

STAFF REPORT

DATE: October 26, 2020
TO: Sacramento Regional Transit Board of Directors
FROM: Shelly Valenton, VP, Integrated Services and Strategic Initiatives
SUBJ: ADOPTING THE SACRAMENTO REGIONAL TRANSIT DISTRICT STRATEGIC PLAN 2021-2025

RECOMMENDATION

Adopt the Attached Resolution.

RESULT OF RECOMMENDED ACTION

If approved, the Sacramento Regional Transit District Strategic Plan 2021-2025 will be implemented at SacRT.

FISCAL IMPACT

None as a result of this action.

DISCUSSION

The Sacramento Regional Transit (SacRT) Strategic Plan 2021-2025 updates the previous plan adopted by the Board on January 26, 2015. The Plan, which is provided in Exhibit A, updates the mission statement, vision statement, values and strategic initiatives outlining the highest priority projects on which teams and individuals within the agency will work. SacRT strives to balance the delivery of a high-quality customer experience with value to taxpayers, and this strategic plan offers a platform from which the agency will take aim at these high-level aspirations.

The SacRT Executive Management Team and management staff, with input from employees at various levels of the organization representing different functional areas, developed strategic priorities and how SacRT will work to achieve them. The plan introduces specific work tactics and a comprehensive performance scorecard system that SacRT management and division leaders will use to monitor organizational and division performance on a quarterly basis.

Staff will implement the new Strategic Plan by continuing to create a culture of change and ownership, engaging with our labor partners and community stakeholders, and developing robust performance management systems for tracking and reporting.

RESOLUTION NO. 20-10-0126

Adopted by the Board of Directors of the Sacramento Regional Transit District on this date:

October 26, 2020

**ADOPTING THE SACRAMENTO REGIONAL TRANSIT DISTRICT
STRATEGIC PLAN 2021-2025**

NOW, THEREFORE, BE IT HEREBY RESOLVED BY THE BOARD OF DIRECTORS OF THE SACRAMENTO REGIONAL TRANSIT DISTRICT AS FOLLOWS:

THAT, the Sacramento Regional Transit District Strategic Plan 2021-2025 as set forth in Exhibit A, attached hereto, is hereby adopted and approved.

STEVE HANSEN, Chair

A T T E S T:

HENRY LI, Secretary

By: _____
Cindy Brooks, Assistant Secretary

EXHIBIT A

Sacramento Regional Transit District Strategic Plan 2021-2025



Strategic Plan 2021-25

Sacramento



Regional
Transit

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1

Introduction

General Manager /
CEO Henry Li

We Are Moving Sacramento



The disruptive impact of the COVID-19 pandemic precisely demonstrates the need for a strategic plan – especially for organizations that are publicly funded like the Sacramento Regional Transit District (SacRT). The pandemic is a major hurdle; however, it's also an opportunity for our industry to show the vital role public transit plays in keeping the Sacramento community moving. One thing that has been consistent from the start of the crisis is that public transit is a lifeline for many – providing critical mobility options for millions of front-line health care, public safety, grocery, and service industry workers fulfilling essential roles during the crisis.

A well-crafted strategic plan provides the management team and stakeholders with guiding goals, projects, and programs to be implemented in the short term to achieve longer-term outcomes. In the event of an unforeseeable incident, like a global pandemic, the plan can be easily resumed once the crisis has been managed or has passed. By having clarity on the bigger picture, it also provides the organization with the freedom and flexibility to adapt the plan to changing conditions.

This strategic plan details SacRT's aspirations and the steps for attaining goals. It articulates the agency's vision for operational excellence, for an

elevated customer experience, for a valuable partnership with the Sacramento community, and for an engaged workforce.

The plan also introduces the SacRT performance scorecard. The scorecard, which is comprised of quarterly metrics, will be used to actively report to the Board, our customers, and the community how well we are performing in efforts to achieve our goals.

No one can accurately predict what the coronavirus will do next, nor when it will be safe for all of us to resume "life as normal." For the time being, all of us at SacRT will continue to do all that we can to get our customers where they want to go – as safely and as efficiently as possible.

SacRT's Strategic Plan for FY2021-25 will serve as for the guiding vision for post-pandemic strategic success.

I am thankful to all staff that helped with the planning process and believe that this plan will elevate SacRT to new heights through a focused pursuit of excellence.

Sincerely,

Henry Li
General Manager / CEO

2 Mission, Vision & Values

Mission

Moving you where you want to go,
when you want to go.



Vision

A leader in providing mobility options for our community.

Values

Six core principles guide individuals, teams, and the entire SacRT organization:

Collaboration

I work with a collaborative spirit to help my colleagues and our customers to succeed.

Respect

I communicate clearly, respectfully, and honorably – in a way that would make my family proud – to my colleagues and our customers.

Trust

I trust my teammates and empower them to make decisions that improve the quality of life for their colleagues, our customers, and the community that supports us.

Diversity

I recognize and honor diversity and social justice, and seek out and listen for voices different than mine.

Innovation

I challenge the easy and inspire myself and others to look for innovative solutions.

Excellence

I work to deliver excellence to our customers through clean, safe, reliable, and convenient service.

3 Executive Summary

Introduction

Sacramento Regional Transit's (SacRT) Strategic Plan represents strategic initiatives outlining the highest priority projects that teams and individuals within the agency will work on over the 2021-25 fiscal years.

The SacRT Executive Management Team and management staff, with input from employees from various functional areas, developed the plan to serve as a blueprint for operational excellence.

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

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

The plan introduces a comprehensive performance scorecard that SacRT management and division leaders will monitor and report on every quarter over the course

of the year. The scorecard will allow SacRT – and all the organization's stakeholders -- to track the agency's performance and how well it is living up to its mission, vision, and goals for the year.

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

1. **WHY** SacRT leaders, teams, and staff are driven to deliver high quality service. This includes Mission, Vision, and organizational Values.
2. **WHAT** outcomes SacRT strives to achieve. This encompasses annual goals.
3. **HOW** SacRT will work toward achieving the goals. This includes identification of specific work plan tactics that will be implemented by SacRT teams.
4. **WHO** within SacRT is contributing to achievement of the goals. This encompasses the use of a performance scorecard system to monitor organizational and division performance on a quarterly basis.

1

WHY?

Mission Statement

Moving you where you want to go, when you want to go.

Vision Statement

A leader in providing mobility options for our community.

Values

Collaboration
Diversity
Innovation
Respect
Trust
Excellence

2

WHAT?

Annual Objectives

It will be a successful year for Sacramento Regional Transit if we:

1. Establish a baseline of customer satisfaction.
2. Deliver operational excellence across the organization.
3. Establish a baseline of the community's perception of SacRT as a trusted partner.
4. Improve employee engagement over the prior year.

3

HOW?

With clarity of goals, strategic priorities were identified to help narrow focus on areas of service and operations that most closely align with stated goals. Then, a work plan was developed to encompass projects and programs that SacRT teams will strive to complete over the coming year.

1. Customer Satisfaction
2. Operational Excellence
3. Community Value
4. Employee Engagement

4

WHO?

Performance in operational areas will be measured over the course of the year with a quarterly agency performance scorecard.

The performance scorecard is comprised of metrics that are significant to the quest for service excellence and value to taxpayers and which tie directly to the four strategic priorities identified. With the scorecard – and the Division level performance scorecards, all members of the workforce can see how their efforts support the success of the entire agency.

WHY

**Mission**

Moving you where you want to go, when you want to go.

Vision

A leader in providing mobility options for our community.

Values

Collaboration
Diversity
Innovation
Respect
Trust
Excellence



The SacRT organization strives to balance the delivery of a high quality customer experience with value to taxpayers, and this strategic plan offers a platform from which the agency will take aim at these two high level aspirations.

WHAT

**Annual Outcomes**

1. Establish a baseline of customer satisfaction
2. Deliver operational excellence across the organization.
3. Establish a baseline of the community's perception of SacRT as a trusted partner.
4. Improve employee engagement over prior year.



HOW

**Tactical Activities**

Team tactics describe how annual goals will be attained. Primary focus this year is on Customer Satisfaction, Operational Excellence, Community Value, and Employee Engagement

1.

Customer Satisfaction

- ✓ Establish Baseline for Customer Satisfaction

2.

Operational Excellence

- ✓ ADA Service Transition
- ✓ Asset Management Planning
- ✓ Capital Improvements Program
- ✓ Develop Key Performance Indicator Standards for Grants
- ✓ Improve Project Management and Performance In Line with Strategic Plan
- ✓ Improve Technology Sources
- ✓ Increase On-Time Performance
- ✓ Increase Vehicle Reliability
- ✓ Proactive Maintenance Planning
- ✓ Procurement Standards
- ✓ Rebuilding Ridership
- ✓ Reduce Cancellations
- ✓ Refine Finance Key Performance Indicator Standards for Various Decision-Making Processes
- ✓ Scheduling to Allow Safety Measures and Achievable Schedules
- ✓ Successful Implementation of SMS
- ✓ Successful System Cleanliness Audit



HOW



Tactical Activities

Focused team tactics organized according to the four strategic priority areas of the Strategic Plan:

3.

Community Value

- ✓ Communications Plan and Marketing Campaign
- ✓ Economic Impact in Station Areas (TOD) and Community Benefit
- ✓ Establish Baseline Goals for Police Services Perception with Customers and Employees
- ✓ Long Range Plan

4.

Employee Engagement

- ✓ Employee Engagement and Implementation Program
- ✓ Employee Retention
- ✓ Reduce Risks (Workers Compensation Claims, Accidents, Claims)



This Strategic Plan introduces the SacRT Scorecard, a new tool to measure and monitor performance in key areas identified as essential to success for SacRT.

WHO



Quarterly Scorecard Metrics to measure performance according to each of the four strategic priority areas.

1.

Customer Satisfaction

- ▶ Customer Perception of SacRT's Value
- ▶ Overall Customer Satisfaction
- ▶ On-Time Performance Satisfaction
- ▶ System Cleanliness Satisfaction

2.

Operational Excellence

- ▶ Rebuild Ridership Trust
- ▶ System Cleanliness
- ▶ Operating Cost Per Vehicle Revenue Hour
- ▶ On-Time Performance
- ▶ In-Service Failures
- ▶ Preventable Accidents

3.

Community Value

- ▶ Community Perception of SacRT's Value to the Region
- ▶ Community Perception of Economic Impact to Sacramento Region
- ▶ Social Media Engagement
- ▶ Community Perception of Transit Accessibility
- ▶ Economic Impact in Station Areas (TOD) and Community Benefit

4.

Employee Engagement

- ▶ % Agree They Receive Timely Feedback on Performance from Supervisor
- ▶ % Agree Teamwork is Encouraged and Practiced
- ▶ % Agree They Receive Enough Training to be Their Best at Work
- ▶ % Agree They are Overall Happy at Work
- ▶ % Agree They Have a Good Working Relationship with Those Around Them



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