



AGENDA ITEM SUMMARY

DATE OF MEETING: June 21, 2023

ITEM TITLE: STRATEGIC BUSINESS PLAN REPORTING

PREPARED BY: Aimee Reichert, Senior Project Manager

CHIEF OFFICER: Joe McCormack, Chief Development Officer

ACTION REQUESTED: Information and Discussion

PURPOSE: To provide a progress update on the fiscal year 2022-2024 Strategic Business Plan (SBP) for fiscal year 2023 (FY23) Quarter 3 (Q3) (January 1, 2023 – March 31, 2023) progress and work ahead.

DESCRIPTION: The FY22-24 Strategic Business Plan guides the direction for Lane Transit District. The SBP includes five strategic areas of focus or success outcomes that the District strives to achieve in the next three years. Each element of the plan is purposefully aligned so that there is clarity around how work activities (tactics) and performance metrics impact these overall strategic outcomes.

BACKGROUND: The Board of Directors adopted LTD's Strategic Business Plan in July 2021. Implementation of the Plan began in October 2021 (FY22 Q2) and will span through June 2024. Since the last staff update to the committee, staff have continued implementing the tactics and monitoring the District's performance metrics as adopted in the SBP. Staff will provide a presentation on the Q3 FY23 results.

CONSIDERATIONS: Results were shared with the Strategic Planning Committee in May, 2023 for input. Staff are currently working on the Fiscal Year 2024 Strategic Plan Refresh, which allows for a review and re-design on tactical work to ensure LTD remains focused on the right work to achieve outcomes.

ALTERNATIVES: N/A

NEXT STEPS: Staff will provide Strategic Planning Committee and Board with Quarter 4, Fiscal Year 2023 Progress results along with Fiscal Year 2024 refreshed tactics in fall of 2023.

SUPPORTING DOCUMENTATION:

- 1) Strategic Business Plan Presentation

PROPOSED MOTION: N/A

LTD Strategic Business Plan Report

Quarter 3, Fiscal Year 2023





MISSION

Connecting Our Community

VISION

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

VALUES

Respect, Integrity, Innovation, Equity, Safety, and Collaboration

Overview



LTD's Strategic Plan Overview



Scorecard Results

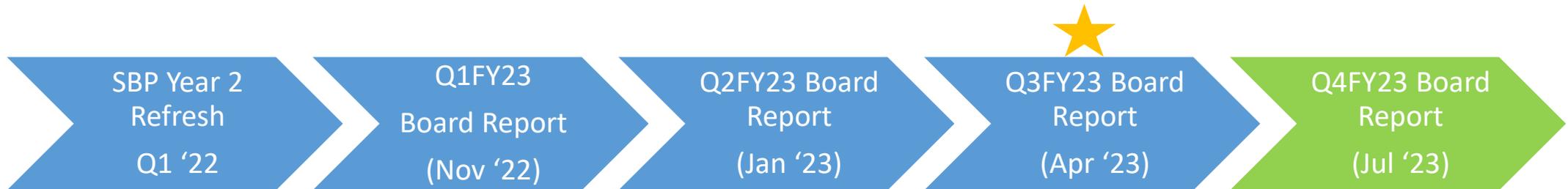
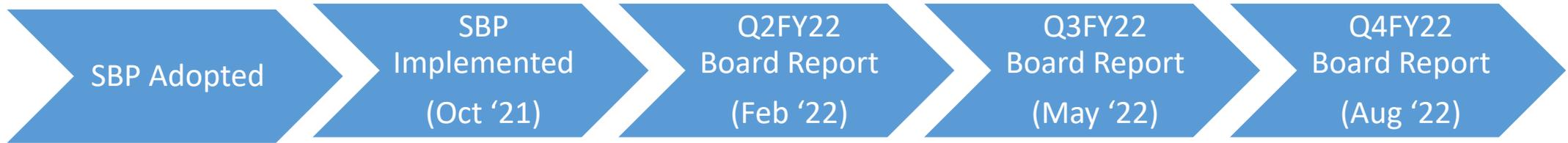


Tactical Highlights and Next Steps

Strategic Plan Overview

<https://www.ltd.org/strategic-business-plan/>

September 2021



June 30, 2024

Strategic Plan Overview – Key Terms



Customer Satisfaction

Work activities and performance goals that align LTD teams on delivering outstanding customer service.

Work Plan Tactics

8

Performance Metrics

8



Employee Engagement

Initiatives and performance goals centered on attracting and retaining a high quality workforce.

Work Plan Tactics

9

Performance Metrics

5



Community Value

Projects, programs, and performance goals aimed at providing strong value for the community.

Work Plan Tactics

7

Performance Metrics

4



Financial Health

Work plan tactics and performance goals focused on maintaining LTD's strong financial position.

Work Plan Tactics

5

Performance Metrics

3



Sustainability

Specific steps and performance goals to help LTD do its part to preserve and protect the environment.

Work Plan Tactics

2

Performance Metrics

4

LTD Scorecard

Introducing LTD's Performance Dashboard - TransDash

<https://www.ltd.org/Performance/>





Customer Satisfaction

Metric	FY23 Q2	FY23 Q3	% Change
On-Time Performance	93.2%	93.3%	No Change
Accidents per 100,000 Miles	5.09	3.52	Decreased 31%
Bus Operator Complaints Per 100,000 Boardings	12.00	7.67	Decreased 36%

Overall, customer satisfaction indicators suggest improvement in progress, with emphasis on safety and responsiveness to customers. Current work focused on customer satisfaction indexing and leadership service sampling in order to drive improvement in this area.



Financial Health

Metric	FY23 Q2	FY23 Q3	% Change
Operating Cost per Boarding	\$9.11	\$9.98	Increased 9.5%
Maintenance Cost per Mile	\$1.46	\$1.44	Decreased 1%
Vehicle Hours per Labor Hour	.626	0.626	No Change

Overall, operating costs are up, which is expected due to standard Q3 VEBA contributions in January 2023. Increased costs also include Union wage adjustments. Current work focused on re-assessing long-term financial assumptions.



Sustainability

Metric	FY23 Q2	FY23 Q3	% Change
Fleet Transitioned to Electric	14%	14%	No Change
Renewable Fuel Consumption	95%	100%	Increased 5%
Ridership	1,485,465	1,539,651	Increased 4%

Overall, Sustainability indicators suggest LTD remains committed to renewable fuel consumption but will need to think innovatively about long-term dynamics in ridership and fleet. Current work focused on bi-annual Green House Gas Emission assessment.

Tactical Work Highlights

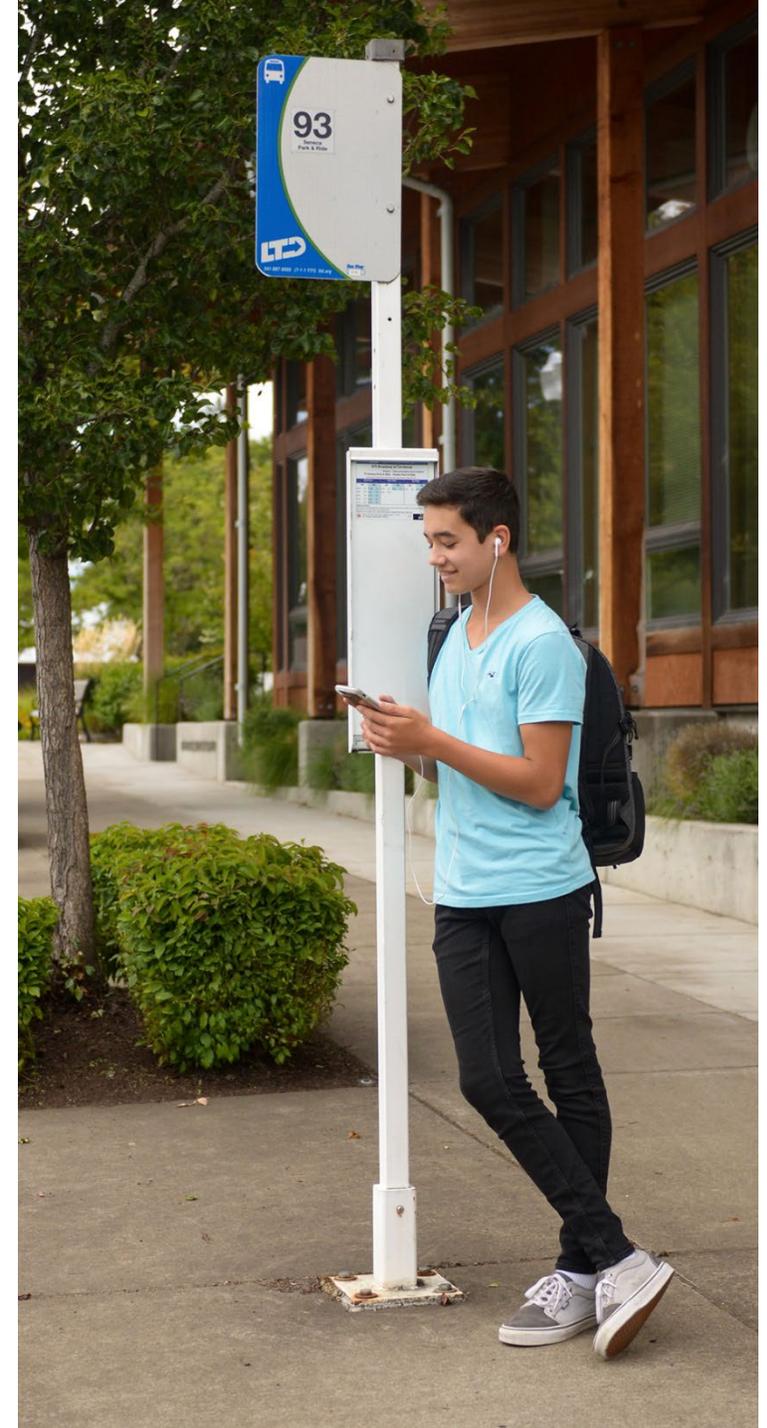


Employee Engagement

- Instructor training week completed
- Operations Command Center Design
- Performance Management Reboot

Community Value

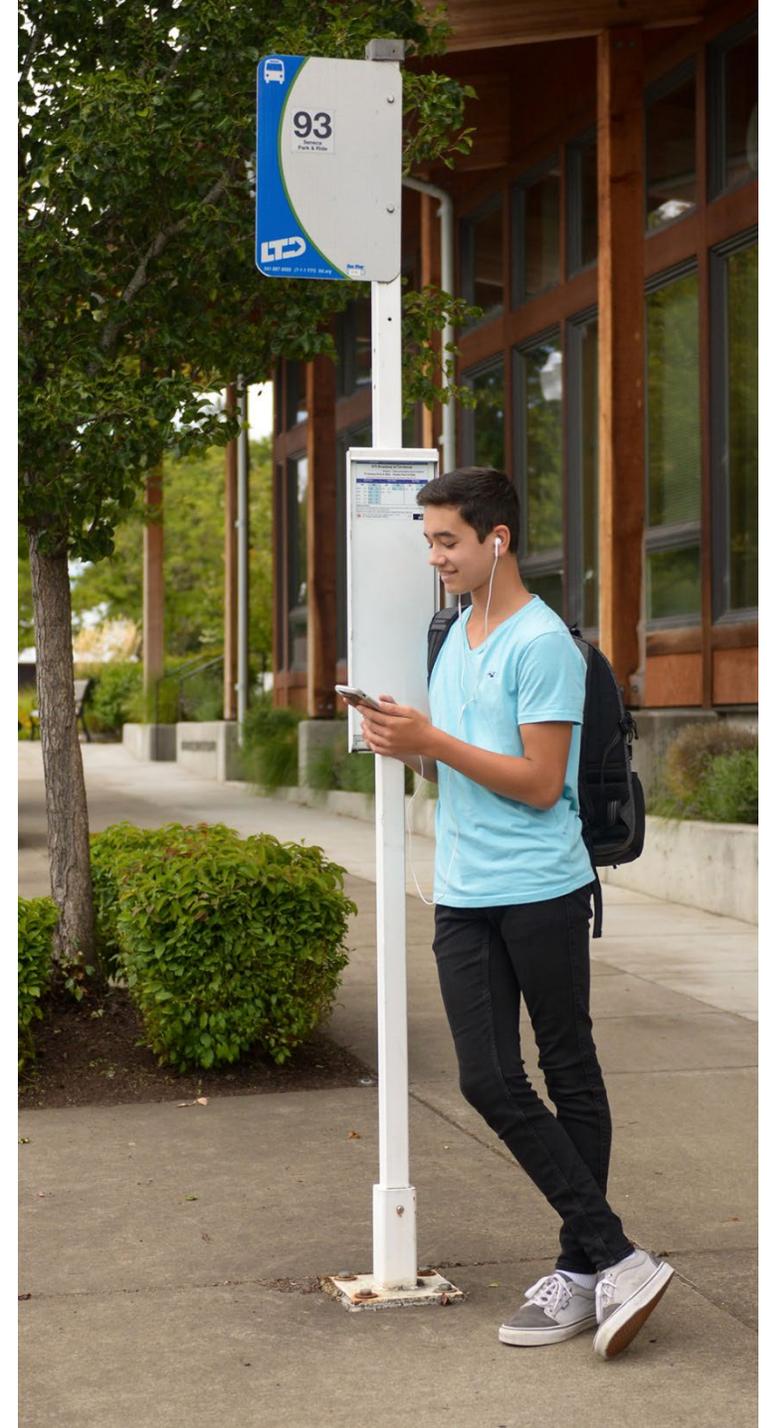
- Leadership Service Sampling
- Eugene Station Modernization Design



What's Next?



- 2023 Employee Engagement Survey
- Comprehensive Operations Analysis Kick-Off
- Fiscal Year 2024 Strategic Plan Refresh



Questions?

