Quarterly Performance Review: 2024 Q2

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Success Outcome Status: 2024 Q2

Success Outcome	Points	Success Definition	Status
Employee Ownership	35	• Complete 1 Employee Ownership survey to inform the 2025 budget. • Create an employee retention action plan by the end of 2024.	• **Instrument complete, execution to begin 8/14** • **Draft plan complete, final by Q3**
Customer Experience	30	• Complete 1 Customer Experience survey by the end of 2024. (move to 2 in 2025) • Achieve an NPS score at or above the industry average. • Adopt a customer experience plan that is reflected in the 2025 budget.	• **Complete!** • **Bus: 57 | TARPS: 59 | Flex: 57** • **Draft plan by Q3**
Financial Health	20	• Create and adopt an outcome-based budget for 2025.	• **Tactics workplan set and James given ownership**
Community Betterment	15	• Complete 1 Community Betterment survey by the end of 2024. (move to 2 in 2025) • Create and adopt a CEO approved Community Betterment strategy by the end of 2024.	• **Stakeholder interviews complete and summary provided. Drafting instrument.** • **Defined "Community Betterment," draft plan by Q3**

Organizational Scorecard: 2024 Q2

Success Outcome	Goal Points	2024 Q1 Points	2024 Q2 Points	2024 Q3 Points	2024 Q4 Points
Employee Ownership	35	8.8	**17.5**		
Customer Experience	30	35.6	**35.6**		
Financial Health	20	6.0	**8.0**		
Community Betterment	15	11.3	**11.5**		
	100	61.7	72.6		

72.6 / 100 points earned

83.0 points possible at present

Organizational Scorecard:
Employee Ownership

Metric	Definition	Goal	Owner	Goal Points	Q2 Results	Points Earned
Employee Engagement Index	The overall employee engagement score (%) as defined by 4 key factors indicated in an employee survey. The 4 key factors are: (1) the % of employees who feel they understand what success looks like for TARTA and how they contribute to that success; (2) the % of employees that believe they have the resources/tools necessary to perform their duties; (3) the % of employees that feel their supervisors provide feedback on their performance; (4) and the % of employees who believe they work in a safe environment where their perspective is invited.	Establish Baseline	Ursula	15	Instrument complete, execution to begin 8/14	7.5
Employee Retention Plan	Create an employee retention action plan by the end of 2024.	Yes	Ursula	20	Drafted Product	10
				Total Goal Points: 35		17.5

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Organizational Scorecard:
Customer Experience

Metric	Definition	Goal	Owner	Goal Points	Q2 Results	Points Earned
Net Promoter Score (Bus)	Promoters minus Detractors. On a scale of 0-10 of how likely to recommend TARTA to others; Promoters are 9-10 and Detractors 0-6.	28	Rick	8	57	10.4
Net Promoter Score (TARPS)	Promoters minus Detractors	51	Rick	8	59	9.3
Net Promoter Score (Flex)	Promoters minus Detractors	Establish Baseline	Rick	6	57	6
On-Time Performance - Perception (Bus)	The percent of customers who are satisfied or very satisfied with the bus arriving on schedule.	67%	Rick	4	79%	4.7
On-Time Performance - Perception (TARPS)	The percent of customers who are satisfied or very satisfied with the bus arriving within the scheduled pickup window.	69%	Rick	4	95%	5.2
Total Goal Points:				30		35.6

Organizational Scorecard:
Financial Health

Metric	Definition	Goal	Owner	Goal Points	Q2 Results	Points Earned
Cost per Hour	Overall operating expenses divided by total revenue hours across three modes.	Establish Baseline	Rick	6	$	0.0
Future Sustainability	Months of operating cost on hand.	6.0	Sean	6	6.0	6.0
Outcome-Based Budget	Create and adopt an outcome-based budget for 2025.	Yes	James	8	Tactic workplan complete	2.0
Total Goal Points:				20		8.0

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Organizational Scorecard:
Community Betterment

Metric	Definition	Goal	Owner	Goal Points	Q2 Results	Points Earned
Community Betterment Perception	The percent of the community that agree or strongly agree that TARTA makes the Toledo community better.	Establish Baseline	Sam	2	Stakeholder engagement complete. Survey Coming Soon	0.75
Population Access	The percent of the total population within a 10-minute walk of transit in the major municipality of the service area.	Establish Baseline	Sean	3	72%	3
Job Connectivity - Actual	The total number of jobs accessible within a 45-minute public transportation commute in the service area.	Establish Baseline	Sean	4	3,215	4
Job Connectivity - Perception	The percent of the community that agree or strongly agree that TARTA provides access to jobs in the community.	Establish Baseline	Sam	3	coming soon	0.75
Educational Services Connectivity	The total number of educational services jobs accessible within a 45-minute public transportation commute in the service area.	Establish Baseline	Sean	1	373	1
Health Care and Social Assistance Connectivity	The total number of health care and social assistance jobs accessible within a 45-minute public transportation commute in the service area.	Establish Baseline	Sean	1	772	1
Arts, Entertainment, and Recreation Connectivity	The total number of arts, entertainment, and recreation jobs accessible within a 45-minute public transportation commute in the service area.	Establish Baseline	Sean	1	51	1
Total Goal Points:				15		11.5

Performance Management Cadence

May 2024	Jun 2024	Jul 2024	Aug 2024	Sep 2024	Oct 2024
Q1 Performance Review In-Person & Virtual Monthly Tactics Review	Virtual Monthly Tactics Review	Q2 Performance Review Virtual	Virtual Monthly Tactics Review	Virtual Monthly Tactics Review	Q3 Performance Review In-Person & Virtual Monthly Tactics Review

Nov 2024	Dec 2024	Jan 2025
Virtual Monthly Tactics Review	Virtual Monthly Tactics Review	Q4 Performance Review Virtual & Virtual Monthly Tactics Review

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