



Lane Transit District Agenda Item Summary (AIS)

Presented By: Aimee Reichert, Chief
Performance Officer

AIS Title: Annual Strategic Plan Update

Action: Information Only

Agenda Item Summary:

LTD began implementing the [FY22-24 Strategic Business Plan in October 2021](#). The adopted plan outlined an annual cycle for monitoring progress using a strategic scorecard, with outcomes focused on customer satisfaction, employee engagement, community value, financial health, and sustainability. Key touchstones in this cycle include quarterly tactical team reviews on milestone progress; and annual tactic and [scorecard analysis](#), with a report out to the Board of Directors. LTD has delivered on this plan and continued the cycle into FY2025.

For FY2025, LTD is mostly staying the course from our refreshed [plan for FY2024](#). We remain guided by our mission, vision, and values. We have deepened our commitment to community value through focus on key outcomes in health, education, workforce and housing. We have consolidated work plans from 9 down to 6, but kept the spirit of work focused on setting a secure organizational foundation, building meaningful relationships, and engaging in a transformational process through our service offerings.

The biggest adjustment for FY2025 is a rebalancing of our scorecard to keep priorities in focus. While we will continue to maintain a commitment to minimal emissions impact from fleet, we've consolidated sustainability outcomes under community value. We have also clarified sets of annual, quarterly, and monthly scorecard inputs to ensure good internal and public monitoring of our progress. Finally, we have set ambitious measurement goals related to transit access and operational efficiency challenges.

The included reports provide details on FY2025 plan in progress, updated scorecard, and noteworthy annual results. In addition, quarterly indicators are up to date on LTD's Strategic Dashboard at ltd.org/performance.

Attachments: LTD Strategic Business Portfolio; LTD Strategic Scorecard; Work Plan Reviews – Jan 2025; Customer Satisfaction Annual Update; Employee Engagement Annual Update



Lane Transit District Strategic Scorecard

Objective	Key Results		
Community Value	Annual	Quarterly	Monthly
	Access Measures	Job Connectivity Measures	Ridership
	Community Perception	Fleet Availability	Vehicle Revenue Hours
	GHG Emissions	Renewable Fuels	Road Calls Between Miles
	Key Partnerships	Student Passes	
Customer Satisfaction	Annual	Quarterly	Monthly
	Customer Impression of Bus Operator Courtesy	Accidents/100,000 Miles	Assaults
	Customer Impression of Safety and Security	On-Time Performance	Bus Operator Complaints/100,00 Boarding
	Net Promoter Score		
Employee Engagement	Annual	Quarterly	Monthly
	Employee Engagement Composite	Operator Turnover	Operator Count
	Performance Reviews	PSO Count	Operator Absenteeism
	Training	Mechanic Count	
	Exit Interviews		
Financial Health	Annual	Quarterly	Monthly
	Budgetary Analysis	Operating Cost/Boarding	Maintenance Cost/Mile
	Grant Recovery		Ridership/Revenue Hour

	Active
	Requires Development



LTD Strategic Business Portfolio

Portfolio owner: Aimee Reichert

Achieve Sustainable Fixed Route Service. At risk Jan 15, 2025	Owner: michael.hursh@lt...
Task progress 62%	
Strategic Outcome Customer Satisfaction; Employee Engagement; Financial Health; Community Value	
Develop Internal Strengths On track Jan 14, 2025	Owner: Wendi Frisbie
Task progress 62%	
Strategic Outcome Employee Engagement	
Improve System Security and Safety On track Jan 17, 2025	Owner: michael.hursh@lt...
Task progress 41%	
Strategic Outcome Customer Satisfaction; Community Value	
Maintain Financial Health At risk Jan 17, 2025	Owner: julie.lindsey@ltd...
Task progress 69%	
Strategic Outcome Financial Health; Community Value	
Engage the public to connect the community. On track Jan 14, 2025	Owner: Aimee Reichert
Task progress 65%	
Strategic Outcome Community Value	
Development Services Strategic Work On track Jan 17, 2025	Owner: Joe McCormack
Task progress 56%	
Strategic Outcome Customer Satisfaction; Financial Health; Community Value	
SBP Project Management On track Jan 19, 2025	Owner: Aimee Reichert
Task progress 61%	
Strategic Outcome Employee Engagement	



LTD Strategic Business Portfolio

Portfolio owner: Aimee Reichert

Achieve Sustainable Fixed Route Service. At risk Jan 15, 2025		Owner: michael.hursh@lt...
<p>Task progress 62%</p> <p>Strategic Outcome Customer Satisfaction; Employee Engagement; Financial Health; Com...</p>	<p>Achieve Sustainable Fixed Route Service</p> <p>FY2025 Work Plan and Update</p> <p>Key Milestones</p> <ul style="list-style-type: none"> Recruit and Train +50 Operators Recruit and Train+5 Mechanics Reduce Employee Turnover <p>Scorecard Monitoring</p> <ul style="list-style-type: none"> Ridership/Revenue Hour Ridership Maintenance Cost/Mile Operator Absenteeism Job Connectivity from Downtown Origin Job Connectivity Income Disparity Job Connectivity Service Area GHG Emissions Renewable Fuel Access to Frequent Transit Access to Resource Connectivity from Transit Fleet Availability Operating Cost/Boarding Operator Count Operator Turnover Mechanic Count <p>Status Update - Jan 2025</p> <p>The Fixed-Route focused team met on Jan 15, 2025 to review progress toward milestones. Several were noted as high priority including Maintain Fleet Size to support a peak of 85; Recruit and Train+5 Mechanics; and Achieve Service increases at each Bid in FY25. Recruit and Train +50 Operators is on track, but Operator Turnover remains high. This means total Operator Count net gain is slower than planned bid increases. For this reason, work has been escalated to at-risk. The next status update for this group is scheduled for April 2025. Q3 priority focus is Operator Turnover.</p>	

Task progress 62%
Strategic Outcome Employee Engagement

Develop Internal Strengths

FY2025 Work Plan and Update

Key Milestones

- [Reduce Employee Turnover](#)
- [Implement onboarding workflow](#)
- [Invest in people manager's continued training and skills development](#)

Scorecard Monitoring

- [Employee Engagement](#)
- [Performance Reviews](#)
- [Staff Onboarding](#)
- [Exit Interviews](#)
- [Operator Count](#)
- [Mechanic Count](#)
- [Operator Turnover](#)
- [Manager Training](#)
- [Operator Absenteeism](#)

Status Update - Jan 2025

The Internal Strengths team met on Jan 14th, 2025 to review progress toward milestones. All work is on track. The [✓ Reassess and prioritize internal communication improvements](#) milestone is complete with new work defined focused on implementing a [Content Management Solution](#). Milestones and measurements related to HR standard processes including Onboarding, Offboarding, Training, and Performance Management have been assigned to project team members for defining. The next status update is scheduled for April 2025. Q3 Priority Focus is [Operator Turnover](#) in support of [Achieve Sustainable Fixed Route Service](#).

Task progress 41%
Strategic Outcome Customer Satisfaction;
 Community Value

Improve System Security and Safety

FY2025 Work Plan and Update

Key Milestones

- [Achieve 24 Public Safety Officer's in service.](#)
- [Implement marketing incorporating safety/security focus](#)
- [Complete Mobile Video Surveillance Upgrades](#)

Scorecard Monitoring

- [Assaults](#)
- [Customer Perceptions of Safety and Security](#)
- [Accidents per 100,000 Miles](#)
- [Achieve 24 Public Safety Officer's in service.](#)

Status Update - Jan 2025

The Safety and Security team met on Jan 17th, 2025 to review progress toward milestones. All work is on track. The [✓ Consider perceptions of system security in marketing strategy](#) milestone is complete, with work started on [Customer Perceptions of Safety and Security](#). [✓ Increase Public Safety Presence - Emx Focused](#) continues to be a priority as well as hiring public safety officers. The next status update is scheduled for April 2025. Q3 priority focus is maintain.

Maintain Financial Health At risk Jan 17, 2025

Owner: julie.lindsey@ltd...

Task progress 69%
Strategic Outcome Financial Health; Community Value

Financial Health

FY2025 Work Plan and Update

Key Milestones

- [Streamline Federal Reporting](#)
- [Establish grant plan and recovery goals based on draft capital plan.](#)
- [Adopt updated Budget](#)

Scorecard Monitoring

- [Ridership/Revenue Hour](#)
- [Maintenance Cost/Mile](#)
- [Grant Recovery](#)
- [Operating Cost/Boarding](#)
- [Student Passes Issued](#)

Status Update - Jan 2025

The Financial Health strategic team will convene to review current state in Feb 2025, with renewed Sponsorship by incoming Chief Financial Officer, Julie Lindsey. At this time work remains in progress with improvements happening related to [ERP Reporting Operational](#) and [Streamline Federal Reporting](#) This work is marked at risk due to delayed review with team. Q3 Priority is [Draft Department Budgets](#).

Engage the public to connect the community. On track Jan 14, 2025

Owner: Aimee Reichert

Task progress 65%
Strategic Outcome Community Value

Public Engagement Process

FY2025 Work Plan and Update

Key Milestones

- [FY2025 Annual Stakeholder Event](#)
- [Enact Key Stakeholder Communication Plan](#)
- [Research Youth and Education Engagement Programs in Transit](#)

Scorecard Monitoring

- [Customer Perceptions of Safety and Security](#)
- [Student Pass Ridership](#)
- [Student Passes Issued](#)
- [Access to Resource Connectivity from Transit](#)
- [Access to Frequent Transit](#)
- [Job Connectivity Service Area](#)
- [Key Partnerships](#)

Status Update - Jan 2025

The Public Engagement team met on Jan 13th, 2025 to review progress toward milestones. All work is on track. The [✓ Define Youth and Education Engagement Program](#) milestone was updated to [Research Youth and Education Engagement Programs in Transit](#) and tasks were added to consider joining [LYTAC](#) and explore a [Youth Board Member](#) process. The [Marketing](#) Team added a milestone to initiate a youth [Art Contest](#) this spring. New measurements are in development for Public Engagement including: [Community Value Survey](#), [✓ Transit Access - Lane County](#); [Affordable Housing](#); [Healthcare](#), and [Key Partnerships](#). The next status update for this group is scheduled for April 2025. Q3 Priority is [Enact Key Stakeholder Communication Plan](#).

Task progress 56%

Strategic Outcome Customer Satisfaction;
Financial Health; Com-
munity Value

Development Services Strategic Work

FY2025 Work Plan and Update

Key Milestones

- [Develop Pilot Prioritization Methodology](#)
- [Implement LRMP Public Involvement Plan](#)
- [Conduct Ridesource Service Analysis \(ROA\)](#)

Scorecard Monitoring

- [Job Connectivity Service Area](#)
- [Access to Frequent Transit](#)
- [Access to Resource Connectivity from Transit](#)
- [GHG Emissions](#)
- [Renewable Fuel](#)
- [On-Time Performance](#)
- [Student Pass Ridership](#)
- [Student Passes Issued](#)
- [Fleet Availability](#)
- [Ridership](#)
- [Net Promoter Score](#)

Status Update - Jan 2025

The Strategic Service transformation group met on Jan 17, 2025. Key work is in progress and on track, including work on Fare Validation and Initiating the Long Range Mobility Plan work through partnership with the University of Oregon Planning Department. Key work ahead for the rest of FY2025 includes to [Develop Pilot Prioritization Methodology](#) and being the process of Pilot selection for Fall 2025. Next review session is scheduled for April 2025. Q3 Priority is [Complete partnership with U of O Planning](#).

Customer Satisfaction Outcome

Published Jan 18, 2025 at 5:40pm



Aimee Reichert · 24 days ago (edited)

Status

● On track

Goal

△ Customer Satisfaction

Time period

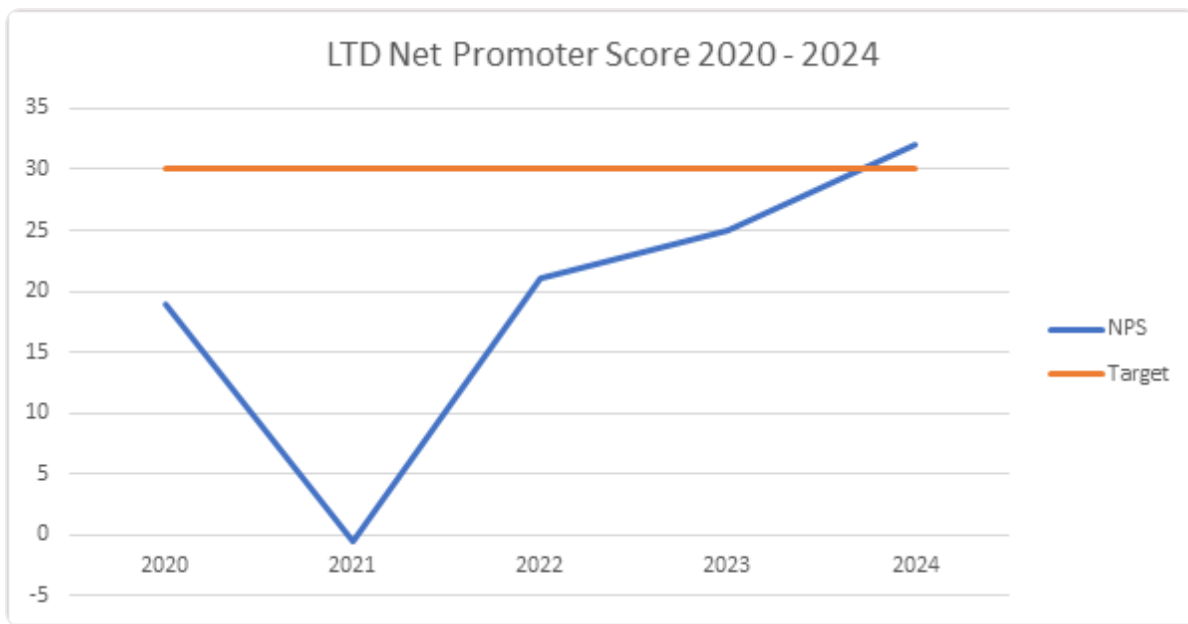
FY25

Summary

Customer Satisfaction annual results are collected through the American Bus Benchmarking Group Customer Satisfaction survey, an online survey delivered across 19 participating transit groups. LTD had above average engagement compared to peer groups, with 2,215 participants. LTD has been monitoring, Net Promoter Score (NPS); Customer Perception of Safety and Security; and Customer impression of Bus Operator Courtesy for the last 4 years. In 2024, LTD also took a closer look at variations by age, race, gender, and household income.

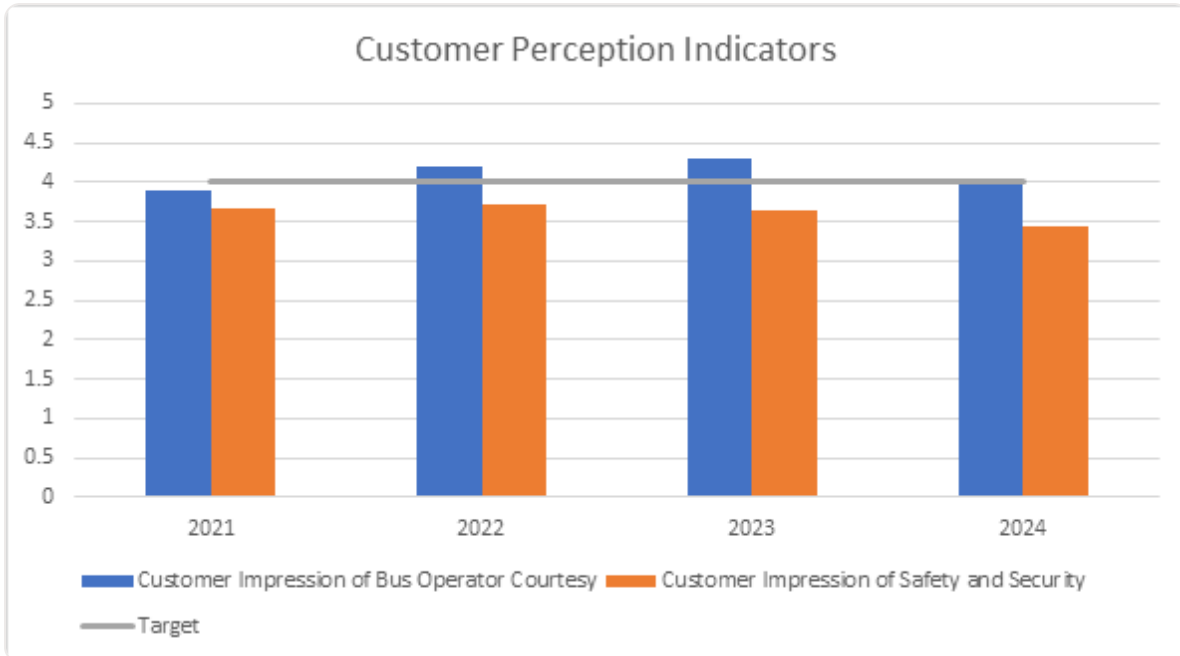
Net Promoter Score Results

Net Promoter Score (NPS) is a metric used to measure customer loyalty and satisfaction. It's calculated by asking customers how likely they are to recommend a company's products or services to others. For 2024, LTD has fully rebounded from our 2021 low of -.6% with a 5 year high of 32%, exceeding target. This indicates riders are steadily converting from detractors to promoters of our services in the community. For comparison, within the ABBG peer agency benchmarking group, LTD has an above average NPS.



Customer Perception Indicators

LTD is able to monitor customer perception indicators, which are collected through customer ratings of the transit service experience from trip planning to arriving. For the last several years LTD has focused on 2 key service quality areas: 1) Customer impression of bus operator courtesy, which is useful as an indicator expected to be stable, and high; and 2) Customer perception of safety & security, which is important as an indicator consistently below target over time. Both indicators showed slippage this year, though Impression of Bus Operator Courtesy remains at target. LTD remains committed to our value of safety, as reflected in our Improving System Safety and Security strategic work plan.



Rider Priorities by Demographic

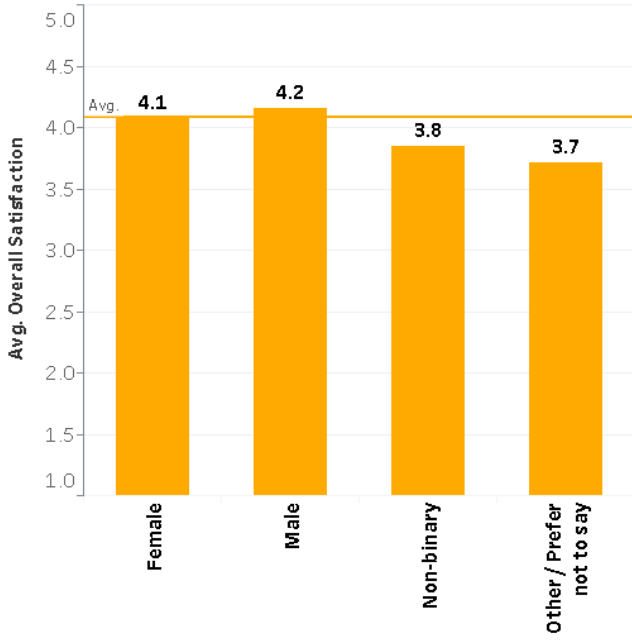
LTD customers indicate 'Availability' and 'Time' are the 2 most important service qualities, which is consistent across the transit industry. For 2024, LTD also took a closer look at priority variations by demographics. No differences were observed based on age or income. Differences were observed for gender, and race.

ABBG 2024 Service Quality Priorities by Gender

"Non-binary" and "prefer not to say" riders reported 'overall satisfaction' below the LTD average. 'Security' was rated above 'Time' as a service quality priority for "prefer not to say" riders.

Average Overall Satisfaction by Gender (2024)

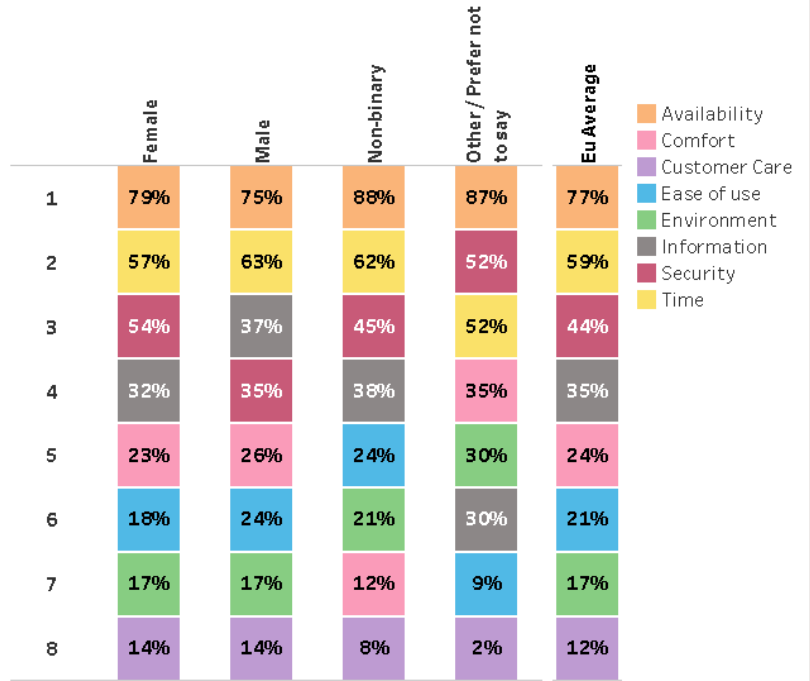
Eugene LTD



Note: Avg. line represents the overall satisfaction score for Eu (as shown in section 4.2)

Top 3 Most Important By Gender (2024)

Eugene LTD

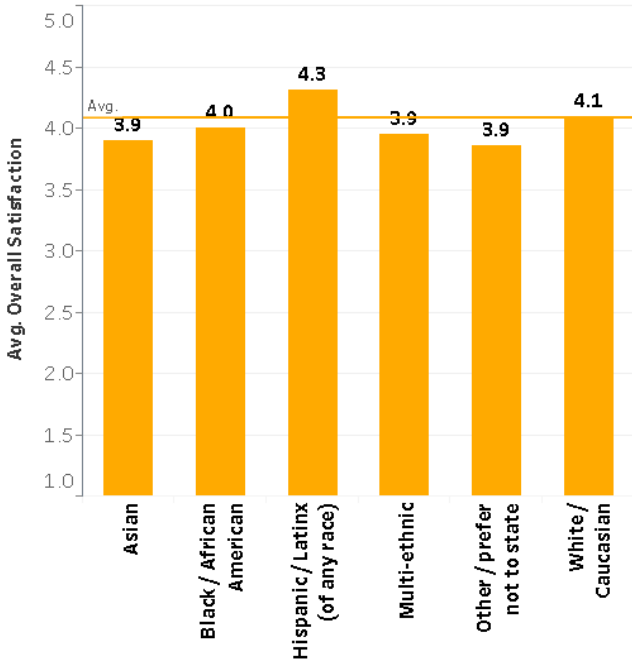


ABBG 2024 Service Quality Priorities by Race/Ethnicity

"Asian", "Black", "Multi-ethnic", and "prefer not to say" riders report lower 'overall satisfaction' than the organizational average. "Asian" riders noted 'security' above 'time' for service quality priorities.

Average Overall Satisfaction by Race/ethnicity (2024)

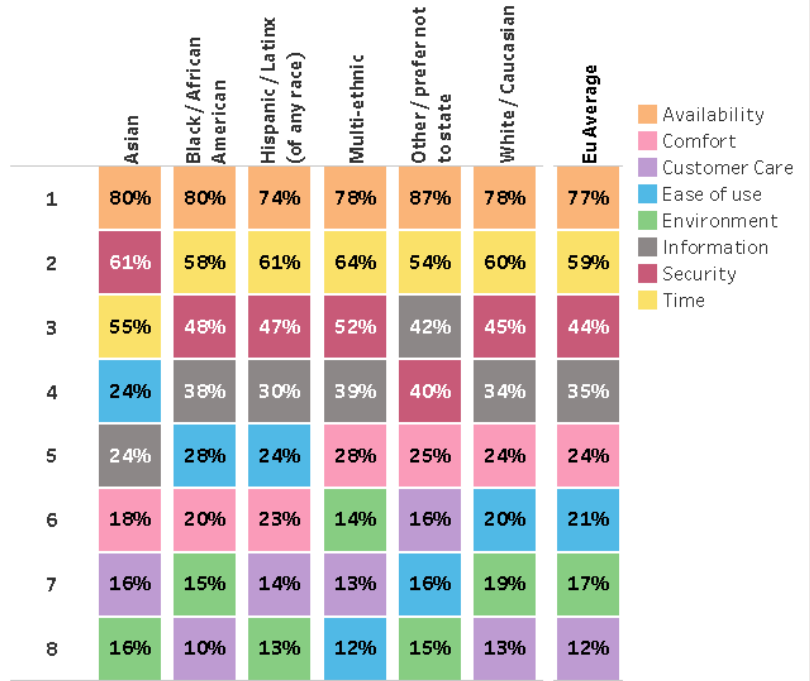
Eugene LTD



Note: Avg. line represents the overall satisfaction score for Eu (as shown in section 4.2)

Top 3 Most Important By Race/ethnicity (2024)

Eugene LTD



For 2025, LTD will continue to focus on customer experience through quarterly and monthly indicators. LTD will also continue to prioritize perceptions of safety and security, as well as expanding customer surveying beyond fixed route.

Employee Engagement Annual Update

Published Jan 18, 2025 at 5:47pm

 **Aimee Reichert** · 24 days ago (edited)

Status

● On track

Goal

△ Employee Engagement

Time period

FY25

Summary

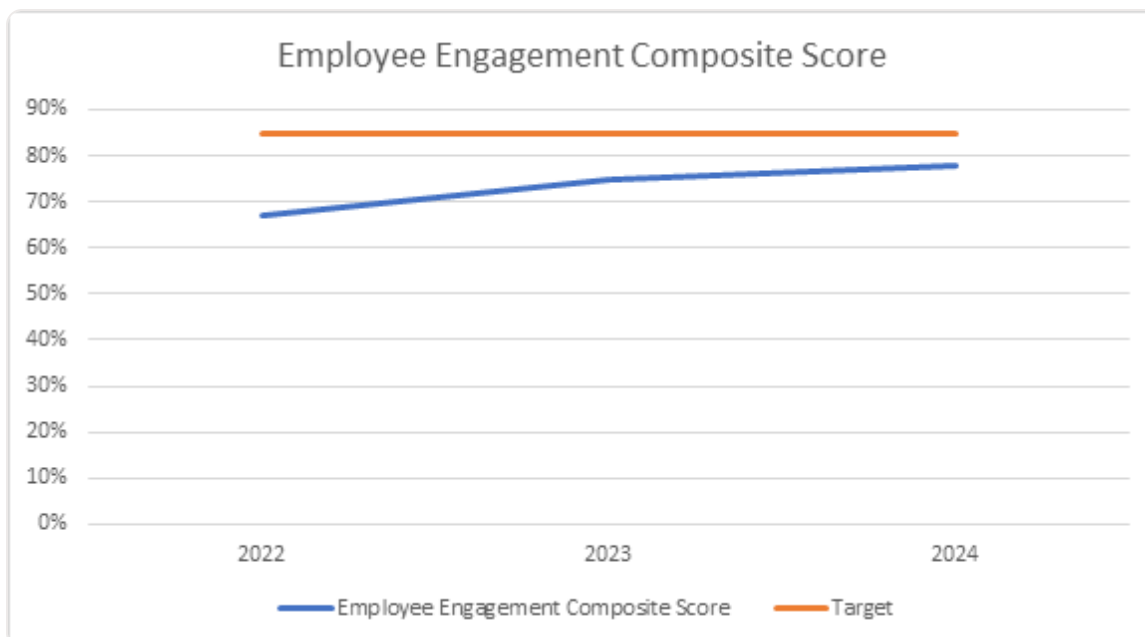
Employee Engagement annual results are collected through an annual survey facilitated by an independent 3rd party via online delivery. For the past 3 years LTD has partnered with Cascade Employer's Association, allowing us to build reliable year over year comparison. LTD had the minimum engagement required for reliable results, at 58% of all employees. The sample was representative, with the majority of respondents from Operations.

Employee Engagement Annual Composite Score

LTD has been monitoring the following indicators for the last 3 years:

- Employees Would Recommend LTD as a good place to work
- Employees Understand How Their Performance is Linked to LTD's Success
- Employees Agree Leadership is Invested in Their Success
- Employees Agree they are Provided with the Tools Needed to Work Successfully
- Employees Agree Departments in Our Organization Work Well Together.

Overall, each year LTD has shown improvement across each indicator, except "Departments in Our Organization Work Well Together," which has remained flat, and below target.



For 2024, a representative from HR has met with all department groups to review results and define actionable next steps to address concerns. For 2025, LTD will continue strategic work focused on Developing Internal Strengths, including development of new indices that can be measured outside of the survey process including: performance reviews, training, and hiring. LTD will also continue to monitor monthly indicators related to operator turnover, and other key positions.