



# LANE TRANSIT DISTRICT BOARD OF DIRECTORS STRATEGIC PLANNING COMMITTEE

Tuesday, June 01, 2021  
5:30 – 7:30 p.m.

## VIRTUAL MEETING

Zoom details for viewing and public participation provided on the web calendar at [www.LTD.org](http://www.LTD.org).

Watch live (viewing only no participation) on channel 21 or via link: <https://metrotv.ompnetwork.org/>

## AGENDA

ITEM	Time	Page
I. CALL TO ORDER	5:30 p.m.	
II. ROLL CALL <input type="checkbox"/> Leah Rausch (Chair) <input type="checkbox"/> Marianne Nolte (Vice Chair) <input type="checkbox"/> Frannie Brindle <input type="checkbox"/> Mike Eyster <input type="checkbox"/> Amy Cabbage <input type="checkbox"/> Emily Secord <input type="checkbox"/> Greg Evans (Councilor) <input type="checkbox"/> Gerry Gaydos <input type="checkbox"/> Vacant (Commissioner) <input type="checkbox"/> Leonard Stoehr (Councilor) <input type="checkbox"/> Caitlin Vargas <input type="checkbox"/> Alma Jesus <input type="checkbox"/> Aliza Whalen <input type="checkbox"/> Pete Knox <input type="checkbox"/> Phillip Shimhue	5:31 p.m.	
III. PRELIMINARY REMARKS FROM THE CHAIR	5:32 p.m.	
IV. ANNOUNCEMENTS AND ADDITIONS TO AGENDA  <i>This agenda item provides a formal opportunity for the Chair to announce additions to the agenda, and for Committee members to make announcements.</i>	5:35 p.m.	
V. AUDIENCE PARTICIPATION	5:40 p.m.	
<u>Public Comment Note:</u> <i>This part of the agenda is reserved for members of the public to address the Committee on any issue.</i> <b><u>Please note the following instructions:</u></b>		
<ol style="list-style-type: none"> <li>1. To indicate that you would like to provide testimony, please use the raise your hand button.</li> <li>2. For those attending via phone only, press *9 on your phone to raise your hand.</li> <li>3. When it is your time to speak, your name will be called. <ul style="list-style-type: none"> <li>o For those attending via phone only, the last four (4) digits of your phone number will be called.</li> </ul> </li> <li>4. Please state your name, city of residence, and who you are representing for the audio record.</li> <li>5. Once you have provided testimony, your hand will be lowered. Please do not raise your hand again. Only one opportunity to speak is provided.</li> <li>6. For those unable or not wanting to speak publicly, testimony may be provided via e-mail at <a href="mailto:clerk@ltd.org">clerk@ltd.org</a>.</li> </ol>		
Public testimony is limited to three (3) minutes per community member. A timer will be displayed on the screen and will beep when the three (3) minutes is up.		
VI. ITEMS FOR ACTION AT THIS MEETING		
A. SPC REPRESENTATION ON COMPREHENSIVE & ACCESIBLE TRANSPORTATION COMMITTEE: <i>No Materials Provided</i> [Tom Schwetz]  <b>Action Needed:</b> Approval	5:50 p.m.	

	<u>ITEM</u>	<u>Time</u>	<u>Page</u>
VII.	ITEMS FOR BOARD RECOMMENDATION		
VIII.	ITEMS FOR INFORMATION AT THIS MEETING		
A.	STRATEGIC BUSINESS PLAN UPDATE: <i>Materials Included</i> [ Kim Ngoc Le] <b>Action Needed:</b> Discussion	6:00 p.m.	2
IX.	WRITTEN REPORTS AND UPDATES		
X.	BOARD REPORT PROVIDED AT THE BOARD MEETING		
XI.	FUTURE MEETING AGENDAS <i>Attached is a calendar of Action or Information items that will be included on the agenda for future meetings.</i>		
XII.	ADJOURNMENT	7:30 p.m.	

*To request a reasonable accommodation or interpreter, including alternative formats of printed materials, please contact LTD's Administration office no later than 48 hours prior to the meeting at 541-682-5555 (voice) or 7-1-1 (TTY through Oregon Relay).*



## AGENDA ITEM SUMMARY

**Tom DATE OF MEETING:** June 1, 2021

**ITEM TITLE:** STRATEGIC BUSINESS PLAN UPDATE

**PREPARED BY:** Kim Ngoc Le, Development Planner

**DIRECTOR:** Tom Schwetz, Planning & Development Director

**ACTION REQUESTED:** Committee Discussion

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**PURPOSE:** Staff and consultant will facilitate SPC discussions on the draft Strategic Business Plan and provide an update on communications.

**ROLE:** The Committees role in this instance is to obtain information for a future recommendation to the Board.

**BOARD DIRECTIVE ALIGNMENT:** N/A

**HISTORY:** At SPC's meeting in May, TransPro facilitated discussions on the development of the Strategic Business Plan strategic areas of focus, draft success outcomes, and prioritization and provided an update on communications.

**CONSIDERATIONS:** At this meeting, TransPro will provide an update on the targeted stakeholder survey results. (Attachment A provides the list of targeted stakeholders who were invited to take the survey). TransPro will also guide SPC discussions through the draft plan and seek input on the direction and alignment of the draft to what has been discussed previously (refer to Attachment B for presentation slides).

**ALTERNATIVES:** N/A

**NEXT STEPS:** The project team will further refine the draft Strategic Business Plan and return to the SPC in July with a revised draft. SPC will be asked to develop a recommendation to the Board of Directors for its adoption in July.

**SUPPORTING DOCUMENTATION:**

- 1) Attachment A – List of Survey Targeted Stakeholders
- 2) Attachment B – Presentation Slides from TransPro

**PROPOSED MOTION:** N/A

## Attachment A – Targeted Stakeholders for Survey Invites

350 Eugene  
4J  
AARP  
Amalgamated Transit Union (ATU) Local 757  
Bethel School District  
Better Housing Together  
Centro Latino  
Comprehensive & Accessible Transportation Committee (CATC) members  
Eugene Chamber of Commerce  
Lane Community College (LCC)  
Lane Education Service District (Lane ESD)  
Lane Workforce Partnership  
Lane Independent Living Alliance (LILA)  
League of Women Voters  
LCOG Senior Services  
NAACP  
Springfield Chamber of Commerce  
Springfield School District  
Technology Association of Oregon (TAO)  
UO Transportation  
UO - ASUO  
Fern Ridge School District  
SPC members as representatives of their organizations/constituencies:  
    Springfield City Councilor  
    Oregon Department of Transportation  
    Eugene City Councilor  
    Gaydos, Churnside & Balthrop, P.C.  
    Former LTD Board Member  
    University of Oregon - Student  
    Cornerstone Community Housing  
    United Way  
    BEST  
    Community Member  
    St. Vincent de Paul  
    UO Student - Transportation Researcher, LiveMove  
Active Bethel Citizens  
Lane County Commissioner  
Bethel Schools  
Bethel School Board Member & Founder, Latino Professionals Connect  
Southeast Neighbors  
Santa Clara Neighbors  
Representative Julie Fahey  
Senator Lee Beyer  
Representative John Lively  
McKenzie-Willamette Medical Center  
Peacehealth  
Willamalane

# Strategic Business Plan SPC Work Session

Lane Transit District, June 1, 2021



# Agenda

Targeted Stakeholder Survey Results

Draft Strategic Business Plan Discussion

Departments Share High-Level Plans

Wrap Up & Next Steps

# SPC Work Sessions

March 2	April 6	May 4	June 1	July 6
<ul style="list-style-type: none"> <li>• Kickoff/ Initial Discussion</li> <li>• Process Overview</li> <li>• Draft Communications Plan discussion</li> </ul>	<ul style="list-style-type: none"> <li>• Strategic Planning Deeper Dive</li> <li>• “Why” Exercise</li> <li>• Draft Mission, Vision, Values discussion</li> <li>• Revised Communications Plan discussion</li> </ul>	<ul style="list-style-type: none"> <li>• Recap/ Status Update</li> <li>• Draft Strategic Areas of Focus discussion</li> <li>• Draft Success Outcomes discussion</li> <li>• Prioritization discussion</li> <li>• Communications Update</li> </ul>	<ul style="list-style-type: none"> <li>• Share Targeted Stakeholder Survey Results</li> <li>• Draft Strategic Business Plan discussion</li> <li>• Departments Share High-Level Plans</li> </ul>	<ul style="list-style-type: none"> <li>• Final Strategic Business Plan Review</li> </ul>

# Targeted Stakeholder Survey Results



# Survey Overview

- **Targeted effort to reach stakeholders who represent a larger group or constituency.**
- **Email invitations containing a survey link were sent by LTD staff.**
  - Responses were accepted between 4/26 and 5/17
  - Multiple reminders sent to encourage participation
- **28 stakeholders completed the survey (~45% response rate).**

Stakeholder Groups
Equity Organizations (NAACP, Centro Latino, AARP, CATC)
Social Services/Non-profits (Food For Lane County, LCOG Senior Services, St. Vincent de Paul, United Way)
Advocacy (BEST, Better Housing Together)
Business Community (Chambers of Commerce, Lane Workforce Partnership, Tech Association of Oregon, Eugene Table)
SPC members as representatives of their organizations/constituencies
Up to 5 key individuals recommended by each Board member from their respective sub-districts (neighborhood association leaders, major employers, neighborhood influencer, community organizations, etc.)
ATU
Environmental Organizations (350 Eugene)
Educational (UO, LCC, K-12 school districts)

# Mission & Vision

## How well do you feel the mission statement represents LTD's core purpose?

*Connecting our community.*

- **22 of 28 (79%)** respondents feel the mission statement represents LTD's core purpose very or extremely well
  - About 25% of respondents cited appreciation for the brevity and conciseness of the draft mission statement
  - About 15% felt it was too vague and should contain more information about what LTD does

## How well do you feel the vision statement represents what LTD strives to achieve?

*In all that we do, we seek to create a more connected, sustainable, and equitable community.*

- **19 of 28 (68%)** respondents feel the vision statement represents what LTD strives to achieve very or extremely well
  - About 10% of respondents felt like the “seek to create” phrase lacks commitment
  - Some suggestions include adding affordable, accessible, and reliable
  - About 30% of respondents liked how broad and clear the draft vision statement is

# Customer Satisfaction & Community Value

**What do you believe are the Top 3 most important areas for LTD to focus on to improve customer satisfaction?**

- **More route coverage**
- **More frequent service**
- **Better on-time performance, reliable trip times**

Is there an area you feel is most important that is missing from this list?

- **Security**
- **Community engagement and leadership**
- **Accessibility for riders with disabilities**

**What do you believe are the Top 3 most important ways in which LTD provides value to the community?**

- **Providing mobility to low-income families, minority populations and individuals who cannot afford the costs of owning a car**
- **Providing affordable transportation options**
- **Providing transportation options to people with special mobility needs, such as the elderly, disabled, and people who are unable to drive**

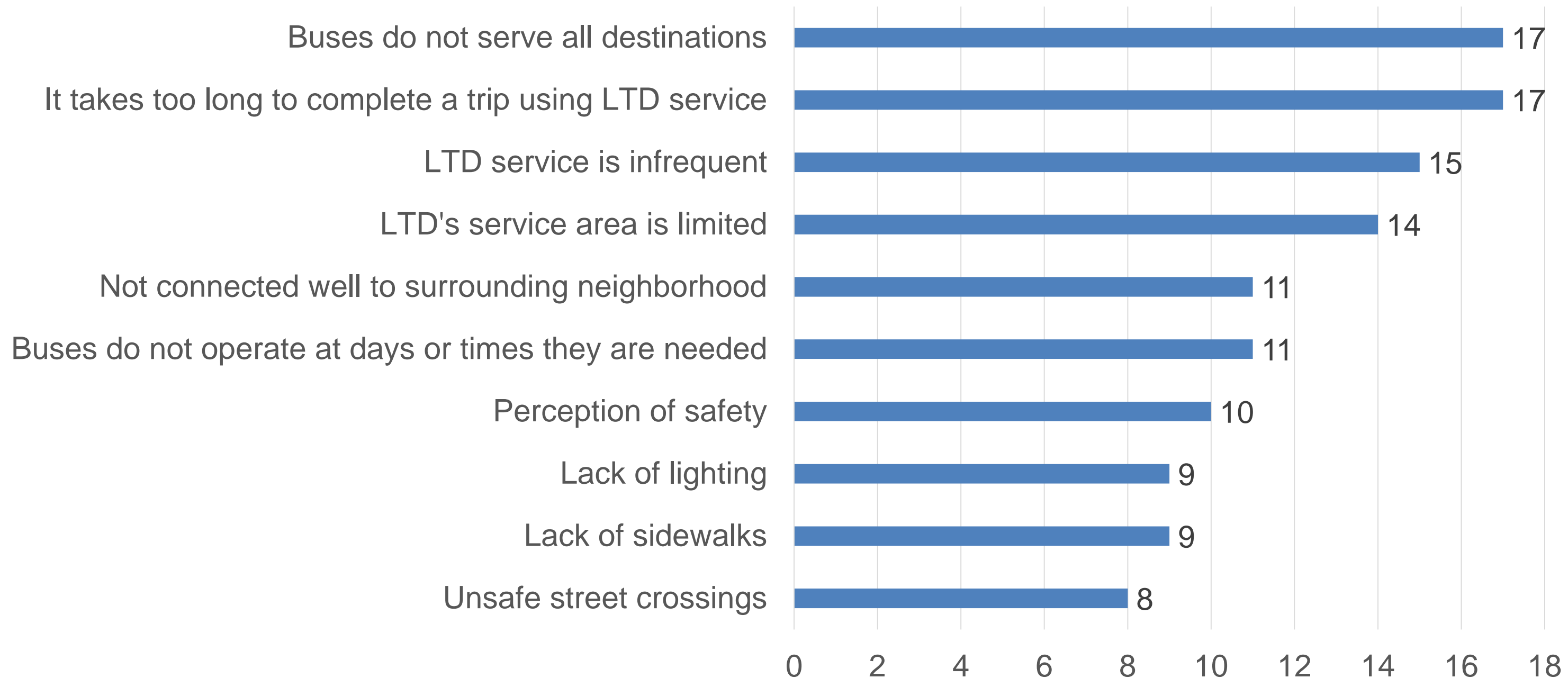
Is there an area you feel is most important that is missing from this list?

- **Using public transit to link affordable housing with support services**

# Barriers to Mobility

**What do you see as the barriers to access and mobility in Lane County?**

**Top 10**



Other options with fewer responses included:

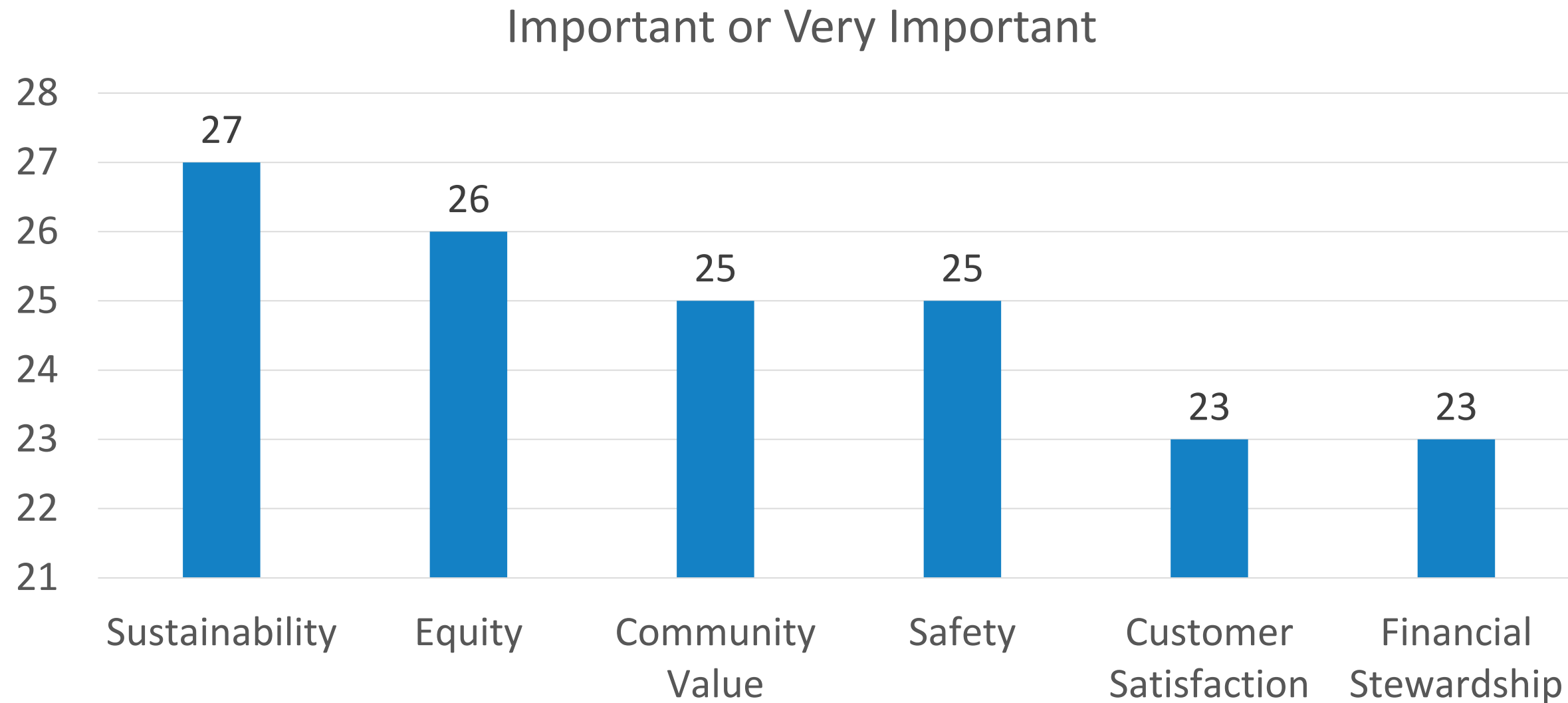
- Sidewalks in poor condition
- Bus stops not accessible
- Confusing LTD schedules and maps
- No ped signal
- Traffic congestion
- Unreliable service

Write-in responses:

- Bike-bus connections
- Accessibility

# Strategic Business Plan

How important is it to you that LTD address the following areas in its Strategic Business Plan?

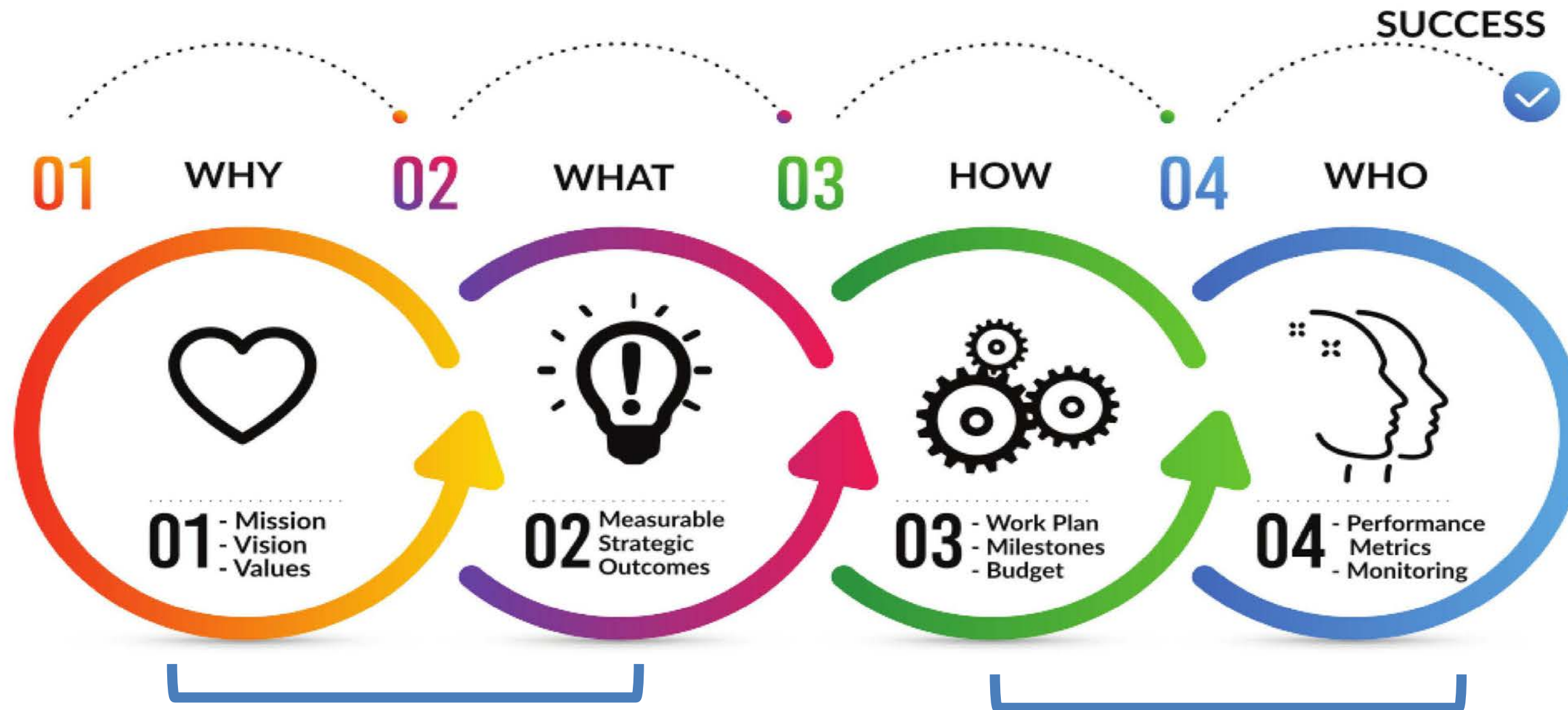


Is there an area you feel is most important that is missing from this list?

- Engaging in getting input from employees.
- Accessibility

# Draft Strategic Business Plan

# Role of the Board in Strategic Planning



Ensure that LTD has clear direction and that LTD is delivering on its mission, vision, and outcomes

Empower staff to manage how and who is responsible for getting the work done that produces the overall outcomes

# Draft Plan Discussion

- A separate document containing the Draft Strategic Business Plan will be shared on screen at this time.

## CONTENTS



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# Departments Share High-Level Plans

# Department Plans

Each Department contributes to the success of LTD and is represented in the Strategic Business Plan through the **Tactics** (initiatives we will work on) and **Performance Scorecard** (metrics that measure how we're performing).

Below are a few illustrative department-led tactics that we'd like to share.

Tactic Name	Strategic Pillar	Owner
Establish Baseline Analysis of Equity of LTD Services	Customer Satisfaction	Planning
Maintain On-Time Performance - Fixed Route	Customer Satisfaction	Planning
Conduct Comprehensive RideSource Analysis	Community Value	Specialized Services
Enhance Customer Convenience	Customer Satisfaction	Marketing & Communications

# Department Plans

Tactic Name	Strategic Pillar	Owner
Create Sustainable Services Stability Fund	Community Value	Finance
Complete Implementation of E-Records Management System	Sustainability Success	Business Services
Implement Workforce Diversity Initiatives	Employee Engagement	HR
Conduct Courtesy Training for Operations/Public Safety	Customer Satisfaction	Operations
Achieve Sustainability Certifications	Sustainability Success	Fleet
Develop IT Hardware/Software Procurement Plan	Financial Health	IT

# Wrap-up & Next Steps

# Next SPC Work Sessions

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- Work with Directors Group and Departments to refine the Draft Plan using the inputs received from community stakeholders, SPC, and LTD employees.
- Fill in additional gaps and details needed to complete the Final Strategic Business Plan for review by SPC on July 6.

# One Word Close

# Strategic Business Plan SPC Work Session

Lane Transit District, June 1, 2021





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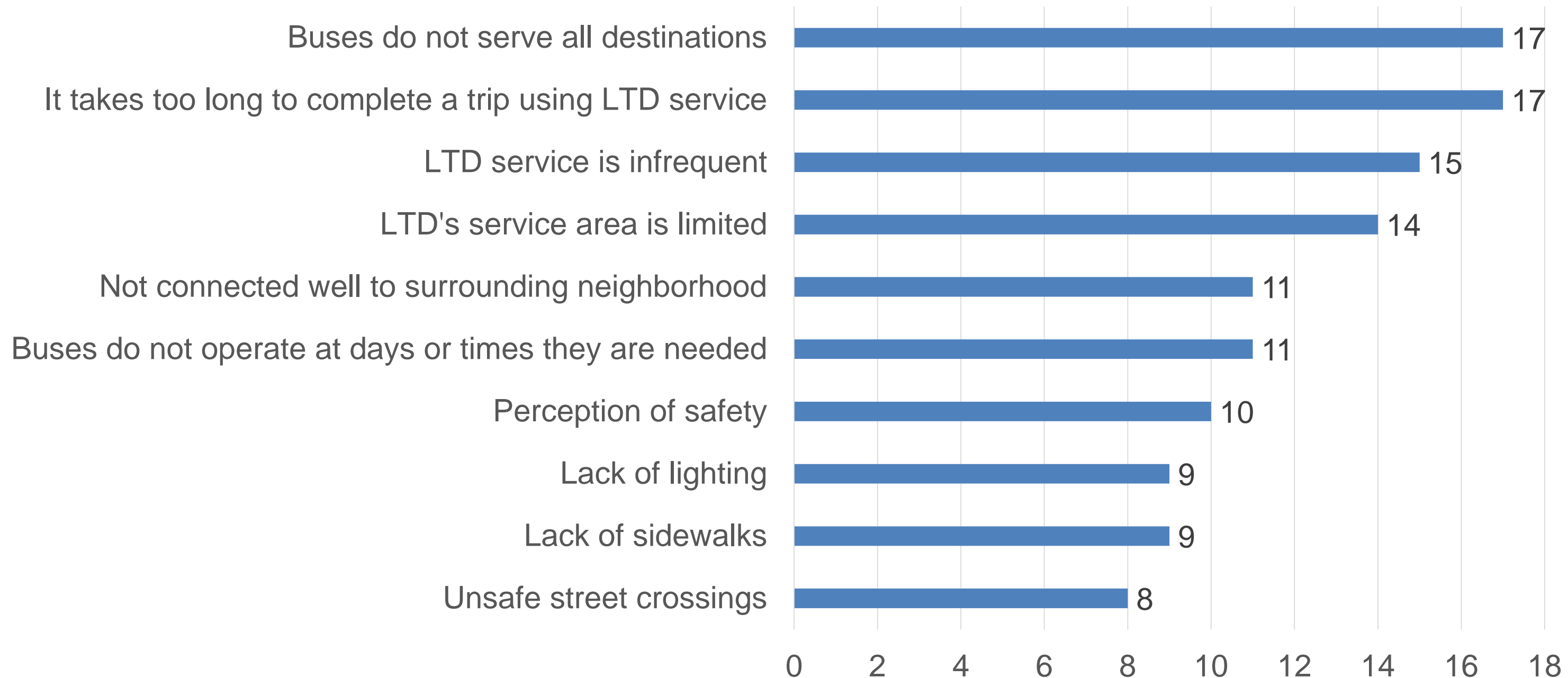
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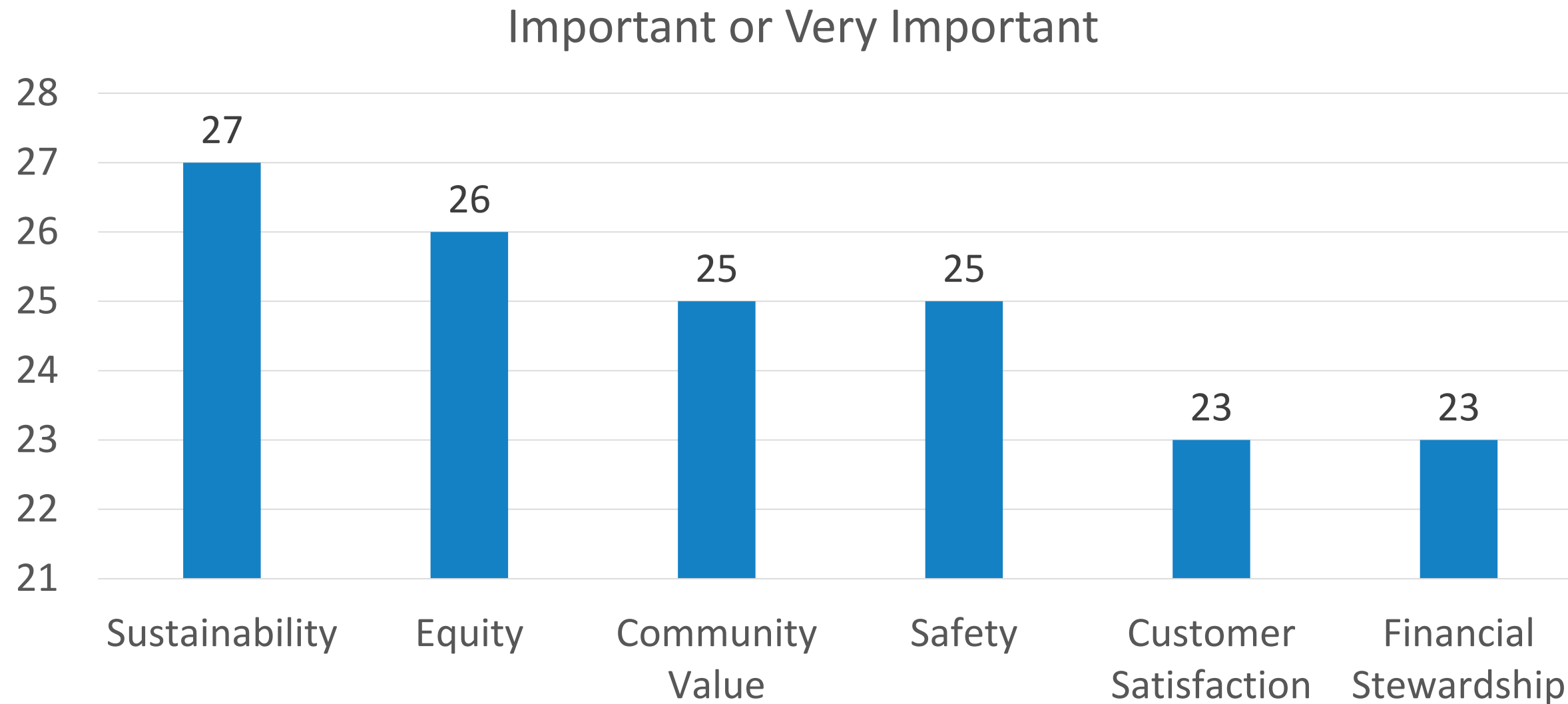
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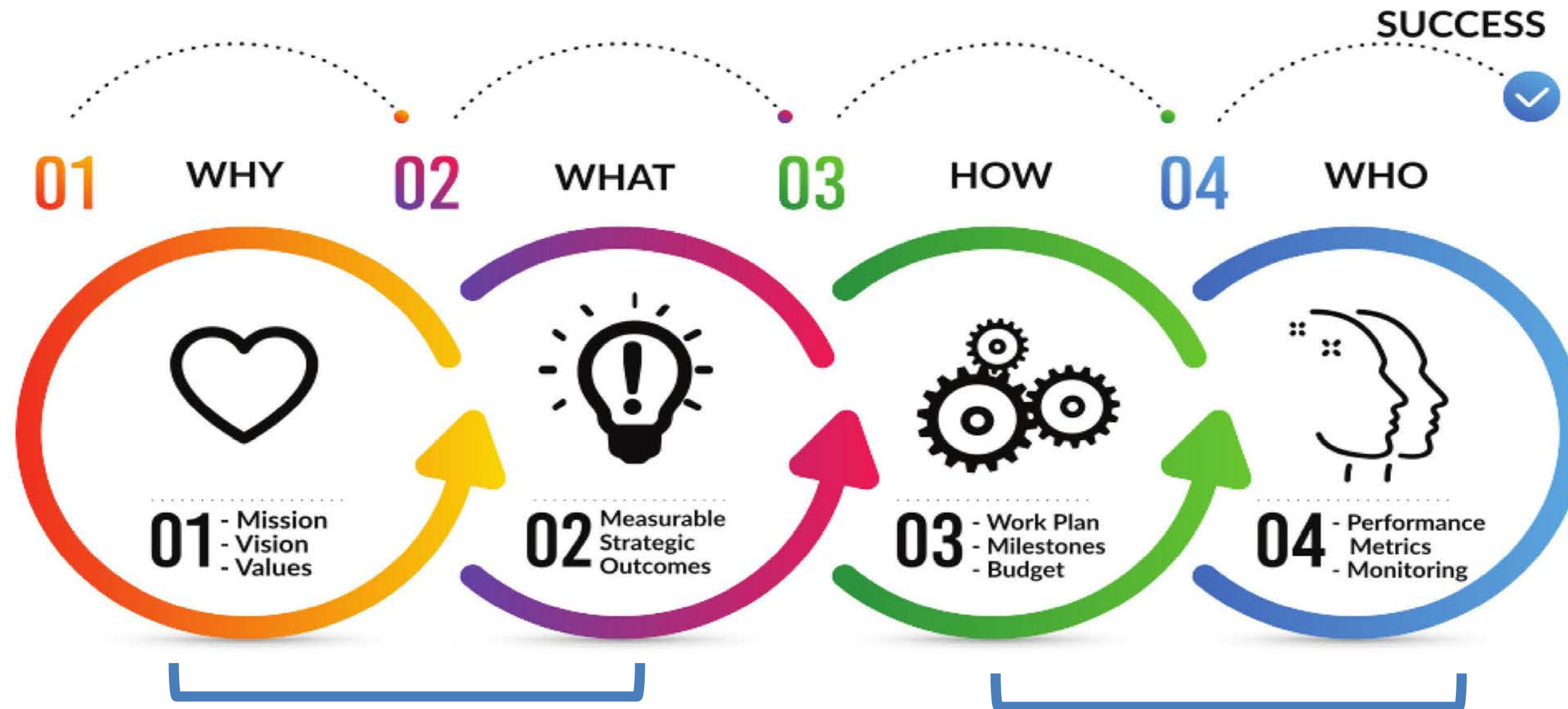
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Mission, Vision & Values	XX
Executive Summary	XX
Success Outcomes	XX
Work Plan	XX
Performance Scorecard	XX

A photograph showing the interior of a bus. Two passengers are visible: a woman wearing a grey hat and a man in a red jacket. They are both smiling. The bus has a blue interior with blue seats and handrails.

3

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# One Word Close

DRAFT



Lane Transit District

**STRATEGIC  
BUSINESS  
PLAN**



Fiscal  
Years **2022 – 24**

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# INTRODUCTION

## from the General Manager

### CONNECTING OUR COMMUNITY



I am honored to introduce Lane Transit District's first ever Strategic Business Plan for fiscal years 2022 – 2024. The goals and initiatives identified as priorities for LTD over the next three years are outlined within this document.

This is an ambitious work plan. It 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. Indeed, the past year's unanticipated events have shown us how great this community is in rising to meet the challenges presented by the coronavirus pandemic.

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 new quarterly LTD Performance Scorecard will show 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.

I encourage you to read this document and invite you to check back over the next three years to see for yourself how well we are doing at connecting our community.

Sincerely,

[INSERT SIGNATURE]

Aurora Jackson  
General Manager



# 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 this Strategic Business Plan.

Despite the ongoing challenges of engaging during the coronavirus pandemic, we provided numerous ways to participate and contribute virtually in a safe and healthy manner. We are grateful for the passionate involvement of our workforce – who have invested over 500 hours through virtual workshops and meetings to contribute ideas to shape the plan, and countless more in drafting and refining the tactics and performance metrics – as well as the members of the Board, Strategic Planning Committee, and diverse array of stakeholder representatives who brought the community’s voice to this process.

Here are just a few highlights of our targeted and inclusive approach to developing the plan:

### Virtual Retreats

To kick off the process, we held a series of three virtual, half-day retreats with LTD Directors and Leadership Council, engaging over 40 leaders

in the organization to dig deeper into our “Why” and set the groundwork for the foundational elements of the Strategic Business Plan.

### Diversity Council

Employees from administration to operations comprise this group that is dedicated to advancing diversity, equity, and inclusion within LTD. The Diversity Council provided early input into the plan and critical perspective to shape our **Equity** value.

### Strategic Planning Committee

Members of the LTD Board and other leaders in our community volunteered their time and energy to contribute to this effort throughout five meetings and work sessions, posing constructive questions and considerations that strengthened the plan.

### “Inside the Bus” Meetings

Although these are not actually held inside a bus, these all-hands meetings gather employees from across our organization to share information, brainstorm ideas, and foster collaboration across departments. In one of these sessions, our 50+ live attendees broke into small groups to participate in an exercise critical in defining our organizational values.

ZOOM PIC/PICS

## 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.

### **Targeted Community Stakeholder Survey**

In addition to drawing information from prior customer, employee, and community surveys and outreach activities, we conducted a targeted community stakeholder survey that asked representatives of equity organizations, social services/nonprofits, advocacy groups, the business community, organized labor, environmental organizations, and educational institutions to provide perspectives on our draft Mission and Vision statements and identify areas of importance to address in our plan.

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.





# MISSION, VISION & Values

## Mission

Connecting our community.

## Vision

In all that we do, we seek to create 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

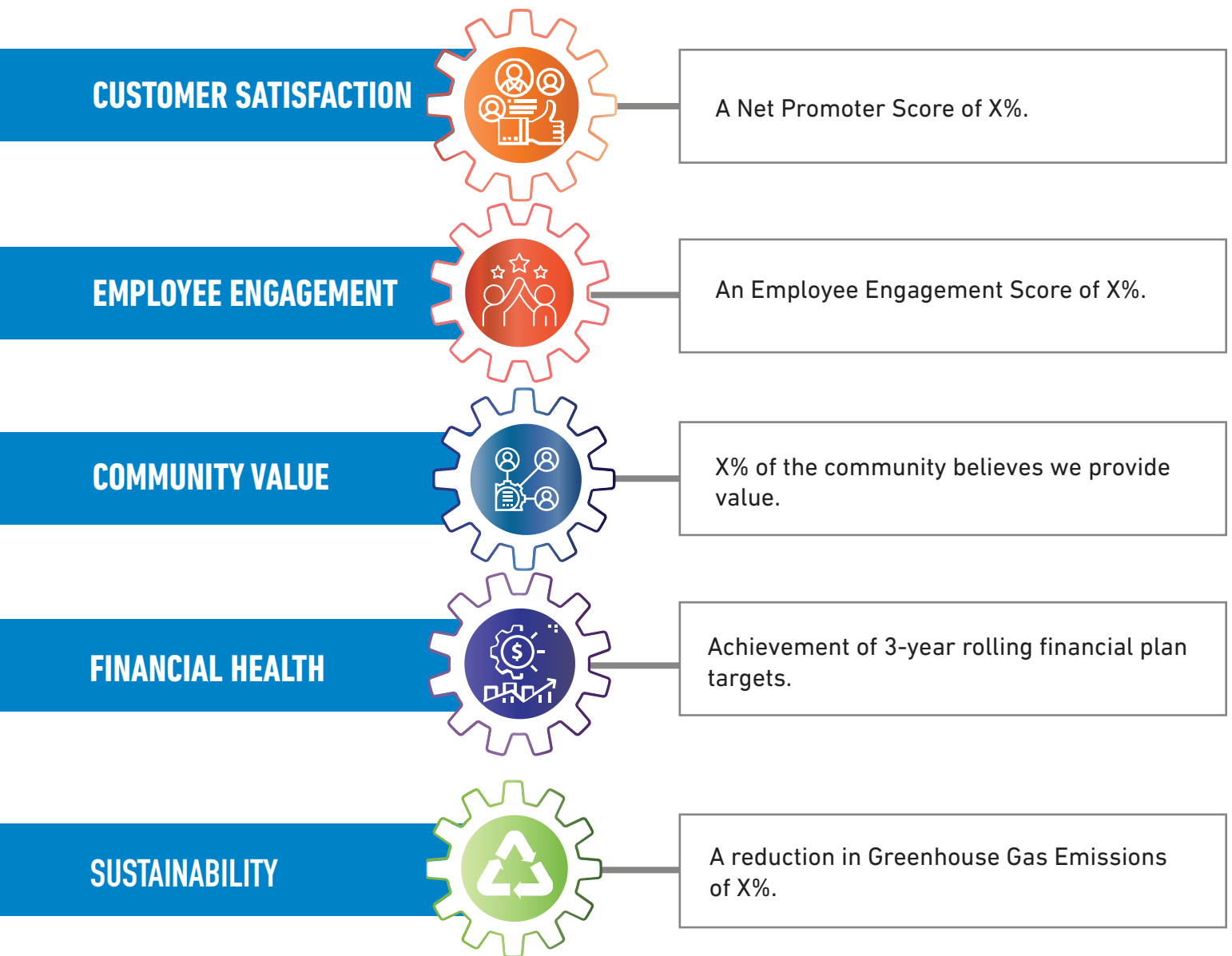
We demonstrate cooperation and excellent team behaviors when working with others — both internally and with our partners in the District — by focusing on common purpose and win-win outcomes.





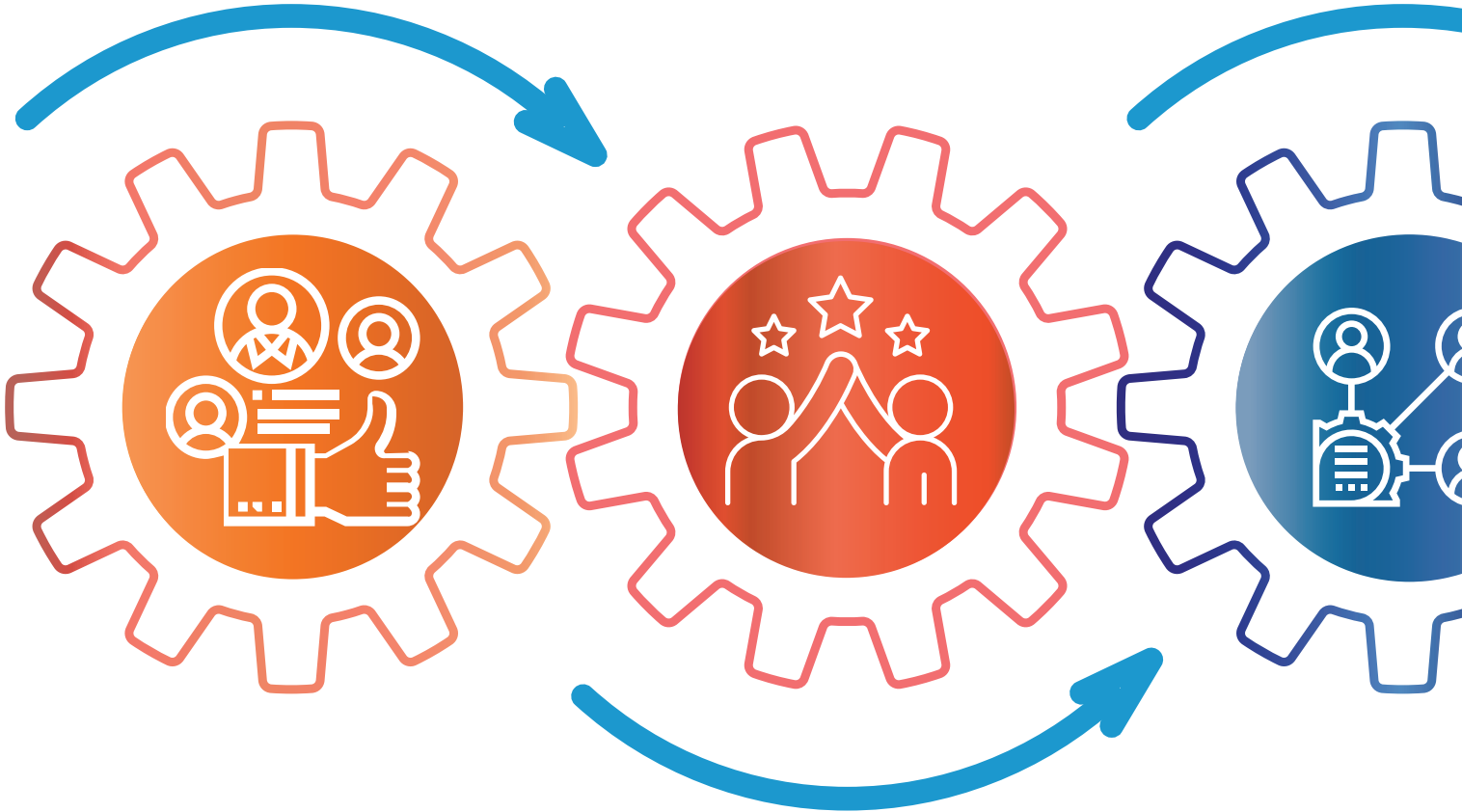
# SUCCESS Outcomes

Outcomes Lane Transit District strives to achieve for FY 2022-24.



# 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.



## 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

8

Performance Metrics

5

## Community Value

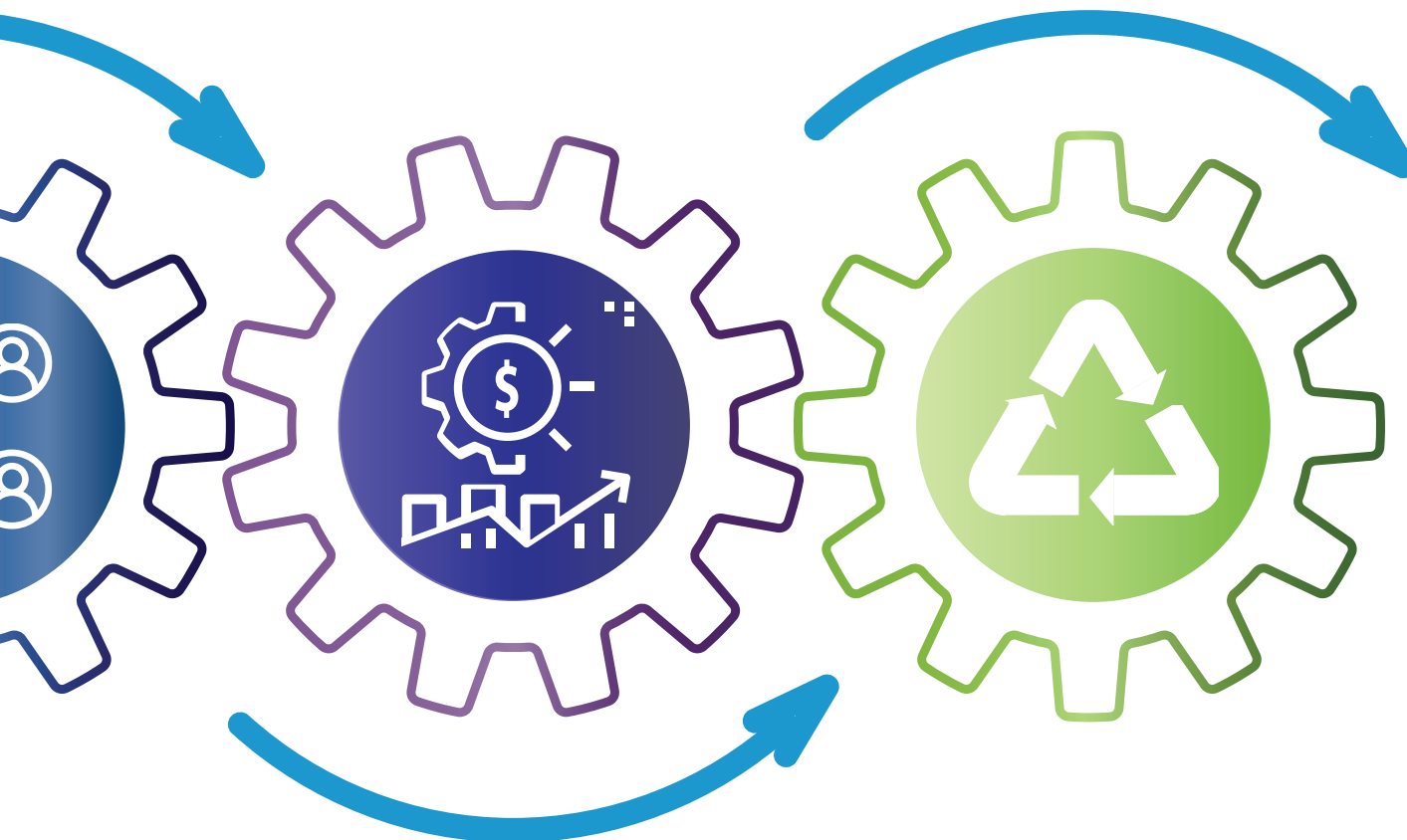
Projects, programs, and performance goals aimed at providing strong value for the community.

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**

4

**Performance Metrics**

3

**Sustainability**

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

**Work Plan Tactics**

3

**Performance Metrics**

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.

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



# MAINTAIN ON-TIME PERFORMANCE – FIXED ROUTE CUSTOMER SATISFACTION

## DESCRIPTION

Conduct analysis and make adjustments to maintain 90% on-time performance for three consecutive years. On-time performance is defined as the percent of trips completed within the scheduled on-time window of no more than four minutes past the scheduled time for arrival.

## PERFORMANCE METRICS ALIGNED

### OWNER

Tom Schwetz

### TEAM MEMBERS

Jake McCallum – Operations

Heather Lindsay, Bret Smith, Jeramy Card – Service Planning

## 2022 Quarterly Milestones

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 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

## 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

# ENHANCE CUSTOMER CONVENIENCE

## CUSTOMER SATISFACTION

### DESCRIPTION

Implement/enhance strategies to improve customer convenience. These include methods for customers to get information about services such as our phone system, trip planning information, paying fares, and using online resources.

### PERFORMANCE METRICS ALIGNED

#### OWNER

Cosette

#### TEAM MEMBERS

Customer Service; Accessible Service; Marketing & Communications; IT

### 2022 Quarterly Milestones

Q2

- Assess/ develop / procurement for website improvements
- Create a plan for web content development and monitoring
- Assess digital/social media engagement; create goals and plan for increased engagement; plan for monitoring and improving
- Implement Voice over Internet Protocol (VoIP) system; create standard operating procedures (SOPs); develop plan to monitor and maintain
- Identify opportunities to use VOIP system to enhance Customer Convenience
- Identify goals for call wait times and strategies to accomplish goals
- Assess/develop plan for optimizing convenience using e-fare system (i.e., messaging, availability, expanding/regionalization)
- Develop goals and plan for Trip Planner/Mobile Wallet project (long-term)
- Identify funding and staffing to accomplish goals
- Identify options for an after-hours call system

Q3

- Track progress on above projects
- Monitor performance and make adjustments as appropriate
- Implement after-hours call system
- Submit budget for FY23

Q4

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

### 2023 Quarterly Milestones

Q1

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

# COMPREHENSIVE OPERATIONS ANALYSIS – RIDESOURCE CUSTOMER SATISFACTION

## 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.

## PERFORMANCE METRICS ALIGNED

### OWNER

Cosette

### TEAM MEMBERS

Primary team includes Accessible Services

## 2022 Quarterly Milestones

Q2

Complete scope of work and identify plan to complete the analysis

Q3

- Complete analysis and create report
- Deliberate on results and create final recommendations

Q4

Develop an implementation plan and identify requirements for recommendations

## 2023 Quarterly Milestones

Q1

Implement and evaluate milestones and outcomes

# ESTABLISH BASELINE ANALYSIS OF EQUITY OF LTD SERVICES CUSTOMER SATISFACTION

## DESCRIPTION

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

## PERFORMANCE METRICS ALIGNED

### OWNER

Tom Schwetz

### TEAM MEMBERS

Planning Department, Cosette Rees, John Ahlen

## 2022 Quarterly Milestones

Q2

- Project kick-off meeting to determine scope, schedule, roles and responsibilities of project
- Define goals & objectives

Q3

- Develop metrics and process on how to measure
- Assess existing conditions, such as fares, accessibility of LTD information, demographics of users
- Engage Diversity Council in gathering initial internal input

Q4

- 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)

## 2023 Quarterly Milestones

Q1

- 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.)





# PERFORMANCE Scorecard

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

# HOW TO READ THE SCORECARD

# LTD Scorecard



PRIMARY STRATEGIC PRIORITY	METRIC	QUARTERLY PERFORMANCE				POINTS		DEFINITION	INFORMATION SYSTEM
		GOAL	Q1	Q2	Q3	Q4	GOAL		
CUSTOMER SATISFACTION									
<b>TOTAL</b>						<b>30</b>			
COMMUNITY VALUE									
<b>TOTAL</b>						<b>25</b>			
FINANCIAL HEALTH									
<b>TOTAL</b>						<b>15</b>			
SUSTAINABILITY									
<b>TOTAL</b>						<b>10</b>			
<b>OVERALL PERFORMANCE SCORE</b>						<b>100</b>			

The column represents the five Strategic Areas of Focus identified by LTD due to their correlation to the organization's overall success.

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.

Each metric has a clear definition.

The Metric has an Owner is responsible for reporting on the metric results

Earned Points are reported on each quarter of the year.

Each metric index is weighted and rolls up to a 100 point overall score.

# LTD Scorecard



PRIMARY STRATEGIC PRIORITY	METRIC	QUARTERLY PERFORMANCE				POINTS		
		GOAL	Q1	Q2	Q3	Q4	GOAL	EARNED
<b>CUSTOMER SATISFACTION</b>	Overall Customer Satisfaction	Establish baseline					8	
	Overall Net Promoter Score	Establish baseline					8	
	Customer Impression of On-Time Performance	Establish baseline					3	
	Actual On-Time Performance	90%					3	
	Customer Impression of Safety & Security	Establish baseline					2	
	Accidents Per 100,000 Miles	<2					2	
	Customer Impression of Bus Operator Courtesy	Establish baseline					2	
	Bus Operator Complaints Per 100,000 Boardings	Establish baseline					2	
<b>TOTAL</b>						<b>30</b>		
<b>EMPLOYEE ENGAGEMENT</b>	Employee Net Promoter Score	Establish baseline					8	
	Employees Understand How Their Performance is Linked to LTD's Success	Establish baseline					4	
	Employees Agree Leadership is Invested in their Success	Establish baseline					4	
	Employees Agree They are Provided with the Tools Needed to Work Successfully	Establish baseline					4	
	Internal Customer Satisfaction	Establish baseline					5	
<b>TOTAL</b>						<b>25</b>		
<b>COMMUNITY VALUE</b>	Community Perception of LTD Value	Establish baseline					8	
	Community Partner Perception of LTD as Trusted Leader	Establish baseline					7	
	Access to Frequent Transit (Total Population)	Establish baseline policy					2	
	Access to Frequent Transit (Minoritized Population)	Establish baseline policy					3	
<b>TOTAL</b>						<b>20</b>		
<b>FINANCIAL HEALTH</b>	Operating Cost per Boarding	75%					8	
	Maintenance Cost Per Mile	\$.98/mile					4	
	Vehicle Hours per Labor Hour						3	
<b>TOTAL</b>						<b>15</b>		
<b>SUSTAINABILITY</b>	Greenhouse Gas Emission Reduction	75%					3	
	Fleet Transitioned to Electric	25%					2	
	Renewable Fuel Consumption	100%					3	
	Overall Ridership Increase	Establish baseline					2	
<b>TOTAL</b>						<b>10</b>		
<b>OVERALL PERFORMANCE SCORE</b>							<b>100</b>	

# LTD Scorecard



PRIMARY STRATEGIC PRIORITY	METRIC	OWNER	DEFINITION	INFORMATION SYSTEM
<b>CUSTOMER SATISFACTION</b>	Overall Customer Satisfaction	Cosette	% of customers who are satisfied or very satisfied with LTD services.	Customer Satisfaction Survey
	Overall Net Promoter Score	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	Cosette	% of customers who agree or strongly agree that buses usually arrive on-time.	Customer Satisfaction Survey
	Actual On-Time Performance	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	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	Tom	Number of accidents per 100,000 miles.	Monthly Report KPIs
	Customer Impression of Bus Operator Courtesy	Cosette	% of customers who agree or strongly agree that bus operators are courteous.	
	Bus Operator Complaints Per 100,000 Boardings	Kari B.	Number of complaints directly related to bus operator performance per 100,000 boardings.	Itrak
<b>EMPLOYEE ENGAGEMENT</b>	Employee Net Promoter Score	Taryn/HR	% 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	Taryn/HR	% 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	Taryn/HR	% 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	Taryn/HR	% of employees agree or strongly agree that they are provided with the tools needed to work successfully.	Employee Survey
	Internal Customer Satisfaction	Taryn/HR	% of employees who are satisfied or very satisfied with internal support functions.	Internal Customer Satisfaction Survey
<b>COMMUNITY VALUE</b>	Community Perception of LTD Value	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	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)	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)	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
<b>FINANCIAL HEALTH</b>	Operating Cost per Boarding	Tom	Total operating cost divided by total boardings, percentile in comparison to peer agencies.	ABBG Reporting
	Maintenance Cost Per Mile	Matt	Total preventative and repair costs exclusive of fuel costs, divided by total miles.	Monthly Board report
	Vehicle Hours per Labor Hour	Tom	Total vehicle hours divided by total operator labor hours.	ABBG Reporting
<b>SUSTAINABILITY</b>	Greenhouse Gas Emission Reduction	Matt	% reduction in greenhouse gas emissions from owned vehicles in comparison to the 2018 baseline.	GHG Inventory
	Fleet Transitioned to Electric	Matt	% of fleet that is transitioned to electric vehicles.	Fleet Replacement Plan
	Renewable Fuel Consumption	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	Tom	% increase in number of unlinked trips.	APC

