



2021

STRATEGIC PLAN

Yuma County Intergovernmental
Public Transportation Authority





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LETTER FROM THE DIRECTOR



As the Yuma County population continues to increase, YCIPTA recognizes the value that a high-quality transportation system can bring to the community. The Yuma County Intergovernmental Public Transportation Authority is committed to delivering service that both supports the needs of the existing community and facilitates economic growth and connectivity across the region.

Over the next three to five years, we will be focused on realizing our vision to be recognized as the leader in

mobility solutions that empower riders and connect the Yuma County region. We strive to become the region's premier mobility resource, and we will continue to explore long-term funding models to sustain our vision.

This Strategic Plan outlines a road map for specific initiatives and programs the YCIPTA team will undertake over the next three to five fiscal years; it also provides a framework for measuring success beyond the five-year period. A well-crafted strategic plan provides the management team and stakeholders with guiding goals, projects, and programs to be implemented in the short term to achieve longer-term outcomes. In the event of an unforeseeable incident, like a global pandemic, the plan can be easily resumed once the crisis has been managed or has passed. Having clarity on the bigger picture also provides the organization with the freedom and flexibility to adapt the plan to changing conditions.

This plan details YCIPTA's aspirations and the steps for attaining goals. It articulates the Authority's vision for an elevated customer experience, operational excellence, financial sustainability, and a valuable partnership with the Yuma County community.

This is an ambitious and actionable plan. To ensure we are achieving our objectives, we are introducing a performance scorecard. The scorecard, which is comprised of quarterly metrics, will be used to actively report to the Board of Directors, our customers, and the community how well we are performing in efforts to achieve our goals.

YCIPTA's Strategic Plan for FY2022-26 will serve as the guiding vision for strategic success. I genuinely believe that this plan will elevate YCIPTA to new heights through a focused pursuit of excellence.

Sincerely,

Shelly Kreger
Transit Director



BOARD OF DIRECTORS



The YCIPTA Board of Directors is made up of nine members, representing each member community:

Michael Sabath, Chair
Northern Arizona University

Jerry Cabrera, Vice Chair
City of Somerton

Ralph Velez, Secretary/Treasurer
City of San Luis

Brian Golding, Sr., **Quechan Tribe**

Larry Killman, **Town of Wellton**

Philip Rodriguez, **City of Yuma**

Paul Soto, **Cocopah Tribe**

Susan Thorpe, **Yuma County**

Susanna Zambrano, **Arizona Western College**

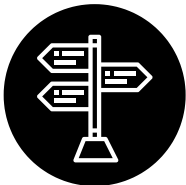
MISSION AND VISION

WHY we are driven to do what we do.



Mission

Mobility solutions that make essential connections possible.



Vision

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





EXECUTIVE SUMMARY

The Yuma County Intergovernmental Public Transportation Authority's (YCIPTA) Strategic Plan represents strategic initiatives outlining the highest priority initiatives that the team will work on over the 2022-26 fiscal years. The YCIPTA Executive Management Team and staff developed the plan to serve as a blueprint for operational excellence.

YCIPTA strives to balance the delivery of a high-quality customer experience with value to taxpayers, and this strategic plan offers a platform from which the agency will aim for these two high-level aspirations.

This strategic plan is crafted for personnel at all levels of the organization and Board as well as stakeholders in the community. Its contents convey with great clarity objectives for the fiscal year and how YCIPTA will achieve them.

The plan introduces a comprehensive performance scorecard that YCIPTA management will monitor and report on every quarter over the course of the year. The scorecard will allow YCIPTA - and all the organization's stakeholders - to track the Authority's performance and how well it is living up to its mission, vision, and goals for the year.

In its simplest form, the Strategic Plan represents four fundamental and integrated elements:

1. **WHY** YCIPTA leaders and staff are driven to deliver high quality service. This includes the organizational Mission and Vision.
2. **WHAT** outcomes YCIPTA strives to achieve. This encompasses annual goals for FY 2022-26, and the use of a performance scorecard system to monitor organizational performance on a quarterly basis.
3. **HOW** YCIPTA will work toward achieving the goals. This includes identification of specific work plan tactics that will be implemented by agency staff over the course of FY 2022-26.
4. **WHO** within YCIPTA is contributing to achievement of the goals. This involves the identification of staff members and teams responsible for the execution of the work plan, creating a culture of ownership and accountability.



FRAMEWORK OVERVIEW

WHY

Mission: Mobility solutions that make essential connections possible.

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

WHAT

It will be a successful year for YCIPTA if we:

1. Establish a baseline of customer satisfaction and increase.
2. Deliver operational excellence across the organization.
3. Maintain partner revenue near-term, and source dedicated revenue long-term.
4. Establish a baseline of community understanding and impression of YCIPTA services.

HOW

After identifying the agency's goals, success outcomes were selected to help prioritize areas of service and operations that most closely align with the defined goals. Then, a work plan was developed to encompass projects and programs that YCIPTA staff will strive to complete over the next three to five years.

WHO

Performance in service and operational areas will be measured using a quarterly organizational performance scorecard. The performance scorecard comprises metrics that are significant to the quest for service excellence and value to taxpayers and tie directly to the four success outcomes identified. With the scorecard, all members of the workforce can see how their efforts support the success of the entire agency.

ANNUAL GOALS/ SUCCESS OUTCOMES

Using the agency's refined mission and vision statements as the guiding pillars for success, incremental goals were identified to guide project prioritization and support purposeful initiatives over the next three to five years. These four success outcomes describe WHAT the entire organization is working to achieve.

Success outcomes address the statement: "It will be a good year for YCIPTA, if the following goals are achieved":



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 (this index will include the factors that are most important to customers, as expressed in a customer survey).



FINANCIAL SUSTAINABILITY

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



COMMUNITY VALUE

Increase non-customer understanding and impression of YCIPTA services.

In order to track progress towards these defined outcomes, YCIPTA will introduce a performance scorecard. This scorecard will serve as the guiding tool for measurement and reporting of quarterly performance.



PERFORMANCE SCORECARD

Measuring What Matters

The YCIPTA Scorecard is a new tool to measure and monitor performance in the key areas identified as essential to success for the Authority. An important objective of the scorecard is to share with employees, Board members, stakeholders, and community members how YCIPTA is performing each quarter of the year in achieving its goals and outcomes. Another is to increase the understanding about contributions to organizational performance for every member of the workforce in ways they may not have ordinarily considered.

How the Organizational Scorecard Functions

The scorecard provides measures of performance in each of YCIPTA's four Success Outcome areas:

1. Customer Satisfaction
2. Operational Excellence
3. Financial Sustainability
4. Community Value

One of the benefits of this performance scorecard is how easy it is to use. The scorecard is based on a 100-point system and is populated with metrics aligned with each Success Outcome. Each index is weighted and given a specified number of points reflecting its relative importance to YCIPTA's overall success.

Metrics within each index are also assigned weighted point values based on their significance to organizational goals for the year. For example, the Customer Satisfaction series of metrics carries 30 out of the scorecard's 100 points. This strategic area is one of the most critical to YCIPTA's ability to achieve success for the year. Therefore, it is the one of the most heavily weighted groups. Nine weighted metrics are contained within the Customer Satisfaction series. The sum of all nine metrics totals 30 points.


If every metric in the overall scorecard achieved exactly the goal established in the Strategic Plan, the overall score would equal 100 points.



HOW TO READ YOUR SCORECARD

The Success Outcomes column represents the 4 outcomes identified as key to overall success for the year.

Each Metric has a clear definition.

 Scorecard							
Success Outcome	Metric	Performance Goal 2022	Objective	Definition	Information System	Owner	Goal Points
Customer Satisfaction							
							30
Operational Excellence							
							30
Financial Sustainability							
							20
Community Value							
							20
Overall Total							100

Performance Goal reflects the actual performance number the YCIPTA team will strive to achieve.

The Metric column contains the performance metrics that most effectively gauge how well YCIPTA is performing to excel in each Success Outcome area.

Each Metric also has an Owner, who is responsible for reporting on the metric results.

Goal Points in this column reflect the maximum points that could be earned when performance goals are achieved.



Scorecard

Success Outcome	Definition	Weighted Performance Goal
<p>Customer Satisfaction</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>This set of metrics provides insight on our performance as it pertains to our ability to deliver high quality transportation services to riders.</p>	<p>30</p>
<p>Operational Excellence</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>This set of metrics helps monitor aspects of operations that are most critical to the delivery of high-quality transportation service.</p>	<p>30</p>
<p>Financial Sustainability</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>This set of metrics are aligned with maintaining partner revenue near-term, and sourcing dedicated revenue long-term.</p>	<p>20</p>
<p>Community Value</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>This set of metrics gauge our success at delivering value to the entire community.</p>	<p>20</p>
<p>Overall Total</p>		<p>100</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	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	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 Vehicle Services	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



WORK PLAN

This section of the Strategic Plan describes HOW YCIPTA aims to achieve its annual goals. It outlines, in detail, numerous tactics that will unite in focus the agency's workforce. The march to organizational success rests in significant part on the completion of these tactics, each of which has been thoughtfully developed to align directly with at least one of the four Success Outcomes:

1. Customer Satisfaction
2. Operational Excellence
3. Financial Sustainability
4. Community Value

Each tactic has an owner who serves as the project manager and is responsible for oversight of a team charged with completing the tactic. Owners of tactics have developed the detailed tactic outlines presented on the following pages. Each worksheet provides a scope of work and quarterly milestones.

The YCIPTA leadership team will review progress of each tactic on a quarterly basis to ensure that initiatives are advancing as planned. If roadblocks are experienced, teams can make tactical adjustments to avoid negative impacts to the overall Strategic Plan.

This work plan covers both short-term and long-term strategic goals, outlining quarterly milestones for the upcoming two years and annual milestones for fiscal years 2024-2026.

Work Plan | Tactics

How to Read A Tactics Worksheet

Start Here The name of the tactic is located here. Each tactic aligns directly with at least one of the four strategic priority areas.		
WHY & WHAT	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
WHO	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

This section clearly lays out the tactic's quarterly goals and is used to keep the team focused on pushing the work forward incrementally over the course of the year.

HOW

Customer Satisfaction

External Communications Enhancement	
Strategic Priority: Customer Satisfaction	FY22 Q1 Engage a partner to redesign the look and feel of agency informational material.
Description: Simplify customer information materials - service schedules and route information (Targeted Service Improvement from Short Range Plan).	FY22 Q2 Develop/edit content for communications material; use less transit jargon to make it more accessible.
	FY22 Q3 Develop/edit content for communications material; use less transit jargon to make it more accessible.
	FY22 Q4 Launch new communications material.
Owner Carol Perez	FY23 Q1 Design customer survey instrument to address customer perception of new communications material.
Impacted Metrics: <ul style="list-style-type: none"> ▶ Net Promoter Score ▶ Customer Understanding of Route Schedules and Transit Access Points ▶ Community Perception of the Quality of ▶ Communications Material 	FY23 Q2 Execute customer survey.
	FY23 Q3 Analyze results and present to employees and Board members.
	FY23 Q4 Update communications material to reflect survey results.

Long-Term Actions: FY24 - 26

After circulating new communications material, YCIPTA staff will establish an annual cadence of customer survey execution to monitor the perception of communications material and make changes accordingly.

Customer Comments Tracking System	
Strategic Priority: Customer Satisfaction	FY22 Q1
Description: Develop and implement a system for tracking and responding to customer comments.	FY22 Q2 Review the current system for recording and tracking customer comments and note any shortfalls and potential edits to the system.
	FY22 Q3 Develop a new information system for tracking and responding to comments.
	FY22 Q4 Implement a new information system for tracking and responding to comments.
Owner Carol Perez Team Anabel Teran	FY23 Q1 Assign an internal champion responsible for recording the appropriate value for the "percent of negative comments" metric on agency scorecard.
Impacted Metrics: <ul style="list-style-type: none"> ▶ Customer Satisfaction ▶ Net Promoter Score ▶ Percent of Negative Customer Comments 	FY23 Q2 Establish regular cadence for reporting customer comment summary to employees and Board.
	FY23 Q3
	FY23 Q4

Long-Term Actions: FY24 - 26

YCIPTA staff and operations contractor will use the tracking system to respond to customer concerns and address shortfalls in agency operation.

Employee Performance Evaluations	
Strategic Priority: Customer Satisfaction	FY22 Q1
Description: Execute regular employee performance evaluations.	FY22 Q2 Establish regular cadence for executing employee evaluations. Confirm performance evaluation content and method of distribution.
	FY22 Q3 Confirm performance evaluation content and method of distribution.
	FY22 Q4 Complete employee performance evaluations.
Owner Carol Perez Team Anabel Teran, Shelly Kreger	FY23 Q1
Impacted Metrics: <ul style="list-style-type: none"> ▶ Customer Impression of Operators ▶ Contractor Compliance with Operator Training Requirements ▶ Employee Performance Evaluations Completed 	FY23 Q2
	FY23 Q3 .
	FY23 Q4 Execute annual employee evaluations and prepare report.

Long-Term Actions: FY24-26

YCIPTA staff will execute annual employee evaluations and prepare reports. These employee performance evaluations will be used to restructure training programs, as needed.

Operator Training Program	
Strategic Priority: Customer Satisfaction	FY22 Q1 Review and document operator training requirements, as stated in RATP Dev contract.
Description: 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.	FY22 Q2 Conduct internal audit of Contractor compliance with operator training requirements. Develop corrective action plan with clear deliverables, milestones, ownership, and reporting.
	FY22 Q3 Conduct training needs assessment to gauge Operators' current performance and potential needs.
	FY22 Q4 Compare the results of the training needs assessment to the mandatory training requirements and defined milestones from the action plan. Alter requirements accordingly.
Owner Carol Perez Team Anabel Teran, Brandy Brookins	FY23 Q1 Create information system for tracking operator participation in mandatory training programs, aligning the system with the action plan milestones previously defined.
Impacted Metrics: <ul style="list-style-type: none"> ▶ Customer Satisfaction ▶ Net Promoter Score ▶ Customer Impression of Operators ▶ Contractor Compliance with Operator Training Requirements ▶ Percent of Negative Customer Comments 	FY23 Q2 Assign an internal champion responsible for updating tracking system and recording performance data on agency scorecard.
	FY23 Q3 Launch new training programs and tracking system. Hold Kick-off meetings to discuss mandatory training plan among employees.
	FY23 Q4 Monitor and record employee participation in training programs.

Long-Term Actions: FY24-26

In FY24, YCIPTA will conduct an employee survey to gauge the effectiveness and perceived value of the training program. Alterations will be made to training programs and requirements according to employee survey results and employee performance evaluations.

In FY25 and beyond, the team will establish and maintain an annual review of operator training programs, employee performance evaluations and employee survey.

Operational Excellence

Real-Time Bus Tracking System	
Strategic Priority: Operational Excellence	FY22 Q1 Establish and document project schedule for system updates. Share schedule with selected vendor.
Description: Continue working with vendor to improve online real-time bus tracking system. Update GTFS data.	FY22 Q2 Establish and document project schedule for system updates. Share schedule with selected vendor. Actively manage implementation.
	FY22 Q3 Support vendor. Actively manage implementation.
	FY22 Q4 Close out implementation and initiate long-term strategy.
Owner Carol Perez	FY23 Q1 Conduct customer survey to gauge satisfaction with online tracking system. Adjust system according to feedback from survey.
Impacted Metrics: <ul style="list-style-type: none"> ▶ Customer Satisfaction ▶ Net Promoter Score ▶ On-Time Performance 	FY23 Q2
	FY23 Q3
	FY23 Q4

Long-Term Actions: FY24-26

YCIPTA will conduct annual customer surveys to gauge satisfaction with the tracking system, and adjust the system according to feedback from the survey.

Website Update	
Strategic Priority: Operational Excellence	FY22 Q1 Begin procurement process. Reach out to vendors for website update.
Description: Begin procurement process for website update.	FY22 Q2 Issue RFP.
	FY22 Q3
	FY22 Q4 Select vendor for website update.
Owner Shelly Kreger	FY23 Q1 Support consultant with delivery of new website.
Impacted Metrics: <ul style="list-style-type: none"> ▶ Customer Understanding of Route Schedules and Transit Access Points ▶ Community Perception of the Quality of Communications Material 	FY23 Q2
	FY23 Q3
	FY23 Q4

Long-Term Actions: FY24-26

After launching the new website, YCIPTA will conduct a customer survey to gauge satisfaction with new website and content. The team will adjust the interface and content according to feedback.

Vehicle Cleanliness Audit	
Strategic Priority: Operational Excellence	FY22 Q1 Identify standardized metrics on cleanliness for vehicles, bus stops, and stations that will meet strategic plan goal.
Description: Develop and document vehicle cleanliness audit system.	FY22 Q2 Create a weighted Cleanliness Audit Checklist/ Tracking System.
	FY22 Q3 Create a weighted Cleanliness Audit Checklist/ Tracking System.
	FY22 Q4 Consolidate standard procedure documents from operations contractor and YCIPTA management. Document final Cleanliness Audit process.
Owner Carol Perez Team Rick Lapa	FY23 Q1 Conduct initial Cleanliness Audit.
Impacted Metrics: <ul style="list-style-type: none"> ▶ Customer Satisfaction ▶ Net Promoter Score ▶ Customer Impression of Vehicle Cleanliness ▶ Vehicle Cleanliness - Actual 	FY23 Q2 Analyze the results and make recommendations on process improvements based on the findings.
	FY23 Q3 Analyze the results and make recommendations on process improvements based on the findings.
	FY23 Q4

Long-Term Actions: FY24-26

YCIPTA will conduct annual customer/community surveys to understand perceptions of cleanliness in comparison to audit results. The team will then implement recommended process improvements based on findings from initial cleanliness audit and customer perception survey.

The team will continue to monitor and track system cleanliness, and the agency scorecard metrics will be reviewed quarterly to determine if additional resources have improved processes.

Fleet Management Program	
Strategic Priority: Operational Excellence	FY22 Q1 Use manufacturer guidelines to develop a vehicle maintenance program best practices document.
Description: 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.	FY22 Q2 Use manufacturer guidelines to develop a vehicle maintenance program best practices document.
	FY22 Q3 Consolidate standard procedure documents from operations contractor and YCIPTA management. Document final maintenance best practices process.
	FY22 Q4 Initiate training and implementation of maintenance program. Monitor performance.
Owner Shelly Kreger Team Oliver Cromwell, Rick Lapa	FY23 Q1 Create a system to flag vehicles when scheduled maintenance is due.
Impacted Metrics: ▶ Customer Satisfaction ▶ Net Promoter Score ▶ Preventative Maintenance Inspections ▶ Distance Between Road Calls	FY23 Q2 Review and implement program. Make changes to best practices as necessary.
	FY23 Q3
	FY23 Q4

Long-Term Actions: FY24-26

YCIPTA will start a mid-life overhaul program on older vehicles in the fleet in FY24.

Performance Management Operations	
Strategic Priority: Operational Excellence	FY22 Q1
Description: Implement and maintain performance management system to track operations metrics.	FY22 Q2
	FY22 Q3
	FY22 Q4
Owner Oliver Cromwell Team Shelly Kreger	FY23 Q1 Create information system for tracking operations performance metrics.
Impacted Metrics: <ul style="list-style-type: none"> ▶ Contractor Compliance with Operator Training Requirements ▶ On-Time Performance ▶ Preventative Maintenance Inspections ▶ Distance Between Road Calls 	FY23 Q2 Create information system for tracking operations performance metrics.
	FY23 Q3 Identify an employee responsible for management of this system, and launch.
	FY23 Q4 Use performance results to complete an annual evaluation of operations contractor.

Long-Term Actions: FY24-26

The management team will establish a quarterly cadence with the operations contractor to review performance.

Financial Sustainability

Long-Term Financial Plan	
Strategic Priority: Financial Sustainability	FY22 Q1 Update schedule for the construction or completion of each project.
Description: Develop long-term financial plan.	FY22 Q2 Develop a classification, itemization, and explanation for the project expenditures. Develop 5-year capital and operating plan to be updated annually.
	FY22 Q3 Develop/update high-level timetable and cost information for each item. Use success outcomes to prioritize all projects.
	FY22 Q4 Develop high-level descriptions and justification for each project. Align with long-term revenue strategy to communicate outputs and anticipated outcomes of the capital and operating plan.
Owner Shelly Kreger Team Chona Medel	FY23 Q1 Finalize plan and present to Board.
Impacted Metrics: <ul style="list-style-type: none"> ▶ Variance from Adopted Budget ▶ Alternative Revenue ▶ Community Perception of Financial Stewardship 	FY23 Q2 Finalize plan and present to Board.
	FY23 Q3
	FY23 Q4

Long-Term Actions: FY24-26

The Long-Term financial plan will begin executing in FY24. Milestones will be revisited and revised as needed.

Community Stakeholder Partnerships	
Strategic Priority: Financial Sustainability	FY22 Q1
Description: 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.	FY22 Q2
	FY22 Q3 Conduct relationship planning to identify community partners and leaders necessary to support long-term success of YCIPTA. Identify possible long-term funding sources.
	FY22 Q4 Initiate targeted community outreach and start intentional relationship growth plan. Develop relationships with community partners by establishing a regular check-in cadence with contacts from each organization.
Owner Shelly Kreger	FY23 Q1 Create system for recording and tracking meetings and key takeaways. Meet with two contacts per quarter.
Impacted Metrics: <ul style="list-style-type: none"> ▶ Operating Cost per Hour ▶ Alternative Revenue ▶ Community Members Feel that YCIPTA Provides Value ▶ Community Perception of Financial Stewardship 	FY23 Q2 Meet with two contacts per quarter.
	FY23 Q3 Meet with two contacts per quarter.
	FY23 Q4 Meet with two contacts per quarter.

Long-Term Actions: FY24-26

The Transit Director will continue to meet with two contacts per quarter, and will edit, expand, or refine the list of possible long-term funding sources according to these meetings and relationship development.

Jurisdictional Reporting	
Strategic Priority: Financial Sustainability	FY22 Q1 Establish schedule for quarterly jurisdictional report.
Description: Establish jurisdictional reporting to keep members up to date on agency activity and funding challenges; increase member dues.	FY22 Q2 Create quarterly activity and financial report to be shared with member organizations. Align with quarterly performance scorecard outputs.
	FY22 Q3 Create quarterly activity and financial report to be shared with member organizations. Align with quarterly performance scorecard outputs.
	FY22 Q4 Finalize quarterly activity and financial report to be shared with member organizations. Align with quarterly performance scorecard outputs.
Owner Shelly Kreger	FY23 Q1 Present quarterly reports to member organizations; highlight need for increased funding.
Impacted Metrics: <ul style="list-style-type: none"> ▶ Alternative Revenue ▶ Community Members Feel that YCIPTA Provides Value ▶ Community Perception of Financial Stewardship 	FY23 Q2 Present quarterly reports to member organizations; highlight need for increased funding.
	FY23 Q3 Present quarterly reports to member organizations; highlight need for increased funding.
	FY23 Q4 Present quarterly reports to member organizations; highlight need for increased funding.

Long-Term Actions: FY24-26

The management team will present quarterly reports to member organizations; emphasize how increased funding was distributed.

Staffing Analysis	
Strategic Priority: Financial Sustainability	FY22 Q1
Description: Conduct staffing analysis - anticipate capacity thresholds.	FY22 Q2
	FY22 Q3
	FY22 Q4
Owner Shelly Kreger Team Chona Medel, Carol Perez	FY23 Q1 Begin conducting a gap analysis; evaluate current positions.
Impacted Metrics: Variance from Adopted Budget	FY23 Q2 Continue gap analysis: determine future staffing needs.
	FY23 Q3 Continue gap analysis: determine future staffing needs.
	FY23 Q4 Complete gap analysis: determine future staffing needs.

Long-Term Actions: FY24-26

YCIPTA will develop and implement staffing, succession and knowledge transfer plans, and continue to monitor and evaluate plan effectiveness.

Community Value

Community Outreach Initiative	
Strategic Priority: Community Value	FY22 Q1 Begin process of establishing a baseline for community perception through execution of a community survey.
Description: Develop and implement community outreach initiative to improve perception of YCIPTA as a trusted agency.	FY22 Q2 Create community survey instrument.
	FY22 Q3 Execute community survey.
	FY22 Q4 Analyze survey results and record relevant data points on agency scorecard. Align activities with Community Stakeholder Partnerships tactic.
Owner Carol Perez	FY23 Q1 Use community survey results to establish baseline and develop actions to improve.
Impacted Metrics: <ul style="list-style-type: none"> ▶ Community Members Feel that YCIPTA Provides Value ▶ Community Perception of Financial Stewardship ▶ Community Perception of the Quality of Communications Material 	FY23 Q2
	FY23 Q3
	FY23 Q4

Long-Term Actions: FY24-26

YCIPTA will conduct annual community surveys, using results to drive changes in service.

Economic Impact Study	
Strategic Priority: Community Value	FY22 Q1 Identify community stakeholders, and define current impact and metrics that can be used to measure growth and economic impacts.
Description: Execute localized economic impact study to determine how YCIPTA services affect the amount and type of economic activity in a region.	FY22 Q2 Define economic impact assessment parameters and put a framework in place to clarify what data needs to be included in the economic impact assessment template.
	FY22 Q3 Define economic impact assessment parameters and put a framework in place to clarify what data needs to be included in the economic impact assessment template.
	FY22 Q4 Gather resources needed for execution of the study.
Owner Shelly Kreger Team Carol Perez	FY23 Q1 Execute economic impact study.
Impacted Metrics: <ul style="list-style-type: none"> ▶ Community Members Feel that YCIPTA Provides Value ▶ Annual Economic Impact 	FY23 Q2 Execute economic impact study.
	FY23 Q3 Analyze results of economic impact study.
	FY23 Q4 Use results to determine the appropriate prioritization of projects, and to alter existing services.

Long-Term Actions: FY24-26

The management team will continue to use the results to determine the appropriate prioritization of projects and to alter existing services. This economic impact study will be executed bi-annually, and changes in results will be monitored.

New Technology Procurement	
Strategic Priority: Community Value	FY22 Q1
Description: Explore procurement of new technologies to enhance service usability.	FY22 Q2
	FY22 Q3
	FY22 Q4
Owner Shelly Kreger Team Carol Perez	FY23 Q1 Determine if there is current technology that we could service better if we had additional training.
Impacted Metrics: <ul style="list-style-type: none"> ▶ Customer Satisfaction ▶ Net Promoter Score ▶ Community Members Feel that YCIPTA Provides Value 	FY23 Q2 Review costs and budget for existing technologies, and new technologies.
	FY23 Q3 Review costs and budget for existing technologies, and new technologies.
	FY23 Q4 Prioritize the enhancement of existing technologies and the procurement of new systems according to value to the agency and cost.

Long-Term Actions: FY24-26

YCIPTA will initiate audits for new technology systems before the implementation of these systems. Customer and community surveys will then be conducted to determine the new technology's performance. Surveys will be conducted annually, and decisions on technology improvements will be made according to the results.



IMPLEMENTATION

Making the Plan Come Alive

The YCIPTA team is focused on advancing the organizational success outcomes over the next 1-5 years. The strategic plan clearly defines the desired outcomes, metrics, tactics, and people necessary to support YCIPTA's growth. The management team has created an actionable plan that facilitates task prioritization and tracks performance so that the agency can celebrate successes.

The key to making a strategic plan come alive is a commitment to performance management that includes developing the systems necessary to measure and report progress. Furthermore, a strong champion in the organization driving performance management ensures effective delivery of tactics by owners. Lastly, reporting to the Board of Directors and community partners assures transparency in the agency's commitment to delivering defined strategic priorities. A successful implementation process is dependent on the effective assessment of existing agency processes, building information systems, establishing the cadence of quarterly reporting, and starting the highest priority tactics.

Keys to Successful Implementation

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

- An identified resource of the team to serve as the performance management champion.
- The champion will coordinate resources to develop the information systems necessary to populate the metrics.
- The champion will work with tactic and metric owners to assure the performance management program is achieving the defined success outcomes.

Information Systems: the tools and resources that allow the organization to measure the effectiveness of the tactics program.

- The champion will focus on assuring that information systems effectively measure what matters.
- The champion will develop information systems, where none exist, allowing team members to stay focused on the implementation of the tactics program.

Transparency: the method of sharing progress on achieving success outcomes and advancing performance management activities at the organization.

- The champion will drive the schedule of quarterly reporting, coordinating with key team members for information system outputs to populate the scorecard.
- The champion will provide analysis and insight on tactic effectiveness based on scorecard performance.
- The champion will prepare presentation tools and resources for public consumption of organizational performance.



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