

REGIONAL TRANSIT ISSUE PAPER

Agenda Item No.	Board Meeting Date	Open/Closed Session	Information/Action Item	Issue Date
11	09/22/14	Open	Action	8/29/14

Subject: Strategic Plan Update: Presentation of Draft Plan

ISSUE

Review a draft update to Sacramento Regional Transit District's Strategic Plan and determine whether to adopt a Mission statement, Vision statement, Values and Goals for the Strategic Plan.

RECOMMENDED ACTION

Motion: Adopting the Mission statement, Vision statement, Values and Goals for the Strategic Plan.

FISCAL IMPACT

None at this time.

DISCUSSION

Strategic plans provide a framework to guide an organization from its current position to its desired state. With consideration of internal and external factors, strategic plans establish goals and indicators to guide and gauge organizational change and progress.

The RT Strategic Plan serves as the guiding document for the agency's other major plans which, as a group, provide direction for the organization's future success.

- The TransitAction Plan incorporates the goals and vision of the organization of the Strategic Plan to provide direction for the service advancements of the organization including major expansion projects, new service types, and technology improvements. Its inputs include land use plans, demographic trends, and various sources of financial information, workforce analysis, and ridership analysis.
- RT's Capital and Operating budgets detail the financial resources necessary to achieve the plans of TransitAction. These budgets are updated annually to reflect the level of service RT can operate and improvements that can be made with available resources.
- In 2010, RT undertook a major effort to reorganize the transit system by evaluating the route structure to determine the most efficient and productive way to design the transit route structure. The project was called TransitRenewal. The route structure developed by TransitRenewal anticipated a five-year time frame in which service hours eliminated during the 2010 budget would be reinstated.
- The TransitRenewal route structure serves as the basis for our short term

Approved:

Presented:

Final 09/17/14

General Manager/CEO

RoseMary Covington, AGM of Planning & Transit Systems Development

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planning. Short term is defined as 5 years. It includes performance standards for the operation of both rail and bus service and provides a strategy for monitoring service.

- The Short Range Transit Plan monitors and projects the activities of RT as it implements the goals of the Strategic Plan, TransitAction Plan and TransitRenewal. The plan is based on the changes in financial projections from the Operating and Capital Budgets. The plan is updated each year to modify plans due to increases or decreases in budget projections.

The following discussion summarizes public outreach efforts undertaken to-date and, and provides a draft update to RT's mission, vision, values, goals and strategies. The full Draft 2014 Strategic Plan is provided in Attachment 1. The draft document was developed with consideration of community and staff input. The presentation that accompanies this paper is provided in Attachment 2.

The Sacramento Regional Transit District's (RT) Board of Directors adopted RT's last Strategic Plan in 2004. In the decade since the previous Strategic Plan was approved, the region has experienced tremendous change. This update to RT's Strategic Plan provides a current framework to evaluate and prioritize potential services and efforts included in various agency plans.

Public & Staff Input Overview

Staff sought public and stakeholder input concerning RT's Strategic Plan at 13 bus transit centers and light rails stations, and over 20 public and stakeholder meetings throughout the first half of calendar year 2014. In addition to on-site input opportunities, an online survey was available from the mid-February through the mid-April of 2014.

Employees were encouraged to take an online survey designed specifically for employees. In addition to the online survey, voting boards were available at the August 2014 Employee Quarterly meeting to allow for input on these elements for employees who may not have regular Internet access.

RT's Executive Management Team (EMT) had several meetings dedicated to the update of the Strategic Plan. In addition to the input opportunities provided at several meetings, information was also distributed electronically and EMT staff members were encouraged to provide input electronically as well.

Strategic Plan Component Descriptions

The following updated Strategic Plan components were created with consideration of external and internal factors such as rules, regulations, current and currently predicted economic and political conditions, and input received from community stakeholders. Below is a brief explanation of each plan component.

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RT Strategic Plan and Strategic Planning Component Explanation:

- The Mission statement articulates the agency’s purpose and reason for existing.
- The Vision statement expresses where RT wants to be in the future.
- The Values are those things that an agency will not compromise and considers to be most important.
- Organization Goals will guide RT from its current to its desired state toward realizing its vision.

After the definition of the Mission, Vision and Goals, staff will present, for Board adoption:

- Key Performance Indicators (KPIs) used to measure an agency’s progress towards achievement of its goals.
- Tactics, including programs, projects and tasks that are undertaken to achieve goals. These measures require resources and, as such, should be identified with consideration of available resources and competing initiatives. As such, it is recommended that this occur with RT’s annual budget process.

Draft Strategic Plan Components

With consideration to the priorities expressed to-date by members of the public and staff understanding of the resources necessary to meet community expectations, the draft Strategic Plan components (shown) below were created.

Draft Mission Statement:

The purpose of the Sacramento Regional Transit District is to promote and improve access in the Sacramento region by operating in an ethical manner to provide safe, reliable, and fiscally responsible transit service that links people to resources and opportunities.

Draft Vision Statement:

The Sacramento Regional Transit District strives to connect people to resources and opportunities while stimulating livable communities and supporting economic development by providing a technologically current, efficient and fiscally sustainable transit system that attracts and serves riders by offering an appealing transportation choice.

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Draft Values:

- **Quality Service & Innovation:** RT is committed to providing safe, reliable and cost efficient public transit services, and initiating innovative technologies to improve service effectiveness.
- **Customer Service:** RT places customers first by providing quality transit services and amenities with convenient and easily understood access at an affordable price.
- **Respect & Professionalism:** RT is committed to treating its customers and employees with dignity and respect, recognizing the importance and value of each individual.
- **Fiscal Responsibility:** RT is committed to the pursuit of efficient use of resources and of secure and stable funding sources.
- **Integrity & Accountability:** RT acknowledges its responsibility for actions and performance with an uncompromising commitment to truth, honesty and high ethical standards. Compliance with regulatory requirements and industry standards and efforts to improve upon existing practices.
- **Quality, Diverse & Positive Work Force:** RT is committed to increasing employee effectiveness and satisfaction through effective communication, teamwork, appropriate resource availability, appreciation of varied abilities, and professional development opportunities.
- **Regional Leadership & Coordination:** RT is committed to work with area stakeholders to create a “world class” transit system that supports livable communities and related efforts.
- **Health & Safety:** RT is committed to achieve an optimal level of safety for our employees, customers and the general public by minimizing risk of injury and property loss and promoting a sound safety culture throughout the organization.
- **Sustainability:** RT is committed to environmentally sensitive services and practices.

Draft Challenges:

- **Quality Service Demand:** Meeting the demand for cost-effective transit services that support livable communities and accommodate varying travel needs between and within communities.
- **System Preservation:** Maintaining, replacing and improving existing infrastructure, vehicles and equipment.
- **Funding:** Addressing the need for additional funding to provide quality services which meet community expectations.
- **Quality Workforce:** Maintain staff and expertise levels to ensure delivery of service.
- **Legislative and Regulatory Changes:** Developing strategies to address legislative changes.

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Draft Strategic Goals & Strategies:

Following the end of the Great Recession, RT is very aware of the difficulties that occur with providing basic functions in times of economic crisis. RT's goals have been divided into fundamental and growth goals with fundamental goals used to measure RT's fulfillment of its mission and preparing itself for realization of its vision. Growth goals are necessary to move beyond fulfilling RT's mission and measure RT's progress towards realization of its vision.

Fundamental Goals & Strategies

- Ensure Financial Stability
 - Secure Funding to Maintain Existing Service Levels, Facilities, Equipment and Infrastructure Quality
 - Seek Funding to Meet Additional Demands and Desires for Enhanced Service, Facilities, Equipment and Infrastructure Quality
 - Operate in a Cost Effective and Efficient Manner

- Meet or Exceed Expectations for Safe & Quality Service in a Cost-Effective Manner
 - Focus on Safety
 - Reduce Criminal Activity
 - System Operations
 - Improve Reliability
 - On-time Performance
 - Reduce Missed Trips
 - Enhance Passenger Environments
 - Cleanliness
 - Stop & Station Maintenance & Amenities
 - Vehicle Maintenance & Amenities
 - Provide Convenient and Easy Ways to Access Services with a Focus on Technological Advances
 - Fare, Route & Schedule Information
 - Fare System Payment Locations and Methods
 - Route & Schedule Structure
 - Improve Support Facilities & Services
 - Facilities & Services Maintenance & Improvements

- Operate in an Ethical Manner
 - Prevent Discriminatory, Dishonest or Misleading Practices
 - Create Comprehensive Policies and Practices to Minimize Potential Discriminatory, Hostile Dishonest or Misleading Environments or Practices for Customers and Employees
 - Manage RT's Finances in an Open and Honest Environment

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Fundamental Goals & Strategies continued

- Invest in the Attraction, Development & Retention of a Quality Workforce
 - Minimize Employee Attrition & Turnover
 - Improve Employee Satisfaction
 - Improve Employee Development Opportunities
 - Recruit & Attract Qualified and Fitting Staff Members

Growth Goals

- Improve Access Within and Between Communities (*in the Sacramento Region*) in a Cost-Effective Manner
 - Expand Service Coverage: *Expand service coverage to areas that can be served effectively and efficiently.*
 - Improve Existing Service Levels: *Improve service levels with priority on well-utilized services and consideration of competing needs*
 - Coordinate Activities with Organizations that Support the Advancement of Transit
- Increase Transit Market Share (*in the Sacramento Region*)
 - Create New Services and Modify Existing Services to Better Meet Community Needs.
 - Promote Services to Various Groups Based on Area Factors and Market Research.
 - Assist in the Development of Land Uses that Encourage Transit Use
- Adjust to Legislative & Regulatory Changes and Stakeholder & Community Initiatives and Support Complementary Efforts
 - Accommodate & Leverage Legislative & Regulatory Changes
 - Engage with Appropriate Partner & Stakeholder Initiatives
 - Cooperate and be Consistent with Related Efforts and Plans such as the Sacramento Area Council of Governments Metropolitan Transportation Plan / Sustainable Community Strategy
 - Support Economic Development Activities in a Fair and Balanced Manner

Next Steps

Input received at this meeting and over the course of the next couple of weeks will be used to make modifications to the Draft 2014 Strategic Plan. Staff will then seek approval of a final draft 2014 Strategic Plan from RT's Board of Directors.



Sacramento Regional Transit District

DRAFT

Strategic Plan

2014-2017



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A	2004 Strategic Plan KPIs Evaluation
B	Public Online and Printed Survey Results
C	Staff Online Survey and Voting Board Results
D	2014 Strategic Plan DRAFT Goals and KPIs with Responsible Division

1.0 Strategic Plan Introduction

Strategic plans provide a framework to guide an organization from its current position to its desired state. With consideration of internal and external factors, strategic plans establish goals and indicators to guide and gauge organizational change and progress.

The Sacramento Regional Transit District's (RT) Board of Directors adopted the last Strategic Plan in 2004. In the decade since the previous Strategic Plan was approved, the region has experienced tremendous change. This update to RT's Strategic Plan provides a current framework to evaluate and prioritize potential services and efforts included in various agency plans.

2.0 Agency Background

2.1 History

In 1971, the California State Legislature enacted the Sacramento Regional Transit District Act, which established a new agency to provide public transit services to the Sacramento region. The legislature found that it was necessary to establish a transit district to:

- Operate a single unified public transportation system in the Sacramento region.
- Provide a comprehensive public transportation system.

The Legislature intended that the formation of the transit district would further:

- The concept of regional rapid transit and transit districts.
- The goal of developing a state network of rapid transit systems operated as a single coordinated statewide system.

RT began operation of transit services in 1973, becoming the largest transit provider in the Sacramento Region. RT's service area includes the urbanized boundary of Sacramento County. RT currently provides transit service to the cities of Sacramento, Citrus Heights, and Rancho Cordova, as well as bus service to portions of Elk Grove and light rail service to Folsom.

2.2 Historical Operating Characteristics

RT currently serves a metropolitan area within Sacramento County encompassing 418 square miles and 1.4 million people, operates 67 bus routes and 38.6 miles of light rail service. Annual ridership is approximately 28 million. The transit system includes 50 light rail stations, 31 bus and light rail transfer centers, 18 park-and-ride lots and 3,300 bus stops throughout Sacramento County. Currently under construction, RT's 4.3 mile light rail extension to Cosumnes River College is designed to improve public transit

service in southern Sacramento County. This rail extension is expected to begin revenue service in September of 2015. Table 1.1 shows select current operating statistics compared to those shown in the 2004 Strategic Plan.

RT's entire bus and light rail system is accessible to the disabled community. Additionally, through a contract with Paratransit, Inc., RT funds door-to-door transportation service for thousands of elderly and disabled Sacramento area residents who are unable to use conventional public transit services.

Table 2.2.1: Select Operating Statistics Comparison

Indicator	2004 - 2009 Strategic Plan Reported Figure	Latest Available Estimate
Service Area Population (millions)	1.2	1.4
# of Bus Routes	81	67
Active Bus Stops	3850	3300
Active Bus & Light Rail Transfer Centers	9	31
Miles of Light Rail Track	26.9	38.6
Light Rail Stations	31	50
Park & Ride Lots	10	18
Annual Passenger Boardings (millions)	28	28
Light Rail Miles Under Construction	10.9	4.3

The last decade brought tremendous change to the Sacramento Region and the transit service provided by RT. While the statistics shown in Table 2.2.1 and in the 2004 Strategic Plan provide a snapshot of the agency's operations, the following graphs provide information on service offerings and service consumption that better relay the fluctuations that occurred during the last decade in relation to previous trends.

RT reports revenue hours, unlinked passenger trips and passenger miles in-keeping with industry standards and National Transit Database definitions for estimating service offerings and consumption. Please see the definitions provided below for more information about these statistics.

National Transit Database Definitions

Revenue Service (Miles, Hours, and Trips)

The time when a vehicle is available to the general public and there is an expectation of carrying passengers. These passengers either: directly pay fares; are subsidized by public policy; or provide payment through some contractual arrangement. Vehicles operated in fare free service are considered in revenue service. Revenue service includes layover / recovery time. Revenue service excludes: deadhead; vehicle maintenance testing; school bus service; and charter service.

National Transit Database Definitions continued

Unlinked Passenger Trips (UPT)

The number of passengers who board public transportation vehicles. Passengers are counted each time they board vehicles no matter how many vehicles they use to travel from their origin to their destination.

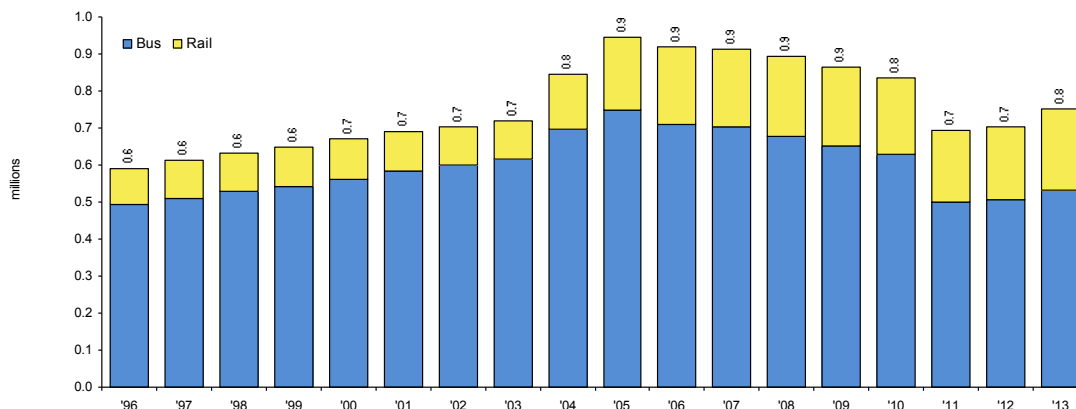
Passenger Miles Traveled (PMT)

The cumulative sum of the distances ridden by each passenger.

Figure 2.2.1 shows service offerings for fixed and route deviated bus service and light rail service as measured by bus and car train revenue hours. Current total service offerings are similar to those provided in Fiscal Year 2003. While bus service levels have increased since their ten-year lows in fiscal years 2011 and 2012, they are similar to that which was provided before the turn of this century. At the time of adoption of the 2004 Strategic Plan, all of RT's services were expanding. Bus service peaked in Fiscal Year 2005. Light rail service levels did not see as large of a proportional decrease as bus service during the service reductions necessitated by the Great Recession.

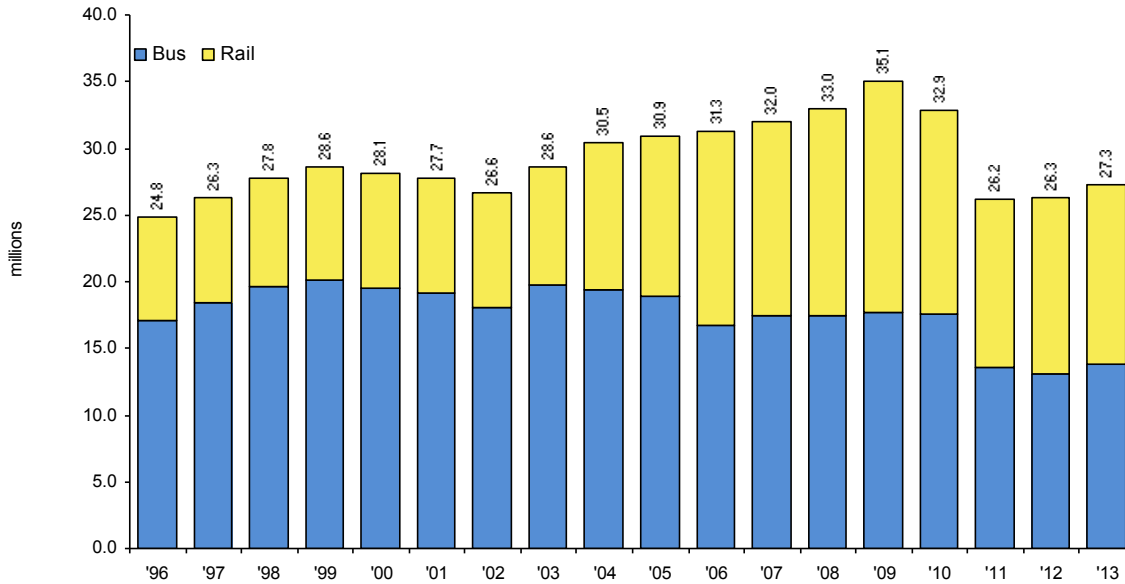
Figure 2.2.1: Service Offerings: Bus and Train Car Revenue Hours by Fiscal Year

Source: National Transit Database



Service consumption as measured by unlinked passenger trips since Fiscal Year 1996 is shown in Figure 2.2.2. While unlinked passenger trip totals in Fiscal Year 2013 are similar to the early 2000s, the trip total on bus is lowest of all years in the range shown. Unlinked passenger trips on light rail service grew (over the shown time period) with several light rail track extensions. In Fiscal Year 2013, total unlinked passenger trips were split almost evenly between bus and light rail.

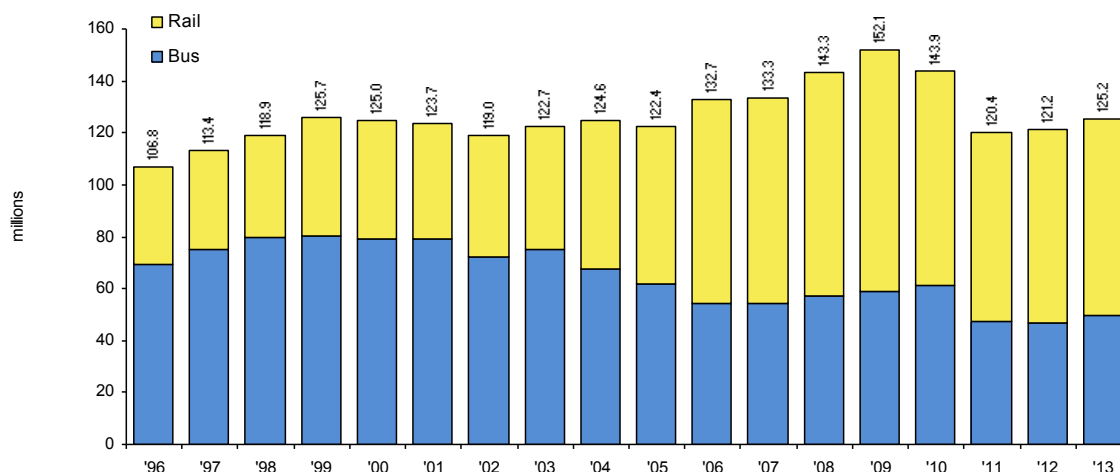
Figure 2.2.2: Service Consumption: Unlinked Passenger Trips by Fiscal Year
 Source: National Transit Database



Service consumption as measured by passenger miles since Fiscal Year 1996 is shown in Figure 2.2.3. Like the unlinked passenger trips total in Fiscal Year 2013, the passenger miles total for bus and light rail service in Fiscal Year 2013 is similar to that estimated in the late 1990s and early 2000s. Light rail passenger miles, however, accounted for a larger percentage of passenger miles than unlinked passenger trips in Fiscal Year 2013, which indicates that passengers are using light rail services to travel longer distances per trip.

Figure 2.2.3: Service Consumption: Passenger Miles by Fiscal Year

Source: National Transit Database



3.0 Review of 2004 Plan Components

3.1 Review of Previously Identified Challenges

Six fundamental challenges were identified in the 2004 Strategic Plan. The following discussion provides an update on the previously identified fundamental changes and was used to determine which, if any, of those challenges are still current. Each goal established in the 2004 Strategic Plan related directly to an identified challenge. Evaluation of these challenges, therefore, also provides insight into the current need for related goals.

Fundamental Challenge: Rapid Regional Growth

At the time of the 2004 Strategic Plan's creation, the Sacramento Region was experiencing rapid growth. Population, housing and employment forecasts predicted the region's rate of growth would continue swiftly and steadily with significant impacts on traffic congestion and air quality levels. While the region has grown since 2004, it has not achieved this growth with the continuous and steady rate that was anticipated during the creation of RT's 2004 Strategic Plan. The region is still forecasted to experience tremendous growth with increases in population, employment and households expected to grow by 34%, 39% and 35% respectively by 2035. The last updates to the Sacramento Area Council of Government's (SACOG) Metropolitan Transportation Plan (MTP) have, however, included revised and lower growth rates than previous versions. The 2035 growth forecast contained in the 2011 MTP/ Sustainable Communities Strategy (SCS) indicates that population in the plan area is expected to grow by 871,000 people, an increase of about 39 percent, between 2008 and 2035. This forecast is lower than the 1.3 million people forecasted in the 2008 MTP, which had the

same 2035 planning horizon, but used 2005 as the base year. Figure 3.1.1 shows the forecasted growth rates shown in the 2008 and the 2012 MTP.

Traffic congestion as measured by congested miles of travel driven per capita per day decreased in the region between 2005 and 2008 and is currently predicted to continue to decrease with efforts identified in the latest MTP/SCS (Figure 3.1.2). The regional reduction in congestion since 2005 follows the national trend that is attributed to unfavorable economic conditions. However, improving economic conditions are predicted to increase travel demand.

Figure 3.1.1: MTP Predicted Growth Rates

Source: SACOG 2008 MTP and 2011 MTP/SCS

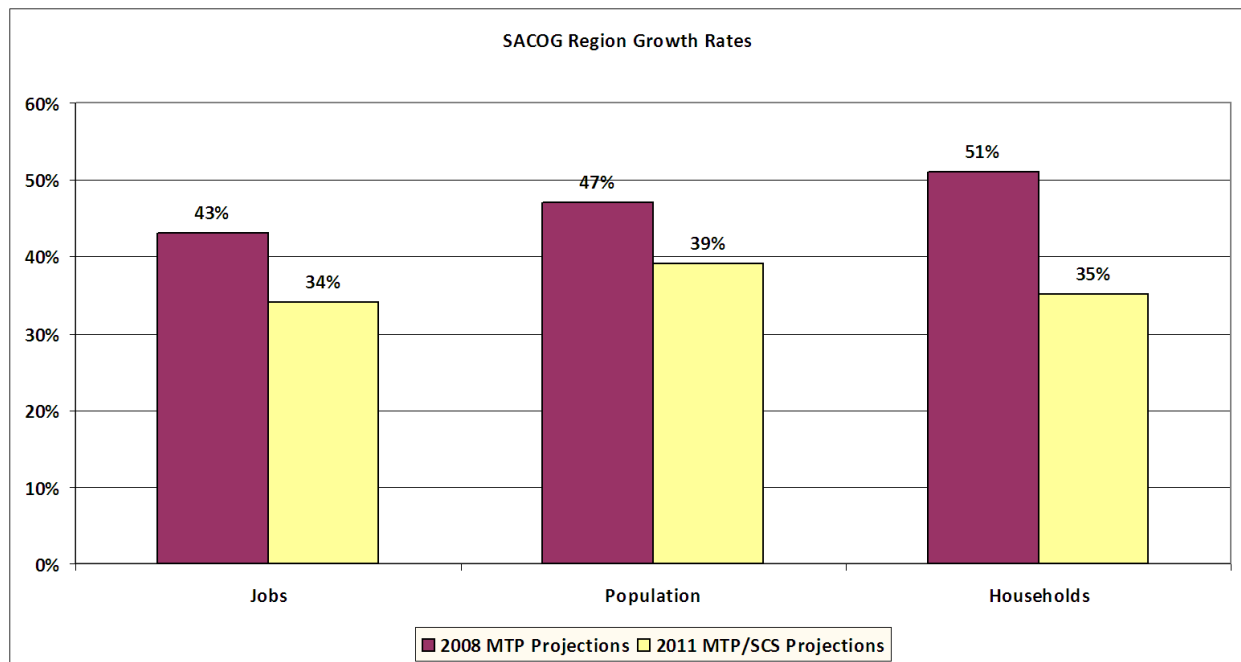
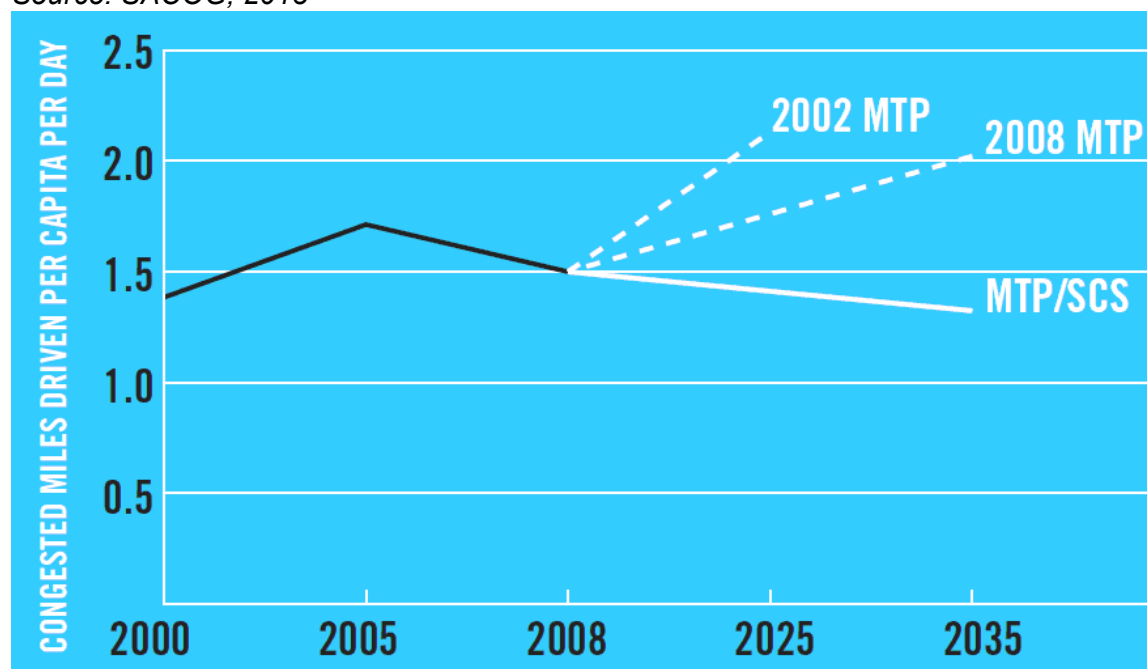


Figure 3.1.2: Congested Miles Driven Per Day Per Capita: Actual (through 2008) and Predicted (after 2008) by MTP Update

Source: SACOG, 2013



Fundamental Challenge: Societal Change

The 2004 Strategic Plan predicted societal changes such as an aging population and changes to household size and composition that were predicted to have significant impacts on travel needs and offerings. While the region didn't see a significant change in household size (Table 3.1.1), it has seen an aging of the population (Figure 3.1.2). The aging population has not yet resulted in a significant change to regional travel mode share (Figure 3.1.3 and Table 3.1.4). This lack of change was likely impacted by lower than predicted levels of congestion and availability of alternatives to driving alone. An unexpected societal change was the lowering of the median household income. 2000 Census data estimates an annual median household income of approximately \$60,400 (adjusted to 2012 dollars) in the Sacramento region. The annual median household income in the Sacramento region was reported by the 2012 American Community Survey to be approximately \$52,700. While the percentage of the population between the ages of five and 24 years of age decreased slightly between the 2000 Census and 2012 American Community Survey estimates and represents one of the largest age ranges shown by representing a 19 year span, it represents a large portion of the community and RT's Executive Management Team would like to note that this may be a segment that RT should focus on for additional outreach efforts.

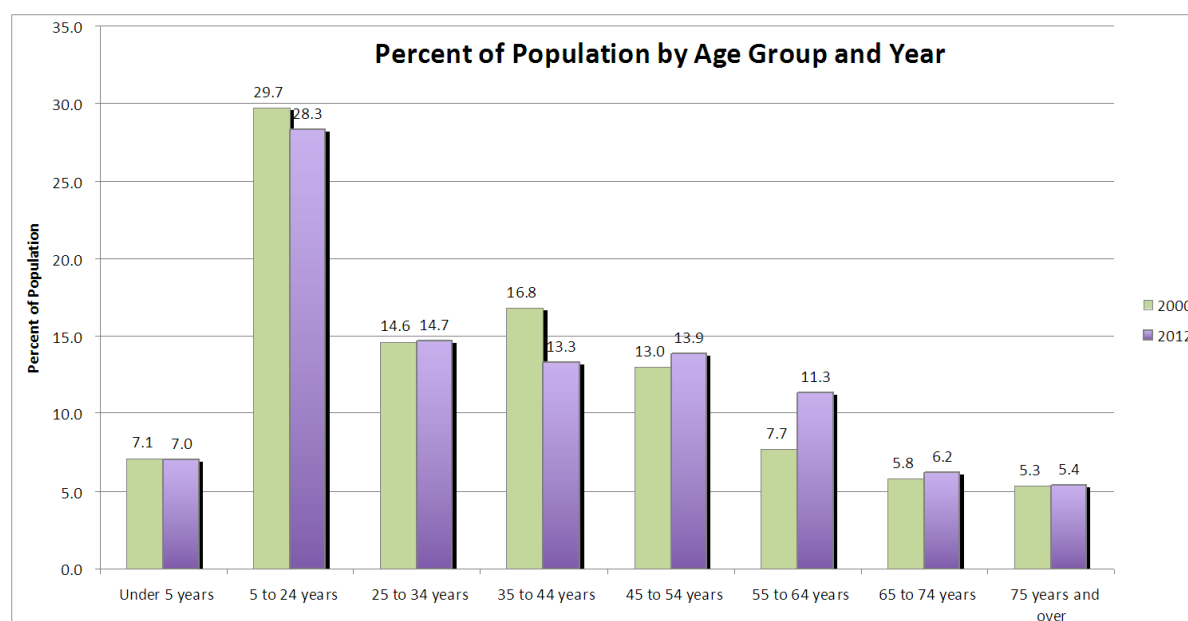
Table 3.1.1: Household, Family Size and Owner-occupied Housing Unit Estimates

Source: U.S. Census Bureau, American Community Survey

Community Profile Statistic	2000	2012	% Change
Average household size	2.64	2.74	3.8%
Average family size	3.24	3.40	4.9%
Owner-occupied housing units	58.20%	56.30%	-3.3%

Figure 3.1.2: Percent of Population by Age Group

Source: U.S. Census Bureau

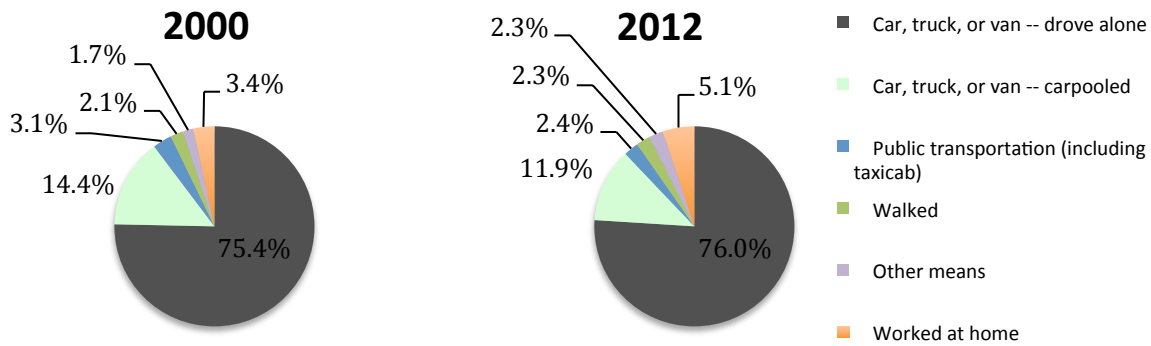
**Table 3.1.3: Commuting Mode Share Estimates**

Source: U.S. Census Bureau, American Community Survey

Commuting to Work Mode	2000	2012	Difference
Car, truck, or van -- drove alone	75.4%	76.0%	0.6%
Car, truck, or van -- carpooled	14.4%	11.9%	-2.5%
Public transportation (including taxicab)	3.1%	2.4%	-0.7%
Walked	2.1%	2.3%	0.2%
Other means	1.7%	2.3%	0.6%
Worked at home	3.4%	5.1%	1.7%

Figure 3.1.4: Commuting Mode Share Estimates

Source: U.S. Census Bureau

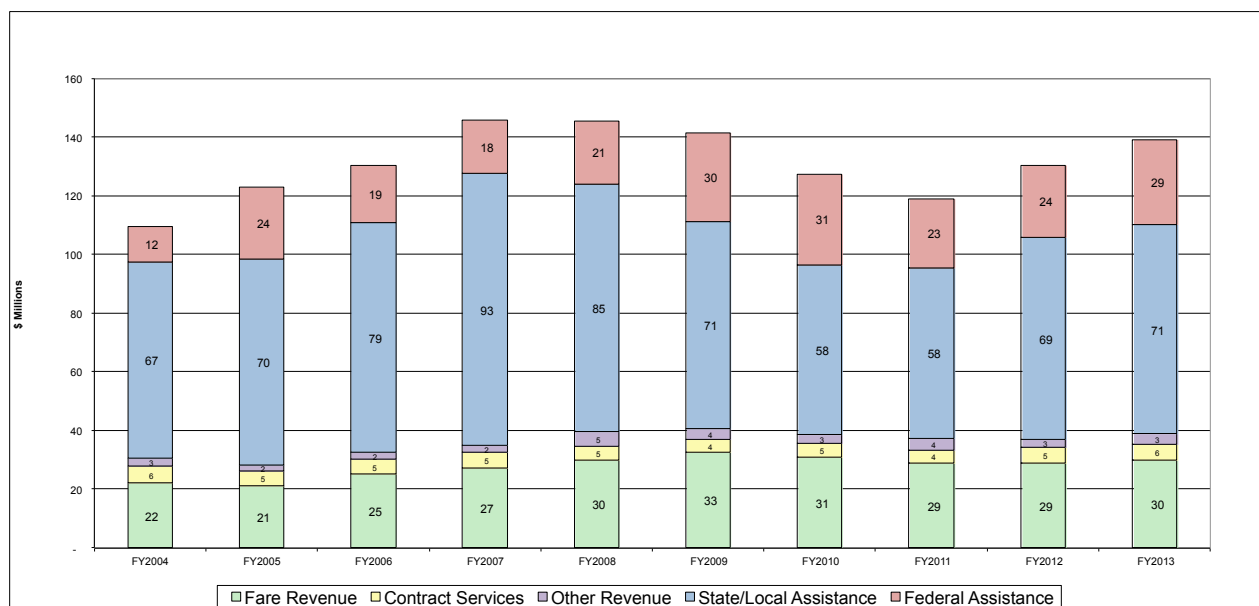


Fundamental Challenge: Funding

The Great Recession impacted household incomes, employment rates and transit funding levels. RT, like many other transit providers in the United States, experienced significant reductions in local, state and federal funding levels. Since 2004, RT’s nominal annual state and local operating revenue ranged from as high as nearly \$93,000,000 in Fiscal Year 2007 to as low as just over \$58,000,000 in fiscal years 2010 and 2011 (Figure 3.1.5). During the same period, RT’s nominal annual federal operating revenue ranged from just under \$12,000,000 in Fiscal Year 2004 to as high as nearly \$31,000,000 in Fiscal Year 2010. Reductions in funding necessitated reductions in staffing levels.

Figure 3.1.5: Annual Funding by Source

Source: National Transit Database Report, not adjusted for inflation



RT experienced several major internal changes in the last decade because of limited funding. Authorized staffing levels have varied greatly over the past decade with the total number of authorized positions peaking in Fiscal Year 2006 at 1,255. Fiscal Year 2011 had the lowest authorized staffing level in the last decade with 928 authorized positions. The total number of authorized positions was reduced significantly in Fiscal Year 2011 with reductions of nearly 23% from the previous fiscal year. Staffing level reduction implemented between fiscal years 2010 and 2011 were split almost evenly between administrative (including all positions represented by the American Federation of State, County and Municipal Employees, Managerial and Confidential Group, and Administrative Employee Association) and operational staff (included all positions represented by the Amalgamated Transit Union and the International Brotherhood of Electrical Workers) with a 24% and 22% reduction in positions respectively.

Fundamental Challenge: System Expansion

Lower than predicted funding levels necessitated lower than planned services levels. RT's service offerings varied greatly over the past ten years. Service levels measured by revenue hours for both bus and light rail modes of service fluctuated considerably since 2004. Bus service levels decreased from nearly 697,000 annual revenue hours in Fiscal Year 2004 to approximately 506,000 in Fiscal Year 2013, while train vehicle revenue hours have increased from nearly 150,000 to over 196,000 during the same period. RT experienced an overall reduction in annual vehicle revenue hours of nearly 144,000 between fiscal years 2004 and 2013. The current trend in service levels does not fit with the Metropolitan Transportation Plan referenced during the creation of the 2004 Strategic Plan which projected transit service expansion that would double light rail mileage and double RT's bus fleet by 2025 with an increase in local transit funding. The extension of the Gold Line to Folsom and introduction of the Green Line increased light rail mileage. The upcoming extensions of the Blue and Green lines will bring RT closer to the previously projected 2025 goal for light rail service. Bus service levels and fleet requirements are currently lower than 2004 levels.

Fundamental Challenge: Local Control

The desire for more direct and local control of transit services is evident in the change in composition of RT's Board of Directors. From 2004, the RT Board of Directors was expanded to include representatives from the cities of Citrus Heights, Folsom and Elk Grove. In addition to the expansion in total board members, the number of representatives from the Sacramento City and Sacramento County was adjusted and a weighted voting system was implemented.

Since the adoption of the latest Strategic Plan, the city of Elk Grove began operating transit service. Other transit services with a local focus such as the Rancho CordoVAN, the North Natomas Flyer and the McClellan Shuttle were initiated by municipalities and transportation management associations.

Fundamental Challenge: System Preservation

The 2004 Strategic Plan identified system preservation of infrastructure and equipment, and personnel to be a fundamental challenge. RT continues to face issues associated

with aging infrastructure, equipment and vehicles and securing funding sources to ensure timely replacement, updates and maintenance of these items. With the first set of light rail vehicles nearing the end of their life cycle, the need to address this situation is more urgent now than in 2004.

Since 2004, 456 employees have retired from RT; this represents over 40% of the average annual number of total authorized positions during the same time period. Retirement doesn't represent all employee turnover, but likely represents loss of employees with high levels of relevant work experience, and many of the employees who were involved in the development of the 2004 Strategic Plan. RT experienced a high rate of retirements over the past decade and has the potential to see more employee turnover due to retirement within the next five years. Nearly 60% of the active employees at the beginning of Fiscal Year 2013 will be eligible for retirement by the end of Calendar Year 2018. The two employee groups with the potential for the greatest impact from retirements are the International Brotherhood of Electrical Workers and the Management & Confidential Group with 65% and 62% of active employees eligible for retirement within the next five years respectively.

4.0 Goals & Key Performance Indicator Review

Strategic goals are used to move an agency towards realization of its vision. Effective goals are specific, measurable, and realistic. Some goals may be short to mid-term efforts with a clear end point while others may be more extending. Key performance indexes (KPIs) are used to measure progress towards realizing the agency vision gauging goal achievement. As was discussed in the Section 3.0: Review of 2004 Plan Components the review of challenges serves as a review of both the previous Strategic Plan's challenges and goals as they were directly related. It is important to note, however, that 68 KPIs were identified in RT's 2004 Strategic Plan. Of these 68 KPIs, 17 were identified as vital statistics that were planned for regular reporting to gauge the health of the agency. Of the 17 identified vital statistics, only 14 were ever reported and only ten are currently reported on a regular basis. The implementation of these monitoring measures highlights the need to select KPIs that are fitting and able to be reported with a reasonable amount of resources. Appendix A contains an evaluation of reporting on KPIs established in the 2004 Strategic Plan.

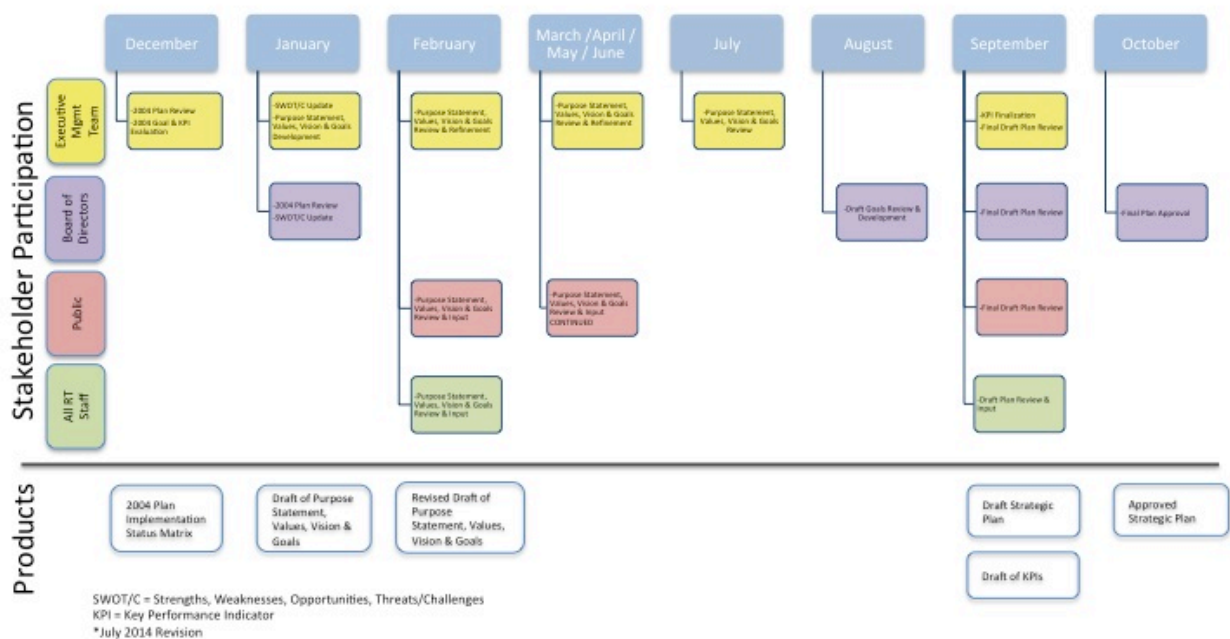
5.0 Plan Update Process

The update process began with a thorough review and analysis of the 2004 Strategic Plan. Current conditions were identified in relationship to previously identified challenges and goals with consideration of previous predictions and actually experienced circumstances. Implementation of the previously identified plan was also considered with a review of on-going reporting efforts and regular use of strategic plan elements. Input from internal and external sources was identified as a critical component of the update process. As such, RT provided several opportunities for RT employees, RT's Executive Management Team, RT's Board of Directors and existing

riders, community groups and other stakeholders to provide input. Figure 5.0.1 shows the timeline for major tasks, activities and products associated with the 2014 update to RT’s Strategic Plan.

Figure 5.0.1: Strategic Plan Update Diagram

Strategic Plan Update: Revised Process & Schedule*



6.0 Input Opportunities & Considerations

According to the Transit Cooperation Research Program’s (TCRP) Synthesis 59: Strategic Planning and Management in Transit Agencies Report (2005), of all (contacted and responding) transit agencies with strategic plans, only 35% reported involving external stakeholders such as taxpayers, citizens and community groups. The low percentage of agencies that reported involving external stakeholders in the strategic planning process is likely because of the limitations on transit agencies’ mission, vision and goals related to enabling legislation and funding sources, and lack of understanding of plan components and purpose by the general public. TCRP’s Synthesis 59 report also highlights the confusion that surrounds strategic plans by relaying that 57% of agencies mistakenly reporting a long or short range transit plan as a strategic plan. While some long and short range transit plans may contain components similar to strategic plans, most of more narrowly focused. The confusion that was found among

reporting staff members at transit agencies likely also exists in the general public. As community stakeholders are most familiar with giving input on transit plans concerning service characteristics, RT staff anticipated that outreach efforts for the update to RT's Strategic Plan would cause some confusion among the general public. RT decided, however, that community input and involvement is a critical component of an update RT's Strategic Plan. As such, RT provided over 30 on-site input opportunities around the Sacramento Region.

RT considered efforts at the federal, state, regional and local level to ensure that this plan was in keeping with and complementary to best practices and plans of related efforts.

6.1 Outreach Efforts and Input Methods

6.1.1 Public & Stakeholder On-site Input Opportunities and Promotional Efforts

Staff sought public and stakeholder input concerning RT's Strategic Plan at 13 transit centers and light rails stations, and over 20 public and stakeholder meetings throughout the first half of calendar year 2014. The initial round of outreach efforts focused on receiving feedback from existing riders. The second round of outreach efforts focused on gathering input from attendees at regularly scheduled committee meetings, community groups and other stakeholders. At most public meetings, a brief presentation was given concerning RT's Strategic Plan update. Printed surveys (that were designed to gather input concerning RT's goals) were available at all Strategic Plan update outreach events. Attendees who weren't able to complete the survey at the event were encouraged to complete an online survey. RT publicized its presence at these sites was publicized on its website, various social media outlets including Facebook and Twitter accounts and RT's newsletter. The efforts were also promoted through the distribution of meeting agendas. Surveys were available in printed format and online in English, Spanish, Russian, Chinese, Hmong and Vietnamese. Over 550 surveys were completed at on-site outreach events. Interested parties were also able to give input concerning the update effort at multiple RT Board meetings with agenda items concerning this effort. Tables 6.1.1.1. and 6.1.1.2 show the stops, station and community meetings that Strategic Plan Update information was presented and surveys were distributed.

Table 6.1.1.1: Stops & Stations: Locations of Outreach Efforts

Transit Center / Station Name
Meadowview Light Rail Station
16th St Light Rail Station
CSUS Transit Center
Fruitridge Light Rail Station
29th St Light Rail Station
City College Light Rail Station
7 & K Light Rail Station
Watt/I-80 Light Rail Station
Arden/Del Paso Light Rail Station
Mather/Mills Light Rail Station
Florin Towne Center Transit Center
Watt/Manlove Light Rail Station
Sunrise Mall Transit Center

Table 6.1.1.2: Community & Stakeholder Meetings: Locations of Outreach Efforts

Organization Meeting
Power Inn Alliance
Mobility Advisory Council
Arden Arcade CPAC
Complete Streets Coalition
Friends of Light Rail & Transit
Natomas CPAC
Carmichael/Old Foothill Farms CPAC
South Sacramento CPAC
Cordova CPAC
REACH Area 6 Sunrise Ranch Neighborhood Meeting
North Highlands/Foothill Farms CPAC
Rio Linda/Elverta CPAC
Orangevale CPAC
Vineyard CPAC
Fair Oaks CPAC
Rancho Cordova Chamber of Commerce
Antelope CPAC
Oak Park Neighborhood Association
Highway 50 Corridor Power Lunch
Sacramento Area Council of Governments
North Natomas TMA Board Meeting

6.1.2 Public & Stakeholder Online Input Opportunities

In addition to on-site input opportunities, an online survey was available from mid-February through mid-April of 2014. The online survey allowed for input concerning goals and challenges, and offered a free comment opportunity. The online survey was promoted on RT's website, newsletter and multiple social media outlets. Over 70 complete online surveys were submitted. The online survey was also promoted at on-site events. Attendees were given a hand-out that contained the online survey address and were encouraged to complete the survey online if not able to do so in-person and to tell friends, neighbors and family members about the online survey.

6.1.3 Employee, EMT & Board Member Input Opportunities

Employees were encouraged to take an online survey designed specifically for employees. The online survey was promoted through email notifications, electronic bulletin board postings and verbal communications from Department heads and at an employee quarterly meeting. Over 90 employees completed the online survey, which sought input of RT's mission and vision statements, goals, challenges and values. In addition to the online survey, voting boards were available at the August 2014 Employee Quarterly meeting to allow for input on these elements for employees who may not have regular Internet access.

RT's Executive Management Team (EMT) had several meetings dedicated to the update of the Strategic Plan. In addition to the input opportunities provided at several meetings, information was also distributed electronically and EMT staff members were encouraged to provide input electronically as well.

Information concerning this update to the Strategic Plan was presented to RT's Board of Directors three times prior to seeking approval of the updated plan in October of 2014.

6.1.4 Other Considerations: Fittingness with other Plans, Regulations and Efforts

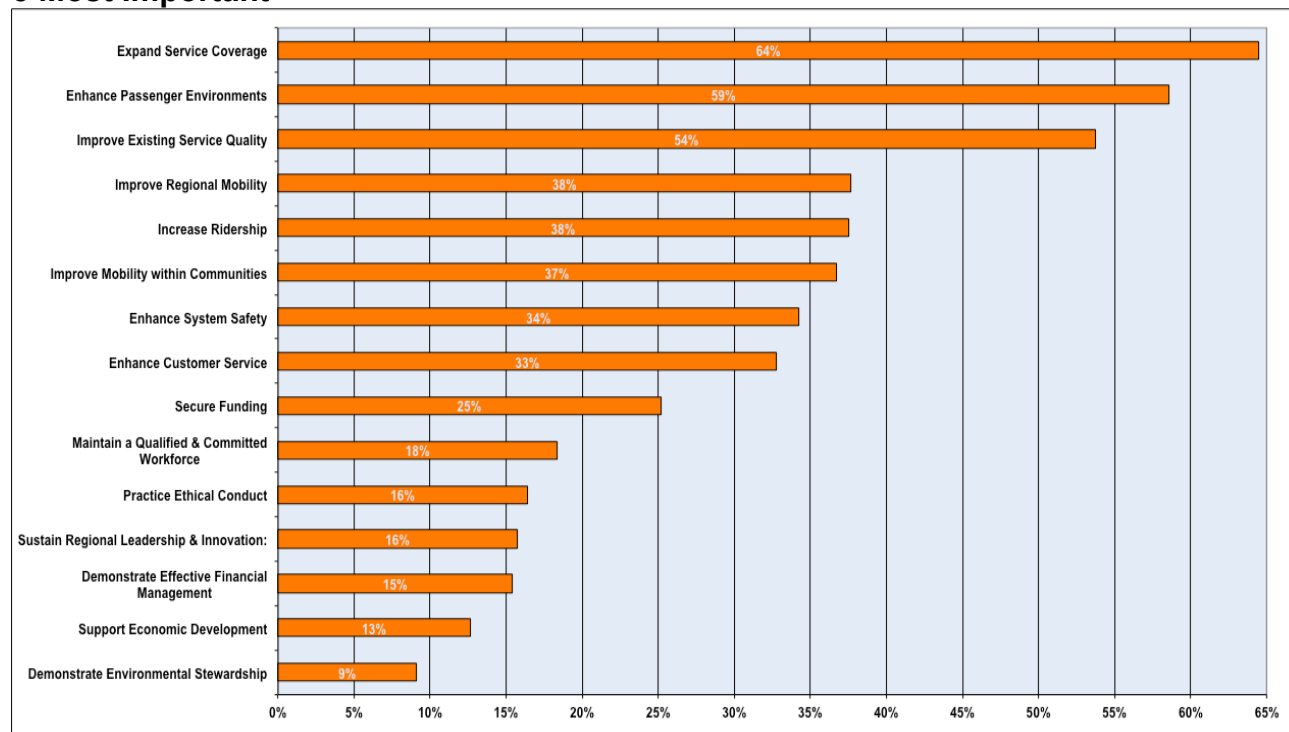
In addition to input from community stakeholders, consideration was given to related efforts such as other planning documents, rules, regulations and environmental factors such as economic and political conditions. All components of the updated strategic elements are consistent with other internal and related external plans and efforts.

6.1.5 Survey Results

Online and printed surveys were available to the general public. The online survey made available to the public was longer and, therefore, more in-depth than the printed survey that was designed to collect input from people waiting at stops or stations, or attending regularly scheduled public meetings. An online survey and voting board were available for RT employees to provide input concerning the Strategic Plan Update. Appendix B contains a complete set of public survey results. Employees were provided access to an online survey and an opportunity to provide input through an on-site voting board at the Employee Quarterly Meeting held in August of 2014 in RT's main administration building.

The following narrative and graphs relay the key findings from input received through various methods.

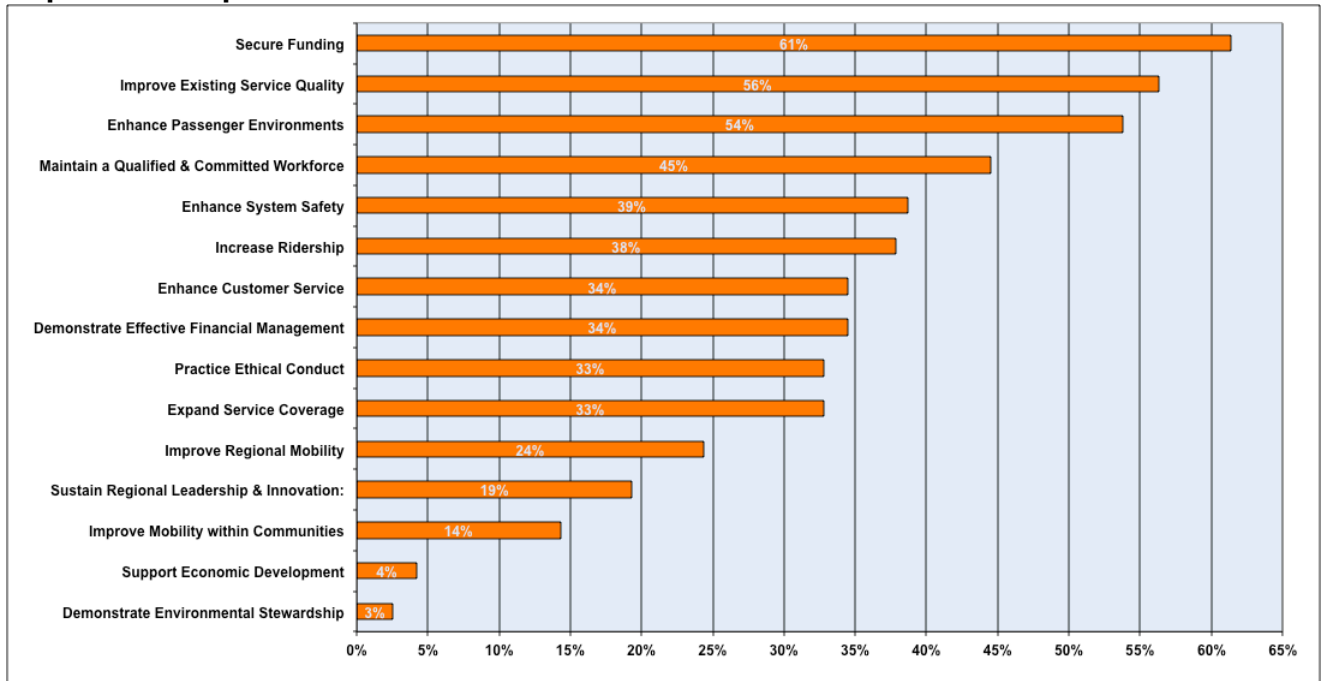
Figure 6.1.5.1: Public Goals Input: Percent of Respondents Selecting Goal as Top 5 Most Important*



*Combination of Printed and Online Survey Input, based on 616 responses

As shown in Figure 6.1.5.1, over half of all non-employee survey respondents selected the following three goals as top five (of 15 provided) most important goals for RT: expand service coverage; enhance passenger environments; and improve existing service quality. Five other goals were selected or ranked as top five most important goals by 33% to 38% of non-employee respondents; this second group of top rated goals are (listed in order of the most selected to least selected in this tier): improve regional mobility; increase ridership; improve mobility within communities; enhance systems safety; and enhance customer service. The ranking of goals by non-employees is clearly focused on enhancing transportation and mobility service and these service experiences as opposed to a direct focus on operational issues such as securing adequate funding and workforce qualifications and conduct or related benefits such as supporting economic development and demonstrating environmental stewardship.

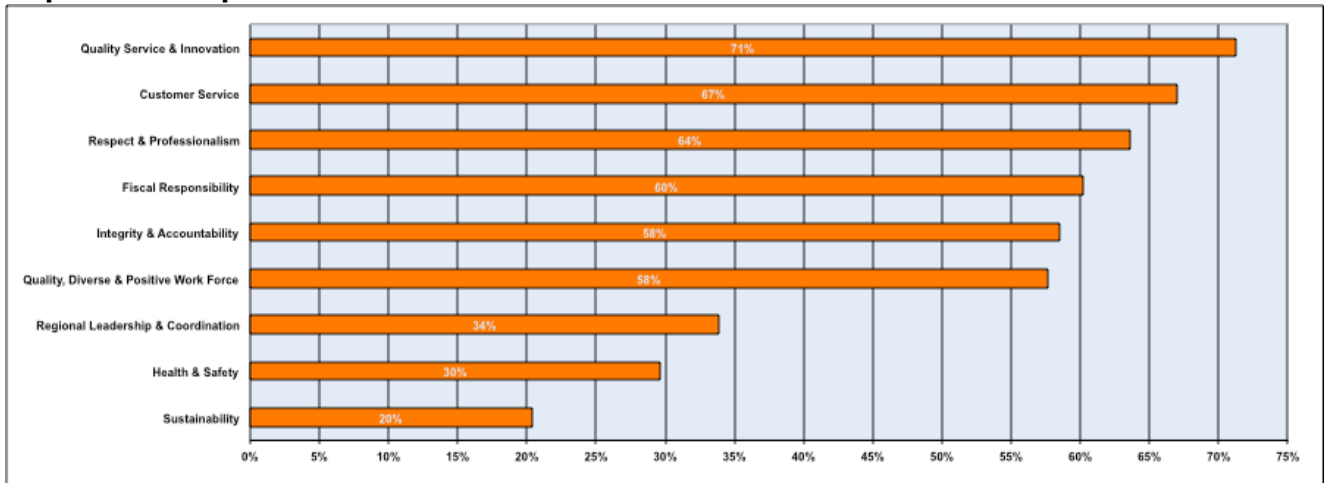
Figure 6.1.5.2: Employee Goals Input: Percent of Respondents Selecting Goal as Top 5 Most Important*



*Combination of Printed and Online Survey Input, based on 119 responses

Figure 6.1.5.2 shows that over half of employee survey respondents selected the following three goals as top five (of 15 provided) most important goals for RT: secure funding; improve existing service quality; and enhance passenger environments. The fourth most selected goal was to maintain a qualified and committed workforce. Six other goals were selected or ranked as top five most important goals by 33% or more of employee respondents; this second group of top rated goals are (listed in order of the most selected to least selected in this tier): enhance systems safety; increase ridership; enhance customer service; demonstrate effective financial management; practice ethical conduct; and expand service coverage. The employee responses placed a greater emphasis on financial issues and operational conduct than responses from the general public and other stakeholders. Employees likely feel and understand that public’s desire for more service offerings, but are also likely to better understand resource constraints and limitations, and the impact of operational practices on service quality.

Figure 6.1.5.3: Employee Values Input: Percent of Respondents Selecting Goal as Top 5 Most Important*



*Combination of Printed and Online Survey Input, based on 118 responses

Figure 6.1.5.3 shows the percentage of employee survey respondents who selected each shown value as being considered one of the top five most important of those listed. Six values received top five ratings by over half of the survey respondents. The top six rated values listed in order of most often selected to least are: quality service & innovation; customer service; respect & professionalism; fiscal responsibility; integrity & accountability; and quality, diverse & positive workforce.

7.0 Updated Plan Components

The following updated Strategic Plan components were created with consideration of external and internal factors such as rules, regulations, current and currently predicted economic and political conditions, and input received from community stakeholders. Below is a brief explanation of each plan component.

RT Strategic Plan and Strategic Planning Component Explanation:

- The Mission statement articulates the agency's purpose and reason for existing.
- The Vision statement expresses where RT wants to be in the future.
- The Values are those things that an agency will not compromise and considers to be most important.
- Organization Goals will guide RT from its current to its desired state toward realizing its vision.
- Key Performance Indicators (KPIs) used to measure an agency's progress towards achievement of its goals.
- Tactics, including programs, projects and tasks that are undertaken to achieve goals. These measures require resources and, as such, should be identified with consideration of available resources and competing initiatives. As such, it is recommended that this occur with RT's annual budget process.

7.1 Mission

Draft Mission Statement:

The purpose of the Sacramento Regional Transit District is to promote and improve access in the Sacramento region by providing safe, reliable, and fiscally responsible transit service that links people to resources and opportunities.

7.2 Vision

Draft Vision Statement:

The Sacramento Regional Transit District strives to connect people to resources and opportunities while stimulating livable communities and supporting economic development by providing a technologically current, efficient and fiscally sustainable transit system that attracts and serves riders by offering an appealing transportation choice.

7.3 Values

Draft Values:

- **Quality Service & Innovation:** RT is committed to providing safe, reliable and cost efficient public transit services, and initiating innovative technologies to improve service effectiveness.
- **Customer Service:** RT places customers first by providing quality transit services and amenities with convenient and easily understood access at an affordable price.
- **Respect & Professionalism:** RT is committed to treating its customers and employees with dignity and respect, recognizing the importance and value of each individual.
- **Fiscal Responsibility:** RT is committed to the pursuit of efficient use of resources and of secure and stable funding sources.
- **Integrity & Accountability:** RT acknowledges its responsibility for actions and performance with an uncompromising commitment to truth, honesty and high ethical standards. Compliance with regulatory requirements and industry standards and efforts to improve upon existing practices.
- **Quality, Diverse & Positive Work Force:** RT is committed increasing employee effectiveness and satisfaction through effective communication, teamwork, appropriate resource availability, appreciation of varied abilities, and professional development opportunities.
- **Regional Leadership & Coordination:** RT is committed to work with area stakeholders to create a “world class” transit system that supports livable communities and related efforts.
- **Health & Safety:** RT is committed to achieve optimal level of safety for our employees, customers and the general public by minimizing risk of injury and property loss and promoting a sound safety culture throughout the organization.
- **Sustainability:** RT is committed to environmentally sensitive services and practices.

7.4 Challenges

Draft Challenges:

- **Quality Service Demand:** Meeting the demand for cost-effective transit services that support livable communities and accommodate varying travel needs between and within communities.
- **System Preservation:** Maintaining, replacing and improving existing infrastructure, vehicles and equipment.
- **Funding:** Addressing the need for additional funding to provide quality services which meet community expectations.
- **Quality Workforce:** Maintain staff and expertise levels to ensure delivery of service.
- **Legislative and Regulatory Changes:** Developing strategies to address legislative changes.

7.5 Goals & Strategies

Draft Strategic Goals & Strategies:

Following the end of the Great Recession, RT is very aware of the difficulties that occur with providing basic functions in times of economic crisis. Goals have been divided into fundamental and growth goals with fundamental goals used to measure RT's fulfillment of its mission and preparing itself for realization of its vision. Growth goals are necessary to move beyond fulfilling RT's mission and measure RT's progress towards realization of its vision.

Fundamental Goals

- Ensure Financial Stability
 - Secure Funding to Maintain Existing Service Levels, Facilities, Equipment and Infrastructure Quality
 - Seek Funding to Meet Additional Demands and Desires for Enhanced Service, Facilities, Equipment and Infrastructure Quality
 - Operate in a Cost Effective and Efficient Manner

- Meet or Exceed Expectations for Safe & Quality Service in a Cost-Effective Manner
 - Focus on Safety
 - Reduce Criminal Activity
 - System Operations
 - Improve Reliability
 - On-time Performance
 - Reduce Missed Trips
 - Enhance Passenger Environments
 - Cleanliness
 - Stop & Station Maintenance & Amenities
 - Vehicle Maintenance & Amenities
 - Provide Convenient and Easy Ways to Access Services with a Focus on Technological Advances
 - Fare, Route & Schedule Information
 - Fare System Payment Locations and Methods
 - Route & Schedule Structure
 - Improve Support Facilities & Services
 - Facilities & Services Maintenance & Improvements

- Operate in an Ethical Manner
 - Prevent Discriminatory, Dishonest or Misleading Practices
 - Create Comprehensive Policies and Practices to Minimize Potential Discriminatory, Hostile Dishonest or Misleading Environments or Practices for Clients and Employees
 - Manage RT's Finances in an Open and Honest Environment

Fundamental Goals continued

- Invest in the Attraction, Development & Retention of a Quality Workforce
 - Minimize Employee Attrition & Turnover
 - Improve Employee Satisfaction
 - Improve Employee Development Opportunities
 - Recruit & Attract Qualified and Fitting Staff Members

Growth Goals

- Improve Access Within and Between Communities (*in the Sacramento Region*) in a Cost-Effective Manner
 - Expand Service Coverage: *Expand service coverage to areas that can be served effectively and efficiently.*
 - Improve Existing Service Levels: *Improve service levels with priority on well-utilized services and consideration of competing needs*
 - Coordinate Activities with Organizations that Support the Advancement of Transit
- Increase Transit Market Share (*in the Sacramento Region*)
 - Create New and Modify Existing Services to Better Meet Community Needs.
 - Promote Services to Various Groups Based on Area Factors and Market Research.
 - Assist in the Development of Land Uses that Encourage Transit Use
- Adjust to Legislative & Regulatory Changes and Stakeholder & Community Initiatives and Support Complementary Efforts
 - Accommodate & Leverage Legislative & Regulatory Changes
 - Engage with Appropriate Partner & Stakeholder Initiatives
 - Cooperate and be Consistent with Related Efforts and Plans such as the Sacramento Area Council of Governments Metropolitan Transportation Plan / Sustainable Community Strategy
 - Support Economic Development Activities in a Fair and Balanced Manner

7.6 Key Performance Indicators

Key Performance Indicators (KPIs) are used to measure progress towards achievement of a strategic goal. Based on currently available data, draft KPIs were selected for each goal. Draft KPIs associated with each goal can be found in Appendix D. All identified KPIs should be shown with historical information for comparative purposes and to track progress and, when available, current industry benchmarks. KPI reports should be created and distributed on a quarterly basis although not all KPIs are intended for quarterly reporting; rather some will be only be reported on an annual basis. KPIs are still under development and additional input from staff members is planned before recommendations will be finalized.

7.7 Implementation & Tracking

7.7.1 Annual Tactic Identification & Budget Accommodation

All efforts undertaken by RT should enable the agency to fulfill its mission and work towards realization of its vision. As such, all efforts should be consistent with the mission, vision and goals identified in RT's Strategic Plan. All strategies, tactics, tasks or efforts used to achieve strategic planning goals will require resources. To ensure that all planned activities are consistent with RT's Strategic Plan and that appropriate resources have been identified to support these activities, it is recommended that the annual budget process identify which goal or goals each budget item promotes and that the Strategic Plan is used as the guiding document to prioritize projects for the coming budget cycle.

7.7.2 Quarterly Progress Reporting

Reports will be issued quarterly with those KPIs that are planned for quarterly reporting (as shown in Appendix D).

7.7.3 Annual Progress Reporting

It is recommended that prior to the beginning of each annual update to RT's budget, an annual progress report is created that shows the key performance indicators with trend information and also contains a written assessment of progress made towards achieving each goal during the previous year. This annual report and an analysis should then be used to help prioritize efforts in the updated budget.

7.7.4 Board Report: Strategic Plan Applicability Section

To ensure that every effort undertaken by RT is in keeping with RT's Strategic Plan and is, therefore, consistent with RT's mission and vision, applicable rules and regulations and community and employee desires, it is recommended that a section that addresses Strategic Plan consistency be added to RT's Board of Directors' Issues Paper Template. The section header may simply be titled "Strategic Plan Integration" and should contain information about which strategic goal or goals the discussion or action item promotes. This section will not only ensure that actions undertaken by the agency are consistent with RT's Strategic Plan, but also keep these goals in the forefront of staff and Board members' minds.

7.8 On-going Development

A comprehensive review of RT's Strategic Plan with opportunities for public and employee input is recommended to occur every three to five years. Minor modifications and updates may also easily occur with the annual Strategic Plan progress report and RT's annual budget update process. Upon review of the progress made on strategic goals, and changes in RT's internal and external operating environments, the EMT should identify and submitted desired changes to the Strategic Plan.

Appendix A: 2004 Strategic Plan KPIs Evaluation

2004 Strategic Plan KPIs Evaluation

2004 SP Goal #	KPI # for indicated Goal #	Key Performance Indicators (KPI)	Vital Statistic (Y/N)	Definition	Currently Reported in KPR?	Currently Reported Elsewhere? Where?	Currently Collected?	Previously Reported?	Previously Collected?	Never Reported?	Never Collected?	Comments: If not currently reported, please explain why this KPI is not reported. If currently reported, please relay any concerns about the use of this statistic or the accuracy of the estimate.	GM	LC	A	FI	PL	OP	MC	FA	EC	
1	1	Operating Cost YTD vs. Budget	Y		Y											X						
1	2	Fare Revenue YTD vs. Budget	Y		Y											X						
1	3	Farebox Recovery Ratio	Y	Fare revenues divided by total expenses.	Y	NTD										X						
1	4	Cost per Vehicle Service Mile		Actual operating costs divided by total actual revenue miles.	S: Cost per Revenue Mile											X	X					
1	5	Cost per Vehicle Service Hour	Y	Actual operating costs divided by total actual revenue hours.	S: Cost per Vehicle Revenue Hour	NTD										X	X					
1	6	Cost per Passengers		Operating costs divided by total actual passengers.		NTD										X	X					
1	7	Passengers per Mile		Actual passengers divided by actual revenue miles traveled by passengers.													X					
1	8	Subsidy per Passenger	Y	Funds granted by federal, state or local government divided by passengers.	C: Cost per Pass & Farebox Recovery Ratio											X	X					
1	9	Vehicle Service Hours per Employee		Total actual revenue hours plus deadhead time divided by # employees.								Data not collected or reported from the Admin Division. This is likely a Scheduling Department matter.				X	X					
1	10	Employee Availability Data (Days)	Y	Days Employees work in a year less scheduled days off and annual benefit accrual days.	S: Monthly estimates for # of scheduled work days, % rate of absenteeism and the corresponding average # of unscheduled absentee days.	Labor Relations Department	Yes	Yes	Yes			Data collected and reported monthly from the Labor Relations Department.				X		X				
1	11	Bond Ratings (if any) of A or Better														X						
2	1	Mean Distance Between Failures (Miles)		Mean vehicle miles traveled during defined period between the number of breakdowns.													X	X				
2	2	• Repeater Road Call Analysis	Y															X				
2	3	• Air Conditioning and	Y	Mean vehicle miles traveled during defined period between the number of breakdowns.	Y: Not with the breakdown by category.													X				
2	4	• Wheelchair Lift/Ramp Reliability	Y															X				
2	5	% Preventive Maintenance Inspections Completed On-Time		All PM inspections completed within 10% of the required time or mileage.														X				
2	6	Weekday AM Pull-Out Availability		# of employees available for the movement of a revenue vehicle from the garage to its first scheduled terminus or stop.														X				
2	7	% Completed Weekday Trips															X	X				
2	8	% No Shows/Cancellations (ADA)		Percentage of demand-responsive trips scheduled where passengers fail to take the trip.													X	X				
2	9	% Trip Denials (ADA)	Y	Percentage of trip requests in which service cannot be adequately provided.													X					
2	10	% On-Time Performance		Percentage of total one-way trips per month departing a terminal or leaving an intermediate time point five or more minutes late.	Y													X				
2	11	Miles between incidents (#Collisions/Customer Incidents)	Y	Vehicle miles traveled during a defined period, divided by the number of collisions/customer incidents.	Y	NTD												X				
2	12	Complaints/Million Passengers	Y		S: # of Complaints & # of PSRs												X		X			
2	13	Commendations/Million Passengers	Y														X		X			
2	14	Call Center Average Wait Time		The average time a customer has to wait to get a response from the call center.														X		X		
2	15	% Calls Handled by Automated Information																X		X		
2	16	% Lost Calls		# of calls made to customer service center in which the customer hangs up prior to being connected with an agent.														X		X		
2	17	Response Time to Passenger Complaints	Y															X		X		
2	18	• ADA Compliant Response Time															X		X			
2	19	• Paratransit Assessments Completed On-Time															X					

2004 Strategic Plan KPIs Evaluation

2004 SP Goal #	KPI # for indicated Goal #	Key Performance Indicators (KPI)	Vital Statistic (Y/N)	Definition	Currently Reported in KPR?	Currently Reported Elsewhere? Where?	Currently Collected?	Previously Reported?	Previously Collected?	Never Reported?	Never Collected?	Comments: If not currently reported, please explain why this KPI is not reported. If currently reported, please relay any concerns about the use of this statistic or the accuracy of the estimate.	GM	LC	A	FI	PL	OP	MC	FA	EC	
2	20	Age of Transit Vehicles														X	X	X				
2	21	% Graffiti Removed within 48 Hours																			X	
2	22	% Stations Cleaned On-Time																			X	
2	23	% of Bus Shelters and Benches																			X	
2	24	# / Type / Location of Crimes Committed on RT System	Y			S: # of reported crimes, # & % of security related complaints.													X			
2	25	Lost Time Accidents (per 100 Employees)	Y																X			
2	26	Fare Evasion Rate																	X			
2	27	# Customers Inspected				C: % inspected & ridership estimates													X			
2	28	% Inspected without Proper Fare																	X			
2	29	% Cited for Fare Nonpayment				Y													X			
3		Ridership Average (# Passenger Trips/Million)																				
3	1	Daily Ridership (Weekdays, Saturdays, Sundays/Holidays)																X				
3	2	ADA Passenger Trips																X				
3	3	Transit Mode Split		The proportion of people who use transit in comparison to the people who use other modes of transportation.														X				
3	4	# of Environmental Initiatives developed or Supported by RT Annually				Unknown	?	?	?	?	?	Data not collected or reported from Admin Division.	X	X	X	X	X	X	X	X	X	X
3	5	Transit Service Availability within 1/4 mile of "high transit need zones"		Title VI Fixed Facility Impact Analysis		Planning has Title VI	?	Yes	?	Yes		Data not collected or reported from Admin Division.					X					
4	1	# / % Eligible Employees Receiving Timely Performance Evaluations				No	No	No	No	No	Yes	Evaluations performed sporadically throughout the District.	X	X	X	X	X	X	X	X	X	X
4	2	# / % Employee Turnover				As requested	HR Dept	As needed	As requested	As requested		Data is reported as requested by GM/EMT. Data not regularly reported.	X	X	X	X	X	X	X	X	X	X
4	3	# Employee Suggestions				No	No	No	Unknown	Unknown		Employee suggestion program officially exists but is rarely used. Suggestions are collected and reviewed by HR staff.	X	X	X	X	X	X	X	X	X	X
4	4	# / % Employee Suggestions Implemented										Am still working on determining a response (HR issue)	X	X	X	X	X	X	X	X	X	X
4	5	# / % Employees Completing Customer Service Training										Data not collected or reported from Admin Division.	X	X	X	X	X	X	X	X	X	X
4	6	# / % Employees Receiving Skills Training Annually										Am still working on determining a response (HR training issue)	X	X	X	X	X	X	X	X	X	X
4	7	# / % RT Managers and Supervisors Completing Core										Don't understand the KPI. "Completing Core" what?	X	X	X	X	X	X	X	X	X	X
4	8	Management/Supervisory Training Modules										Am still working on determining a response (HR training issue)	X	X	X	X	X	X	X	X	X	X
4	9	% Annual VTT Operator Training Completed On-Time										Data not collected or reported from Admin Division. This is an Operations Division question.	X	X	X	X	X	X	X	X	X	X
4	10	RT Compensation at Median of Local Governmental/Peer Transit Labor Market				No	No	Yes	No	Yes	Unknown	The District periodically has a salary survey performed on all union and non-union positions. Contract managed in HR.	X	X	X	X	X	X	X	X	X	X
4	11	% Core Positions (management/technical skills) Covered by Succession Plan				No	No	No	No	No	Yes	A Succession Plan for core positions has never been established / implemented.	X	X	X	X	X	X	X	X	X	X
4	12	% Core Positions with Established Competency-Based Model				No	No	No	No	No	Yes	No positions have been established on a "Competency Based Model".	X	X	X	X	X	X	X	X	X	X
4	13	Accomplishment of EEO/AA Program Goals	Y			Unknown	EEO/AA Officer	Yes	Yes	Yes		Reported through the GM's office	X	X	X	X	X	X	X	X	X	X
5	1	No Code of Ethics Violations				Unknown	Legal Office?	Unknown	Unknown	Unknown		This would be reported out of the Legal Office	X	X	X	X	X	X	X	X	X	X
5	2	No Conflict of Interest Policy Violations				Unknown	Legal Office?	Unknown	Unknown	Unknown		This would be reported out of the Legal Office	X	X	X	X	X	X	X	X	X	X
5	3	# / % of management/Supervisory Employees and RT Board Members Trained on RT Ethics and Conflict of Interest Policies				No	No	As needed	As requested	Yes		HR collects and reports as requested. Not reported on a regular or consistent basis.	X	X	X	X	X	X	X	X	X	X
5	4	Unqualified External Annual Financial Audit Report				Unknown						Finance Division ?	X	X	X	X	X	X	X	X	X	X

2004 Strategic Plan KPIs Evaluation

2004 SP Goal #	KPI # for indicated Goal #	Key Performance Indicators (KPI)	Vital Statistic (Y/N)	Definition	Currently Reported in KPR?	Currently Reported Elsewhere? Where?	Currently Collected?	Previously Reported?	Previously Collected?	Never Reported?	Never Collected?	Comments: If not currently reported, please explain why this KPI is not reported. If currently reported, please relay any concerns about the use of this statistic or the accuracy of the estimate.	GM	LC	A	FI	PL	OP	MC	FA	EC	
5	5	No Repeat Audit Deficiencies			Unknown							Finance Division ?	X	X	X	X	X	X	X	X	X	X
5	6	"Satisfactory" FTA Triennial Audit (no major deficiencies)			Unknown							Finance Division?	X	X	X	X	X	X	X	X	X	X
5	7	Satisfactory TDA State Audit			Unknown							Finance Division?	X	X	X	X	X	X	X	X	X	X
5	8	Satisfactory PUC Audit			Unknown							Operations Division?	X	X	X	X	X	X	X	X	X	X
5	9	Satisfactory Caltrans Audit			Unknown							Operations Division?	X	X	X	X	X	X	X	X	X	X
5	10	% Achievement of Annual Disadvantaged Business Enterprise (DBE) Program Goal			Unknown							Procurement Department	X	X	X	X	X	X	X	X	X	X

2004 Strategic Plan KPIs Evaluation Reference Sheet

Goal References

Goal #	Goal Description
1	Secure the financial means to deliver our services and programs.
2	Provide total quality customer service.
3	Create a "world class" regional transit system.
4	Be a great workplace, attract and retain a qualified, talented and committed workforce.
5	Conduct our business in a sound and ethical manner.

Reporting Status

Status Abbreviation	Description
Y	Yes
C	May be quickly calculated using information provided in the KPR.
S	Similar information is presented in the KPR.
P	Partially reported.
KPI	Key Performance Indicator

Department/Division

Department Abbreviation	Title
GM	General Manager/CEO
LC	Chief Counsel
A	Chief Administrative Officer
FI	Chief Financial Officer
PL	Assistant General Manager of Planning and Transit System Development
O	Chief Operating Officer
MC	Assistant General Manager of Marketing and Communications
FA	Chief of Facilities & Business Support Services Division
EC	Assistant General Manager of Engineering and Construction

KPI Initial Review Summary

Count	Item
68	# of KPIs identified in 2004 Strategic Plan
17	# of Vital Stats identified in 2004 Strategic Plan
10	# of Vital Stats Currently Reported in monthly Key Performance Report
14	# of KPIs Currently Reported in monthly Key Performance Report

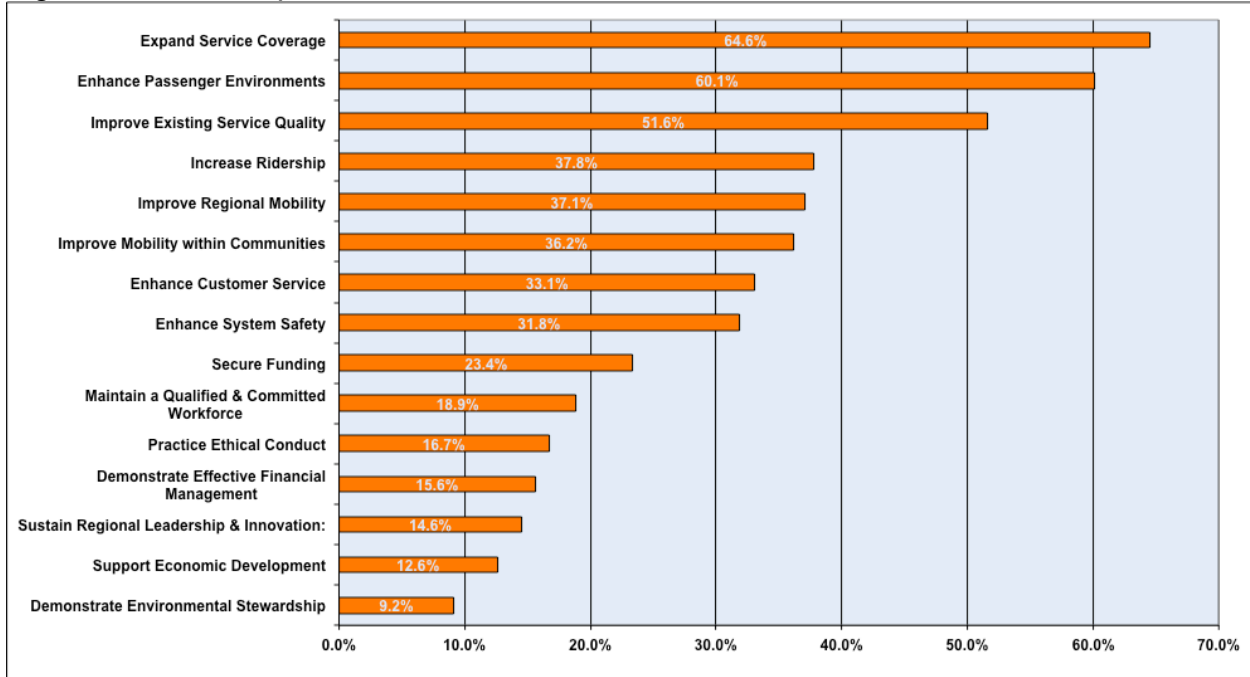
Appendix B: Public Online and Printed Survey Results

Public: Printed / On-site Survey

Figure B1: Printed Survey Results: Goals Input

Response to: What matters most? Achievement of which of the listed goals do you believe to be most important to RT's successful fulfillment of its role as a regional public transportation provider? Please select up to five goals by checking the box to the left of the goal.

Figure B1: Most Important Goals



*Based on 556 completed surveys

Public: Printed / On-site Survey

Table B1: Printed Survey Results: Free Comments*

Count	Free Comment
1	Most of the drivers are very nice. Others could use training.
2	Student rates for students 18 and over.
3	to the airport.
4	Student rates for students who are 13 & 19.
5	seat belts/ & buses waiting for light rail
6	24 hour light rail - less drunk drivers - more night life activity (\$\$) spent in Sacramento
7	STOP/ CESSATION (sp.) OF SMOKING IN RT OPEN AREA 20' OF STATION
8	Cleanliness of trains & stations, fix lights @ 16th St
9	Improve bike service Light Rail & Bus
10	More room for bicycles at ends "Remove one seat" more hangers
11	* Keep the 95 Bus Running - Do Not Cancel Route! :)
12	busses don't show up bus drivers are mean
13	Yuba City/Marysville
14	stations need a good architect
15	ADD BIKE SPACES rider behavior
16	make 19 run longer on weekends & more often than every hour
17	Desire Scott
18	Increase volume of audio announcements
19	For passengers to board back be available. Return the light rail schedule. On-going-lower noise, disturbing passengers Bring back 101 in the morning & evening Have the bus 19 & 80 run on weekends longer
20	Later time travel
21	Bring 101 line back Security is really good, the gentlemen in the yellow jackets are for the most part very helpful
22	Bus service to Antelope and Sunday service
23	Jeanine at call center was on bus 68 and talking about how customers are irritating
24	Provide car seats and safety restraints for babies and children and adults
25	Expand to Natomas from Carmichael. 82 Driver at 7:45ish is great. The 80 or 84 early at Watt & Mission at 6:56

**All comments are shown as they were submitted. Grammatical and spelling errors have not been corrected to avoid inadvertently changing the meaning of comments.*

Public: Online Survey

Figures B2 & B3: Online Survey Results: Goals Input

Response to: What matters most? Achievement of which of the listed goals do you believe to be most important to RT's successful fulfillment of its role as a regional public transportation provider? Please rank the following goals numerically with 1 representing the goal that you believe to be most important and 15 the least important.

Figure B2: Top 5 Goal Rankings (percentage of times goal received a ranking of 1-5)*

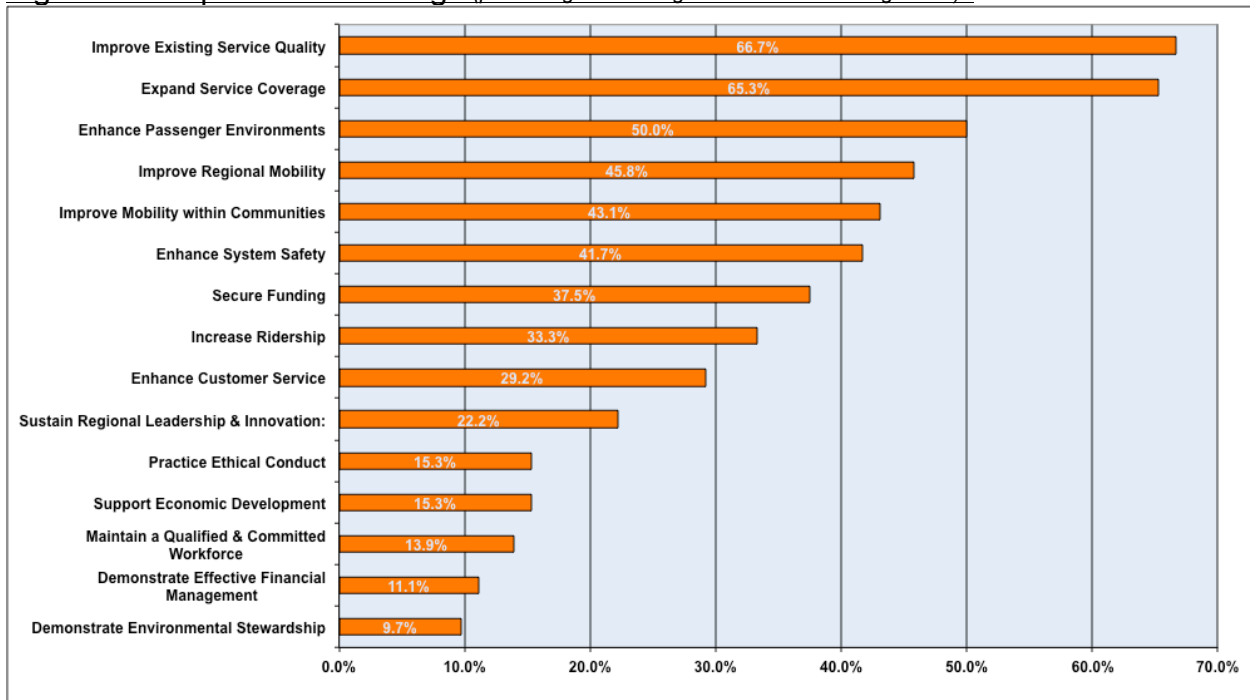
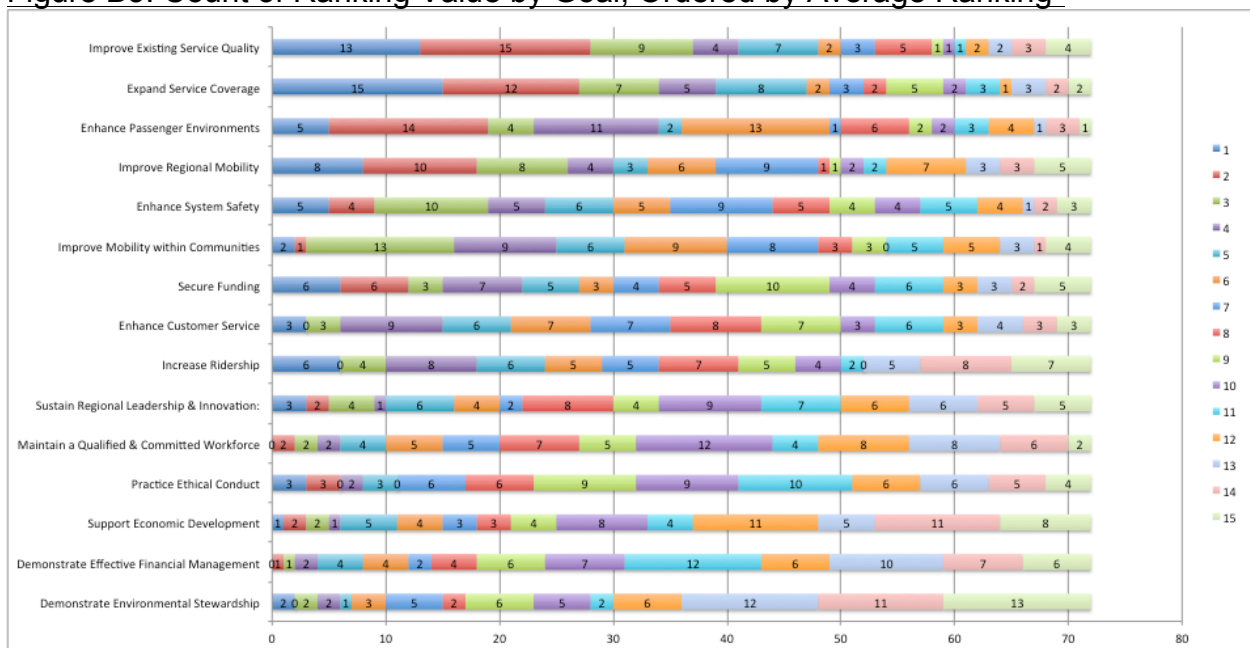


Figure B3: Count of Ranking Value by Goal, Ordered by Average Ranking*



*Based on 72 responses

Public: Online Survey

Figures B4, B5 & B6: Online Survey Results: Challenges Input

Response to: Which of the following challenges do you believe to present the most significant obstacles to RT's successful fulfillment of its role as a regional transportation provider? Please rank the following challenges numerically with 1 representing the issue that you believe to be most challenging and 5 the least challenging.

Figure B4: Top 3 Challenge Rankings * Figure B5: Average Challenge Ranking*
 (percentage of times goal received a ranking of 1-3)*

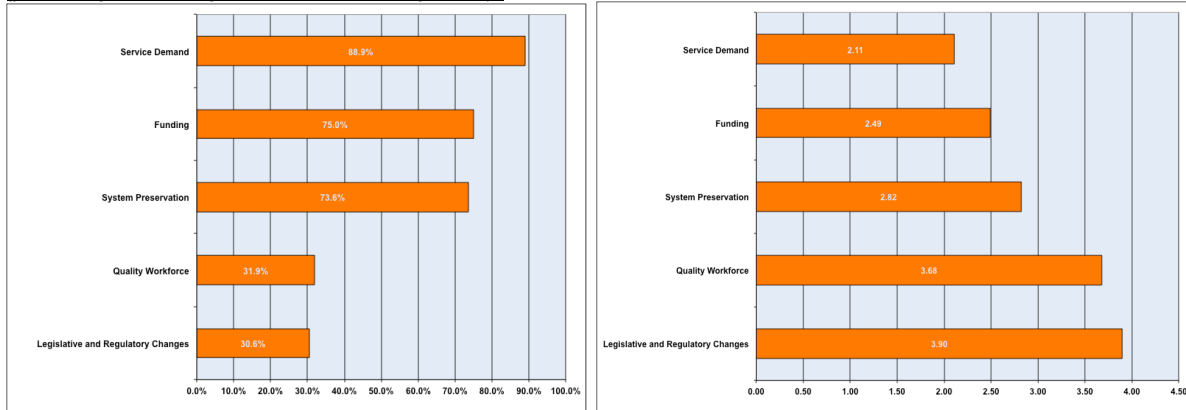
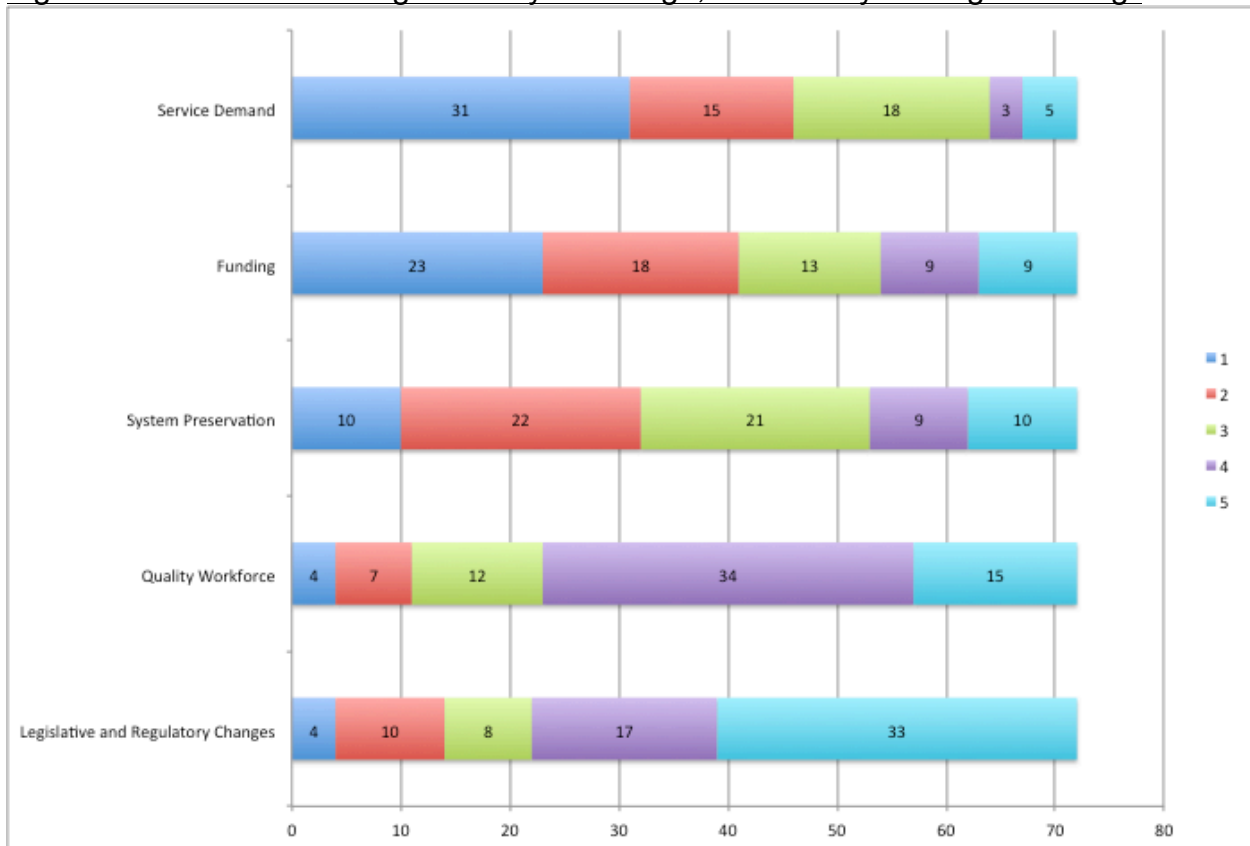


Figure B6: Count of Ranking Value by Challenge, Ordered by Average Ranking*



*Based on 72 responses

Public: Online Survey

Table B2: Online Survey Results: Free Comments*

Count	Free Comment
1	The bus is too expensive. If I didn't receive a bus pass from my school I wouldn't be able to afford to ride the bus. I can't afford gas money either so I'd be out of luck. Also, please clean the buses more often. The seats have a lot of gross stains.
2	Ethical conduct covers spending, environmental stewardship and safety. Ridership will increase when the system allows riders easy access to the light rail from their neighborhood. Right now 2 hour commutes are common and only to a few destinations.
3	Question #1 has too many choices. After choosing 1, 2, 3, 4, it is overwhelming unless you have lots of time to categorize.
4	I think it is doing a good job where they go, but I would like to see bus service along Folsom blvd. between Butterfield and Mather.
5	There should be a bus that goes from sunrise mall to nationals shopping center straight down greenback/elkhorn. While I live in Rio Linda, it takes me about 1 hour and 30 minutes to get to nationals shopping center which is a 5-10 minute drive. It also takes around 2 hours to get to sunrise mall from here. Those are two major attractions and it seems that a lot of people would benefit from it. It would cut about an hour out of my daily commute on the bus.
6	Sometimes it is hard to understand how RT decides how many cars are on a train. For example, for the Gold Line, after 6:00 pm, there are only two cars going to Folsom, but there are four cars on the Sunrise trains. Also, please restore late night trains, if nothing else, on weekends. We would go into downtown Sacramento more often, but we can't count on the trains to get us home since they stop running so early, and they only run every 30 minutes.
7	Since the school district discontinued bus service, there are a lot of kids walking home from school. I would like to see buses that go from the schools to the edges of the school boundaries in one trip. Or altered routes at school attendance times.
8	run more vehicles and more transportation vehicles as well as more lines
9	Focus on doing a few things really well to drive demand for quality transit
10	I commute from Folsom to Downtown Sacramento Monday through Friday. I rarely use light rail to commute due to the substantial increased travel time vs driving. Add that with the fact Folsom trains only run every 1/2 hour and it is not a convenient/efficient mode of transportation. I would appreciate RT looking into commuter lines (end of line-end of line) as an additional service. I would ride every work day if it was more convenient. Thank you for the opportunity to express my concerns
11	Build-out of light rail would seem to be your biggest stumbling block, factored in with lack of security that is showing up with some of the mentally ill or homeless people who ride the trains. This is a community problem, not necessarily your problem.
12	In general, you need to do what you can to aggressively expand and improve transit in the region leveraging light rail, streetcars/trams, and bus rapid transit. The focus should be on aggressive build out and expansion of those modes with dedicated rights of way with the goal of providing convenient transit as a viable mobility mode. What does that mean? Basically, it means you need to stop thinking of transit as a commuter alternative and start thinking of it as a general mobility option. It should be designed for a multitude of uses such as commuting, running errands, shopping, visiting friends and family. As it is currently designed, it serves only one function: commuter alternative. Stop thinking of it as an alternative and start thinking of it as a choice and make it as close to convenient as the car. That means significantly reducing the number of transfers required, improving service frequencies (especially during perceived periods of "low use"), making trains more bike friendly and promoting non-vehicle modes such as the bicycle as a solution to the "last mile" problem.
13	Nothing to add.

**All comments are shown as they were submitted. Grammatical and spelling errors have not been corrected to avoid inadvertently changing the meaning of comments.*

Table B2: Online Survey Results: Free Comments* CONTINUED

Count	Free Comment
14	RT gives the impression they are REGIONAL but in actuality they are within the confines of Sacramento City exclusively. Placer County is yet to receive any benefit to their contributions regarding regional transit. I have looked into using the actual regional transit system to travel from Roseville to Natomas and according to the schedule, if I leave at 6:00 PM I will arrive at the nearest bus stop to work by 7:00AM the following morning with a 8 hr layover at the longview transfer station. Nice system ya got there.
15	Clean the stations and repair broken lighting!
16	Please continue to expand light rail.
17	Make the rail system more usable in the downtown and midtown core of the city. Have obvious service maps and station names displayed.
18	Bus 24 serving Orangevale: Weekend service needed to connect to Sunrise/Arcadia. Taxpayers, like myself who work weekends, and retailers in Orangevale/Folsom, will gain revenue for the communities with weekend service. Sidebar: Bus10: Although this is Folsom Stage Lines, it also does not provide weekend service. I work 6 days a week (Mon-Sat), have been a monthly pass rider for 7 years. Sat. taxi service adds 120.00 per month to get to Orangevale from Folsom or Citrus Heights. Thank you for asking us and taking surveys,
19	Please extend hours of travel to/from Folsom to 9 pm, at least!
20	I think it is great your are connecting to Calvine!
21	The services do not run late enough for regular working people who do shift work. There should be a collection of "owl" routes, like they have in san francisco which run 24 hours a day. along the major corridors such as Stockton Blvd to Florin and all the of the light rail lines should have at least hourly service between midnight and 5 am. In San Francisco this is done using buses running parallel to the rail lines for owl service. 24 hour service means that people who must work odd hours don't have to be stranded. I
22	Clean up station platforms. Provide on site security at LT Rail parking lots during operating hours, not just peak times. More presence of ticket and law enforcement personnel onboard trains. Replace ticket machines that only accept cash with models that will also accept atm/debit and credit cards.
23	I truly believe that Sacramento can and should have the best transit system in all of CA. In L.A. if you wait for a bus for ten minutes, that's waiting ten minutes to long. This is the state capital-for crying out loud. I lived in Seoul, South Korea for two and a half years-now that's a real city! Sacramento, which I call Sactucky is a joke compared to there! We should have 24/7 transportation-at least the light rail trains. In San Jose, some buses run 24/7-and are 2 buses stuck together-even. San Jose even has a free shuttle service from the Amtrak station to the downtown area! The light rail train extension from Meadowview station to the Cosumnes River College, and the Airport extension should have been done 20 years ago! When I was in Seoul, a real city, they have a subway system with like 280 stops-and it took you everywhere for like \$2.00 each way, back in 2000-2003. Thanks.
24	Developing more bus schedules to run every fifteen minutes. Use the #1 bus as an example. It can be used in some ways to circumvent other lines that run every half hour or even every hour. If a few more major arteries could be developed, or existing ones improved, in order to have a more robust modern system with only a minimal increase in funding, then riding the transit system would be more functional. Currently, there are locations I can get to in twenty minutes by auto but that can take one to one and one half hour to arrive by public transit. A functioning transit system should get people to their appointments on time without having to leave an extra hour or more early in case one's bus is late and the connection is not.

**All comments are shown as they were submitted. Grammatical and spelling errors have not been corrected to avoid inadvertently changing the meaning of comments.*

Table B2: Online Survey Results: Free Comments* CONTINUED

Count	Free Comment
25	<p>Bring back transfers! If your destination is not on the light rail line, your chances of getting from point A to point B on one ticket is pretty much zero. If where you're going is not on the rail line, you might as well buy an all day pass.</p> <p>It might help cut down on light rail fare jumpers if you had a lower priced 3- or 4-stop fare. It's just too tempting to risk a fine rather than pay full fare to go such a short distance, but most people would pay 50 or 75 cents for a short distance ticket. Maybe even a dollar for 4 stops. I'd bet you'd see an increase in revenue without having to pay for additional personnel to check tickets. Most people will be honest as long as they don't feel they're being gouged by doing so. \$2.50 to go 1-3 stops is ridiculous. Btw, the 2 hr time on light rail tickets is a real boon - please don't go back to 90 min. Schedule so that routes intersect in a timely manner. More than half the time, one bus will arrive 5 minutes after the connecting bus has left, so what could have been a 30 minute trip ends up taking an hour and a half, with 55 minutes of that being waiting for the next bus. If working out the intersections is impossible, then you should increase the frequency of those buses.</p> <p>Require that anyone with authority to make decisions about RT routes and schedules go a minimum of one week (two would drive the point home more clearly) using only RT to get around town for *everything,* not just their commute. It's clear that people who drive, or who can drive when RT isn't convenient (or running at all) do not have the first idea about what it's like to depend on this retrograde system. Your executives are just pushing paper and numbers around like abstract puzzle pieces and are satisfied when the pieces fit, even if that configuration actually serves no one in real life.</p>
26	<p>I have noticed over a period of 3 years riding both light rail and buses daily, that you have inadequate plans in place for emergency situations. i.e. When the light rail broke down at Watt/Manlove about 5 or so weeks ago, the signs at other stations indicated there would be shuttle buses to take us past the station to the other various stations we would need. My understanding is that the occurrence that prevented the light rail from running happened at 2:30 am, yet by 6 am there were still no shuttle buses, and no word as to when they might get there. This should not have happened. There was plenty of time to get things happening by the time the light rail began running. I used to ride the opposite direction, toward downtown, and it seemed that every time something came up that involved the light rail, an accident, people being hit, etc. it was hours before anything actually took place to continue service as necessary. I feel strongly you need to develop a contingency plan that can be put into place quickly and efficiently.</p>
27	<ol style="list-style-type: none"> 1. Light rail to Davis 2. Expand service hours, including weekends that were cut.
28	<p>There aren't many (if any) transit systems in the US that charge \$2.50 for a single ride with no transfers. That is an exorbitant fare and penalizes people for riding short distances. Expedite the Connect Card process and move forward with distance-based fares. Divert funding for the light rail to nowhere (Green Line) to improve existing service and to hire more security for light rail. Contribute money to Yolobus' operation of routes 42A and 42B to increase express airport bus service, and develop new bus routes from other areas of the city to the airport. Bus investment remains more cost effective and flexible than funneling money into light rail. Investigate ways to better integrate commercial areas into bus routes/service plans. Some cities have offered to advertise local businesses on their transit in exchange for funds. Pursue more ways to get advertising revenue. Make bus and light rail more user friendly/tourist friendly -- announce bus connections at each light rail station and vice versa; this doesn't have to cost anything, just have the conductor announce them on the PA system. Explore express bus service and light rail service, varying fare structures depending on time of day, and altering time intervals of bus and light rail routes to better reflect demand and to improve cohesion/shorten transfer times between bus and light rail.</p>
29	<p>RT Personnel have extremely poor customer service. They are rude to passengers. They require training on providing quality customer service.</p>

**All comments are shown as they were submitted. Grammatical and spelling errors have not corrected to avoid inadvertently changing the meaning of comments.*

Table B2: Online Survey Results: Free Comments* CONTINUED

Count	Free Comment
30	It seems that are some improvements have been made while it has lacked in the areas of providing efficient, timely and frequent ridership. Cleanliness is my issue with riding RT but I would rather because I am trying to make an impact on the environment.
31	Sacramento needs a 24 hour transit system. Many people work odd hours, and they need to get home too. Being able to take a train or bus home after going to a club or bar will reduce drunk driving. Entertainment money will be spent by riders, the city's economy would likely improve, and more tax money generated\$\$! Even if this was a \$\$\$ loss to RT, the bennifit to Sacramento as a whole would be immense. Reducing drunk driving is a hot-button issue... perhaps there is a grant that would help offset the cost? I strongly feel that light rail and major bus lines should run at least once an hour.
32	Need buses to run more frequently in the South Sac area--such as bus 65. It should run on weekends, and run more frequently during the week, and stay on later into the evening. The area of Franklin Blvd between Florin and Mack Roads has a much greater population now due to recent development of the area. More frequent buses are needed! Also buses that DO NOT QUIT after 6 or 7pm.
33	Also consideration to running better connections between South Sac buses and Elk Grove.. 21 needs to run earlier and more complete runs along with 13
34	Some weekend services such as the 21 bus line have big problems. If I needed to get past the sunrise transit center and go towards roseville before 11 am, I wouldn't be able to. There are several bus lines with similar issues that are all on the weekend schedules.
35	RT continues to expand rail service while reliability, safety and cleanliness all suffer. There is insufficient support for each expansion.
36	Light Rail should extent past Watt towards Roseville. It would be nice if staff were available to help people with bikes load/unload on/off train or other activity. More bike lockers available at affordable rates for low income commuters. More routes needed in North Highlands area. Enforce the Disabled Seating availability for the Disabled or for those with carts/strollers. Create a reporting system for drivers that speed/brake hard or are just rude. Drivers should always offer ramp to those with shopping carts. Routes could be better synchronized with transferring to other buses/light rails. I'm getting too old to run.
37	We need more jobs provided. By RT to make it larger routes to make it more effective
38	Planning and political support for transit oriented development must be strengthened. RT needs to leverage demographic changes among youth, with car ownership declining, to build familiarity and comfort with public transit among this group. Building and re-instituting school transportation routes would be a good way to introduce youth to transit.
39	I feel that communicating the benefits of RT to the community is vital to the growth of the system. Funding will always be a challenge, but without demand from the public, it will prove even more difficult as budgets continue to get squeezed.
40	I'm sick of the bums messing around for bus fair while the bus is moving. I'm also sick of people playing their loud music, leaving their food and trash on the bus, and spitting in the bus. Let's address that. It's also time for RT to have their own bus to the Sac Airport (as oppose to the Yolobus 42). And, if possible, extend 7-day bus service to midnight. Sacramento's a capital city, and cities like Reno and San Francisco are beating us up. With that being said; thank you so much, regardless.

**All comments are shown as they were submitted. Grammatical and spelling errors have not been corrected to avoid inadvertently changing the meaning of comments.*

Table B2: Online Survey Results: Free Comments* CONTINUED

Count	Free Comment
41	An opportunity and challenge up and coming is enhanced service in Downtown Sacramento with the new Entertainment Sports Complex set to open in Fall 2016. How will public transit agencies throughout the Six County Sacramento Region bolster their service levels to/from the Downtown Entertainment Sports Complex by Fall of 2016 and be in compliance with this provision of State Senate Bill 743 (CEQA Modernization)?
42	Improve hardware and software system wide as needed.
43	Watt/I 80 station needs a complete facelift. Replace stairs with circular ramps with open grate fencing. Change elevators to clear doors. Both should help with urination issues on stairs and elevators. Circular ramps would still allow disabled access if elevators not working.
44	The light rail service is deteriorating, in several senses: quality and reliability of equipment, cleanliness of railcars and stations, maintenance of track, motor vehicle interference with trains on shared streets. Overall, the system is really showing its age, using 30 year old technology and equipment that does not meet current standards for ADA, level boarding, bicycle accommodation, and operation of doors. So, I think the most important strategic issues are to maintain and enhance the light rail system to reverse the deterioration.
45	The DNA line from downtown to the airport must become the agency's top priority now that phase 2 to CRC is under construction. This is a critical gap in the light rail network that needs to be addressed. Continued work with the city of Sacramento on the Truxel bridge, as well as working with the County to elevate this priority should be a primary focus in the immediate future.
46	Put additional resources also on cleanliness on buses on light rail. Enforce rules. Also have an emphasis on frequency of bus routes and have more express bus service.

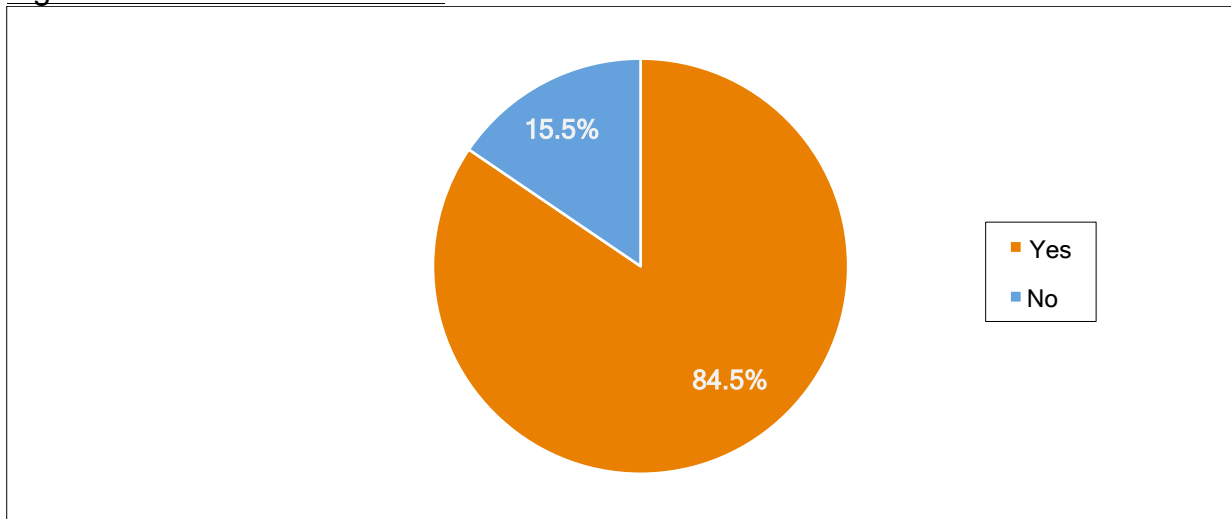
**All comments are shown as they were submitted. Grammatical and spelling errors have not been corrected to avoid inadvertently changing the meaning of comments.*

Appendix C: Staff Online Survey and Voting Board Results

Employee: Online Survey**Figure C1 & Table C1: Employee Online Survey Results: Mission Evaluation**

Response to: Do you believe that RT's current mission statement (shown below) accurately describes RT's purpose? Mission statements relay agency's purpose and reason for existing. RT's Current Mission Statement: The purpose of the Sacramento Regional Transit District is to promote and enhance regional mobility and serve the public by providing quality transit services and solutions that improve the overall quality of life in the Sacramento Region. If you answered "No" to the question above, please explain why and relay what you would like to add or remove from the current mission statement.

Figure C1: Mission Evaluation*



*Based on 97 responses

Table C1: Mission Evaluation*

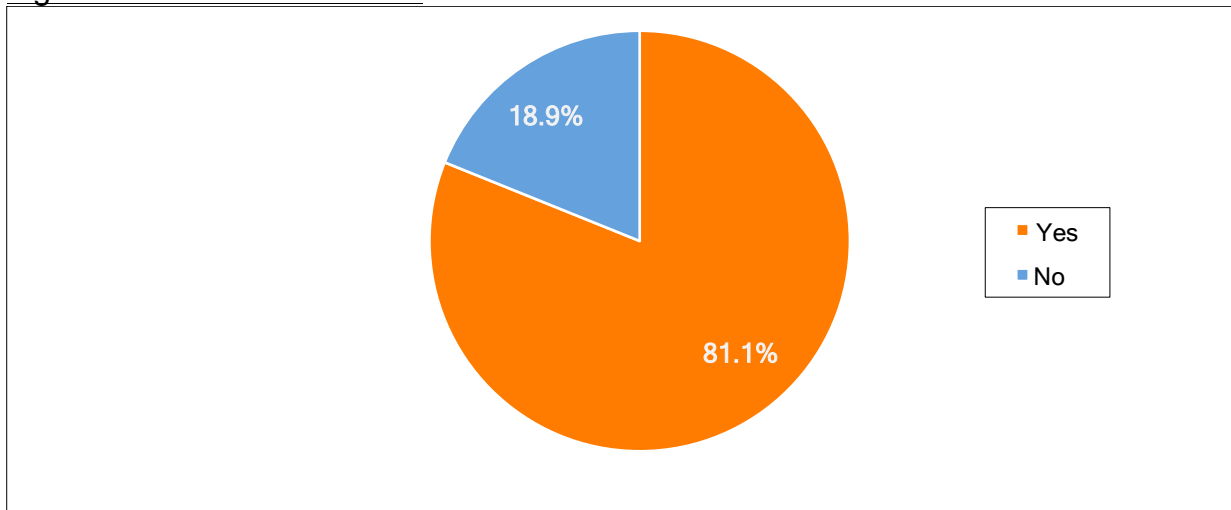
Count	Free Comment
1	The mission statement does not seem to drive the top priorities.
2	there is a glaring lack of securtiy on RT' buses and trains. they're dirty, they smell bad and service to passengers is less than quality.
3	The statement is great, but I don't feel that it is what is actually excuted.
4	I would propose: "The purpose of the Sacramento Regional Transit District is to promote and enhance regional mobility and serve the public by providing clean, reliable, safe transit services that improve the quality of life in the Sacramento region."
5	Streamline and simplify. Add "... providing safe and reliable"
6	I think it weakens the statement to use the word "quality" twice; the meaning is accurate, but the sentence could be improved.
7	I don't have a clear picture of how we "promote and enhance regional mobility". The rest is easier to communicate and understand.
8	...serve the public by providing affordable, quality.... continuously strive to improve the overall quality of life.....
9	However, the Construction and Project Managers do not have the philosophy ar RT to build a high quality product since they are most concerned about a scedule or budget driven project.
10	BECAUSE IT HAS MANY FLAWS. TIME AND NOT ENOUGH SERVICES IN AREAS THAT ARE NOT SERVICED.
11	RT does not provide quality transit services. The vehicles are filthy and a lot of the drivers are rude and there is no planning to branch out to places like Roseville.
12	"Solutions that improve the overall quality of life" is too over reaching.
13	I would like to add/change as follows: The purpose of the Sacramento Regional Transit District is to promote and enhance regional mobility and serve the public by providing safe, reliable, and efficient quality transit services and solutions that improve the overall quality of life in the Sacramento region
14	I don't think our purpose is to improve quality of life, just focus on SAFE reliable public transit focusing on reducing traffic congestion and improving mobility
15	I think the mission statement is good in theory, but it does not appear to be what RT is doing. It seems that the District is more interested in expanding and improving our political position in the region rather than making fiscally responsible decisions on expansions and contractions of service.
16	I would remove the promotion and ehancement. We provide bus and LR service based on available tax resources, we should not celebrate this effort and attempt to create a transit fiefdom.

**All comments are shown as they were submitted. Grammatical and spelling errors have not been corrected to avoid inadvertently changing the meaning of comments.*

Figure C2 & Table C2: Employee Online Survey Results: Vision Evaluation

Response to: Do you believe that RT's current vision statement (shown below) reflects the services and benefit that customers and stakeholders hope to receive from RT? Vision statements show where an agency wants to be in the future. RT's Current Vision Statement: A coordinated regional public transit system that delivers quality and environmentally sensitive transit services that are an indispensable part of the fabric of the communities throughout the Sacramento region. If you answered "No" to the question above, please explain why and relay what you would like to add or remove from the current vision statement.

Figure C2: Vision Evaluation*



*Based on 95 responses

Table C2: Vision Evaluation*

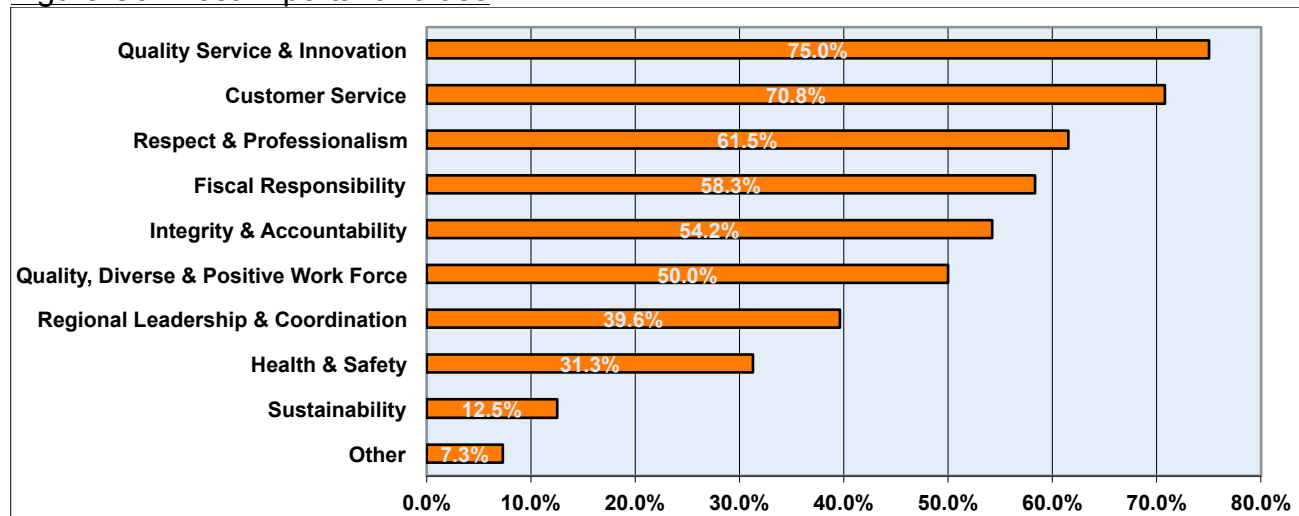
Count	Free Comment
1	Environmental concerns are rarely publicized or even mentioned.
2	RT is not nearly as coordinated and efficient as it should or could be. Primarily because, even though RT is a medium to small size agency compared to other large cities, the agency suffers from the typical internal dysfunction, bloated overhead and inefficiency you see in a large agency like AC Transit or Santa Clara. Because of this, RT is unable to bring systems like Roseville, Elk Grove, Folsom, Yolo, etc under its umbrella and better coordinate. And instead settles for the limited footprint and coordination it now has.
3	not sure i understand what this means exactly
4	This is a great start. We also need to add reliable and safe. We cancel too much service and people are afraid to ride our system with all of the bad publicity we've been receiving-especially the light rail after dark.
5	Although I really don't like that vision statement; needs to be revamped for the 21st century
6	I believe safety and cleanliness is very important to our riders.
7	I would propose: "A coordinated regional public transportation system that delivers reliable, safe, and environmentally sensitive transit services connecting the communities throughout the Sacramento region."
8	Again, simplify and consider your audience and who we're trying to reach; i.e. "indispensable part of the fabric of communities" is overstated. Use more commonly acceptable wording.
9	The vision should express our desire to expand, enhance and improve the system. We are in desperate need of more service.
10	quality, affordable,...
11	RT is working and trying to provide this but there are issues as part of not having a District wide Quality Program that brings in consistency or work.
12	IT IS NOT SERVICES LOT OF PARTS OF SACRAMENTO. THE QUALITY IS NOT REALLY GOOD.
13	I like the vision stated in the TransitAction Plan better (though it's a little long). Suggest using the word "sustainable" rather than env sensitive. I don't like "indispensable part of the fabric of communities" - maybe say "integrated part of the community"?
14	RT does not deliver a quality transit service, but the rest is accurate.
15	The word "quality" is rather open to interpretation. We could be more specific by changing that to "attractive, efficient, effective".
16	I would like to add/change as follows: A coordinated regional public transportation system that delivers safe, reliable and efficient quality transit services that are environmentally sensitive and sustainable and are an indispensable part of the fabric of communities throughout the Sacramento region.
17	Almost there but a little flowery language
18	What about fiscally responsible service. We are primarily funded with state/local tax revenue and federal funding, how are the individuals paying taxes seeing the benefits of our system. I see empty Paratransit buses on a daily basis and that is a waste of tax payer money. I know the service has to be provided, but it needs to be taken out to bid and have the cost reduced. \$12 million + per year to drive empty buses around the city is obscene.
19	You should add - economically feasible/responsible.

**All comments are shown as they were submitted. Grammatical and spelling errors have not been corrected to avoid inadvertently changing the meaning of comments.*

Figure C3 & Table C3: Employee Online Survey Results: Values Input

Response to: Which of the following organizational values do you feel are most important to RT's successful execution of its mission and role as a regional leader and public agency? Organizational values are those things that an agency considers to be most important. Goals will be developed with consideration of identified values. Please select up to five (5) values.

Figure C3: Most Important Values



*Based on 96 responses

Table C3: Most Important Values: Other (please specify) responses*

Count	Free Comment
1	Restructuring internally, eliminating inefficient, dysfunctional employees, minimizing agency overhead.
2	Stop focusing on hiring a "diverse" workforce and focus more hiring the best qualified.
3	They are all integral!! Can not choose just 5.
4	Servant Leadership, and Transparency
5	Management style change towards more progressive and implementation of state of the art technology and cultural image, so initiate a change to contribute to change the image of Sacramento
6	Cleanliness of LRVs on a dailey basis, seats, floors, ramps and interior doors.
7	Long term health of our system - who is looking at a ten to twenty year horizon? RT's service should be about the citizens and riders, not improving ones resume with fancy projects or full funding grant agreements. We are taking on projects that can not be sustained with our current funding sources and ridership levels.

*All comments are shown as they were submitted. Grammatical and spelling errors have not been corrected to avoid inadvertently changing the meaning of comments.

Figures C4 & C5: Employee Online Survey Results: Goals Input

Response to: What matters most? Achievement of which of the listed goals do you believe to be most important to RT's successful fulfillment of its role as a regional public transportation provider? Please rank the following goals numerically with 1 representing the goal that you believe to be most important and 15 the least important.

Figure C4: Top 5 Rankings (percentage of times goal received a ranking of 1-5)*

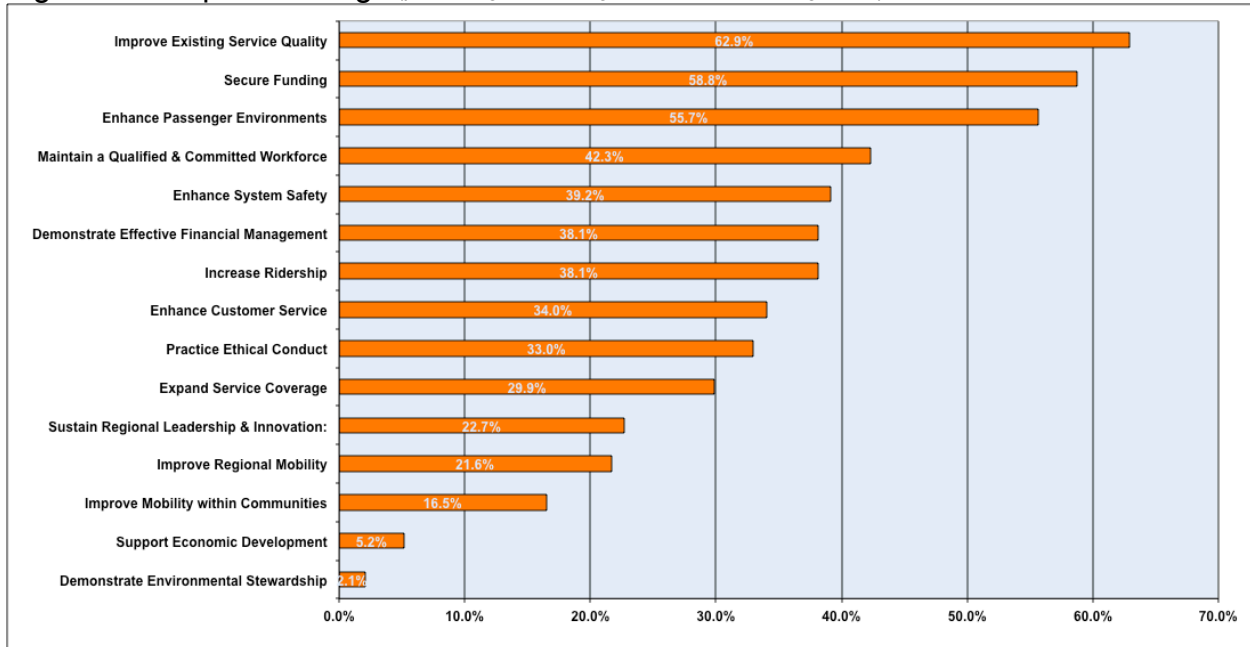
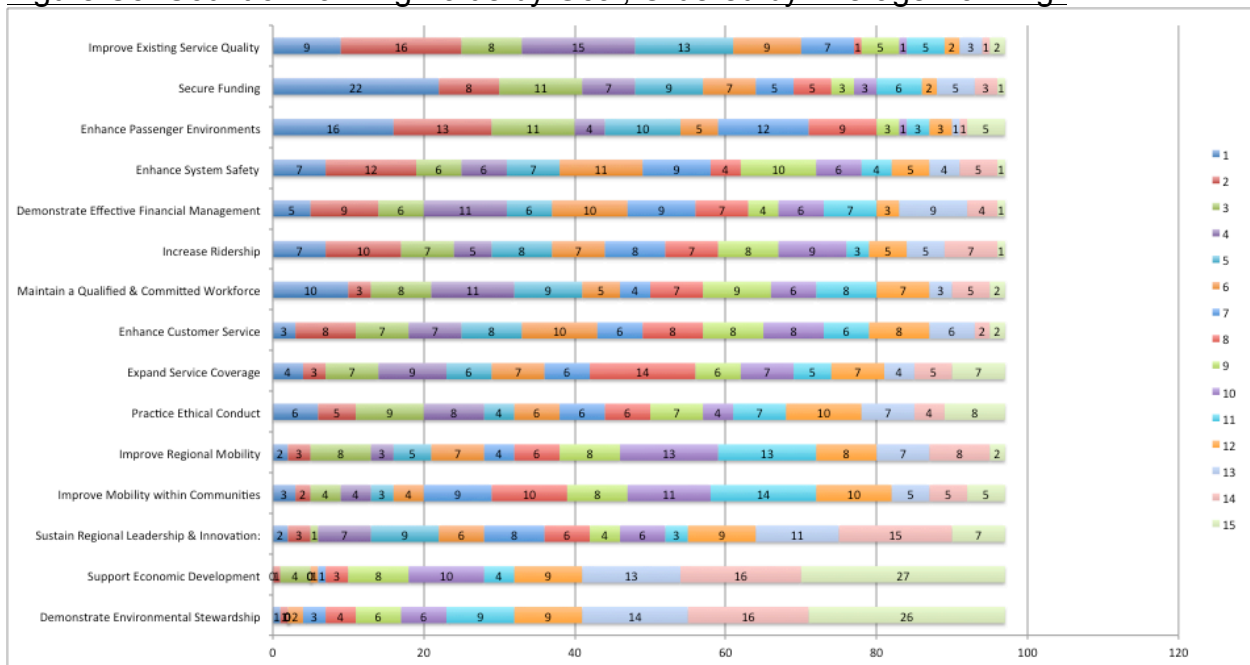


Figure C5: Count of Ranking Value by Goal, Ordered by Average Ranking*



*Based on 72 responses

Figures C6, C7 & C8: Employee Online Survey Results: Challenges Input

Response to: Which of the following challenges do you believe to present the most significant obstacles to RT's successful fulfillment of its role as a regional transportation provider? Please rank the following challenges numerically with 1 representing the issue that you believe to be most challenging and 5 the least challenging.

Figure C6: Top 3 Challenge Rankings* Figure C7: Average Challenge Ranking*
 (percentage of times goal received a ranking of 1-3)

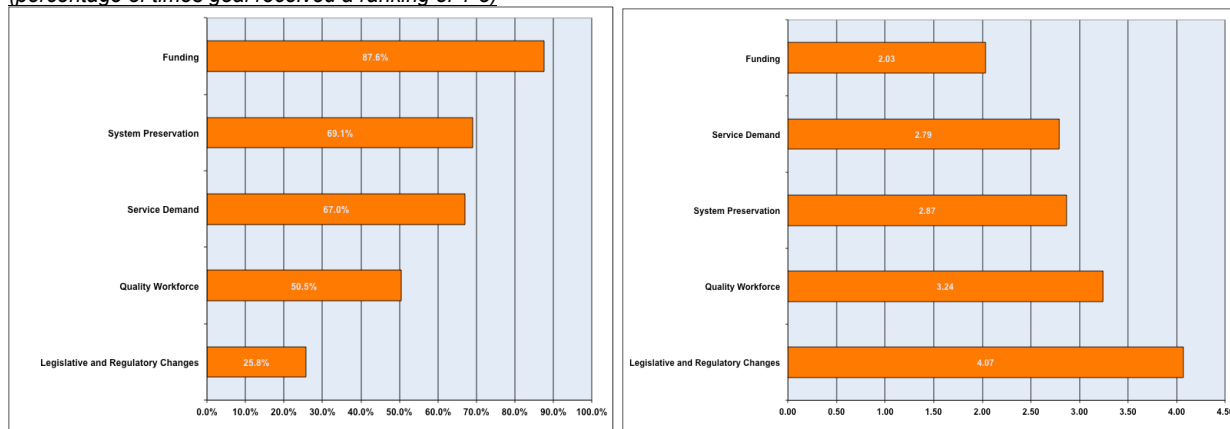
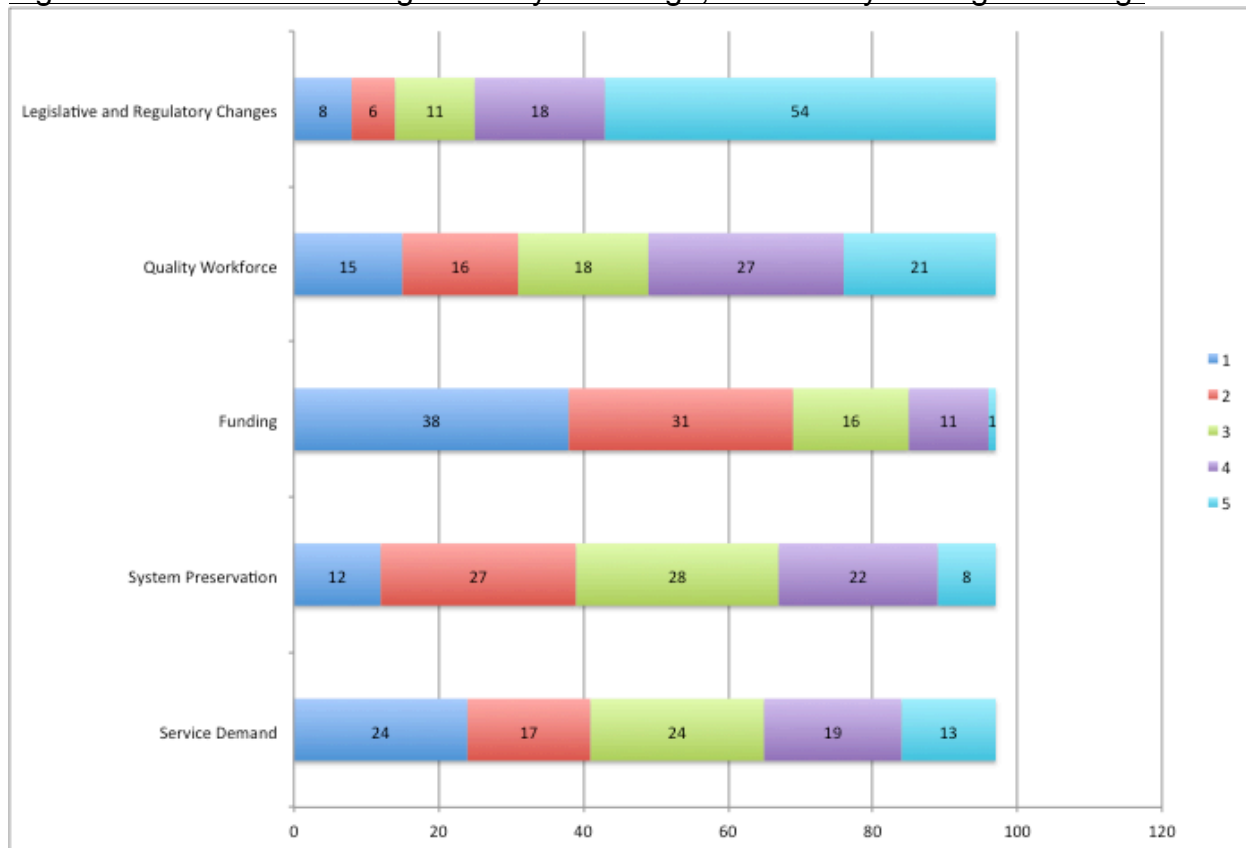


Figure C8: Count of Ranking Value by Challenge, Ordered by Average Ranking*



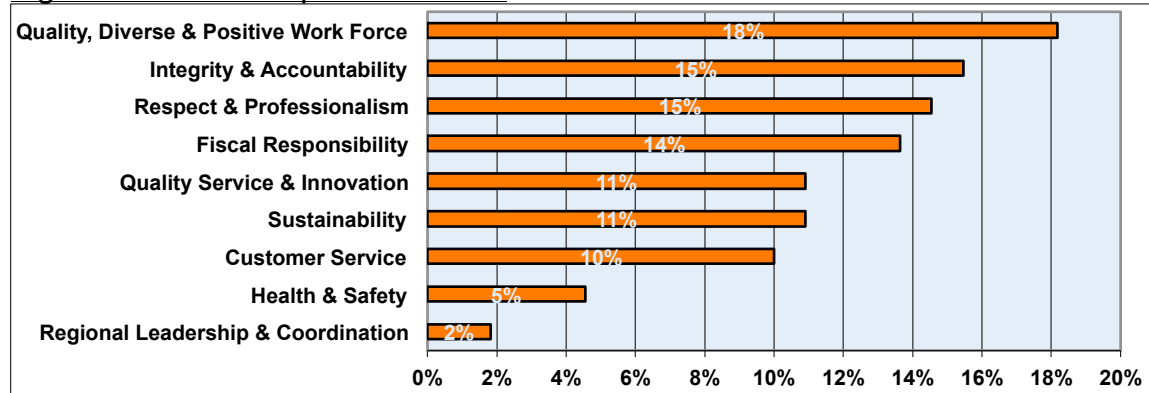
*Based on 97 responses

Employee: Voting Boards

Figure C9: Employee Voting Board Results: Values Input

Response to: Which of the following organizational values do you feel are most important to RT's successful execution of its mission and role as a regional leader and public agency? Organizational values are those things that an agency considers to be most important. Goals will be developed with consideration of identified values. Please select up to five (5) values.

Figure C19: Most Important Values

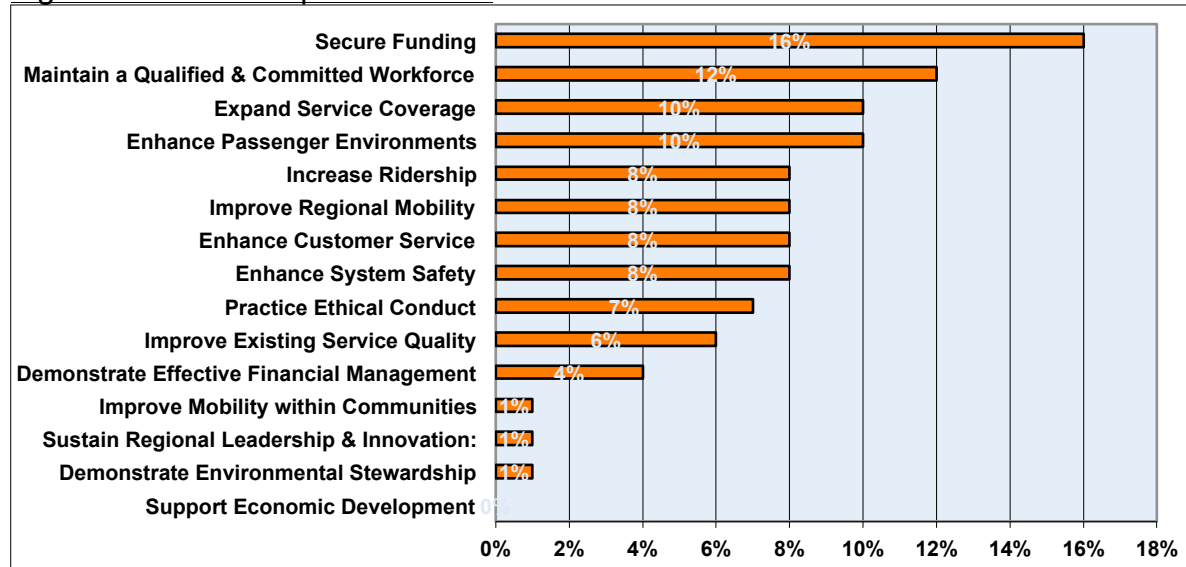


*Based on approximately 22 responses

Figure C10: Employee Voting Board Results: Goals Input

Response to: Achievement of which of the listed goals do you believe to be most important to RT's successful fulfillment of its role as a regional public transportation provider? Please select up to five (5) values.

Figure C10: Most Important Goals



*Based on approximately 20 responses

**Appendix D: 2014 Strategic Plan *DRAFT* Goals and KPIs
with Responsible Division**

2014 Strategic Plan **DRAFT** Goals and KPIs with Responsible Division

2014 SP Goal ID	2014 SP Goal #	KPI # for indicated	Key Performance Indicators (KPI)	Definition	Reporting Period*	Primarily Responsible Department(s)/Division(s)								
						GM	LC	A	FI	PL	OP	MC	FA	EC
F1	Ensure Financial Stability	1	Total Funding Level by Source	Total current funding levels compared to previous distribution and industry trends (adjusted for inflation)	Annually				X					
F1		2	Operating Cost YTD vs. Budget	Actual operating costs compared to budgeted operating costs	Quarterly				X					
F1		3	Fare Revenue YTD vs. Budget	Actual fare revenue collected compared to predicted level	Quarterly				X					
F1		4	Bond Ratings (if any) of A or Better	Actual bond rating	Annually				X					
F1		5	Farebox Recovery Ratio	Fare revenues divided by total expenses.	Annually				X					
F2	Meet or Exceed Expectations for Safe & Quality Service in a Cost-Effective Manner	1	Reported Crime	Total number of criminal activity incidents reported	Quarterly						X			
F2		2	Security Related Complaints	Total number of security related complaints received and the percentage of these complaints compared to all complaints received	Quarterly						X	X		
F2		3	Mean Distance Between Failures (Miles)	Mean vehicle miles traveled during defined period between the number of breakdowns.	Quarterly					X	X			
F2		4	Miles Between Incidents (Collisions/Customer Incidents)	Vehicle miles traveled during a defined period, divided by the number of collisions/customer incidents.	Quarterly						X			
F2		5	Percent of Preventive Maintenance Inspections Completed On-Time	All PM inspections completed within 10% of the required time or mileage.	Quarterly						X			
F2		6	Wheelchair Lift and Ramp Reliability	Total number of wheelchair lift failures reported	Quarterly						X			
F2		7	On-Time Performance	Percentage of total one-way trips per month departing a terminal or leaving an intermediate time point five or more minutes late.	Quarterly						X			
F2		8	Percent of Completed Weekday Trips	Percentage of trips actually operated compared to those scheduled on weekdays	Quarterly					X	X			
F2		9	Percent of No Shows/Cancellations (ADA)	Percentage of demand-responsive trips scheduled where passengers fail to take the trip	Quarterly					X	X			
F2		10	Percent of Trip Denials (ADA)	Percentage of trip requests in which service cannot be adequately provided	Quarterly					X				
F2		11	Percent of Graffiti Removed within 48 Hours	Percentage of Graffiti Removed within 48 Hours after receiving notification	Quarterly								X	X
F2		12	Cleanliness Related Complaints	Total number of cleanliness related complaints	Quarterly								X	X
F2		13	Percent of Stations Cleaned On-Time	Percentage of Stations Cleaned in-keeping with RT standards and scheduled maintenance	Quarterly									X
F2		14	Percent of Stops with Bus Shelters and Benches	Percentage of stops with shelter and benches	Quarterly									X
F2		15	Age of Transit Vehicles	Average age transit vehicles by mode	Annually				X	X	X			
F2		16	Air Conditioning Failures	Total number of air conditioning failures reported	Quarterly						X			
F2		17	Methods Available to Access Route and Schedule Information	Number and type of methods by which route and schedule information is accessible to the public	Annually							X	X	
F2		18	Methods Available for Customers to Provide Feedback & Input	Number and type of methods by which customers may always provide input	Annually							X	X	
F2		19	Fare Payment Methods Available	Number and type of methods by which fares may be paid	Annually							X	X	
F2		20	Complaints/Million Unlinked Passenger Trips	Number of complaints received divided by the number of estimated unlinked passenger trips provided in the same time period	Quarterly					X		X		
F2		21	Commendations/Million Unlinked Passenger Trips	Number of commendations received divided by the number of estimated unlinked passenger trips provided in the same time period	Quarterly					X		X		
F2		22	Unlinked Passenger Trips per Revenue Hour	Boardings per Revenue Hour	Quarterly									
F2		23	Cost per Vehicle Revenue Mile	Actual operating costs divided by total actual revenue miles.	Annually				X	X				
F2		24	Cost per Vehicle Revenue Hour	Actual operating costs divided by total actual revenue hours.	Annually				X	X				
F2		25	Vehicle Revenue Hours per Employee	Total actual revenue hours plus deadhead time divided by # employees.	Annually			X		X				
F3	Operate in an Ethical Manner	1	Training Opportunities Related to Unethical Behavior	Number of training opportunities and information available concerning unethical actions and ways to report such activity	Quarterly			X						
F3		2	Methods Available to Report Unethical Behavior	Number and type of methods available to employees to report unethical conduct	Quarterly			X						
F3		3	Unethical Behavior Reports	Number of times unethical behavior is reported. Please note: reporting of such behavior should be encouraged. As such, a lower number of reported incidents should not be considered ideal.	Quarterly			X						

2014 Strategic Plan **DRAFT** Goals and KPIs with Responsible Division

2014 SP Goal ID	2014 SP Goal #	KPI # for indicated	Key Performance Indicators (KPI)	Definition	Reporting Period*	Primarily Responsible Department(s)/Division(s)								
						GM	LC	A	FI	PL	OP	MC	FA	EC
F3	Operate in an Ethical Manner (continued)	4	Code of Ethics Violations	Number of Code of Ethics Policy Violations reported. Please note: reporting and recording of such behavior should be encouraged.	Quarterly	X	X	X	X	X	X	X	X	X
F3		5	Conflict of Interest Policy Violations	Number of Conflict of Interest Policy Violations reported. Please note: reporting and recording of such behavior should be encouraged.	Quarterly	X	X	X	X	X	X	X	X	X
F4	Invest in the Attraction, Development & Retention of a Quality Workforce	1	Employee Turnover Rate	Positions vacated compared to total FTEs	Annually	X	X	X	X	X	X	X	X	X
F4		2	Employee Satisfaction Rating	Create survey and report results to gauge employee satisfaction and report average rating	Annually									
F4		3	Employee Suggestions Received	Total number of employee suggestions received	Quarterly	X	X	X	X	X	X	X	X	X
F4		4	Responses to Employee Suggestions	Total number of responses issued to address employee suggestions	Quarterly	X	X	X	X	X	X	X	X	X
F4		5	Percent of Employees Receiving Skills Training	Percent of employees who receive skills training	Quarterly	X	X	X	X	X	X	X	X	X
F4		6	RT Managers and Supervisors Completing Core Management Training Modules	Percent of managers and supervisors receiving management related training	Annually	X	X	X	X	X	X	X	X	X
F4		7	RT Compensation at Median of Local Governmental/Peer Transit Labor Market	Percent of positions that fall at or above the median compensation level for comparable work	Annually	X	X	X	X	X	X	X	X	X
F4		8	Evaluation Techniques Used in the Recruitment Process to Ensure Fittingness for all Employment Groups	Total number of evaluation techniques used in the recruitment process	Annually			X						
F4		9	Percent of Core Positions (management/technical skills) Covered by Succession Plan	Percent of management and technical positions for which a strategy has been identified to address succession issues	Annually	X	X	X	X	X	X	X	X	X
F4		10	Achievement of Annual Disadvantaged Business Enterprise (DBE) Program Goal	True or False	Annually	X	X	X	X	X	X	X	X	X
F4		11	Accomplishment of EEO/AA Program Goals	Accomplishment of goals relayed in EEO/AA plan	Annually	X	X	X	X	X	X	X	X	X
G1	Improve Access Within & Between Communities (in the Sacramento Region) in a Cost-Effective Manner	1	Population within 1/4 mile of transit stop or station	Total number of residents within a 1/4 mile of an active stop or station by service day	Annually					X				
G1		2	Employment within 1/4 mile of transit stop or station	Total number of employees within a 1/4 mile of an active stop or station by service day	Annually					X				
G1		3	Percentage of Routes with Headways of 30 minutes or Less	Percentage of routes with headways of 30 minutes or less	Annually					X				
G1		4	Percentage of Non-Commute Routes that Operate on Saturday	Percentage of non-commute routes that operate on Saturday	Annually					X				
G1		5	Percentage of Non-Commute Routes that Operate on Sunday	Percentage of non-commute routes that operate on Sunday	Annually					X				
G2	Increase Transit Market Share	1	Commute Transit Mode Split	Percentage of commute trips made by transit	As available: from U.S. Census, American Community Survey, or estimates from Sacramento regional model runs					X		X		
G2		2	Route Evaluation Efforts	Total number of route review efforts performed	Annually					X				
G2		3	Promotional Activities	Total number of promotional activities	Annually						X			
G3	Adjust to Legislative & Regulatory Changes and Stakeholder & Community Initiates and Support Complementary Efforts	1	Unqualified External Annual Financial Audit Report	True or False	Annually	X	X	X	X	X	X	X	X	
G3		2	No Repeat Audit Deficiencies	True or False	Annually	X	X	X	X	X	X	X	X	
G3		3	Satisfactory FTA Triennial Audit (no major deficiencies)	True or False	Annually	X	X	X	X	X	X	X	X	
G3		4	Satisfactory TDA State Audit	True or False	Annually	X	X	X	X	X	X	X	X	
G3		5	Satisfactory PUC Audit	True or False	Annually	X	X	X	X	X	X	X	X	
G3		6	Satisfactory Caltrans Audit	True or False	Annually	X	X	X	X	X	X	X	X	

60 # of KPIs identified in 2014 Strategic Plan

* Reporting statistics may be shown period less than a quarter, but must cover the time associated with three months and be presented on no more than a quarterly basis to the RT Board of Directors

2014 Strategic Plan **DRAFT** Goals and KPIs with Responsible Division
Reference Sheet

Goal References

Goal # (ID)	Goal Description
Fundamental 1 (F1)	Ensure Financial Stability
Fundamental 2 (F2)	Meet or Exceed Expectations for Safe & Quality Service in a Cost-Effective Manner
Fundamental 3 (F3)	Operate in an Ethical Manner
Fundamental 4 (F4)	Invest in the Attraction, Development & Retention of a Quality Workforce
Growth 1 (G1)	Improve Access Within & Between Communities (in the Sacramento Region) in a Cost-Effective Manner
Growth 2 (G2)	Increase Transit Market Share
Growth 3 (G3)	Adjust to Legislative & Regulatory Changes and Stakeholder & Community Initiatives and Support Complementary Efforts

Department/Division

Department Abbreviation	Title
GM	General Manager/CEO
LC	Chief Counsel
A	Chief Administrative Officer
FI	Chief Financial Officer
PL	Assistant General Manager of Planning and Transit System Development
O	Chief Operating Officer
MC	Assistant General Manager of Marketing and Communications
FA	Chief of Facilities & Business Support Services Division
EC	Assistant General Manager of Engineering and Construction

KPI Initial Review Summary

Count	Item
60	# of KPIs identified in 2014 Strategic Plan

KPI= Key Performance Indicator

Strategic Plan Update 2013-2014

Sacramento Regional Transit District

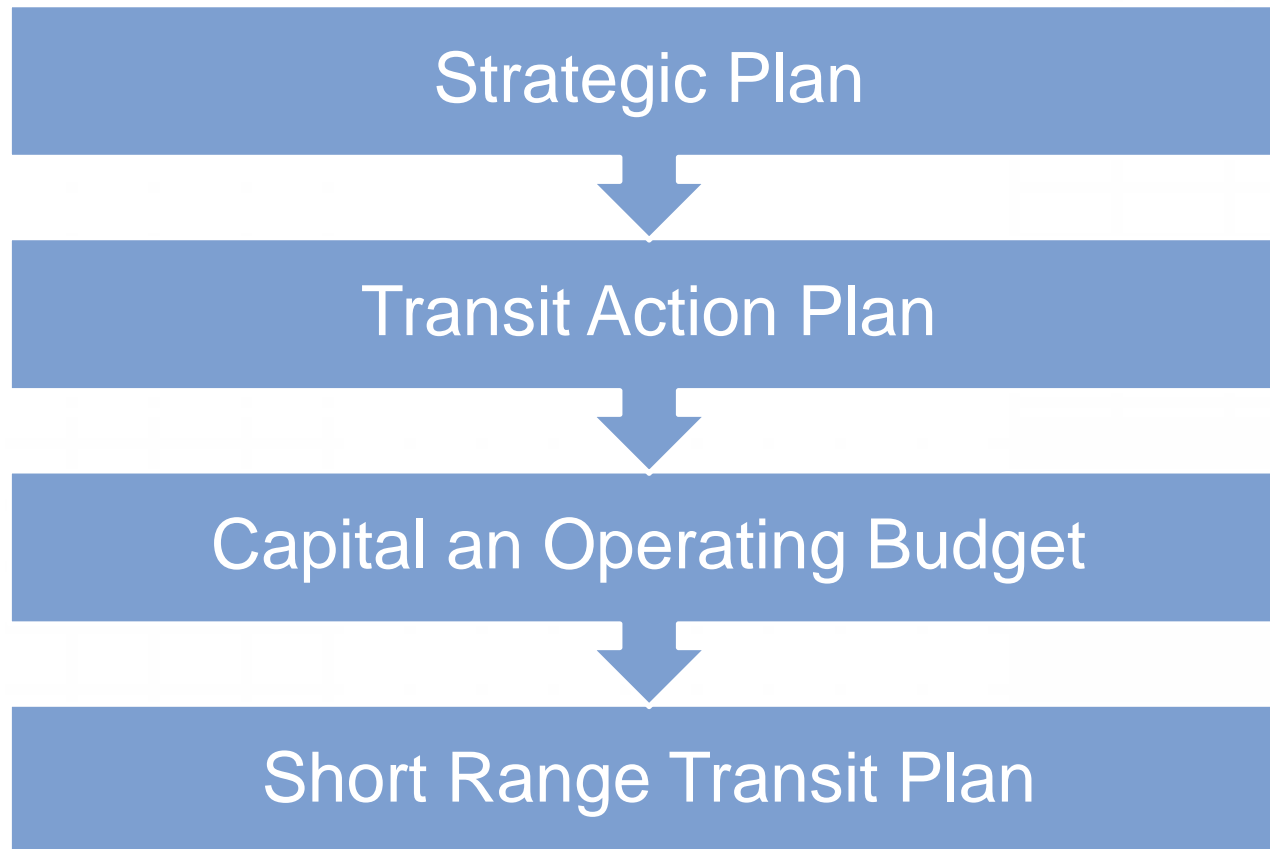
Board of Directors Meeting

September 22, 2014



RT Planning Process

Attachment 2



DRAFT Mission Statement

Attachment 2

The purpose of the Sacramento Regional Transit District is to **promote and improve access in the Sacramento region by providing safe, reliable, and fiscally responsible transit service that links people to resources and opportunities.**

DRAFT Vision Statement

Attachment 2

The Sacramento Regional Transit District strives to **connect people to resources and opportunities while stimulating livable communities and supporting economic development by providing a technologically current, effective, efficient and fiscally sustainable transit system that attracts and serves riders by offering an appealing transportation choice.**

DRAFT Values

Attachment 2

- Quality Service & Innovation
- Customer Service
- Respect & Professionalism
- Fiscal Responsibility
- Integrity & Accountability
- Quality, Diverse, Positive Work Force
- Regional Leadership & Coordination
- Health & Safety
- Sustainability

DRAFT Challenges

Attachment 2

- Quality Service Demand
- System Preservation
- Funding
- Quality Workforce
- Legislative & Regulatory Changes

DRAFT Goals

Attachment 2

Fundamental Goals:

- Ensure Financial Stability
- Meet or Exceed Expectations for Safe & Quality Service in a Cost-Effective Manner
- Operate in an Effective Manner
- Invest in Attraction, Development & Retention of a Quality Workforce

DRAFT Goals

Attachment 2

Growth Goals:

- Improve Access Within and Between Communities in a Cost-Effective Manner
- Increase Transit Market Share
- Adjust to Legislative & Regulatory Changes and Stakeholder & Community Initiatives and Support Complementary Efforts