Using Your Scorecard, Success Plan and Community Connectivity Plans

NCDOT PTD Annual Conference – Chapel Hill

September 2017
Public Transportation Network
North Carolina’s Public Transportation Network
Benefits of Transit

**BENEFITS OF TRANSIT IN NORTH CAROLINA**

- **75.4 MILLION TRIPS PROVIDED IN 2015**
  
  Source: DOT

- **$1.019 BILLION STATEWIDE BUSINESS OUTPUT**
  
  Expenditure related economic contribution refers to statewide economic effects supported by the capital and operational expenditures of North Carolina's transit systems.
  
  Source: NCDOT (Transporation Economic Development Impact System)

- **$802 MILLION ANNUAL BENEFIT OF HAVING A TRANSIT OPTION IN NC COMMUNITIES**
  
  Transportation cost savings — using transit instead of other modes.
  
  Affordable mobility options — benefit from having transit services available.
  
  Source: SURT/CTUR (Tall Urban and Rural Transit Centers) Center for Urban Transportation Research

**PUBLIC TRANSPORTATION PROVIDES**

- Economic benefits to communities
- Health benefits
- Access to work, education, training, medical transportation, shopping and tourism

**REDUCES**

- Individual transportation costs
- Congestion and delays
- Road construction and maintenance

**TRANSIT FUNDING**

Every $1 the state of North Carolina invests in transit generates approximately $1 of local investment in North Carolina from federal, state and local sources.

Source: NCDOT

More than **11,000 JOBS** are supported by transit system operations and capital investments which results in **$416 MILLION** in wages.

Source: NCDOT
Statewide Public Transportation Planning

Public Transit Then.

Public Transit Today.
Former Community Transportation Service Plans (CTSP)

- Outsized effort
- Every 5 years
- PTD undertakes annually
- High level of organization and coordination
- Contracted with consulting firms
- Exceeding available resources
- Too complex

Gerbil Wheel Management
What We Are Already Doing

- Performance Plans
  - For CTSPs
  - Technology Implementations
- 5 Year Budgets / Cost Allocation model
- Transit Asset Management
- Economic Benefits of Transit
  - Statewide and by system
- Vehicle Utilization Data – 14 days annually
- Operating Statistics
  - Peer Analysis
- Success Plans
  - All 81 rural systems focused on defining / measuring success moments
How We Got Here

Coverage & Capacity

Connectivity
Community Connectivity Plan

Transforms the Organization and the Agencies it Oversees into Being:

- Goal–Oriented
- Pro-active
- High-Performing
- Greater Levels of Accountability
- Empower Local Agencies
What’s New?

• Performance
• Connecting Communities
• Increased Flexibility
• Continuous Planning
• Alignment
• New Tools
  – Success Plan
  – Quarterly Scorecard
  – Customer Satisfaction Survey
• Save Money
Purpose of the CCP

Investigate opportunities to connect communities

Aligned with local mobility needs

High-quality transportation services

Allocating resources

Success Plan and Performance Scorecard.
Two Levels of CCP: Category 1

Biennial Success Planning, Quarterly Customer Satisfaction Scorecards/Surveys

Smaller, serve more rural populations, fewer opportunities for consolidation.

Completed in-house by PTD staff in collaboration with agency’s staff – 4-6 Month Timeline

- Average number of trips per year: 35,000
- Typical Fleet Size: 1-20 vehicles
- Typical Workforce: 1-20 employees

Plans are updated by MDS every other year with annual Success Plan update
Two Levels of CCP: Category 2

5-year planning cycle, Annual Success Plans, Quarterly Customer Satisfaction Scorecards/Surveys

Large, serve multiple counties or urbanized areas, more complex, higher level of coordination

Completed by consultants – 8-10 Month Timeline

- Average number of trips per year: 160,000
- Typical Fleet Size: 25-35 vehicles
- Typical Workforce: 30-50 employees

Average six plans per year
- Start 3 in July and 3 in December
Category 1 CCP elements include:

- Introduction
- Performance Plan
- Success Plan and Growth Opportunities Plan
- 5-year budget with Fully Allocated Cost
- Operating Statistics Review and Presentation
- Stakeholder engagement
- Trigger Events
Potential Trigger Events for Category 1 Agencies

- New Executive Director or other significant change in leadership
- Agency considering regional coordination and/or consolidation
- Major employment shift (new large employer, shift in location of employment center)
- Significant population growth
- Significant change in economic conditions (poverty level, households with no vehicles, unemployment level)
- Other events or conditions evaluated by PTD to necessitate a Category 2 CCP
Cat. 2 CCP Elements Include:

- Introduction
- Current Performance and Service Area Trends
- Public Input
- Service and Connectivity Plan
- Asset Enhancement Plan
- Financial Plan and Cost Allocation Model
- Assessment and Strategies Plan and Success Plan
- Draft and Final CCP Plan
Plan Expectations

The final plan will provide the transit system with an understanding and guidance on the following expectations:

- Understanding all trip purposes
- Utilizing their fleet inventory efficiently
- Functioning in the most effective manner?
- Contract service diversity
- Most efficient fare rate method
- Expand stakeholder surveys
Plan Expectations

Also:

• What it Means?
• Does the Success Plan Tie…
• Shared services or coordination opportunities?
• How to Set Up a budget?
CCP Stands up the Success Plan

Cornerstones:

1. **Articulated goals and outcomes**
2. **A Work Plan** comprised of tactical projects and programs that will guide success for the year.
3. **Performance Scorecard**, which measures success with quarterly monitoring.
Success Plan
3 Fundamental Questions

Work Plan
Strategies &
Tactics

HOW

WHAT

WHO

- Mission
- Vision
- Values
- Success

Who is achieving high performance results
PTD Success Plan

Mission
Delivering transportation options to communities.

Vision
Connecting communities by investing in customer centered innovation and rewarding results.

Values
• Teamwork • Respect • Competence • Commitment • Deliver on your promises • Integrity • Focus on facts first
**Strategic Areas of Focus with alignment of Tactics**

<table>
<thead>
<tr>
<th>STRATEGY</th>
<th>TACTICS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thriving Agencies</td>
<td>1. Develop Support Models That Improve Agency Performance</td>
</tr>
<tr>
<td></td>
<td>2. Implement and Refine the New Planning Program</td>
</tr>
<tr>
<td></td>
<td>3. Build Multi-Year Training Curriculum</td>
</tr>
<tr>
<td></td>
<td>4. Introduce Transit Advisory Grantee Group</td>
</tr>
<tr>
<td>Financial Management</td>
<td>1. Develop Overall Grant Cycle Management Process</td>
</tr>
<tr>
<td></td>
<td>2. Optimize Use of SAP Functionality</td>
</tr>
<tr>
<td></td>
<td>3. Develop and Document Process for Ensuring Adherence to Claims Review</td>
</tr>
<tr>
<td></td>
<td>4. Build Reporting Model</td>
</tr>
<tr>
<td></td>
<td>5. Statewide Budget Needs Identification &amp; Management</td>
</tr>
<tr>
<td>Results Driven</td>
<td>1. Implement Performance Based System For Funding</td>
</tr>
<tr>
<td></td>
<td>2. Update &amp; Maintain Procedures</td>
</tr>
<tr>
<td></td>
<td>3. Implement Technical Assistance Program (TAP) Review System</td>
</tr>
<tr>
<td></td>
<td>4. Develop A Statewide Strategic Plan</td>
</tr>
<tr>
<td>Employee Success</td>
<td>1. Construct A Comprehensive PTD Training Curriculum</td>
</tr>
<tr>
<td></td>
<td>Maintain Project Management Plan For Key Agency Deadlines And</td>
</tr>
<tr>
<td></td>
<td>2. Establish Accountability For PTD Deadline Adherence</td>
</tr>
<tr>
<td></td>
<td>3. Conduct Annual Employee Engagement Survey</td>
</tr>
</tbody>
</table>
### Transit Agency Success Scorecard

<table>
<thead>
<tr>
<th>Guiding Management Pillar</th>
<th>Metric Name</th>
<th>Performance Goal</th>
<th>Goal Points</th>
<th>Owner</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Sustainability</td>
<td>Subsidy Per Customer Trip</td>
<td>10</td>
<td>Smith</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cost Per Customer Trip</td>
<td>8</td>
<td>Wright</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cost Recovery</td>
<td>18%</td>
<td>5</td>
<td>Anderson</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Fixed Route Farebox Recovery</td>
<td>12%</td>
<td>4</td>
<td>Anderson</td>
<td></td>
</tr>
<tr>
<td></td>
<td>DIB Percentage</td>
<td>16.08%</td>
<td>3</td>
<td>Wright</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Total FPA Score</strong></td>
<td><strong>30</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer Satisfaction</td>
<td>Net Promoter Score</td>
<td>20%</td>
<td>5</td>
<td>Smith</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Customer Satisfaction</td>
<td>87.0%</td>
<td>2</td>
<td>Wright</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Fixed Route On-Time Performance</td>
<td>75.0%</td>
<td>4</td>
<td>Anderson</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Customer per Revenue Hour</td>
<td>19.5%</td>
<td>4</td>
<td>Anderson</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mean Distance Between Vehicle Failures</td>
<td>11,750</td>
<td>3</td>
<td>Wright</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Customer Trips Per Vehicle Hour</td>
<td>34.7%</td>
<td>6</td>
<td>Wright</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Transit Access</td>
<td>30%</td>
<td>6</td>
<td>Anderson</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Route Directness</td>
<td>30%</td>
<td>3</td>
<td>Anderson</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Adherence to Composite Project Budget</td>
<td>90%</td>
<td>5</td>
<td>Sheldon</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Adherence to Composite Project Schedule</td>
<td>90%</td>
<td>3</td>
<td>Mann</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Total CIV Score</strong></td>
<td><strong>20</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Mobility                  | Perceptions Scores of Safety and Security   | 89%              | 4           | Wright  |            |
|                           | Fixed Route Preventable Collisions per 100,000 Miles | 0.86          | 3           | Anderson|            |
|                           | Fixed Route Non-Preventable Collisions per 100,000 Miles | 1.48         | 2           | Anderson|            |
|                           | Fixed Route Preventable Incidents per 100,000 Miles | 0.22         | 2           | Sheldon |            |
|                           | Fixed Route Non-Preventable Incidents per 100,000 Miles | 0.52         | 2           | Mann    |            |
|                           | Workers Compensation Claims                 | 57               | 2           | Mann    |            |
|                           | **Total ESS Score**                         | **15**           |             |       |            |

| Employee Success          | Employee Satisfation                        | 80%              | 4           | Sheldon |            |
|                           | Employee Engagement                         | 60%              | 4           | Sheldon |            |
|                           | Training Hours per Employee                 | 36.7             | 2           | Sheldon |            |
|                           | **Total ESI Score**                         | **10**           |             |       |            |

**PERFORMANCE SCORE**: 100
Final Outcome
(Putting The Pieces Together)

1. The CCP is the backbone of the Success Plan

2. The success moments identified in the Success Plan are the result of the analysis conducted in the CCP

3. Achieves a measureable and implementable plan
Success Moments

It will be a good year for my agency if.....