YCIPTA Strategic Plan

March 22, 2021

Agenda

- Strategic Plan Framework

- Mission & Vision Statements

- Aligning Around Results

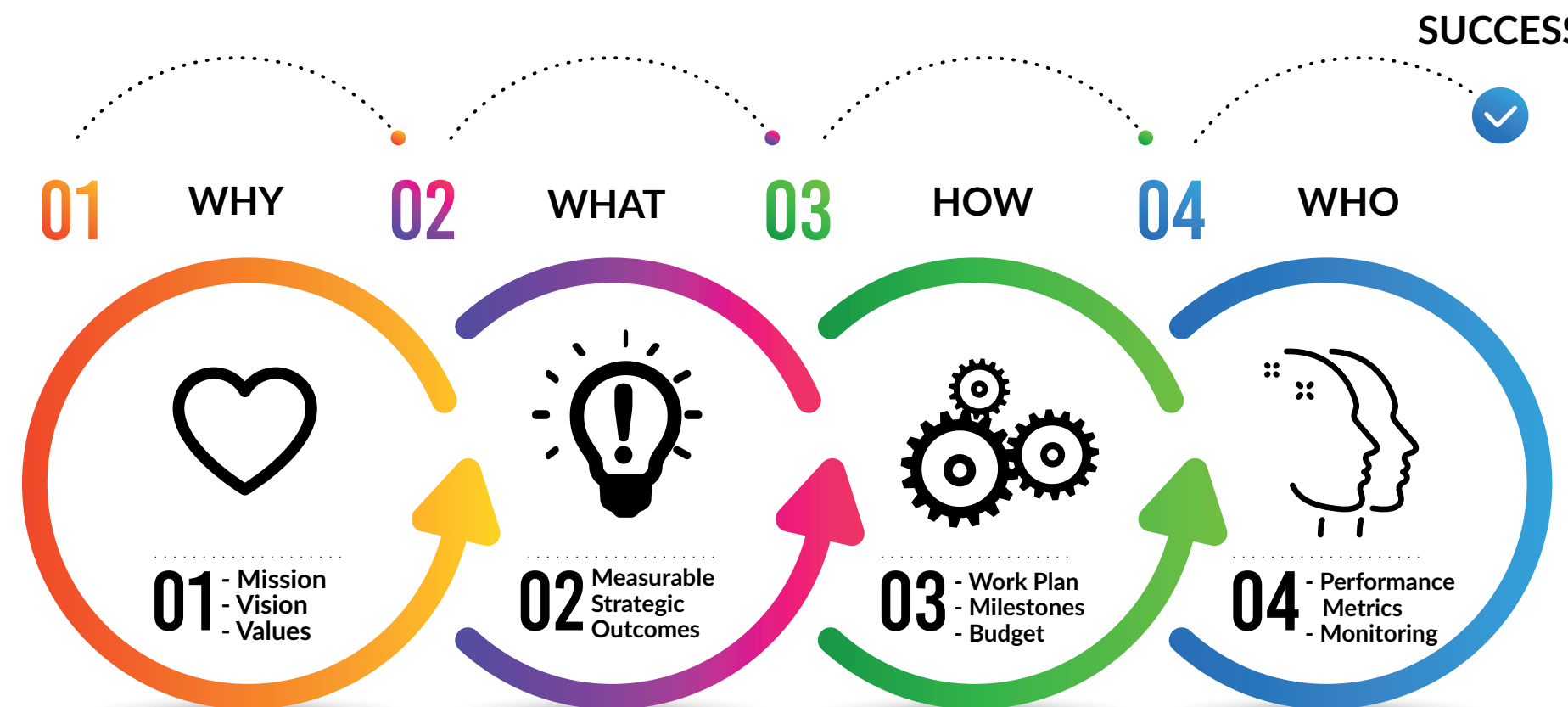- Making The Outcomes Come Alive

- Making The Plan Come Alive

Organizational Excellence
Constructing an Organization Focused on Outcomes

Constructing an Organization Focused on Outcomes

1. **WHY** YCIPTA leaders, teams, and staff are driven to deliver?

2. **WHAT** outcomes YCIPTA strives to achieve?

3. **HOW** YCIPTA will work toward achieving the goals?

4. **WHO** within YCIPTA is contributing to achievement of these goals.?

SUCCESS

| 01 WHY | 02 WHAT | 03 HOW | 04 WHO |

01 - Mission - Vision - Values

02 Measurable Strategic Outcomes

03 - Work Plan - Milestones - Budget

04 - Performance Metrics - Monitoring

Mission & Vision Statements

What does success look like?

YCAT Mission

Purpose, Cause, or Beliefs

WHY

01 - Mission
- Vision
- Values

Mobility solutions that make essential connections possible.

YCAT Vision

Purpose, Cause, or Beliefs

WHY

01 - Mission - Vision - Values

To be recognized as the leader in mobility solutions that empower and connect the community. .

Aligning Around Results

YCIPTA Success Outcomes

- **Customer Satisfaction**
  Establish a customer satisfaction or Net Promoter Score baseline and increase.

- **Operational Excellence**
  Achieve a score of 24 in a defined operational excellence index.
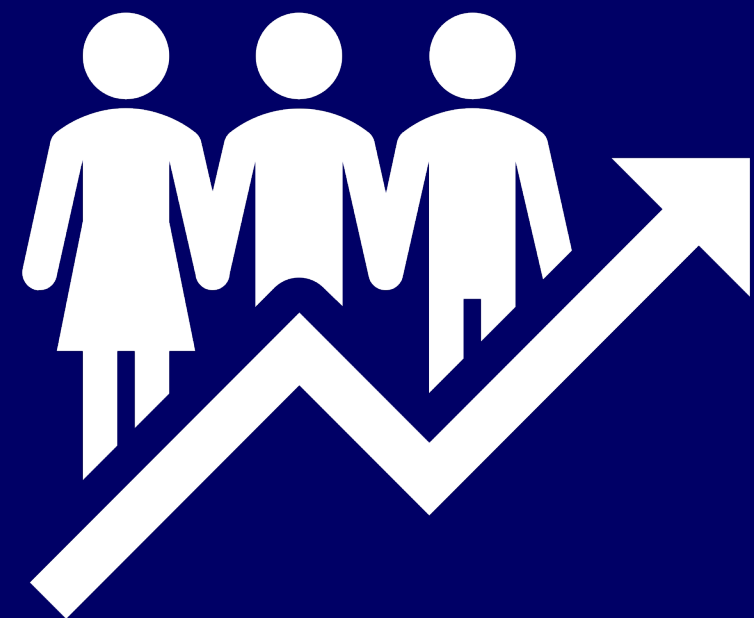
- **Financial Sustainability**
  Maintain partner revenue near-term, and source dedicated revenue long-term.

- **Community Value**
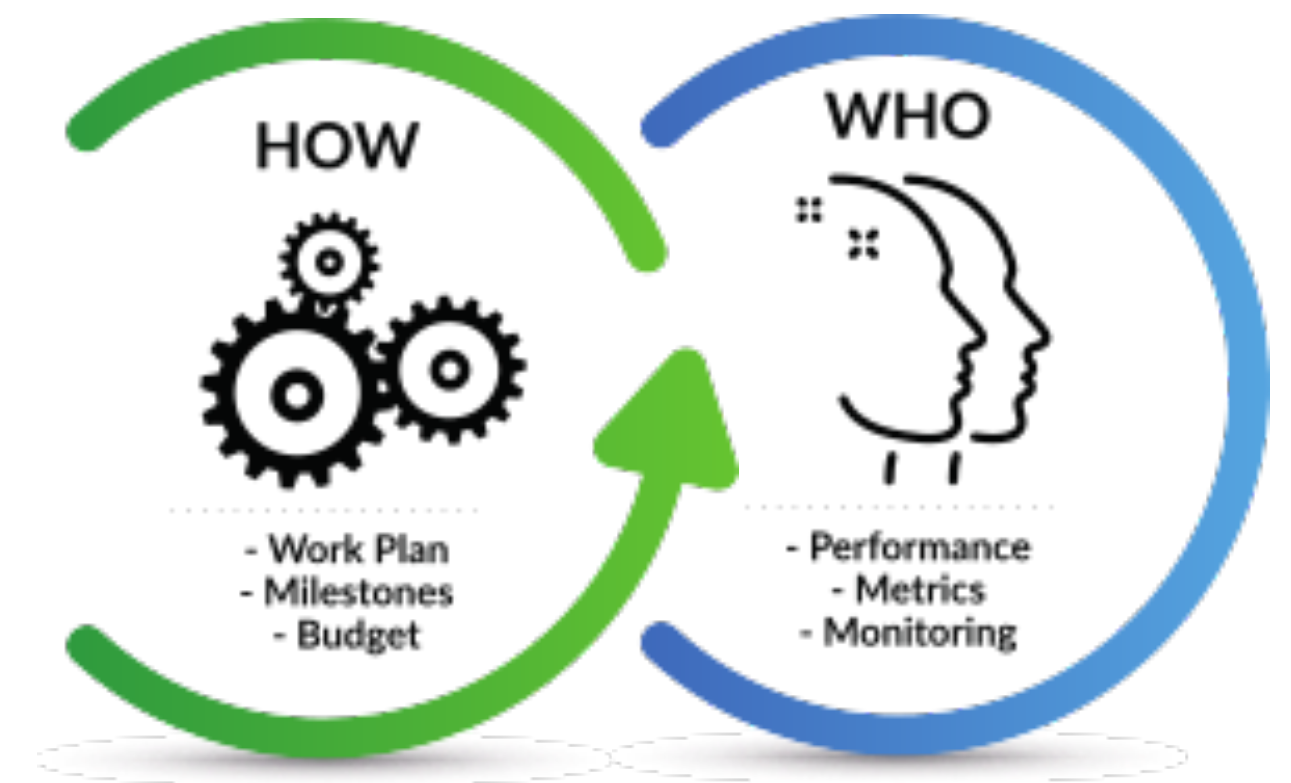 Increase non-customer understanding and impression of YCIPTA services.

WHAT

02 Measurable Strategic Outcomes

Making the Outcomes Come Alive

Making the Outcomes Come Alive

- **HOW** we will deliver success

- **WHO** is responsible for it

- Monitoring our progress toward these outcomes

HOW
- Work Plan
- Milestones
- Budget

WHO
- Performance
- Metrics
- Monitoring

YCIPTA Performance Scorecard

Elements of a Performance Scorecard

1. Designed to Deliver Success Outcomes

2. Achievable, Challenging, Collaborative

3. Prioritized Metrics With Goals

4. Supporting Information Systems

Performance Scorecard: Metrics

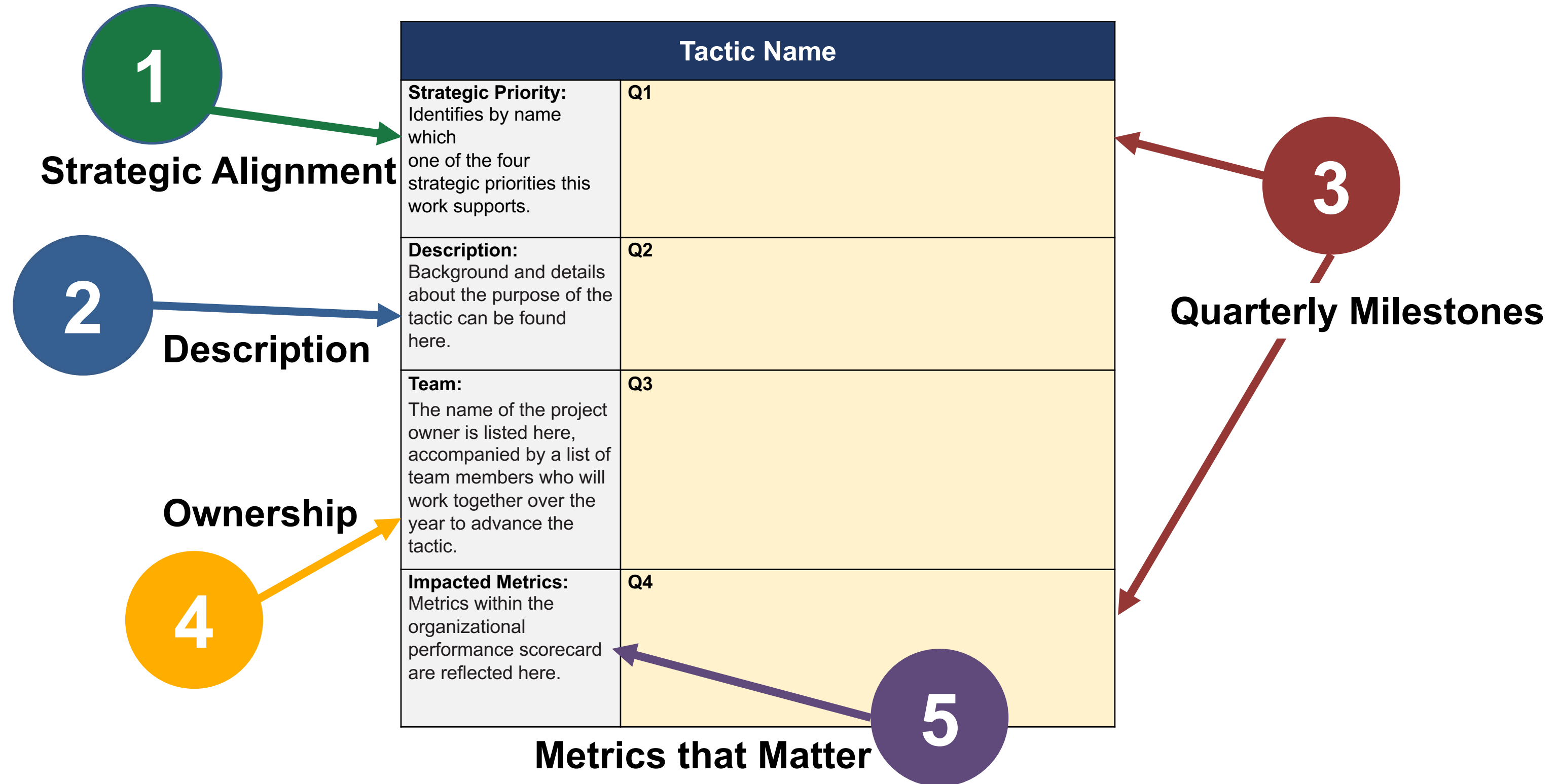|	
Customer Satisfaction	Ensuring that YCIPTA customers have access to high quality mobility solutions that they actively and increasingly use is a priority for the agency. We want to ensure that our system provides customers with mobility solutions that connect the community and encourage independence. *This set of metrics provides insight on our performance as it pertains to our ability to deliver high quality transportation services to riders.* **Weight: 30**
Operational Excellence	YCIPTA is dedicated to providing innovative mobility solutions and developing and implementing programs that provide best in class service that empowers the community. *This set of metrics helps monitor aspects of operations that are most critical to the delivery of high-quality transportation service.* **Weight: 30**
Financial Sustainability	YCIPTA seeks to develop and implement financial practices that support long-term sustainability for the agency and the community. With the rapidly increasing population of Yuma County, YCIPTA is focused on establishing local revenue streams that can support agency growth. *This set of metrics are aligned with maintaining partner revenue near-term, and sourcing dedicated revenue long-term.* **Weight: 20**
Community Value	YCIPTA is committed to providing value to the wider Yuma County community, developing long-standing partnerships with community stakeholders and providing excellent public transit service. YCIPTA will continue to develop and implement a community outreach program to demonstrate our value and economic impact as a community partner and educate the public about the benefits of transit and how local funding is important to create a regional leader in mobility solutions. *This set of metrics gauge our success at delivering value to the entire community.* **Weight: 20**
	Total: 100

Scorecard

Success Outcome	Metric	Performance Goal 2022	Objective	Definition	Information System	Owner	Goal Points
Customer Satisfaction	Customer Satisfaction - Fixed Route	Establish Baseline	Increase	% of customers who are satisfied or very satisfied with fixed route service.	Customer Survey	Anabel Teran	5
	Customer Satisfaction - YCAT On-Call	Establish Baseline	Increase	% of customers who are satisfied or very satisfied with demand-response service.	Customer Survey	Anabel Teran	2.5
	Net Promoter Score - Fixed Route	Establish Baseline	Increase	% Promoters minus % Detractors. On a 0-10 scale of how likely to recommend YCAT, Promoters are 9-10 and Detractors are 0-6.	Customer Survey	Oliver Cromwell	5
	Net Promoter Score - YCAT On-Call	Establish Baseline	Increase	% Promoters minus % Detractors. On a 0-10 scale of how likely to recommend YCAT On-Call, Promoters are 9-10 and Detractors are 0-6.	Customer Survey	Oliver Cromwell	2.5
	Customer Impression of Operators	Establish Baseline	Increase	% of customers who agree or strongly agree that operators are helpful and courteous .	Customer Survey	Brandy Brookins	3
	Contractor Compliance with Operator Training Requirements	Establish Baseline	Increase	% compliance with mandatory operator training requirements, as stated in contract.	Mandatory Training Data, Operations Contract	Carol Perez	3
	Percent of Negative Customer Comments	41%	Decrease	% of negative customer comments referring to employees.	Customer Comments	Anabel Teran	3
	Quality of Employee Performance Evaluations Completed	75%	Increase	% of employee performance evaluations completed accurately, according to guidelines.	Employee Performance Evaluations	Anabel Teran	2
	Customer Understanding of Route Schedules and Transit Access Points	Establish Baseline	Increase	% of customers who agree or strongly agree that they are confident navigating the system.	Customer Survey	Carol Perez	4
							30
Operational Excellence	On-Time Performance - Fixed Route	Establish Baseline	Increase	% of actual on-time performance - fixed route.	Solutions for Transit, Monthly Performance Review	Oliver Cromwell	5
	On-Time Performance - YCAT On-Call	Establish Baseline	Increase	% of actual on-time performance - YCAT On-Call	Solutions for Transit, Monthly Performance Review	Oliver Cromwell	2.5
	Minutes of Delayed Service	11 hrs	Decrease	Average number of minutes of delayed service per month due to operators arriving late to the first stop by 5 minutes or more.	Solutions for Transit, Monthly Performance Review	Oliver Cromwell	3
	Unaccounted Revenue Time	9 hrs	Decrease	Total number of hours of unaccounted revenue time accrued due operators logging off before the end of revenue service.	Solutions for Transit, Monthly Performance Review	Oliver Cromwell	2
	Preventative Maintenance Inspections	100%	Target	% of scheduled preventative maintenance inspections completed on-time.	Solutions for Transit, Monthly Performance Review	Rick Lapa	4
	Distance Between Road Calls	4,000	Increase	Average distance between road calls (miles).	Solutions for Transit, Monthly Performance Review	Rick Lapa	3
	Passengers per Hour	10	Increase	Average number of passengers per revenue hour.	Solutions for Transit, Monthly Performance Review	Oliver Cromwell	0.5
	Customer Impression of Safety	Establish Baseline	Increase	% of customers who agree or strongly agree that they feel safe when riding YCAT buses.	Customer Survey	Brandy Brookins	3
	Safety - Actual	5	Increase	Total score on an index including existing safety measures: preventable accidents, passenger incidents, and passenger injuries.	Safety Statistics	Brandy Brookins	3
	Customer Impression of Vehicle Cleanliness	Establish Baseline	Increase	% of customers who agree or strongly agree that vehicles are clean.	Customer Survey	Rick Lapa	2
	Vehicle Cleanliness - Actual	Establish Baseline	Increase	Average audit score for vehicle cleanliness.	Cleanliness Audit Data	Rick Lapa	2
							30
Financial Sustainability	Overall Operating Cost	$3,453,232	Target	Maintenance of total system operating costs at or below budgeted dollar amount.	Financial Data	Shelly Kreger	5
	Subsidy per Passenger	$5.00	Decrease	Average public subsidy per boarding passenger.	Financial Data	Shelly Kreger	3
	Farebox Recovery Ratio	15%	Increase	% of operating expenses covered by passenger fares.	Financial Data	Shelly Kreger	3
	Variance from Adopted Budget	2%	Target	% above or below adopted budget.	Financial Data	Shelly Kreger	5
	Alternative Revenue	$237,250	Target	Achieve 5% increase in revenue generated from sources other than farebox and local contribution/taxes (e.g. grants, advertising, partnerships…).	Financial Data	Shelly Kreger	4
							20
Community Value	Community Members Feel that YCIPTA Provides Value	Establish Baseline	Increase	% of community members who agree or strongly agree that YCIPTA provides value to the community.	Community Survey	Shelly Kreger	6
	Community Perception of Financial Stewardship	Establish Baseline	Increase	% of community that agrees or strongly agrees that YCIPTA manages financial resources well.	Community Survey	Shelly Kreger	5
	Community Perception of the Quality of Communications Material	Establish Baseline	Increase	% of community members who agree or strongly agree that they are satisfied with quality of communications material.	Community Survey	Carol Perez	5
	Community Impression of Safety on Vehicles	Establish Baseline	Increase	% of community members who agree or strongly agree that they would feel safe while using YCAT services.	Community Survey	Brandy Brookins	2
	Annual Economic Impact	Establish Baseline	Increase	The annual change in business sales, jobs, value added, income,or tax revenue.	Economic Impact Study	Shelly Kreger	2
							20
Overall Total							100

Establishing an Actionable Work Plan

Organizational Tactics: Key Elements

1 Strategic Alignment

2 Description

4 Ownership

3 Quarterly Milestones

5 Metrics that Matter

Tactic Name	
Strategic Priority: Identifies by name which one of the four strategic priorities this work supports.	Q1
Description: Background and details about the purpose of the tactic can be found here.	Q2
Team: The name of the project owner is listed here, accompanied by a list of team members who will work together over the year to advance the tactic.	Q3
Impacted Metrics: Metrics within the organizational performance scorecard are reflected here.	Q4

Organizational Tactics by Success Outcome

Priority Tactics: Customer Experience

Tactic Name	Description	Impacted Metrics	Owner/Team Members
External Communications Enhancement	Simplify customer information materials - service schedules and route information (Targeted Service Improvement from Short Range Plan). Conduct annual customer surveys to determine impression of communications material. Adjust material accordingly.	Net Promoter Score Customer Understanding of Route Schedules and Transit Access Points Community Perception of the Quality of Communications Material	Carol Perez
Customer Comments Tracking System	Refine existing system for recording and tracking customer comments. Use tracking system to respond to customer concerns and address shortfalls in agency operation.	Customer Satisfaction Net Promoter Score Percent of Negative Customer Comments	Carol Perez Anabel Teran
Employee Performance Evaluations	Refine and execute high-quality annual employee performance evaluations. Use employee performance evaluations and customer survey feedback to restructure training programs, as needed.	Customer Impression of Operators Contractor Compliance with Operator Training Requirements Employee Performance Evaluations Completed	Carol Perez Anabel Teran Shelly Kreger
Operator Training Program	Review mandatory operator training requirements, bringing long-standing operators into the training programs. Record contractor compliance with training requirements, as stated in the contract agreement.	Customer Satisfaction Net Promoter Score Customer Impression of Operators Contractor Compliance with Operator Training Requirements Percent of Negative Customer Comments	Carol Perez Anabel Teran Brandy Brookins

Priority Tactics: Operational Excellence

Tactic Name	Description	Impacted Metrics	Owner/Team Members
Real-time Bus Tracking System	Continue working with vendor to improve online real-time bus tracking system. Update GTFS data. Conduct annual customer surveys to evaluate effectiveness of tracking system, and make adjustments to system accordingly.	Customer Satisfaction Net Promoter Score On-Time Performance	Carol Perez
Website Update	Begin procurement process for website update. Select vendor for website update. Complete website update. Conduct annual customer surveys to gauge satisfaction with website and content. Adjust interface and content according to feedback.	Customer Understanding of Route Schedules and Transit Access Points Community Perception of the Quality of Communications Material	Shelly Kreger
Vehicle Cleanliness Audits	Develop and document vehicle cleanliness audit system. Implement recommended process improvements based on findings from initial cleanliness audit, and customer perception survey.	Customer Satisfaction Net Promoter Score Customer Impression of Vehicle Cleanliness Vehicle Cleanliness - Actual	Carol Perez Rick Lapa
Fleet Maintenance Program	Develop a strategic fleet maintenance program to ensure that the total fixed route fleet is available for service each day and meets pull-out requirements.	Customer Satisfaction Net Promoter Score Preventative Maintenance Inspections Distance Between Road Calls	Shelly Kreger Oliver Cromwell Rick Lapa
Performance Management - Operations	Implement and maintain performance management system to track operations metrics. Establish quarterly cadence with operations contractor to review performance and implement tactical service strategies to improve customer experience.	Contractor Compliance with Operator Training Requirements On-Time Performance Preventative Maintenance Inspections Distance Between Road Calls	Oliver Cromwell Shelly Kreger

Priority Tactics: Financial Sustainability

Tactic Name	Description	Impacted Metrics	Owner/Team Members
Long-term Financial Plan	Develop long-term financial plan.	Variance from Adopted Budget Alternative Revenue Community Perception of Financial Stewardship	Shelly Kreger Chona Medel
Community Stakeholder Partnerships	Develop partnerships with targeted community stakeholders to establish financial support for the future; secure long-term funding source in anticipation of reaching 200k population threshold.	Operating Cost per Hour Alternative Revenue Community Members Feel that YCIPTA Provides Value Community Perception of Financial Stewardship	Shelly Kreger
Jurisdictional Reporting	Establish jurisdictional reporting to keep members up-to-date on agency activity and funding challenges; increase member dues.	Alternative Revenue Community Members Feel that YCIPTA Provides Value Community Perception of Financial Stewardship	Shelly Kreger
Staffing Analysis	Conduct staffing analysis - anticipate capacity thresholds. Develop budget and funding strategy to sustain staffing plan.	Variance from Adopted Budget	Shelly Kreger Chona Medel Carol Perez

Priority Tactics: Community Value

Tactic Name	Description	Impacted Metrics	Owner/Team Members
Community Outreach Initiative	Develop and implement community outreach initiative to improve perception of YCIPTA as a trusted agency.	Community Members Feel that YCIPTA Provides Value Community Perception of Financial Stewardship Community Perception of the Quality of Communications Material	Carol Perez
Economic Impact Study	Execute localized economic impact study to determine how YCIPTA services affect the amount and type of economic activity in a region.	Community Members Feel that YCIPTA Provides Value Annual Economic Impact	Shelly Kreger Carol Perez
New Technology Procurement	Explore procurement of new technologies to enhance service usability.	Customer Satisfaction Net Promoter Score Community Members Feel that YCIPTA Provides Value	Shelly Kreger Carol Perez

Making the Plan Come Alive
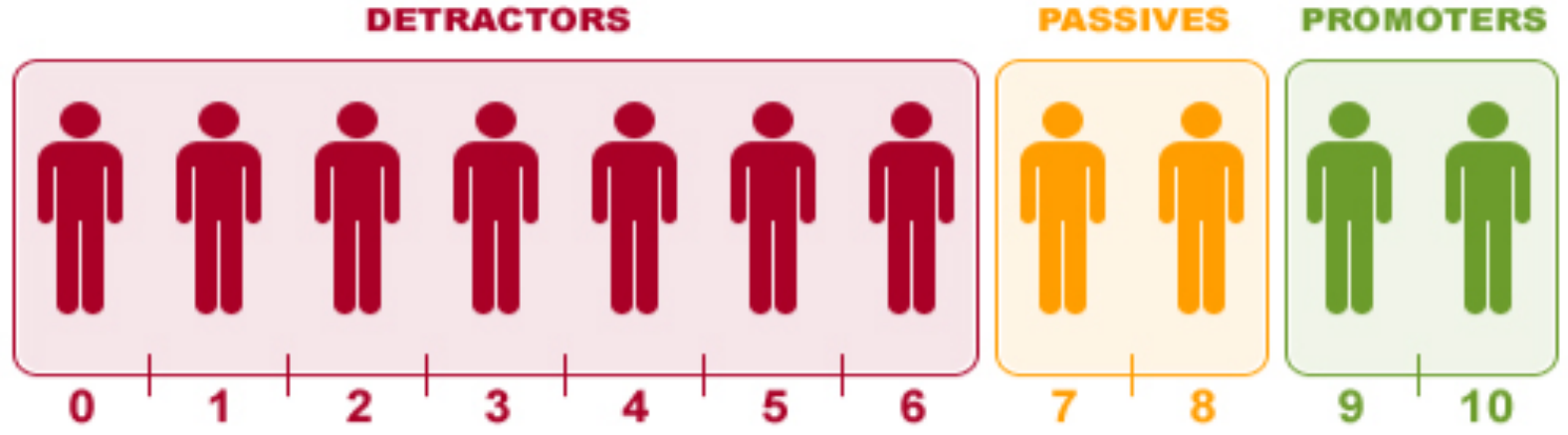
Keys for Successful Implementation

1. **Champions:** resource that drives coordination of the team's program of tactics and assures metrics from data are current and complete.

2. **Information Systems:** develop the reporting tools and resources to measure the effectiveness of the tactics program.

3. **Transparency:** initiate cadence of quarterly reporting to share the agency's progress on achieving success outcomes and advancing performance management activities.
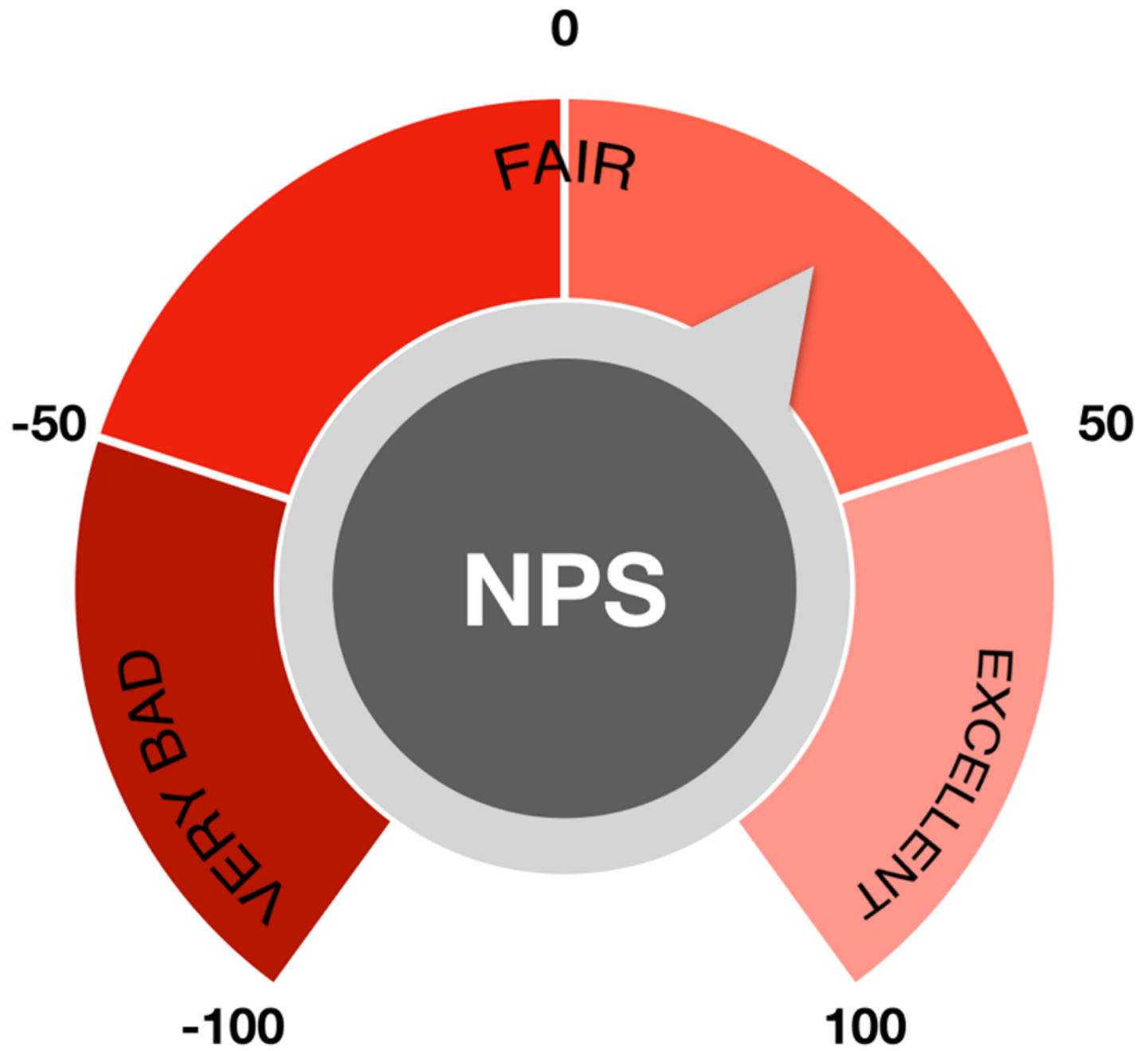
Questions?

transproconsulting.com

Net Promoter Score

NPS poses the ultimate question:

"How likely would you be to recommend riding YCAT to a friend or neighbor?"

Net Promoter Score