



# Quarterly Performance Review FY23 Q3

India L. Birdsong Terry, GCRTA *General Manager and CEO*

Dr. James Rubin, TransPro *Principal*

# Performance Management Cadence

METRICS		TACTICS	METRICS		TACTICS		METRICS		TACTICS	METRICS	
Oct	Nov	Dec	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24		
<ul style="list-style-type: none"> <li>Q3 Quarterly Metrics Review</li> <li>2024 Success Planning</li> </ul>	2024 Success Planning	Monthly Tactics Reviews	<ul style="list-style-type: none"> <li>Q4 Quarterly Metrics Review</li> <li>2023 Year End Review</li> </ul>	Monthly Tactics Review	Monthly Tactics Review	Q1 Quarterly Metrics Review	Monthly Tactics Review	Monthly Tactics Review	Q2 Quarterly Metrics Review		

↑  
We are here

# Glossary: NPS

**Net Promoter Score (NPS):** a number based on responses to the question “On a scale from 0-10, how likely are you to recommend RTA to a friend or neighbor?” Responses 9 and 10 are deemed Promoters. Responses 7 and 8 are deemed Passives. Responses 0 through 6 are deemed Detractors. The NPS is found by subtracting the percent of Detractors from the percent of Promoters.

# Glossary: Environmental Justice (EJ)

**Environmental Justice (EJ):** the fair treatment and meaningful involvement of all people. DOT is committed to ensuring a fast, safe, efficient, accessible, and convenient transportation system for communities nationwide. In the region, Environmental Justice Areas are those Transportation Analysis Zones (TAZ's) with either Minority Populations greater than or equal to 28.81% or Residents Below the Poverty Line greater than or equal to 14.72%.

<https://www.transportation.gov/transportation-policy/environmental-justice>

# Organizational Success Outcomes: FY23 Status

Success Outcomes	Metric	Information System	Success Definition	Status
<b>Customer Experience</b>	Net Promoter Score	Customer Survey	5% improvement in Net Promoter Score over 2022 (NPS goal of 29).	Customer Satisfaction survey completed. <b>Combined NPS of 25.</b>
<b>Community Value</b>	Community Value Score	Community Survey & Data	50% of the community agrees that GCRTA serves employment. 79% of major projects are within EJ communities. 4 active Transit Oriented Development Projects. 7 as a ratio of private sector capital to GCRTA capital.	<b>43%</b> of the community agrees that GCRTA serves employment. <b>77%</b> of major projects are within EJ communities. <b>2 active TOD projects</b> with several in the pipeline. Current ratio of private sector to GCRTA is <b>8.9</b> .
<b>Financial Sustainability</b>	Operating & Capital Performance	Financial Reporting	\$10m transfer to capital and reserve fund over the board policy. \$35m of competitive capital grants (CMAQ year).	<b>\$10 million transfer complete.</b> <b>\$157 million</b> won in competitive grants, including \$130 million rail vehicle replacement grant.
<b>Employee Engagement</b>	Employee Engagement	HR Data	Vacancy Fill Rate: Operators, Mechanics, Transit Police target is 91% for Q3 (95% for the year) Vacancy Fill Rate: Non-bargaining target is 95% for Q3 (95% for the year)	<b>Operators/Mechanics/Transit Police: 86%</b> <b>Non-bargaining: 93%</b>

# Organizational Scorecard 2023

RTA earned **91.0** out of **100** points in Q3 FY23.



Organizational Total				
Success Outcome	Goal Points	Q1 Points Earned	Q2 Points Earned	Q3 Points Earned
Customer Experience	35	28.7	28.2	↑ 29.2
Community Value	30	26.1	26.7	↑ 27.1
Financial Sustainability	25	19.5	26.2	26.2
Employee Engagement	10	8.6	8.6	8.5
<b>Total</b>	100	82.9	89.7	<b>91.0</b>

# Organizational Scorecard Q3 – Customer Experience

RTA earned **29.2** out of **35** points in Customer Experience.

Success Outcome	Metric	Goal	Owner	Goal Points	Q1 Results	Q2 Results	Q3 Results	Points Earned
Customer Experience	Net Promoter Score	29	I. Terry	13	20	21	↑ 25	11.1
	Overall Customer Satisfaction	84%	I. Terry	8	66%	66%	↓ 57%	5.4
	On-Time Performance - Impression	77%	F. Caver	4	71%	68%	↓ 67%	3.5
	On-Time Performance - Actual	85%	F. Caver	4	86%	83%	↓ 80%	3.8
	Safe & Secure Riding / Waiting - Impression	74%	F. Caver	4	64%	59%	↑ 63%	3.4
	Vehicle Cleanliness - Impression	54%	F. Caver	2	59%	51%	↑ 55%	2.0
					<b>35</b>			

# Organizational Scorecard Q3 – Community Value

RTA earned **27.1** out of **30** points in Community Value.

Success Outcome	Metric	Goal	Owner	Goal Points	Q1 Results	Q2 Results	Q3 Results	Points Earned
Community Value	Community Perception - Access to Employment	50%	J. Freilich	7.5	32%	32%	↑43%	6.5
	Capital Dollars Invested in Environmental Justice Zones/Communities	79%	M. Schipper	7.5	81%	87%	↓77%	7.3
	Transit Oriented Development (TOD) on RTA properties	4	J. Reed	7.5	2	2	2	3.8
	Ratio of Private Sector Investment to Major Capital Investment	7	M. Schipper	7.5	10.7	9.3	↓8.87	9.5
					<b>30</b>			




# Organizational Scorecard Q3 – Financial Sustainability

RTA earned **26.2** out of **25** points in Financial Sustainability.

Success Outcome	Metric	Goal	Owner	Goal Points	Q1 Results	Q2 Results	Q3 Results	Points Earned
<b>Financial Sustainability</b>	General Fund Transfer to Capital/Rolling Stock Reserve Fund*	\$10 million	R. Gautam	7	\$10 million	\$10 million	<b>\$10 million</b>	7
	Competitive Capital Grants	\$35 million	M. Schipper R. Gautam	7	\$12 million	\$145 million	<b>↑\$157 million</b>	9.1
	Operating Ratio : Expense Covered by Own Source Revenue	13%	R. Gautam	6	11.8%	11.5%	<b>11.5%</b>	5.3
	Cost per Service Hour: Overall Operating Cost/Revenue Hour	\$165.00	R. Gautam F. Caver	5	\$175.13	\$171.60	<b>↑\$172.31</b>	4.8
					<b>25</b>			

# Organizational Scorecard Q3 – Employee Engagement

RTA earned **8.5** out of **10** points in Employee Engagement.

Success Outcome	Metric	Goal	Owner	Goal Points	Q1 Results	Q2 Results	Q3 Results	Points Earned
Employee Engagement	Vacancy fill rate : Operators (Bus, Paratransit, Rail), Mechanics, and Transit Police	91%	I. Terry G. Fields	2	84%	84%	 <b>86%</b>	<b>1.9</b>
	Vacancy fill rate : Non-Bargaining	95%	G. Fields	2	91%	93%	<b>93%</b>	<b>2.0</b>
	Agencywide Retention Rate	88%	G. Fields	1.5	96%	98%	<b>98%</b>	<b>1.7</b>
	Supervisor Invested in Growth and Success*	57%	G. Fields	1.5	55%	55%	<b>55%*</b>	<b>1.4</b>
	Understand How Performance Linked to Organization Success*	71%	I. Terry G. Fields	1.5	72%	72%	<b>72%*</b>	<b>1.5</b>
	Workforce Net Promoter Score*	5	G. Fields	1.5	-3	-3	<b>-3*</b>	<b>0</b>
					<b>10</b>			

\*results carried over from a previous quarters. New employee engagement results expected Q1 2024.

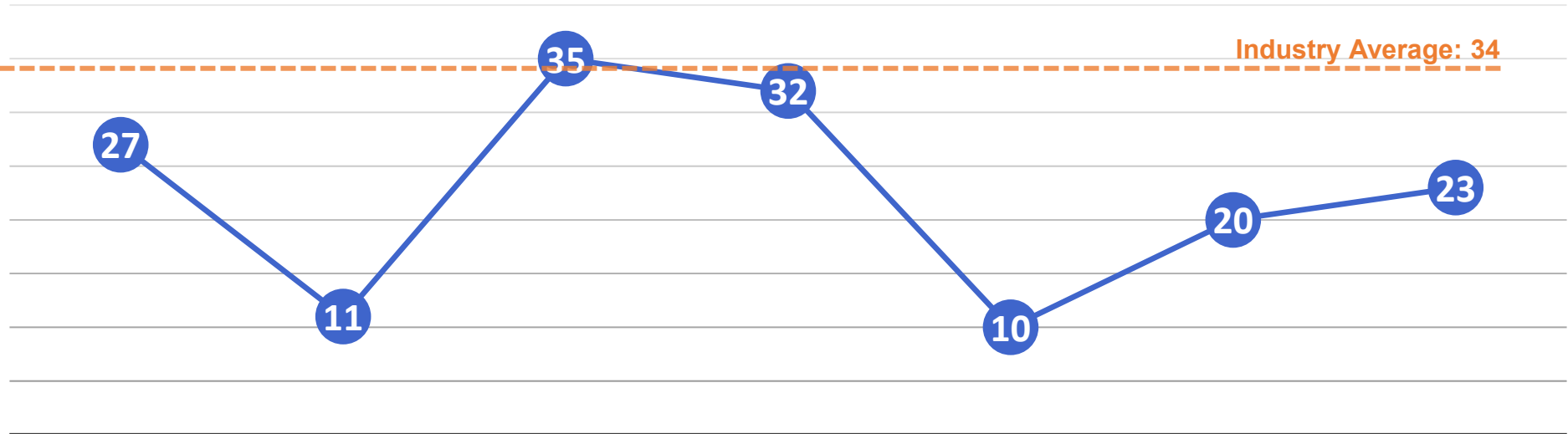
# Customer Survey

September 2023

# Customer Satisfaction Results – NPS

**Fixed Route**

**NPS**



Industry Average: 34

Wave 1  
(Feb '22)

Wave 2  
(May '22)

Wave 3  
(Sep '22)

Wave 4  
(Dec '22)

Wave 5  
(Mar '23)

Wave 6  
(Jun '23)

Wave 7  
(Sep '23)

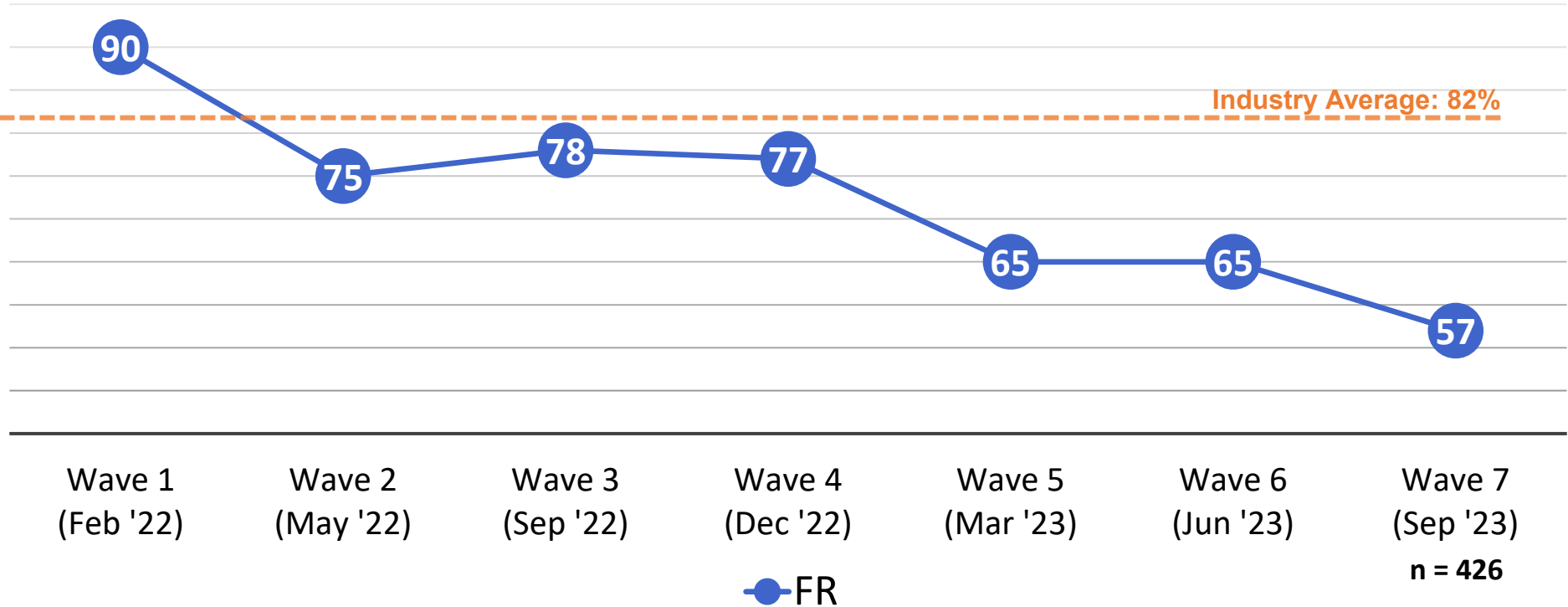
● FR

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# Customer Satisfaction Results – Overall Satisfaction

**Fixed Route**

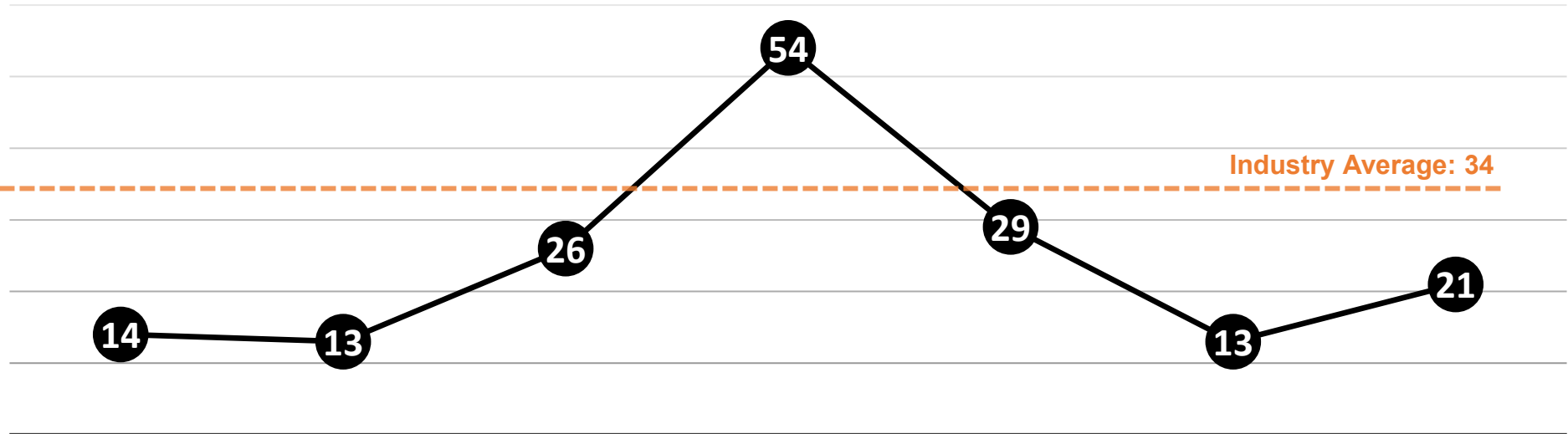
### Overall Satisfaction (%)



# Customer Satisfaction Results – NPS

**Bus Rapid Transit**

**NPS**



Industry Average: 34

Wave 1  
(Feb '22)

Wave 2  
(May '22)

Wave 3  
(Sep '22)

Wave 4  
(Dec '22)

Wave 5  
(Mar '23)

Wave 6  
(Jun '23)

Wave 7  
(Sep '23)

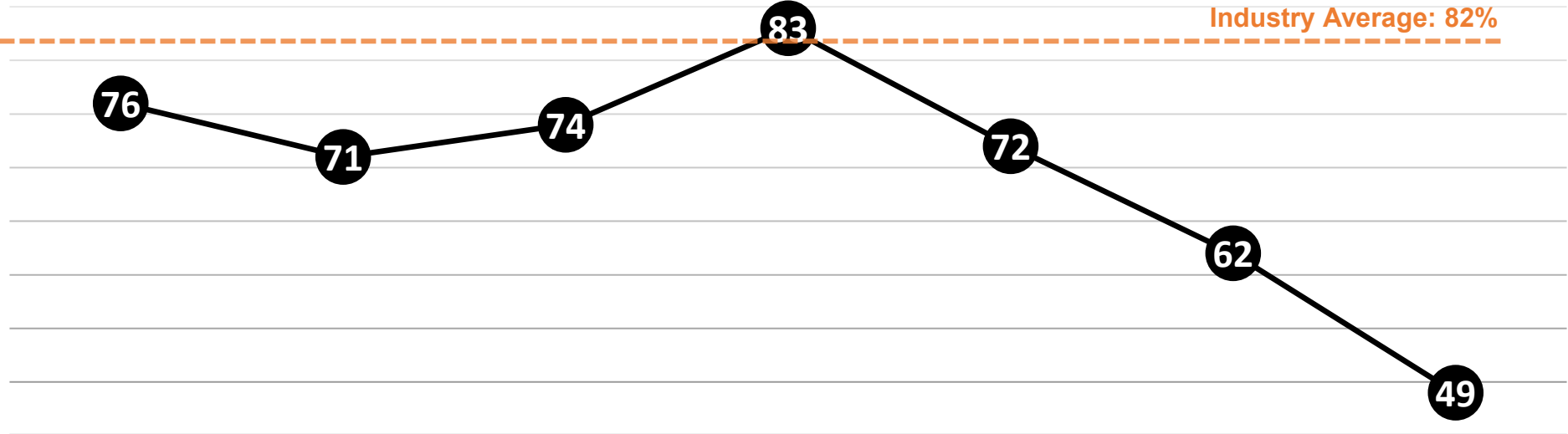
● BRT

n = 428

# Customer Satisfaction Results – Overall Satisfaction

**Bus Rapid Transit**

### Overall Satisfaction (%)



Wave 1  
(Feb '22)

Wave 2  
(May '22)

Wave 3  
(Sep '22)

Wave 4  
(Dec '22)

Wave 5  
(Mar '23)

Wave 6  
(Jun '23)

Wave 7  
(Sep '23)

● BRT

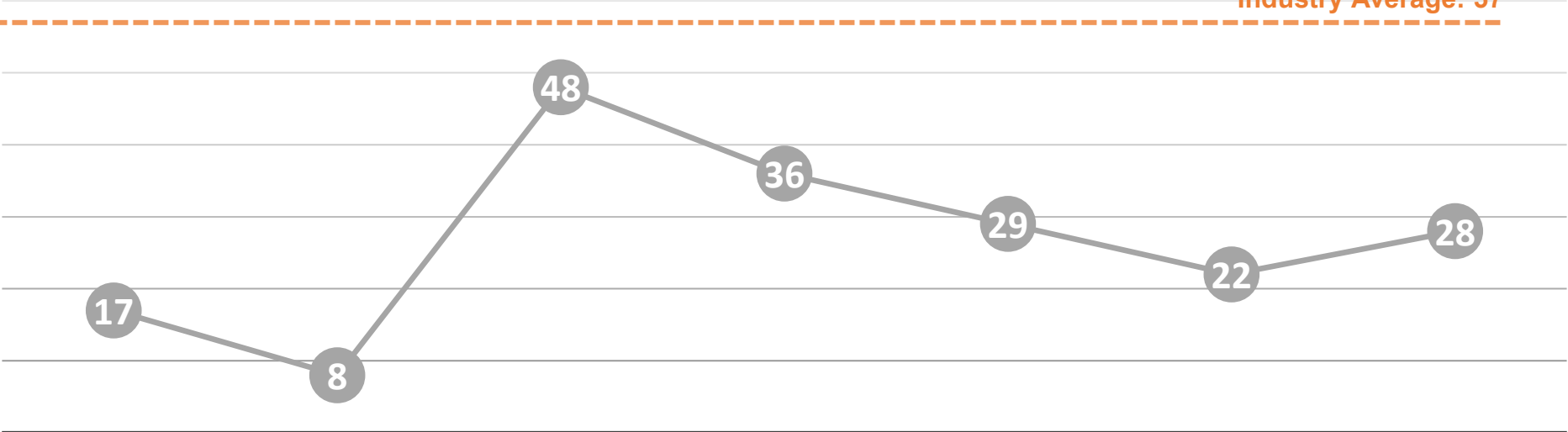
n = 428

# Customer Satisfaction Results – NPS

Rail

NPS

Industry Average: 57



Wave 1  
(Feb '22)

Wave 2  
(May '22)

Wave 3  
(Sep '22)

Wave 4  
(Dec '22)

Wave 5  
(Mar '23)

Wave 6  
(Jun '23)

Wave 7  
(Sep '23)

● Rail

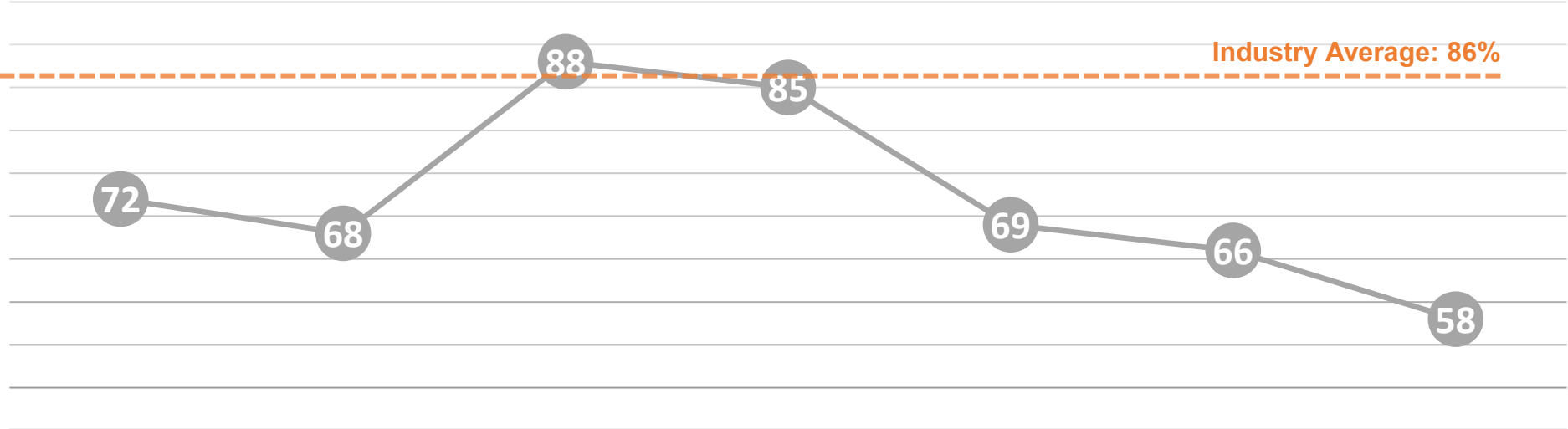
n = 429



# Customer Satisfaction Results – Overall Satisfaction

Rail

### Overall Satisfaction (%)



Wave 1  
(Feb '22)

Wave 2  
(May '22)

Wave 3  
(Sep '22)

Wave 4  
(Dec '22)

Wave 5  
(Mar '23)

Wave 6  
(Jun '23)

Wave 7  
(Sep '23)

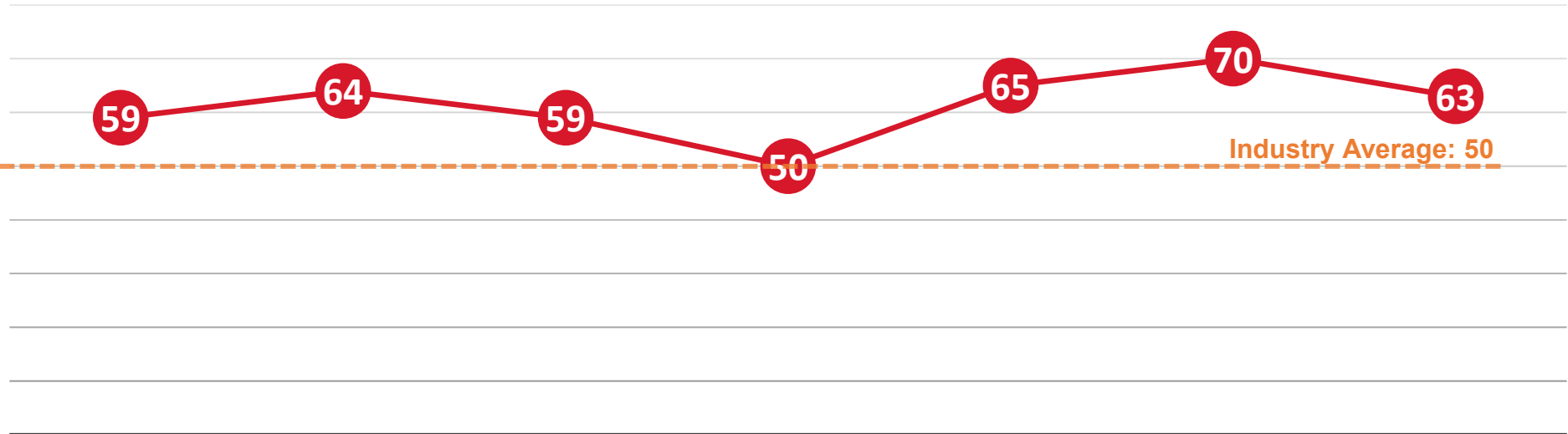
● Rail

n = 429

# Customer Satisfaction Results – NPS

Paratransit

NPS



Wave 1  
(Feb '22)

Wave 2  
(May '22)

Wave 3  
(Sep '22)

Wave 4  
(Dec '22)

Wave 5  
(Mar '23)

Wave 6  
(Jun '23)

Wave 7  
(Sep '23)

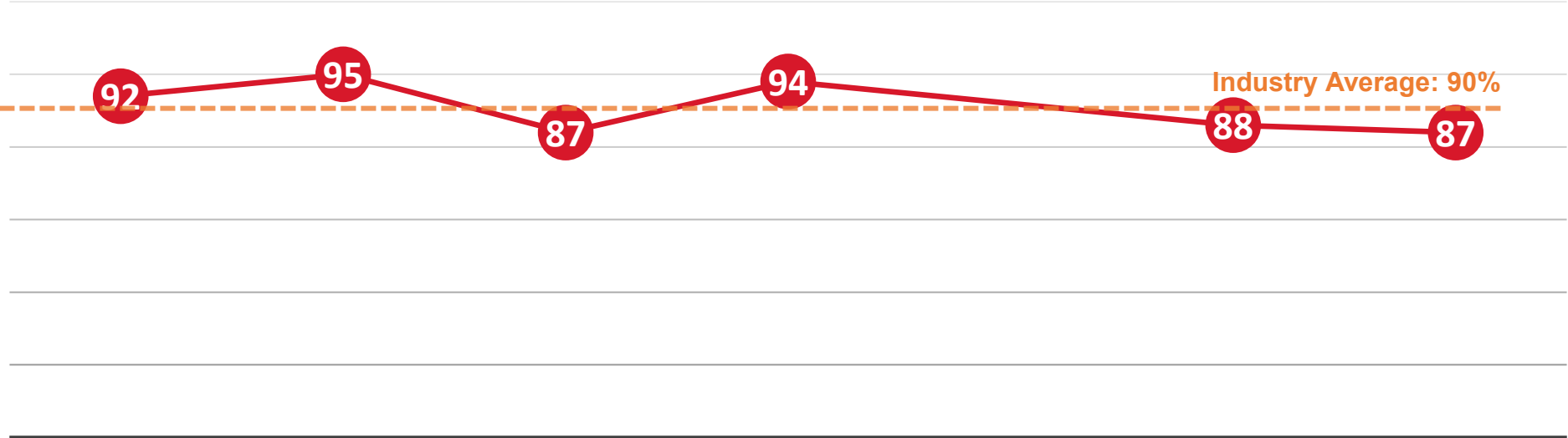
● Paratransit

n = 400

# Customer Satisfaction Results – Overall Satisfaction

Paratransit

### Overall Satisfaction (%)



Wave 1  
(Feb '22)

Wave 2  
(May '22)

Wave 3  
(Sep '22)

Wave 4  
(Dec '22)

Wave 5  
(Mar '23)

Wave 6  
(Jun '23)

Wave 7  
(Sep '23)  
n = 400

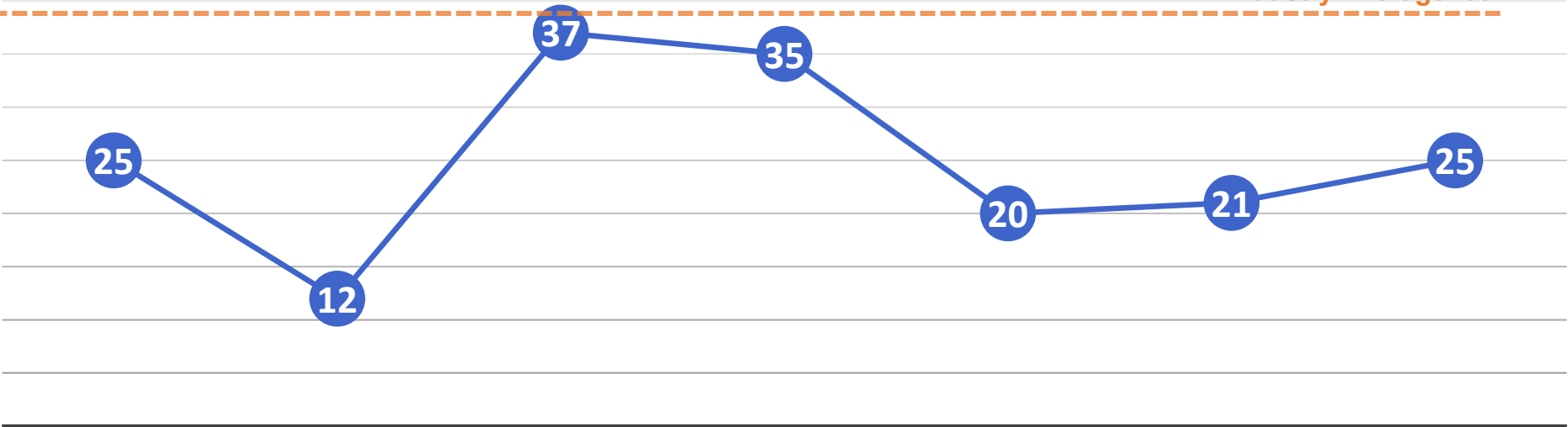
\*Due to a data collection failure, overall satisfaction was not measured Wave 5.

# Customer Satisfaction Results – Agency NPS

Agency

## Agency NPS

Industry Average: 39



Wave 1  
(Feb '22)

Wave 2  
(May '22)

Wave 3  
(Sep '22)

Wave 4  
(Dec '22)

Wave 5  
(Mar '23)

Wave 6  
(Jun '23)

Wave 7  
(Sep '23)

● Agency NPS

# Key Driver Analysis – Fixed Route

Fixed Route Bus	Wave 1 (Feb '22)	Wave 2 (May '22)	Wave 3 (Sep '22)	Wave 4 (Dec '22)	Wave 5 (Mar '23)	Wave 6 (Jun '23)	Wave 7 (Sep '23)
On-time Performance	Red	Red	Red	Red	Red	Green	Red
Bus Cleanliness	Red	Red	Red	White	Red	Red	Red
Safe On	Green	Red	Red	Red	Red	Red	Red
Safe Wait	Red	White	Red	Red	Red	Red	Red
Safe Drivers	Green	Green	Green	White	White	White	White
Fare Price	White	Red	Red	Red	White	Green	Red
Frequency	Green	Red	Red	White	Green	White	White
Travel Time	White	Green	Red	Green	Green	Green	White
Coverage	Green	Green	Green	White	White	White	White
Convenient Routes	White	White	White	White	Green	Green	Green
Courteous Drivers	Red	White	White	White	White	Green	White
Span	Green	White	White	White	Green	Green	White
Accurate/Available Schedules	White	Green	White	White	White	White	White
Information Ease	White	Red	White	White	White	White	White

# Key Driver Analysis – Bus Rapid Transit

Bus Rapid Transit	Wave 1 (Feb '22)	Wave 2 (May '22)	Wave 3 (Sep '22)	Wave 4 (Dec '22)	Wave 5 (Mar '23)	Wave 6 (Jun '23)	Wave 7 (Sep '23)
On-time Performance	Red	Red	Red	Red	Green	Red	Green
Bus Cleanliness	Red	Red	Red	Red	Red	Red	Red
Safe On	Red	Red	Red	Red	Red	Red	Red
Safe Wait	Red	Red	Red	Red	White	Red	White
Safe Drivers	White	Green	White	White	White	White	White
Fare Price	White	Red	Red	White	Red	Red	Red
Frequency	Green	Red	Red	White	Red	Red	White
Travel Time	Green	Red	Red	Green	Green	Green	White
Coverage	Green	White	Green	White	White	White	White
Convenient Routes	White	White	White	White	Green	Green	Green
Courteous Drivers	Red	Red	Red	White	White	Red	White
Span	Green	White	White	White	Green	Green	Green
Accurate/Available Schedules	Green	White	White	White	White	White	White
Cust. Serv. Responsiveness	White	Red	White	White	White	White	White
Ease to find out if bus is on sched.	White	Red	White	White	White	White	Green

Greater Cleveland Regional Transit Authority



Less Important	Strength	Opportunity
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# Key Driver Analysis – Rail

Rail	Wave 1 (Feb '22)	Wave 2 (May '22)	Wave 3 (Sep '22)	Wave 4 (Dec '22)	Wave 5 (Mar '23)	Wave 6 (Jun '23)	Wave 7 (Sep '23)
On-time Performance	Red	Green	Red	Red	Green	Green	Green
Train Cleanliness	Red	Red	Red	White	Red	Red	Red
Safe On	Red	Red	Red	Red	Red	Red	Red
Safe Wait	Red	Red	Red	Red	Red	Red	Red
Safe Operators	Green	Green	Green	White	White	Green	White
Fare Price	Red	White	Red	White	White	Red	Green
Frequency	Green	Red	Red	White	Green	Red	White
Travel Time	Green	White	Green	White	Green	Green	White
Coverage	Green	Red	Green	White	White	White	White
Convenient Routes	White	White	White	White	Green	Green	Green
Courteous Operators	Red	Red	Red	White	White	White	White
Span	Green	Green	Green	White	Green	Green	Green
Accurate & Available Schedules	Red	Red	White	White	White	White	White
Customer Service Courtesy	White	Red	White	White	White	White	White
Information Ease	Red	White	White	White	White	White	White

# Key Driver Analysis – Paratransit

Paratransit	Wave 1 (Feb '22)	Wave 2 (May '22)	Wave 3 (Sep '22)	Wave 4 (Dec '22)	Wave 5 (Mar '23)	Wave 6 (Jun '23)	Wave 7 (Sep '23)
On-time Performance	Red	Red	Red	Red	Grey	Red	Red
Bus Cleanliness	White	White	White	White	Grey	White	Green
Safe On	Green	Green	Green	Green	Grey	Green	Green
Safe Boarding	White	White	White	White	Grey	White	Green
Safe Drivers	White	White	White	White	Grey	White	Green
Scheduling Ease	Red	Red	Red	White	Grey	White	White
Fare Price	White	Red	Red	White	Grey	Red	White
Travel Time	Green	Red	Red	White	Grey	Green	Green
Courteous Drivers	Green	Green	Red	Green	Grey	Green	White



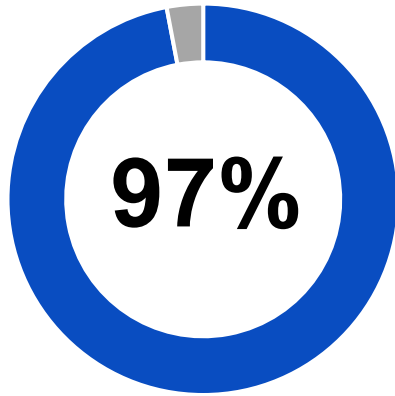
# Community Survey

September 2023

# Community Value

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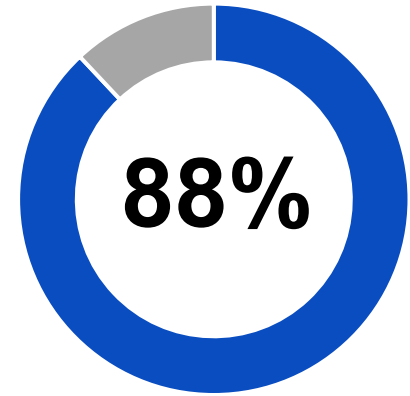
Aware of RTA



## Most Important

1. Providing access to employment
2. Providing affordable transportation options
3. Providing transportation options to people with special mobility needs
4. Providing mobility to low-income families and individuals

RTA is Valuable



# Quarterly Reporting Cadence and Schedule

	Quarter Begins	Quarter Ends	Leadership to Populate Metrics	Leadership Reporting	Leadership Reports Performance Results to Board
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Define Success Outcomes for 2024 →

<b>Q3 2023</b>	Jul 1	Sep 30	Oct 13	Oct 26	Nov 28
<b>Q4 2023</b>	Oct 1	Dec 31	Jan 12	Jan 25	Feb 27
<b>Q1 2024</b>	Jan 1	Mar 30	Apr 12	Apr 25	May 21
<b>Q2 2024</b>	Apr 1	Jun 30	Jul 12	Jul 25	Aug 27

# Defining Success for 2024

2023 Success Outcomes and Priority		2024 Success Outcomes and Priority		Reasons for Change
Customer Experience	35	Customer Experience	40	Customer Experience remains RTA’s highest priority. Increasing the points by 5 further separates it as RTA’s clear, primary aim.
Community Value	30	Community Impact	25	Community <i>Impact</i> conveys the active effect and positive imprint RTA commits to have on the Greater Cleveland region.
Financial Sustainability	25	Financial Health	15	RTA upholds the multifaceted dimension to the word “sustainability,” choosing Financial <i>Health</i> as the better word. RTA sits in a place of financial health and thus moves it to fourth priority—foundational to achieving success in the other 3 areas.
Employee Engagement	10	Employee Investment	20	RTA commits to Employee <i>Investment</i> in its workforce, including contributing resources to attract, develop, and retain high quality personnel. Leadership demonstrates commitment by doubling the allotted points.

# 2024 Organizational Success Outcomes

Success Outcomes	Points	Information System	Success Definition
Customer Experience	40	Customer Survey	<ul style="list-style-type: none"> <li> Net Promoter Score</li> <li> Customer Satisfaction</li> </ul>
Community Impact	25	Community Survey & Data	<ul style="list-style-type: none"> <li> Economy</li> <li> Equity</li> <li> Environment</li> <li> Perceived Value</li> </ul>
Employee Investment	20	HR & Employee Survey Data	<ul style="list-style-type: none"> <li> Vacancies</li> <li> Employee Engagement</li> </ul>
Financial Health	15	Financial Reporting	<ul style="list-style-type: none"> <li> Compliance</li> <li> Debt</li> <li> Stability</li> </ul>



Questions?