equitable and inclusive solicitation process.

OWNER
Collina Beard

2024 Quarterly Milestones

Q1
- Host 2nd open house for DBE vendors – reverse vendor fair – Consider countywide agency participation
- Continue quarterly research to find DBE vendors in the region – get added to B2GNow
- Continue vendor outreach programs – attend vendor outreach meetings (OAME/CADE, Chamber of Commerce, SBA)
- Review Q4 DBE spend – measure against outreach and open house participation

Q2
- Pre-quarter 2 – Start with Procurement staff training
- Strengthen department best practices
- Implementation of B2GNow
- Research quarterly DBE vendors in the region – get added to B2GNow
- Refine solicitation process to include DEI scoring – ¼ of the total value
- Vendor outreach programs – attend vendor outreach meetings (OAME/CADE, Chamber of Commerce, SBA)
- Work with DOT and other transit agencies to learn about their DBE programs
- Develop "How to do business with LTD" handout

Q3
- Host open house for DBE vendors – reverse vendor fair
- Continue quarterly research to find DBE vendors in the region – get added to B2GNow
- Continue vendor outreach programs – attend vendor outreach meetings (OAME/CADE, Chamber of Commerce, SBA)
- Review Q2 DBE spend – start tracking progress

Q4
- Continue quarterly research to find DBE vendors in the region – get added to B2GNow
- Continue vendor outreach programs – attend vendor outreach meetings (OAME/CADE, Chamber of Commerce, SBA)
- Review Q3 DBE spend – look for trends – how can we do a better assessment of ridership impacts and trends as a result of COVID-19

COMMUNICATIONS: LTD AS TRANSPORTATION LEADER

DESCRIPTION
Implement strategies to measure and build an understanding of LTD as a valued community partner; build ridership in the short-term as we emerge from COVID-19; and long-term, enhance opportunities to engage the community on timely and valued transportation-related topics.

OWNER
Cosette Rees

2023 Quarterly Milestones

Q1
- Complete first Community Value Survey; present results
- Implement a robust communication plan to reengage riders and our community geared toward rebuilding ridership post-COVID

Q2
- Develop community partnership plan to communicate community benefits; plan to engage community to prioritize areas of focus
- Publish first annual community report

Q3
- Submit budget for FY23
- Track progress on above projects
- Monitor performance and make adjustments as appropriate

Q4
- Track progress on above projects
- Monitor performance and make adjustments as appropriate

ESTABLISH COMMUNITY PARTNERSHIPS FOR TALENT PIPELINE

DESCRIPTION
Identify and foster community partnerships to help train and support future recruitments at LTD.

OWNER
Perry Adams

2023 Quarterly Milestones

Q1
- Establish Baseline Partnership goals for FY23
- Establish baseline events calendar with Talent Partnerships for Sept 2022 school year

Q2
- Define Community Partnerships - technical (local, state, regional, national)
- Define Community Partners with Diversity, Equity, and Inclusion (DEI) lens for opportunities
- Open communication channel for Community Partners once defined

Q3
- Participate in 1-2 Career Fairs – College/High School/ Technical Programs
- Define LTD partnership with Fleet to broaden Diesel Tech Program
- Develop sourcing strategy to assess talent pool for Bus Operators

Q4
- Participate in 1-2 Career Fairs – College/High School/ Technical Programs
- Assess talent pool for Bus Operators for timely Fall Bid

SUCCESSION PLANNING

DESCRIPTION
Develop and implement a succession plan to develop staff for current and future agency needs and respond to workforce disruptions.

OWNER
Jameson Auten

2023 Quarterly Milestones

Q1
- Develop list of recommendations
- Presentations to directors, Leadership Council, Employee Council

Q2
- Prioritization process to determine implementation phasing

Q3
- Implement priority 1 recommendations

Q4
- Evaluate priority 1 implementations
- Continue developing process of implementation for the remaining priority recommendations
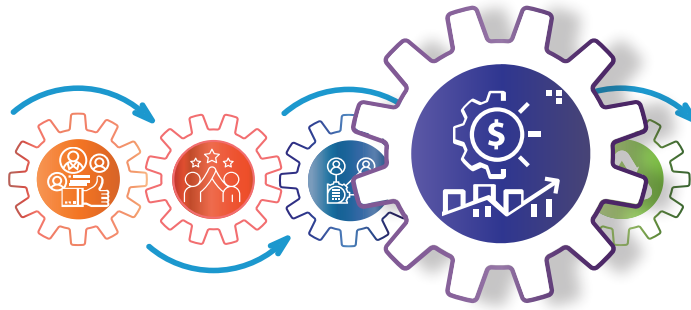
Financial Health Work Plan Tactics

Develop IT Hardware/Software Replacement Plan

Define Financial Forecasting Model

Assess & Evaluate Long-Term Financial Stability

Increase Operational Efficiency

Warranty Program Development and Management

DEVELOP IT HARDWARE/SOFTWARE REPLACEMENT PLAN

DESCRIPTION
Implement a system of tracking for IT hardware and software assets that will maximize the useful life of each asset and set target dates for replacement while minimizing risks, meeting the business requirements of the District, and ensuring fiscal responsibility.

OWNER
Cossette Rees

2023 Quarterly Milestones

Q1
- Create policies – best practices for lifecycles of IT Network and Systems hardware and ITS hardware
- Research and determine lifespan of 4th batch (40%) of IT Assets

Q2
- Inventory of IT Software, Hardware, Network, and ITS assets – in Excel
- Research IT Inventory systems to determine if cost-effective tracking methods exist that would provide a benefit

Q3
- Research and determine lifespan of initial batch (10%) of IT Assets
- Create policy – best practices for on-prem software replacement lifecycle

Q4
- Create policies – best practices for lifecycles of cloud software and IT user hardware (laptops, desktops, monitors, etc.)
- Research and determine lifespan of 3rd batch (25%) of IT Assets – focus on large ticket items likely to become capital projects
- Budget preparation – include funding for any large capital replacement projects
- Research and purchase Inventory System (if deemed appropriate in Q2 FY23)

DEFINE FINANCIAL FORECASTING MODEL

DESCRIPTION
Define current financial forecasting model to increase organizational understanding and awareness of the District's financial health and begin continuous improvement process on financial forecasting models.

OWNER
Christina Shew

2023 Quarterly Milestones	
Q1	• Prepare financial performance scorecard • Design a cadence for reviewing and discussing financial performance at various levels of the organization
Q2	• Prepare financial performance scorecard
Q3	• Prepare financial performance scorecard • Produce FY24 Budget videos for public and internal consumption (2)
Q4	• FY24 Budget video for public and internal consumption published • Prepare financial performance scorecard • Develop a standard format/scorecard for presenting financial performance (FY24) • Design a cadence for reviewing and discussing financial performance at various levels of the organization (FY24)f

ASSESS & EVALUATE LONG-TERM FINANCIAL STABILITY

DESCRIPTION
Identify cross-organizational opportunities to increase long-term financial stability through a reduction in the community cost for transit percentage (payroll taxes + fare revenue/all revenues) and costs to operate our fixed route service (general fund operating cost/revenue hour; general fund operating cost/miles traveled).

OWNER
Christina Shew

2023 Quarterly Milestones

Q1
- Utilize research and brainstorming information to develop department financial targets, tactics, metrics, owners, and timeline
- Prepare draft department financial targets, tactics, metrics, owners, and timeline

Q2
- Adoption of Board Financial Planning Policies
- Compliance with Board adopted Financial Health Policies
- Design a cadence for reviewing and discussing department contribution towards financial health targets.
- Research benchmark targets, tactics, and metrics

Q3
- Compliance with Board adopted Financial Health Policies
- Hold cross-organizational listening sessions to brainstorm areas of opportunity to create efficiencies or increase resources (e.g. increase discretionary grant competitiveness)
- Analyze financial information to identify additional opportunities to create efficiencies or increase resources

Q4
- Hold cross-organizational listening sessions to brainstorm areas of opportunity to create efficiencies or increase resources (e.g. increase discretionary grant competitiveness)
- Analyze financial information to identify additional opportunities to create efficiencies or increase resources

INCREASE OPERATIONAL EFFICIENCY

DESCRIPTION

Increase operational efficiency through analysis and implementation of improvements designed to:
-Reduce unscheduled overtime
-Reduce stand hours
-Reduce layover and out of service time
-Achieve bus operator productivity in line with agencies with the same fleet size as LTD
-Reduce "out of service" on-the-road training time
-Reduce controllable existing material and service costs

OWNER
Jake McCallum

2023 Quarterly Milestones

Q1	• Identify adequate bus operator to assignment ratio needed to ensure appropriate manpower to cover assignment vacancies caused by absences • Evaluate vacation and time off requests as compared to labor contract standard, if applicable • Evaluate trend in unscheduled absences
Q2	Implement a hiring plan to ensure an adequate level of bus operators available to cover assignments as identified in the leave of absence trend
Q3	Manage to desired bus operator to assignment ratio and plan ahead for future vacancies to prevent periods of less than assignment ratio
Q4	Continue managing to desired bus operator to assignment ratio and plan ahead for future vacancies to prevent periods of less than assignment ratio

WARRANTY PROGRAM DEVELOPMENT AND MANAGEMENT

DESCRIPTION
Build and manage the District's Warranty Program established by Materials Management.

OWNER
Collina Beard

2023 Quarterly Milestones

Q1
- 70% complete Establish Warranty Program (LTD & Commercial) – Pending IEAM tracking
- Document Roles and Responsibilities for each section of the warranty process. Claims, Settlements, Commercial vs LTD Warranty
- Outline to date what has been accomplished and next steps moving forward
- 100% SharePoint Established tracking, goal is for it to be moved into EAM
- 50% Tracking within EAM complete for Commercial Warranty. Establish 100% completion within EAM of tracking Commercial Warranty

Q2
- Present Power Point Presentation on LTD's first Warranty Program to LC, with totals to date and future plans to build the warranty program
- Establish 50% of LTD Warranty tracking within EAM

Q3
- Complete the rest of EAM LTD Warranty
- Complete outline of LTD's first Warranty Program

Q4
- Create SOP for both LTD and Commercial Warranty
- Build reporting within EAM that can be communicated to LTD Staff in real time
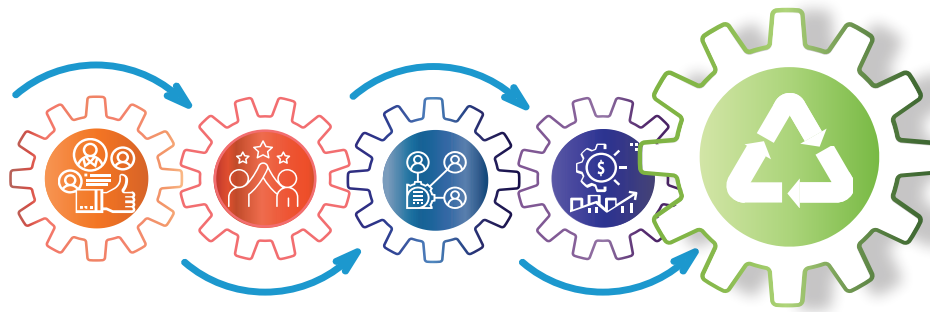
Sustainability Work Plan Tactics

Improve Trip Efficiencies & Performance - RideSource

Fleet Procurement Plan

Achieve Sustainability Certifications

IMPROVE TRIP EFFICIENCIES & PERFORMANCE – RIDESOURCE

DESCRIPTION
Conduct analysis and make adjustments to maintain 90% on-time performance for three consecutive years. On-time performance is defined as 90% of the buses on all routes will depart within four minutes of their scheduled significant timepoint.

OWNER
Tom Schwetz

2023 Quarterly Milestones

Q1
- Implement fall bid
- Collect Blue cards and customer input forms (CIF) from drivers, operations, customer service, and riders for analysis for winter bid

Q2
- Collect Blue cards and customer input forms (CIF) from drivers, operations, customer service, and riders for analysis of winter bid
- Start analysis of current OTP from Crystal reports, Sequel excel reports, driver performance, and Route profiles for analysis of OTP for winter bid
- Use step one and two information to compare to previous quarter OTP
- Complete analysis of OTP and make adjustments if needed to routes for winter bid

Q3
- Implement winter bid
- Collect Blue cards and customer input forms (CIF) from drivers, operations, customer service, and riders for analysis of OTP for summer bid

Q4
- Continue to collect Blue cards and customer input forms (CIF) from drivers, operations, customer service, and riders for analysis of summer bid
- Start analysis of current OTP from Crystal reports, Sequel excel reports, driver performance, and Route profiles for summer bid
- Use step one and two information to compare to previous quarter OTP
- Complete analysis of OTP and make adjustments to routes for summer bid
- Implement summer bid
- Collect Blue cards and customer input forms (CIF) from drivers, operations, customer service, and riders for analysis for fall bid
- Start analysis of current OTP from Crystal reports, Sequel excel reports, driver performance, and Route profiles fall bid
- Use step six and seven information to compare to previous quarter OTP for fall bid
- Complete analysis of OTP and make adjustments to routes for fall bid

FLEET PROCUREMENT PLAN

DESCRIPTION

Development of a fleet procurement plan that will inform the types of fuels/technologies LTD plans to invest in over the next 15 years to allow the District to meet both its service obligations to the community and the goals outlined in the Board's Climate Action Policy and Fleet Procurement Goals.

OWNER

Matt Imlach

2023 Quarterly Milestones

Q1	• Information posted to website for general public to stay informed about the project • Email communication sent to public stakeholder list
Q2	• Draft Scenarios Developed • Information posted to website for the general public to stay informed about the project • Email communication sent to public stakeholder list • Final Fleet Procurement Plan Adopted
Q3	• Information posted to website for the general public to stay informed about the project • Email communication sent to public stakeholder list
Q4	• Community Investment Plan (CIP) updated with results of Fleet Procurement Plan • Begin to collect bids/quotes for work needed to be done to support Fleet Procurement Plan

ACHIEVE SUSTAINABILITY CERTIFICATIONS

DESCRIPTION
LTD voluntarily signed on to the APTA Sustainability Commitment in 2014 when LTD achieved a certification level of Silver. The commitment asks for periodic updates of sustainability performance to the industry standards set in the commitment and LTD seeks to be a leader in this area.

OWNER
Matt Imlach

2023 Quarterly Milestones

Q1	• Begin implementation work for identified goals and stretch goals for application process • Set timeframe for next round of reporting to APTA
Q2	• Collect necessary data and set appropriate goals for APTA sustainability certification • Share results with Board of Directors
Q3	• Collect necessary data and set appropriate goals for APTA sustainability certification • Share results with Board of Directors
Q4	• Achieve certification for APTA Sustainability Commitment at Gold level or higher

PERFORMANCE Scorecard

LTD Scorecard

Customer Satisfaction	Performance metrics that measure LTD's success at delivering customer satisfaction.	**30 points**
Employee Engagement	Performance metrics that measure the level of employee engagement.	**25 points**
Community Value	Performance metrics that gauge LTD's success at achieving perceived community value.	**20 points**
Financial Health	Metrics that measure how well LTD is performing financially.	**15 points**
Sustainability	Performance metrics that measure LTD's achievement of environmental goals.	**10 points**
	TOTAL	**100 points**

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HOW TO READ THE SCORECARD

LTD**Scorecard**

PRIMARY STRATEGIC PRIORITY	METRIC	QUARTERLY PERFORMANCE						POINTS		DEFINITION	INFOR-MATION SYSTEM
		GOAL		Q1	Q2	Q3	Q4	GOAL	EARNED		
CUSTOMER SATISFACTION	The Metric column contains the performance metrics that most effectively gauge how well LTD is performing to excel in each Strategic Area of Focus.	Performance Goal reflects the actual performance number LTD teams will strive to achieve.						Goal Points in this column reflect the maximum points that could be earned when performance goals are achieved.			
							TOTAL	30			
The column represents the five Strategic Areas of Focus identified by LTD due to their correlation to the organization's overall success.				Each metric has a clear definition.							
		The Metric has an Owner who is responsible for reporting on the metric results.					TOTAL	25			
COMMUNITY VALUE									Earned Points are reported on each quarter of the year.		
							TOTAL	20			
FINANCIAL HEALTH											
							TOTAL	15		Each metric index is weighted and rolls up to a 100 point overall score.	
SUSTAINABILITY											
							TOTAL	10			
OVERALL PERFORMANCE SCORE									100		

LTDScorecard

PRIMARY STRATEGIC PRIORITY	METRIC	QUARTERLY PERFORMANCE					POINTS		OWNER	DEFINITION	INFORMATION SYSTEM
		GOAL	Q1	Q2	Q3	Q4	GOAL	EARNED			
CUSTOMER SATISFACTION	Overall Customer Satisfaction	Establish baseline					8		Cosette	% of customers who are satisfied or very satisfied with LTD services.	Customer Satisfaction Survey
	Overall Net Promoter Score	Establish baseline					8		Cosette	% Promoters minus % Detractors. On a 0-10 scale of how likely to recommend LTD, Promoters are 9-10 and Detractors are 0-6.	Customer Satisfaction Survey
	Customer Impression of On-Time Performance	Establish baseline					3		Cosette	% of customers who agree or strongly agree that buses usually arrive on-time.	Customer Satisfaction Survey
	Actual On-Time Performance	≥ 90%					3		Tom	% of trips completed within the scheduled on-time window (no more than four minutes past the scheduled time for arrival and departure).	CAD/AVL
	Customer Impression of Safety & Security	Establish baseline					2		Cosette	% of customers who agree or strongly agree that they feel safe and secure when riding LTD.	Customer Satisfaction Survey
	Accidents Per 100,000 Miles	<2					2		Tom	Number of accidents per 100,000 miles.	Monthly Report KPIs
	Customer Impression of Bus Operator Courtesy	Establish baseline					2		Cosette	% of customers who agree or strongly agree that bus operators are courteous.	Customer Satisfaction Survey
	Bus Operator Complaints Per 100,000 Boardings	Establish baseline					2		Jake	Number of complaints directly related to bus operator performance per 100,000 boardings.	Itrak
	TOTAL						**30**				
EMPLOYEE ENGAGEMENT	Employee Net Promoter Score	Establish baseline					8		Perry	% Promoters minus % Detractors. On a 0-10 scale of how likely to recommend LTD as a place to work, Promoters are 9-10 and Detractors are 0-6.	Employee Survey
	Employees Understand How Their Performance is Linked to LTD's Success	Establish baseline					4		Perry	% of employees agree or strongly agree that their work is important for LTD to reach its goals.	Employee Survey
	Employees Agree Leadership is Invested in Their Success	Establish baseline					4		Perry	% of employees agree or strongly agree that Managers/Leadership are invested in their growth and success.	Employee Survey
	Employees Agree They are Provided with the Tools Needed to Work Successfully	Establish baseline					4		Perry	% of employees agree or strongly agree that they are provided with the tools needed to work successfully.	Employee Survey
	Internal Customer Satisfaction	Establish baseline					5		Perry	% of employees who are satisfied or very satisfied with internal support functions.	Internal Customer Satisfaction Survey
	TOTAL						**25**				
COMMUNITY VALUE	Community Perception of LTD Value	Establish baseline					8		Tom	% of community members who agree or strongly agree that LTD provides value to the community.	Community Survey
	Community Partner Perception of LTD as Trusted Leader	Establish baseline					7		Tom	% of partner agencies such as the City of Eugene and LCOG that agree or strongly agree that LTD is a trusted leader in the community.	Community Survey
	Access to Frequent Transit (Total Population)	Establish baseline policy					2		Tom	% people and jobs within the urban growth boundary that are within ¼-mile of an active bus stop or station with 15 minute frequency or less. (Performance goal policy to be established through the COA)	Remix
	Access to Frequent Transit (Minoritized Population)	Establish baseline policy					3		Tom	% low-income, communities of color, seniors, and people with disabilities within the urban growth boundary that are within ¼-mile of an active bus stop or station with 15 minute frequency or less. (Performance goal policy to be established through the COA)	Remix
	TOTAL						**20**				
FINANCIAL HEALTH	Operating Cost per Boarding	75%					8		Tom	Total operating cost divided by total boardings, percentile in comparison to peer agencies.	ABBG Reporting
	Maintenance Cost Per Mile	$.98/mile					4		Matt	Total preventative and repair costs exclusive of fuel costs, divided by total miles.	Monthly Board report
	Vehicle Hours per Labor Hour	≥ .86					3		Tom	Total vehicle hours divided by total operator labor hours.	ABBG Reporting
	TOTAL						**15**				
SUSTAINABILITY	Greenhouse Gas Emission Reduction	70%					3		Matt	% reduction in greenhouse gas emissions from owned vehicles in comparison to the 2018 baseline.	GHG Inventory
	Fleet Transitioned to Electric	25%					2		Matt	% of fleet that is transitioned to electric vehicles.	Fleet Replacement Plan
	Renewable Fuel Consumption	70%					3		Matt	% of non-fossil fuel consumption (fuel from renewable sources such as waste, plants, animal products, etc) as a percent of total fuel consumed.	Spreadsheet
	Overall Ridership Increase	9,865,000					2		Tom	Number of unlinked trips (recover to 2019 levels).	APC
	TOTAL						**10**				
OVERALL PERFORMANCE SCORE							**100**				

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