

# 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

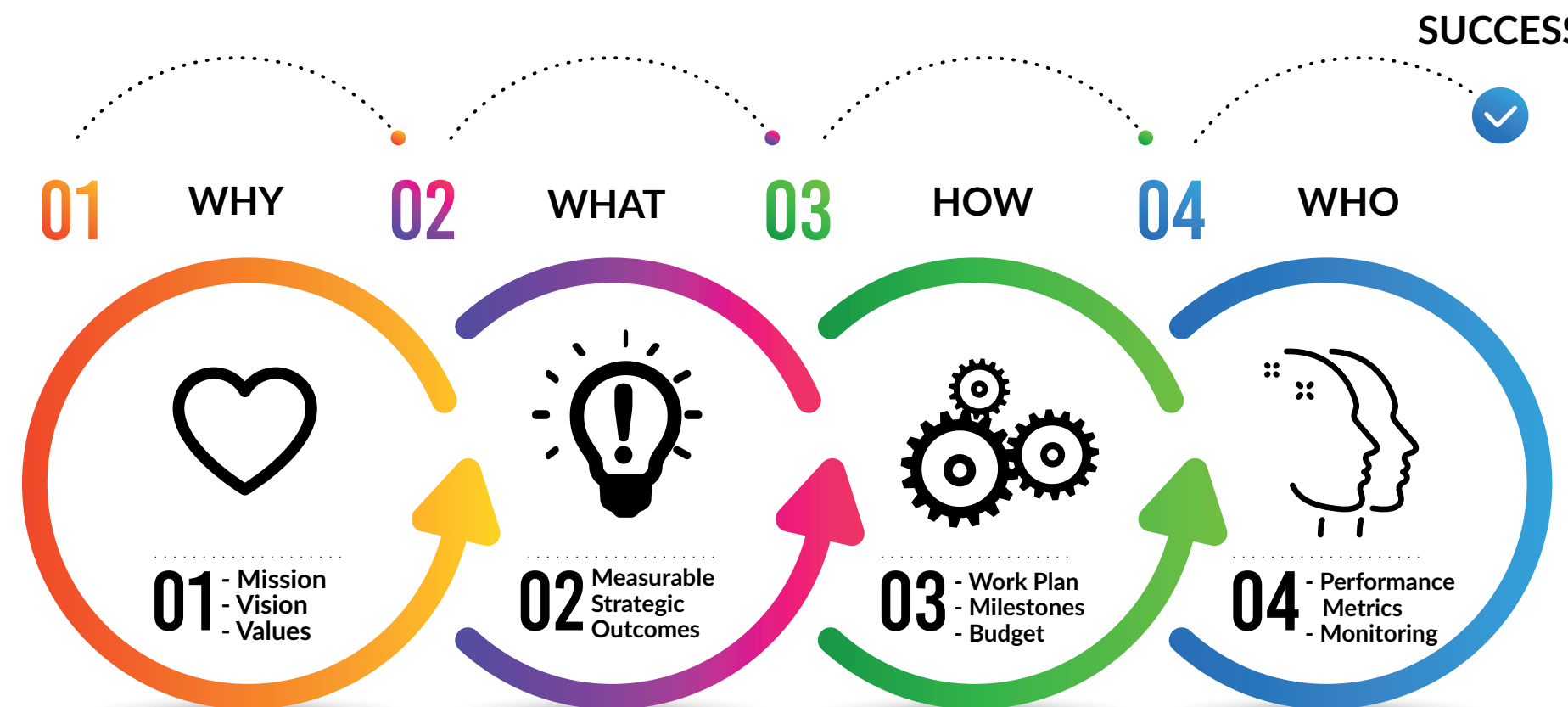


# Organizational Excellence

*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.?





# Mission & Vision Statements

*What does success look like?*



*Purpose, Cause, or Beliefs*



Mobility solutions that make essential connections possible.



*Purpose, Cause, or Beliefs*



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.

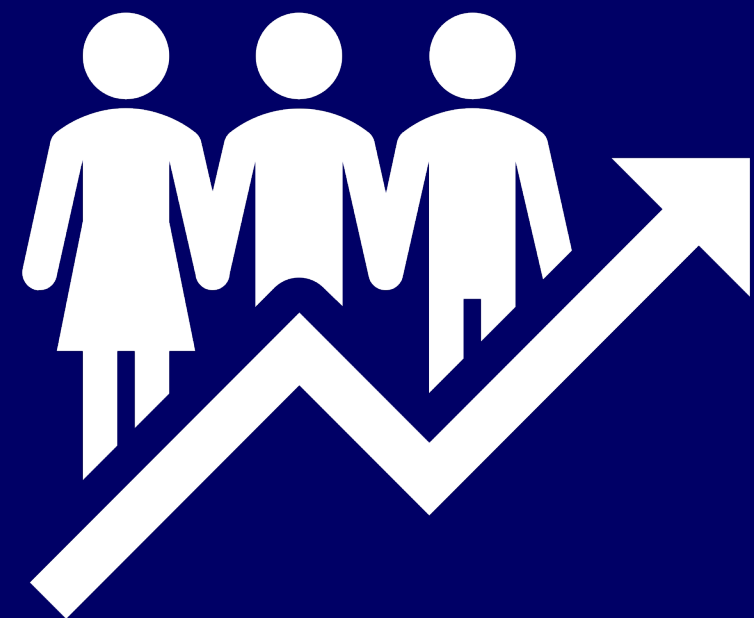


- **Financial Sustainability**  
Maintain partner revenue near-term, and source dedicated revenue long-term.



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

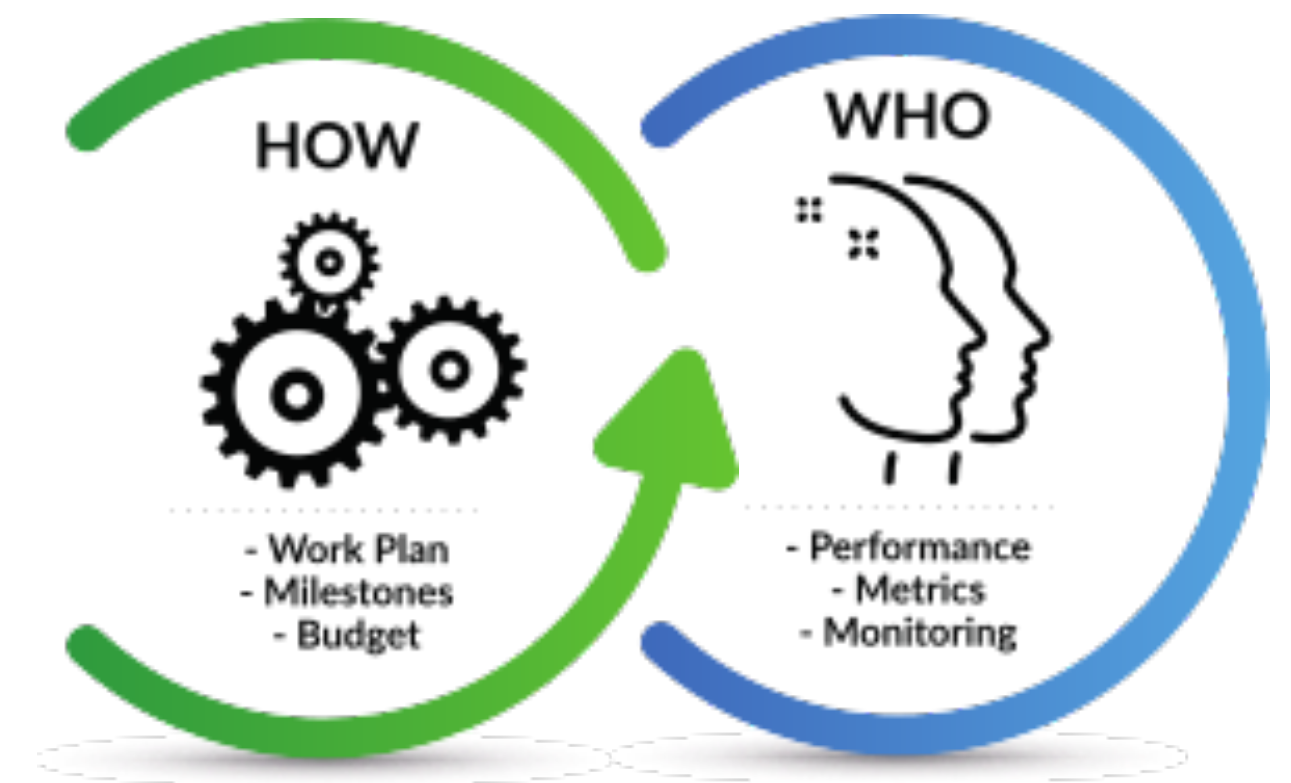




**Making the Outcomes  
Come Alive**

# Making the Outcomes Come Alive

- **HOW** we will deliver success
- **WHO** is responsible for it
- Monitoring our progress toward these outcomes





# 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

1

Organizational Alignment

2

Metrics That Matter

Performance Scorecard										
Organizational Goal	Metric	FY 2024 Baseline	Annual Performance Goal	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Overall Fiscal Year	Goal Points	Fiscal Year Earned Points
Financial Stability	Net Operating Income	\$3.9 M (A)	\$1,000,000						10	
	Operating Cost per Revenue Hour	\$111.80	\$113.80						8	
	Cost Recovery	18%	18%						5	
	Fixed Route Farebox Recovery	17%	17%						4	
	DBE Percentage	22.10%	16.08%						3	
<b>Total FPI Score</b>									<b>30</b>	
Customer Satisfaction	Fixed Route Customer Satisfaction	81%	81.0%						5	
	Connexion Customer Satisfaction	82%	87.0%						2	
	Fixed Route On-Time Performance	72%	75.0%						4	
	Customers per Revenue Hour	79.5	78.9%						4	
	Mean Distance Between Vehicle Failures	12,363	11,750						3	
	Concern Resolution	8 Days	7 Days						2	
<b>Total CSI Score</b>									<b>20</b>	
Mobility	Park-n-Ride Utilization	31.7%	34.7%						6	
	Transit Access	9%	30%						6	
	Route Directness	53%	30%						5	
	Adherence to Composite Project Budget	NA	90%						5	
<b>Total MPI Score</b>									<b>26</b>	
Safety and Security	Perception Scores of Safety and Security	85%	80%						4	
	Fixed Route Preventable Collisions per 100,000 Miles	0.91	0.86						3	
	Fixed Route Non-Preventable Collisions per 100,000 Miles	1.56	1.48						2	
	Fixed Route Preventable Incidents per 100,000 Miles	0.24	0.22						2	
	Fixed Route Non-Preventable Incidents per 100,000 Miles	0.54	0.52						2	
Workers' Compensation Claims	60 (A)	57						2		
<b>Total SPI Score</b>									<b>15</b>	
Employee Success	Employee Satisfaction	78%	80%						4	
	Employee Engagement	55%	60%						4	
	Training Hours per Employee	34.68	36.7						2	
<b>Total ESI Score</b>									<b>10</b>	
<b>PERFORMANCE SCORE</b>									<b>100</b>	

5

Information System

3

Ownership

4

Definitions

Organizational Goal	Metric	Owner	Metric Definition
Financial Stability	Net Operating Income	Anderson	Operating revenue net of operating expenses for JTA transit modes.
	Operating Cost per Revenue Hour	Phillips	The combined average operating cost of a dollar hour of Fixed Route, Community Shuttle, and Skyway revenue service.
	Cost Recovery	Marck	The percentage of total operating expenses recovered by all forms of directly generated revenue for Fixed Route, Community Shuttle, and Skyway service.
	Fixed Route Farebox Recovery	Cadell	The percentage of Fixed Route operating expenses recovered by Fixed Route fare revenue.
	DBE Percent	Valenzia	The percentage of JTA contractor payments that are made to DBE firms.
Customer Satisfaction	Fixed Route Customer Satisfaction	Forsythe	The percent of JTA Fixed Route customers satisfied with overall Fixed Route service, as expressed in a customer satisfaction survey.
	Connexion Customer Satisfaction	Calise	The percent of JTA Connexion customers satisfied with overall Connexion service, as expressed in a customer satisfaction survey.
	Fixed Route On-Time Performance	Flarity	The percentage of Fixed Route time point departures that occur within 59 seconds before and 5 minutes and 59 seconds after the scheduled time.
	Customers per Revenue Hour	Calise	The aggregate average number of Fixed Route, Community Shuttle, and Skyway customer boardings occurring in each revenue hour.
	Mean Distance Between Vehicle Failures	Anderson	The average number of miles driven by Fixed Route, Community Shuttle, and Connexion vehicles before experiencing a major or minor mechanical failure.
Concern Resolution	Fulmer	The average number of days required to resolve Fixed Route, Community Shuttle, and Skyway customer complaints and communicate the final outcome to the customer.	
Mobility	Park-n-Ride Utilization	Wagen	The total average weekly utilization of Park-n-Ride facilities.
	Transit Access	Shultz	The percentage of Duval County residents residing within a quarter mile of Fixed Route, Community Shuttle, or Skyway service with headways of 10 minutes or less.
	Route Directness	Thomas	The percent deviation between the actual path and the shortest possible driving path from the starting point to the ending point of JTA Fixed Routes.
	Adherence to Composite Project Budget	Cark	The percentage of projects on-budget for all capital projects with budgets of \$200,000 or greater.
Safety and Security	Adherence to Composite Project Schedule	McCartney	The percentage of project milestones completed on-time for all projects with budgets of \$200,000 or greater.
	Perception Scores of Safety and Security	Daigler	The percentage of JTA Fixed Route customers satisfied with operator performance (30% weighting), safety at the stop (40% weighting), and safety on board (40% weighting), as expressed in a customer satisfaction survey.
	Fixed Route Preventable Collisions per 100,000 Miles	Lary	The average number of Fixed Route vehicle collisions determined to be preventable for every 100,000 miles driven.
	Fixed Route Non-Preventable Collisions per 100,000 Miles	Kilbourn	The average number of Fixed Route vehicle collisions determined to be non-preventable for every 100,000 miles driven.
	Fixed Route Preventable Incidents per 100,000 Miles	Kulp	The average number of Fixed Route incidents determined to be preventable for every 100,000 miles driven.
Fixed Route Non-Preventable Incidents per 100,000 Miles	Wilde	The average number of Fixed Route incidents determined to be non-preventable for every 100,000 miles driven.	
Workers' Compensation Claims	Gichrist	The total number of new Workers' Compensation claims.	
Employee Success	Employee Satisfaction	Spantina	The percentage of JTA employees indicating satisfaction with their employment experience, as expressed in the JTA employee satisfaction survey.
	Employee Engagement	Lewis	The percentage of JTA employees indicating satisfaction with their level of engagement in their workplace, as expressed in the JTA employee satisfaction survey.
	Training Hours per Employee	Michaelis	The average number of training hours completed by each JTA employee.



# Performance Scorecard: Metrics

<p><b>Customer Satisfaction</b></p>	<p>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.</p> <p><i>This set of metrics provides insight on our performance as it pertains to our ability to deliver high quality transportation services to riders.</i></p> <p style="text-align: right;"><b>Weight: 30</b></p>
<p><b>Operational Excellence</b></p>	<p>YCIPTA is dedicated to providing innovative mobility solutions and developing and implementing programs that provide best in class service that empowers the community.</p> <p><i>This set of metrics helps monitor aspects of operations that are most critical to the delivery of high-quality transportation service.</i></p> <p style="text-align: right;"><b>Weight: 30</b></p>
<p><b>Financial Sustainability</b></p>	<p>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.</p> <p><i>This set of metrics are aligned with maintaining partner revenue near-term, and sourcing dedicated revenue long-term.</i></p> <p style="text-align: right;"><b>Weight: 20</b></p>
<p><b>Community Value</b></p>	<p>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.</p> <p><i>This set of metrics gauge our success at delivering value to the entire community.</i></p> <p style="text-align: right;"><b>Weight: 20</b></p>
<p><b>Total: 100</b></p>	



# Scorecard

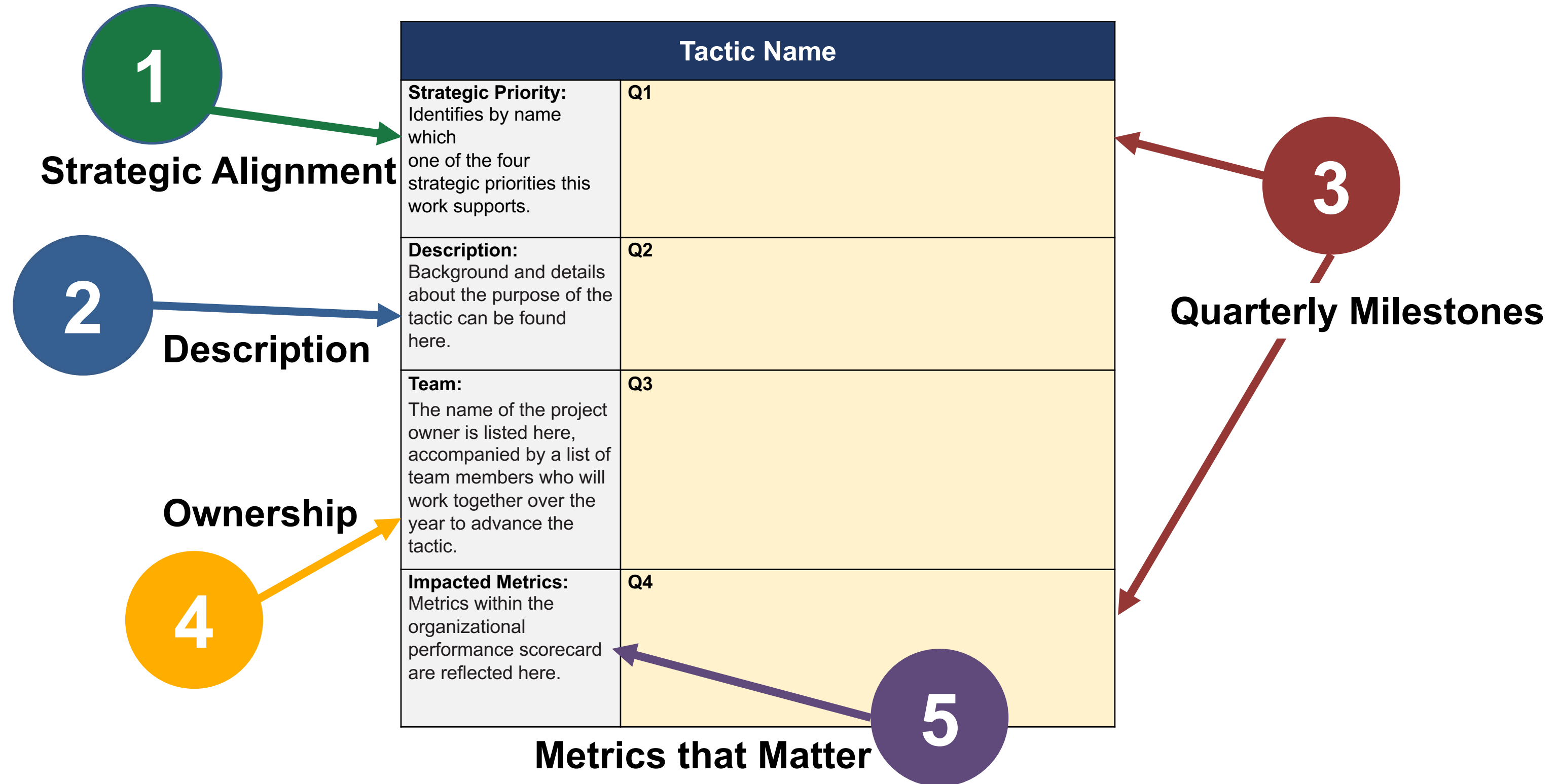
Success Outcome	Metric	Performance Goal 2022	Objective	Definition	Information System	Owner	Goal Points
Customer Satisfaction	Customer Satisfaction - Fixed Route	Establish Baseline	Increase	% of customers who are satisfied or very satisfied with fixed route service.	Customer Survey	Anabel Teran	5
	Customer 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
<b>Overall Total</b>							<b>100</b>





# Establishing an Actionable Work Plan

# Organizational Tactics: Key Elements



# Organizational Tactics by Success Outcome

# Priority Tactics: Customer Experience



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

# Priority Tactics: Operational Excellence



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

# Priority Tactics: Financial Sustainability



Tactic Name	Description	Impacted Metrics	Owner/Team Members
<b>Long-term Financial Plan</b>	Develop long-term financial plan.	Variance from Adopted Budget Alternative Revenue Community Perception of Financial Stewardship	Shelly Kreger Chona Medel
<b>Community Stakeholder Partnerships</b>	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
<b>Jurisdictional Reporting</b>	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
<b>Staffing Analysis</b>	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
<b>Community Outreach Initiative</b>	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
<b>Economic Impact Study</b>	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
<b>New Technology Procurement</b>	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

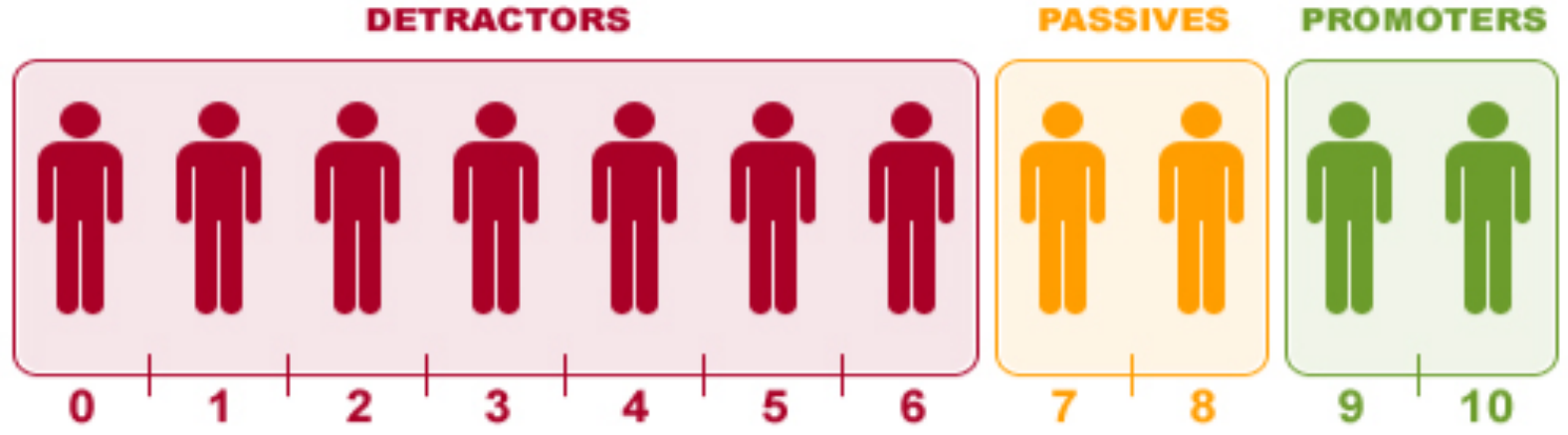
1. **Champions:** resource that drives coordination of the team's program of tactics and assures metrics from data are current and complete.
2. **Information Systems:** develop the reporting tools and resources to measure the effectiveness of the tactics program.
3. **Transparency:** initiate cadence of quarterly reporting to share the agency's progress on achieving success outcomes and advancing performance management activities.

# Questions?

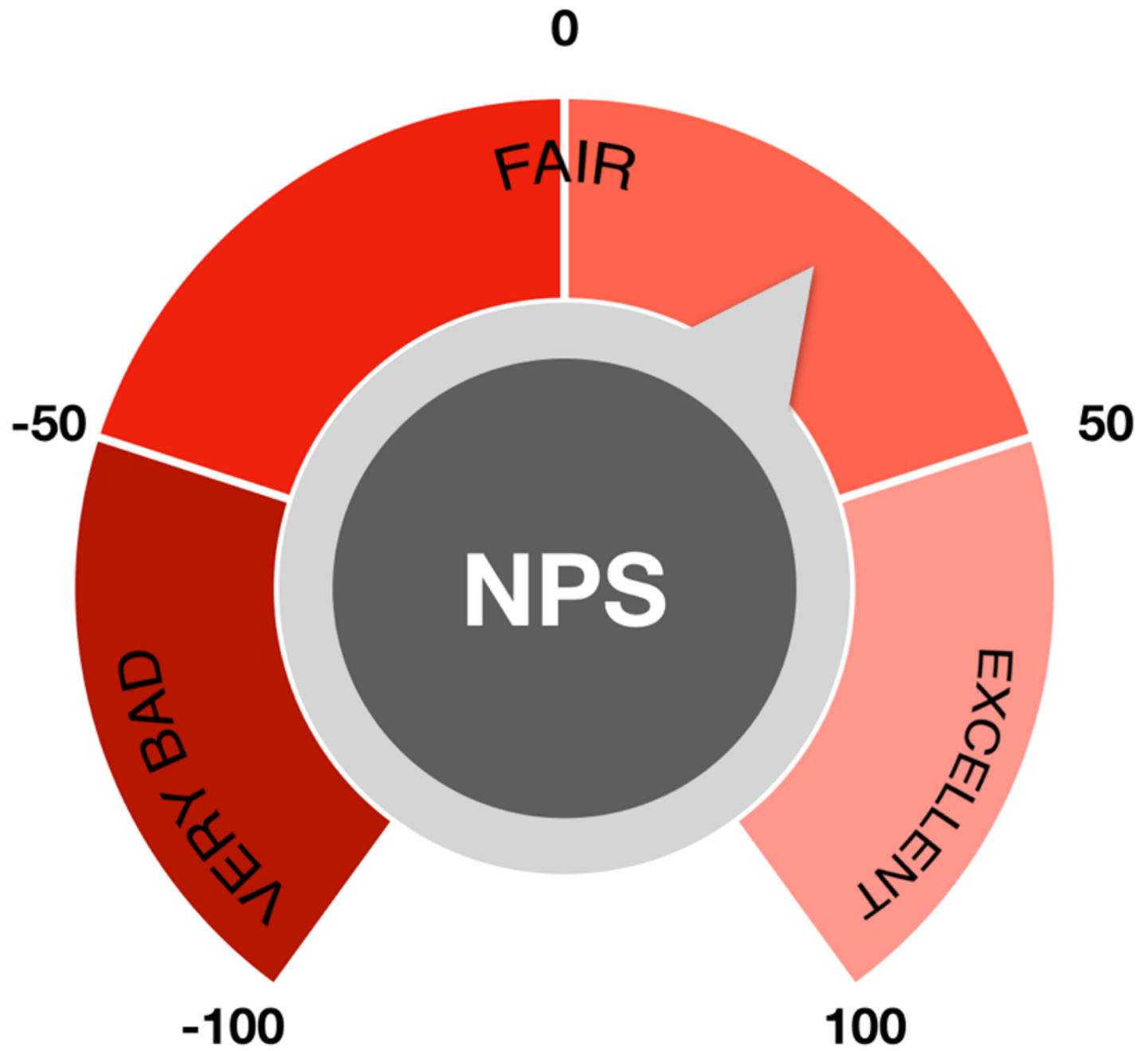
[transproconsulting.com](http://transproconsulting.com)

# 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 = % Promoters - % Detractors



Net Promoter Score