

STRATEGIC WORKPLAN

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The Strategic Workplan is the foundation of the Strategic Plan. It is the work we plan to do over the next two years, organized by Goals and Core Elements.

INTRODUCTION

See below for more a key to this document’s organization and the definitions of Goals, Core Elements, Outcomes, Strategies, Actions, Milestones, and Resources. Questions about specific areas of work? Please contact the Executive Sponsor named on the front cover. Questions about the document in general? Please contact Rachel Dungca.

GOALS AND CORE ELEMENTS

Our goals describe what we are trying to achieve, and we believe we can improve in these areas.

Our core elements describe our values and how we want to approach our work.

OUTCOMES - DESCRIBES THE DESIRED OUTCOME AFTER THE STRATEGIES AND TACTICS ARE ADVANCED.

Strategies - describes how we plan on tackling the outcomes and may easily link to outcome metrics or to specific tactics. Strategies may also help group similar tactics that have the same resources assigned or are different elements of the same project. Sometimes, strategies and tactics are similar or difficult to distinguish.

Action	Milestones (2021-2022)	Resources (people, operating budget, CIP, etc.)
<p>Action describes the unit of work that is specific, <u>could be easily translated into tasks for an individuals’ workplan</u>. It can also be measured; the indication of success is clear within the description or paired with milestones. An action may support one or more strategies.</p>	<p>The Milestones list the achievement and the Quarter or Month that it will be completed per the plan and level of resources assigned. Milestones could be described as changes in performance (e.g. increase productivity/performance by X% over Y time period) or project milestones (e.g. complete construction by X date); it will depend on the task or effort described.</p>	<p>Committed Resources indicates what department, work unit, or individuals are committed to dedicate time or budget items to this tactic to advance it per the provided schedule or intended impact.</p> <p>-OR-</p> <p>Uncommitted Resources (in grey box) indicates what department, work unit or individuals are anticipated but have not yet been secured because of competing priorities or unmet budgetary needs.</p>

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GOAL 1: WE WILL TRANSITION FROM THE PANDEMIC PERIOD TO A BETTER AND STRONGER TRANSIT SYSTEM.

DEVELOP AND EXECUTE A TRANSIT SERVICE TRANSITION STRATEGY THAT IMPROVES THE QUALITY OF TRANSIT SERVICES BASED ON REGIONAL AND CUSTOMER NEEDS, EXPECTATIONS AND DEMANDS

STRATEGIES

1. Analyze transit performance and customer demand
 - a. Review system performance
 - b. Understand customer demand and interests
2. Leverage relationships with downtown councils/chambers/employers and other key business partners
3. Gather and use information about how peer agencies are making service decisions
4. Evaluate system impact on communities and equity
5. Design to strengthen service with demonstrated success before and during pandemic (2020-2021)
6. Identify new approaches to service planning and development that adapt to post-COVID changes to regional travel behavior
7. Apply an equity lens and evaluation to service transition decision making
8. Balance bus operator and financial resources in developing service plans
9. Leverage the work of other strategic Goals to provide a transit environment that is welcoming, clean, and safe
10. Develop an external marketing and communications strategy to promote transit services and inform our riders and stakeholders of what to expect
11. Identify measures and standards to evaluate system performance outcomes

Action	Milestones (2021-2022)	Resources
Complete Annual Service Equity Evaluation 2019-2020, update in 2022 (Strategy 4)	June 2021 review draft, August 2021 post online	Service Development lead, Strategic Initiatives support, Marketing support; within existing budget
Complete Service and Market performance Analysis (Strategy 1) <ul style="list-style-type: none"> • Analyze route level ridership/service levels 2019-2021 • Review TBI and census data 	On-going (started June 2020) Downtown Minneapolis HR Directors monthly meetings Metropass survey, complete On-going use of TBI and Census data to inform service planning Staff review of on-going Customer Relations contacts	Service Development lead, Strategic Initiatives support, Marketing support, Community Engagement staff, Drew Kerr; within existing budget

<ul style="list-style-type: none"> Review customer input from surveys, customer relations, operators Review peer agency strategies Coordinate with city and business organizations 	<p>Staff review of Listening and Learning customer survey, complete May 2021</p> <p>On-going review of peer agencies</p> <p>On-going Use Remix to geographically evaluate service access, equity, service design</p> <p>On-going Use new tools in HASTUS to efficiently and effectively schedule and operate</p>	<p>Support for Remix and HASTUS included in operating and capital budget</p>
<p>Open to full capacity based on MDH recommendations and data (Strategy 2)</p> <ul style="list-style-type: none"> Hire additional cleaners and maintenance staff for LRVs, platforms, bus stops, stations Enhanced cleaning 	<p>June 2021; complete</p> <p>Daily enhanced cleaning of buses & LRVs</p> <p>Cleaning of in-service LRT trains at terminals</p>	<p>Bus, Rail Operations, Facility Maintenance; within existing budget</p>
<p>Enhanced bus stops and stations (Strategy 2, 3, 6)</p> <ul style="list-style-type: none"> Better bus route and stop implementation 	<p>Route 63/323 implemented June 2021, Route 3 implemented August 2021</p> <p>Implement 7th St bus lane downtown Minneapolis, August 2021</p> <p>Bus stop improvement by end of 2021</p> <ul style="list-style-type: none"> 25 new & 30 replacement shelters Light added at 23 shelters Heat added at 11 shelters <p>Next Five Years</p> <ul style="list-style-type: none"> 270 new/replacement shelters 150 concrete boarding areas at locations without shelters 	<p>Service Development, Facilities Planning, municipal partners; within existing budget between E&F and Service Development, cities</p>
<p>Plan and implement post-pandemic service (Strategy 2, 3, 5)</p> <ul style="list-style-type: none"> August 2021 commuter and core local/LRT December 2021 Orange Line and connecting service 	<p>June 2021 service implemented, August 2021, service developed, adding commute service for downtowns, U of M. Scaled back with limited bus operator availability. More service to be added in December 2021.</p> <p>Dec 2021; June 2021 service plan complete, Transportation Comm approval June 14.</p>	<p>Service Development, Bus and Rail Operations & Maintenance, E&F, BRT, Marketing; within existing budget</p>

	Orange Line implementation December 2021	
<p>Development of future service enhancements (Strategy 2, 3, 5, 6)</p> <ul style="list-style-type: none"> • BRT • On-demand transit service • Future bus service and transitway planning 	<p>D Line under construction June 2021, opening 2022 B Line funded (June 2021), opening 2024 E Line funded (June 2021), opening 2025 F, G, H lines identified (March 2021) in Network Next for 2026+ Microtransit Pilot project, Spring 2022 Gold Line construction 2022 Green Line Ext and Blue Line Ext in development Future planning/evaluation of Purple Line, TH55 BRT, TH 252/94 BRT Develop local bus service plan/process to support BRT direction in East Metro 2022 Add local and express service to primary corridors to strengthen service as bus operator hiring allows</p>	<p>Service Development, BRT, E&F, Strategic Initiatives, Project Offices</p> <p>Planning efforts within existing budget Capital budgets identified for projects to be implemented Future projects, no funding committed</p> <p>2022 operating budget allows to add local and express bus service up to 100% of pre-pandemic levels and the additions of Orange Line and D Line.</p>
<p>Promote transit system enhancements & customer info tools (Strategy 7)</p>	<p>Implement new mobile Metro Transit app, complete July 2021 Enhance NexTrip and website, complete spring 2021 Three phase 2021 Marketing campaign</p> <ul style="list-style-type: none"> • April-May Travel responsibly • June-August; Ready when you are • Sept-Dec; Moving Forward welcoming customers 	<p>Marketing, IS, Communications; within existing budget</p>
<p>Review and evaluate service performance, ridership relative to service standards (Strategy 4, 6, 8)</p>	<p>Develop improved reporting of ridership and service design. Performance team established July 2021.</p> <ul style="list-style-type: none"> • Service levels • Passengers/in-service hour • Ridership/stop • Subsidy/passenger • Develop accessibility metrics 	<p>Service Development, Strategic Initiatives, MTS; within existing budget</p>

	<p>Guiding Framework to be updated in 2022 based on observed performance up to February 2022. Update service performance expectations, review standards in TPP</p>	
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GOAL 2: OUR SERVICE IS SAFE, WELCOMING, AND COMFORTABLE.

INCREASE METRO TRANSIT’S VISIBLE AND OFFICIAL PRESENCE ON OUR SYSTEM

STRATEGIES

- 12. Seek a state law change for an administrative citations program for fare evasion
- 13. Increase our official presence on transit by expanding the Community Service Officer program
- 14. Staff and improve proactive use of Real Time Information Center
- 15. Improve MTPD rapid response capabilities and outcomes through transit response teams
- 16. Continue to increase police focus on transit rolling stock and at transit properties

Action	Milestones (2021-2022)	Resources
Hire 50 Community Service Officers – Strategy 2	<p>May 2021: Begin to hire and train CSO staff to create a welcoming environment on transit,</p> <p>May 2021: Ensured ticket validation equipment is functional</p> <p>Workforce Planning Metrics: Budgeted FTEs (CSOs), # actively deployed, in recruitment, in training or onboarding, not available, available and on patrol [goal is to maximize those available for patrol according to budget]</p> <p>HR Metrics: Positions posted, closed, interviews completed, backgrounds completed, conditional offers, academy, field training, training complete</p>	<p>HR (hiring)</p> <p>Police training staff (training)</p> <p>Finance and Revenue Operations (budget, ticket validation equipment)</p> <p>Police (reporting progress and metrics)</p>
Hire 10 full-time officers – Strategy 2		

Additional staffing of FT Officers, CSO's, RTIC civilians - Strategy 2/3/4/5	<p>Hiring of 51 total PCN's HR Metrics: Positions posted, closed, interviews completed, backgrounds completed, conditional offers, academy, field training, training complete</p> <p>LRT hours Platform checks Fare inspections Fare warnings Fare citations Non-law enforcement Calls for Service Transit Response Unit stats (tbd)</p>	<p>HR (hiring) Police training staff (training) Police (reporting progress and metrics)</p>
Hire more MTPD Dispatch staff– Strategy 2/3/4/5	<p>5/27: Request & justification submitted to Petrie and Kandaras Q4: Hire 3 additional FTE's for Transit Control Center.</p>	<p>HR (hiring) Finance (budget) TCC (training)</p>
Review the scope of RTIC assignments to ensure that buses and bus facilities are receiving similar attention to rail cars/stations - Strategy 3	<p>Review Activity Metrics Across Modes: LRT hours Platform checks</p> <p>Operator Check-ins Bus On-Boards Transit Center Checks</p>	<p>Brian Funk MTPD</p>
Review the open/closed hours for all public facilities to match service profiles, customer needs, weather conditions, etc - Strategy 3?	<p>Brian to meet with Pam and Marilyn by end of June to review list, document recommended changes, evaluate other stakeholder needs and opinions.</p>	<p>E&F</p>

BUILD EMPLOYEE PARTNERSHIPS TO INFORM SAFETY AND SECURITY STRATEGIES

STRATEGIES

1. Leverage employee expertise and experience in identifying improvements to safety and security
2. Develop employee focus groups, surveys, and consultation strategies
3. Create feedback loops to openly communicate security issues and steps to address them

4. Continue security meetings with Metro Transit and ATU leadership

Action	Milestones (2021-2022)	Resources
Citizens League engagement – Strategy 1/2	<p>June 2021: Frontline employee, TSSC and E&I Team engagement facilitation completed</p> <p>July 2021: Communicate results of engagement with employees that participated</p> <p>September date: Determine if any projects need to be implemented or work processes need to change</p>	Citizens League, Michelle Fure
Launch Employee engagement survey that includes tracking feelings of personal safety and security from frontline employees – Strategy 2/3	<p>X 2021: Draft survey questions and ensure they meet objectives and need for information</p> <p>October 2021: Reinstigate the frontline employee engagement survey during Professional Operator Development</p>	Donathan Brown, Dan Stoffer, Eric Lind
Whole cloth review of late night service as it relates to employee and customer safety, consider a micro-transit approach – Strategy 1/2	<p>August 2021: Develop a project team to begin a review of whether the service we are providing late at night is safe for our employees and customers and whether the demand justifies the allocation of resources (or if a partnership can be explored for current transit users that may be safer).</p> <p>Key milestones for project team:</p> <ul style="list-style-type: none"> • Complete report that analyzes demand/supply over time for late night service including travel behaviors (trip purpose, frequency) • Document perceptions of safety for customers and operators • Anticipate and respond to questions regarding various service scenarios (less service) 	Bus/Rail Operations, Strategic Initiatives, Service Development, Customer Relations. May result in operational \$ savings.

Promote work of Transit Safety and Security Committee (TSSC) – Strategy 1/3	July 2021: Complete first example of TSSC activities report and link or connect to Insights X 2021: Complete garage visits or other in-person strategy to communicate TSSC activities	TSSC Lead, TSSC Mgmt Advisor, Drew Kerr
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BUILD EXTERNAL PARTNERSHIPS AND FEEDBACK TO STRENGTHEN SAFETY EFFORTS

STRATEGIES

1. Regularly review customer feedback on transit service experiences
2. Inventory and document key external partnerships that may contribute to public safety
3. Explore new partnerships that will improve safety at bus stops, transit stations, and other Metro Transit public facilities
4. Consider continuing, expanding, and improving programs like CX360

Action	Milestones (2021-2022)	Resources
Create an internal, cross-functional working group led by Customer Relations that focuses on the customer feedback received on transit service experiences - Strategy 1	Discuss with Lesley and Robin, work toward pitching the idea by end of June. Group to hold a meeting and discuss process for review, recommendations, resolutions, etc in July 2021.	Staff time from CRD, Operations, Police, Facilities, SI
Create resource guide (or section of a larger external relationships document) to identify all external partners who may be able to help contribute to public safety - Strategy 2	Aug 2021: final draft of resource guide Resource guide will be complete when <ul style="list-style-type: none"> • All partners and their roles to support a safe environment are detailed • Key contacts/roles are identified at partner agencies along with transit contact responsible for maintaining relationship and communication of key activities • List of goals for partnerships – what can we provide and what can we ask 	Robin Caufman and team, PD, Operations, Bruce Howard (executive sponsor of broader effort to document partnerships)
Increase visible presence of staff at key locations and facilities including transit centers – Strategy 3	X date: Work with PD to determine external resource to be a “force multiplier” and design pilots including metrics for effectiveness X date: Pilot at 3-5 sites, 2-4 people X 8-16hrs/day	(\$300k-400k from X budget), PD, Brian Funk

Pilot the use of “Safety Stick” technology for remote viewing and alerts through a subscription service - Strategy 3	Meet with MPS Park to review current product offerings and receive pricing for a pilot at transit centers that are not able to be regularly patrolled such as Cedar Grove, 46 th BRT, Maplewood Mall	Pilot the technology at 3 sites starting Aug 2021 (price TBD)
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PROVIDE INTERNAL AND EXTERNAL STAKEHOLDERS WITH CONSISTENT, TIMELY, ACCURATE DATA REGARDING SECURITY OUTCOMES

STRATEGIES

1. Complete police datamart project
2. Develop measures and standards for evaluation and establish a regular report on outcomes for providing security and rolling and facilities clean and welcoming

Action	Milestones (2021-2022)	Resources
Develop technology strategy that supports regular police reporting and ad hoc reporting	TBD	
Develop vehicle and public facility scorecard/audit process along with 360 feedback for users - Strategy 2	TBD	

EFFECTIVELY COMMUNICATE AND REPORT ON EFFORTS AND OUTCOMES TO PROVIDE A SAFE, WELCOMING, AND COMFORTABLE TRANSIT SERVICE

STRATEGIES

1. Develop and implement strategies for messaging to customers and stakeholders
2. Develop and implement strategies for messaging to employees
3. Create annual capital maintenance report on asset management
4. Institute standardized security and asset management reporting in the Council Transportation Committee Workplan

Action	Milestones (2021-2022)	Resources
Create Comms Plan on MTPD strategy - Strategy 1/2		
Annual capital maintenance plan needs e-process sheet implementation - Strategy 3	Date Unknown: Implement e-process sheets for asset documentation and evaluation to develop condition-driven instead of the current project-driven approach. Part of current EAM project.	Tom Humphrey

GOAL 3: OUR SERVICES ARE RELIABLE AND EASY TO USE.

SERVICES ARE FAST AND RELIABLE

STRATEGIES

1. Implement bus lanes in existing high ridership corridors (Service Development)
2. Continue rail speed and reliability initiatives (Strategic Initiatives, Rail Operations)
3. Continue Better Bus Routes program to increase speed and reliability (Serv. Dev. lead)
4. Deliver funded projects and expand METRO program efforts (Capital Programs)
5. Incorporate speed and reliability best practices design principles into all roadway reconstruction projects (Service Development, BRT Projects, Engineering & Facilities)
6. Take inventory of assets, identify gaps, and strategically match and develop interagency relationships beginning with central cities and counties, and MnDOT (Exec Sponsor and GM Direct Reports team, especially Bus Operations, Capital Programs, Service Development)

Action	Milestones (2021-2022)	Resources
Minneapolis 7th Street	Q3 2021 – implementation of bus lane on 7 th St between Chicago Ave and 1 st Ave N	Within CIP
Minneapolis 12th Street contraflow lane (w/ Orange Line BRT)	Q3 2021- complete construction and testing Sept-Oct 2021 open for service	Activation via Orange Line (per below)
Downtown Saint Paul- 5th and 6th Street (w/ Gold Line BRT)	Q3 2021- Finalize design and construction readiness 2022+ begin construction for late 2024 service	BRT Projects- design/construction Gold Line capital budget funding
Evaluate delays across rail system and implement signal timing improvements or other infrastructure investment to reduce delay (Blue and Green Line corridors)	Q2 2021 – Start monthly segment travel time monitoring Q4 2021 – Complete Downtown St Paul LRT/Traffic Signal Interconnect Q4 2021 – Complete evaluations of traffic signal opportunities along 4 th Street and University Avenue Q4 2021 – Incorporate ARINC delay reports to estimate major delays by delay type	Rail Operations and Administration Strategic Initiatives Engineering and Facilities

	Q4 2022 – Complete University of Minnesota LRT/Traffic Signal Interconnect	
Bus stop consolidation, signal priority to increase speed and reliability	Q2 2021 – Evaluation and selection of future Better Bus Route projects Q3 2021 – Implementation of Route 3 bus stop consolidation Q3 2022 – Anticipated implementation of 4 th BBR project	Service Development- Speed & Reliability with Engineering & Facilities and Transit Information
Award and begin construction of METRO D Line (BRT Projects)	Q1 2021- Contract awarded and construction underway Q4 2022- Revenue service launch	BRT Projects Engineering & Facilities- construction management Bus Operations- Service Activation
Complete METRO Orange Line construction (BRT Projects, Engineering & Facilities)	2021 ongoing construction Mid-2021 service activation planning underway Q4 2021 full pre-service testing and certification Late 2021- Service Launch	BRT Projects E&F Safety Bus Operations
Advance METRO Gold Line toward Full Funding Grant Agreement (BRT Projects)	Q2-Q3 2021- FTA readiness reviews Q3 2021- design completion Late 2021- FFGA application 2022- Execute FFGA and begin construction	BRT Projects Finance- Financial Management Plans
Complete bus procurements to support BRT system expansion (Bus Maintenance)	Q1 2021- Awarded 40' & 60' diesel bus contracts 2022- Electric bus contracts TBD	Bus Maintenance
Continued construction and development of METRO LRT program (TSD)	2021-2022 Ongoing Green Line Extension LRT construction 2021- Blue Line Extension LRT alignment review 2022- Blue Line Extension alignment next steps TBD	
Shape roadway processes led by external partners to obtain transit speed and reliability improvements Major roadways entering full design processes in 2021 include Hennepin Ave S, Franklin Ave	2021: Bryant Ave layout decisions Q3 2021: Hennepin Ave layout decisions Q3 2021-2022: Robert Street design process Others vary by road project phase	Service Development Street Operations Engineering & Facilities BRT Projects

(Lyndale-Hennepin), Johnson St, Bryant Ave, University Ave SE, Jackson St, Robert St, Arcade St, downtown Saint Paul, Rice St, and others		
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Action	Milestones (2021-2022)	Uncommitted Resources
To advance these efforts successfully we need capable project teams, strategic partnerships, and close working relationships with local roadway authorities at all levels of each organization. Strategically matching and purposefully cultivating these relationships will establish a network to improve transit performance and investment in professional peer relationships critical to these outcomes. Current efforts at the staff level are often delayed by slow response or lack of organizational buy-in from traffic engineering staff. Developing higher level relationships would allow partner policy frameworks to be better reflected in evaluation and outcomes. The nature of this effort does not lend itself to any particular department and instead is proposed to be developed through the GM Direct Reports team and the Executive Sponsor for this framework priority, with facilitation and strategic planning support from Strategic Initiatives.	TBD- may overlap with other areas; requires further consideration. Major opportunity to inventory, strategize, recalibrate relationships with hiring of DGM in late June 2021.	GM Direct Reports team Strategic planning support from Strategic Initiatives.

SERVICES ARE SIMPLE TO NAVIGATE

STRATEGIES

1. Design services and routes to be easy for new and existing riders to know where routes go and how to ride (Service Development)
2. Create fare structures and payment tools that are simple, understandable, and easy to use (Finance)
3. Design and locate bus stops and facilities to be consistent, predictable, and accessible throughout the service area (Facilities Planning)
4. Ensure customers can easily and naturally transfer between stops and modes of service (Transit Information)
5. Develop customer information tools that are intuitive, available, and accurate and meet customers’ expectations at each stage of their journey (Creative Services/Transit Information)

Action	Milestones (2021-2022)	Resources
Use microtransit to provide coverage for limited service route branches, providing more service on trunk portions of the route	2022: Initial Microtransit pilot implementation Post-2022 TBD: following microtransit implementation and evaluation, consider for future route planning work	Strategic Initiatives
Pursue route design that streamlines route patterns for greater legibility	Q2 2021- Orange Line Connecting Bus Study approved, changes implemented Q4 Q3 2021 – Route 3 BBR will significantly reduce route and schedule complexity	Service Development
Launch Residential Bulk Pass Program	July/August 2021 - Initiate soft launch of Residential Pass Program Q1 2022 – Launch full Residential Pass Program	Finance, Marketing, TOD and Procurement staff
Fare Simplification- reduce confusion and complexity in the fare structure.	Q2 2021- Project kickoff Q3 2021- Synthesize current practices	Finance

<p>Review national trends and document recent best practices</p> <p>Identify and prioritize fare simplification initiatives</p>	<p>Q3 2021 – Review options with Council leadership, proceed with evaluation</p> <p>Q4 2021 – Review updated ridership data for MTS and Metro Transit to understand options/impacts</p> <p>January 2022 – Decide and begin implementation of prioritized fare simplification initiatives.</p>	<p>Support from Strategic Initiatives, Service Development</p>
<p>Identify mid-term (5-year) fare collection tools and technology</p> <p>Develop strategy for technology, including integrating 3rd party data, introducing contactless payment options, and more</p> <p>Options could include upgrade-in-place, complete system replacement, or something in the middle based on goals, funding availability, and other factors.</p> <p>Analyze current customer pain points in the fare payment process to inform desired technology approaches</p>	<p>2021- Cubic proposal to “Upgrade in Place”</p> <p>Q3 2021- Phase 1 fare collection system analysis will determine regional fare collection goals and opportunities, SWOT analysis, industry trends, risk, etc.</p> <p>Q4 2021 -Review system upgrade options with Sr. management and other Council leaders</p> <p>Late 2021/2022- Decision on 5-year fare collection tools and technology strategy</p>	<p>Revenue Operations</p> <p>\$11.5M in capital funding has been included in the approved CIP for 2021-2026.</p> <p>However, a complete system upgrade or replacement has been estimated at closer to \$30M, so additional funds could be needed depending on the final direction chosen for a fare collection system upgrade/improvement.</p>
<p>Finalize and communicate Street Design Guidelines</p> <p>a. These guidelines provide the framework to communicate with municipalities and stakeholders around construction projects to provide consistent, accessible bus stops and facilities.</p>	<p>Q2 2021 – Updating Street Design Guidelines with partner agency feedback.</p> <p>Q3 2021 – Publish guide on metrotransit.org</p>	<p>E/F Facilities Planning - Sonja</p>

<p>b. While Metro Transit controls design at our facilities, much of the work around bus stops is driven by different parties. Having standardized guidelines to influence design decisions will provide our customers with a consistent and predictable approach, simplifying their journey.</p>		
<p>Shelter Inventory Project to inform capital planning and address shelter site configuration issues</p> <p>Evaluation of bus stops with shelters will provide information about elements of the bus stops that don't meet ADA requirements, as well as gathering data about consistent layout and design of stops. This can lead to a capital project to address issues.</p>	<p>Q1 2021 – E&F Shelter Inventory Assessment completed and data processing/cleaning began.</p> <p>Q2 2021 – Shelter Inventory utilized to inform 2021 capital improvement plan. Added nuance in understanding additional capital needs when scoping existing bus stop improvements.</p> <p>Q3 2021+ – Shelter Inventory passed to Facilities Maintenance team for use in additional maintenance responsibilities. Will be utilized to a higher degree moving forward when sheltered stop improvements are slated to occur.</p>	<p>E&F Planning – Berry Farrington, Arman Rajaeian, Anna Flintoft</p> <p>E&F Facilities Maintenance – Donn Rude, Murray Olson, Rich DeMarchis, Michael Knight</p> <p>*Special shoutout to Andrew Brenny for conducting Shelter Assessment*</p>
<p>Pilot, evaluate, and develop Wayfinding Guidelines</p> <ul style="list-style-type: none"> a. Pilot wayfinding signage at MOA and Westbank stations b. Evaluate customer impact c. Update guidelines based on customer feedback d. Communicate guidelines and make Wayfinding Guidelines available 	<p>Q3 2021 - Design, Fabrication, and Installation of wayfinding signage at MOA</p> <p>Evaluate base line customer experience around wayfinding and evaluate impact of wayfinding signage.</p> <p>Q1 2022 - Design, Fabrication, and Installation of wayfinding signage at West Bank Station</p> <p>Evaluate base line customer experience around wayfinding and evaluate impact of wayfinding signage.</p>	<p>Transit Information; Creative Services; Engineering & Facilities; LRT; Strategic Initiatives</p> <p>Funding through Ladders of Opportunity Grant</p>

	<p>Q3 2022- Recommendations for use of wayfinding signage</p> <p>Defined criteria and guidelines for usage and placement</p> <p>Q3 2022 - Update and finalize wayfinding guidelines and make available internally and for partners</p>	
<p>Increase ease of website navigation using “Site Improve” tools</p> <ol style="list-style-type: none"> Utilize this tool to create heatmaps and click maps Prioritize usability improvements for web and mobile sites Expand WECO (accessibility testing vendor/service) In-person testing Partner with work units to initiate in-person testing of customer tools Partner with work units to determine applicability of Validately user testing 	<p>Ongoing - Implement weekly Site Improve task check-in in Workfront</p> <p>Q1 2021 - Review MetroTransit.org and implement changes based on accessibility user testing</p> <p>Ongoing - Integrate usability reviews to project reviews</p> <p>Q3 2021 – accessibility testing on redesigned route pages</p> <p>Q1 2022 - accessibility testing after website content management upgrade</p>	Creative Services

Action	Milestones (2021-2022)	Uncommitted Resources
<p>Explore use of “GTFS Pathways” to improve online passenger wayfinding information within stations. If viable, complete Requirements and Data Architecture for GTFS Pathway implementation</p> <ol style="list-style-type: none"> Better understand the data specifications and content development need to support a GTFS pathways feed. 	<p>Milestones undetermined due to exploratory nature of current state. If progressed steps would include:</p> <ul style="list-style-type: none"> Develop GTFS Pathways feed for initial pilot locations Requirements development for ScheduleDB Test feed & document necessary effort to build and maintain feed for station <p>Develop recommendations for the dissemination and maintenance of GTFS Pathways feed</p>	<p>Transit Information; IS Resources are required for additional application development</p>

- b. Evaluate overall maintenance support needs.

SERVICES ARE ACCESSIBLE- RIDERS OF ALL BACKGROUNDS AND ABILITIES USE OUR SERVICES WITH EASE

STRATEGIES

1. Enhance digital accessibility of Metro Transit’s website and app (Transit Information)
2. Continue to improve the physical accessibility of our transit facilities and vehicles (Engineering & Facilities, Bus Maintenance, LRV Maintenance)
3. Expand and enhance accessible wayfinding and navigational support (Transit Information)

Action	Milestones (2021-2022)	Resources
Replace Mobile App	Q1 2021: Token has been selected as vendor (Adam Mehl lead), vetted to ensure ADA compliance Q3 2021: App launches on July 16, future expansion to tickets in third-party apps	Marketing
Based on a full accessibility audit of its website, Metro Transit will continue to incorporate greater digital accessibility practices into the enhancements of its websites. a. Specifically, trip tools, schedules and interactive maps will be improved as well as accessibility testing during the development lifecycle.	Q2 2021: Completed., Weco was vendor completed audit of redesigned site; changes were made to ensure compliance with digital ADA guidelines, Web Content Accessibility Guidelines (WCAG)	Ellen Thompson and Rich Bothe project leads General fund, non-CIP related ADA project funds
Utilize 2019 ADA Self-Evaluation Data to scope Capital Improvements at public and support facilities	2021: ADA Facility Self-Evaluation data being utilized on an ad-hoc basis to correct identified barriers at facilities with active projects. Q4 2021 & Beyond: Aiming for E&F to have hired additional staff resources at this point. New	E&F Planning – Arman Rajaeian E&F Engineering – Derek Berube, Jim Harwood, Claudius Toussaint

	engineering staff will be looking at all barriers identified and creating capital project scopes and packages for implementation moving forward into 2022 and beyond.	
<p>Transit information will pilot a livestream transit wayfinding app with input from community members who are blind/low vision.</p> <ul style="list-style-type: none"> a. An app-based wayfinding service that seeks to improve the reliability, consistency, and accessibility of transit information for those with visual disabilities using transit services. b. If this pilot is successful, this application will be supported by Metro Transit and incorporated in the broader efforts of the department to improve transit navigation assistance. 	<p>Q2 2021 - Launch pilot of Aira</p> <p>Q2 2021 - Hold focus groups and recruit people for pilot</p> <p>Q4 2021 – Q1 2022 - Prepare final pilot report and make recommendations for continued usage of Aira.</p>	<p>Transit Information; Community Outreach; OEO; Marketing; Strategic Initiatives; Communications</p>
<p>Implement Bluetooth low-energy beacons at two light-rail platforms to evaluate this technology and to inform future recommendations about its utility and scalability.</p>	<p>Q4 2021 - Develop content and install beacons at two pilot locations (University/Raymond, University/Snelling)</p> <p>Q1 – Q3 2022 - Evaluate beacon technology and benefit to blind & low-vision customers, along with maintenance considerations and alternative uses for technology</p> <p>Q4 2022 - Final pilot report & evaluation, will guide future applications and scale of future expansion</p>	<p>Transit Information</p>

GOAL 4: WE ACTIVELY CONTRIBUTE TO THE ENVIRONMENTAL SUSTAINABILITY OF OUR REGION.

WE ACTIVELY CONTRIBUTE TO THE ENVIRONMENTAL SUSTAINABILITY OF OUR REGION.

STRATEGIES

1. Develop a Metro Transit Sustainability Plan
2. Develop a Zero Emission Bus (ZEB) Transition Plan to be incorporated into the Metro Transit Sustainability Plan
3. Assign resources and leadership required to develop and execute sustainability plans
4. Develop objectives, measures, and standards required for evaluating progress in implementing the sustainability plans

Action	Milestones (2021-2022)	Resources
Define and charter a multi-stakeholder steering team to identify business/sustainability objectives; provide management oversight to sustainability work within Metro Transit.	Q3- Review and refine current sustainability work plan to identify Goals to continue; how do these Goals align with new Framework strategies. Establish sub-group to define key Metrics, KPIs, and dashboard tools that quantify and support the work and those doing it annual report.	Existing sustainability work plan resides with Jeff Freeman (Project Coordinator); Harwood and Porter to identify potential steering committee team participates
Effectively communicate energy/sustainability goals/metrics/reports out (link to #8); Develop an awareness and outreach program to inform staff and promote a more sustainable business culture.	Q2- create a monthly sustainability forum within E&F to share updates and garner input related to sustainability issues. Q4- expand forum to include other stakeholders external to E&F Q4- use internal communication strategies, i.e., Insight News, etc. to inform and promote a sustainable business culture. 21Q4 – Develop ZEB Transition Plan public engagement strategy	Jim Harwood to provide oversight related to monthly forums. Work with Public Relations (Drew Kerr) to prepare key messaging Work with Creative Services relative to posters and other materials to promote sustainability.
Create sustainability work group (s) to evaluate and shape sustainable practice, policy and process within the work we do, the work of the	Q3- Establish two work groups; sustainability (redefined), and Electric Bus Infrastructure (staff identified in Q2); moved positions around.	Committed resources-Jeff Freeman, Carrie Desmond, and Rick DeMarchis

group(s) is transparent and touches multiple stakeholders, internal and external.	Q4- Create business case for a Lead position for Sustainability and Electric Bus Infrastructure respectively.	Facilities Maintenance Project Manager (oversee operations of electric bus infrastructure) - position approved, but not filled
Inventory and assess current sustainability efforts (Baseline, what are we working with.)	Q4- inventory list created by newly formed work group	Input from E&F PM's, leads, Urban Design Group as applicable. Input from TOD on joint development and land use optimization Input from Bus Maintenance on current bus fleet efforts, Non-Rev Vehicles. Software/data tracking system? Review existing systems in software already in place as well
Define and Establish Sustainable Project Development, Inclusion, and Assessment Program	Q3 and ongoing: identify opportunities and include in 2022-2027 CIP request. Q?: Define CIP mechanism for ensuring sustainability opportunities in new projects are identified and assessed for technical and economic feasibility. Q?: Develop mechanism for defining sustainable project requirements in consultant SOWs and RFPs.	Steering Committee, E & F leadership, New Starts Leadership Project #62111 work plan and existing funding – Claire Warren
Develop measurement strategies to evaluate the impact of our sustainability strategies	Q3 - SROI Tool, Cost Benefit Analysis, Target and Goal KPIs	Sustainability work group; E&F PMs
Develop a Review and Assessment process to strategically fund initiatives with desirable impacts	Q3 – Integrate sustainability questions into Engineering's Project Request Form Q4 Identify assessment tools for prioritizing work	Steering Committee or delegates (Claire Warren)
Address how Metro Transit fits with the Council-wide effort	Q3- survey Transit stakeholders	Council's Climate Action Team; Jeff Freeman Transit liaison
Identify strategies that provide the best opportunity for early success [for zero-emissions bus fleet]	21Q3 – Kickoff ZEB Transition Plan Q3/Q4 2021 – Master Contract executed, developing statement of work for initial work order(s).	Committed Resources – Carrie Desmond with support from David Haas, Kristin Thompson

	<p>21Q4 – Define ZEB Transition Plan Guiding Principles, Goals, Milestones. Conduct workshop with consultant and key Transit stakeholders to develop these key elements. Incorporate environmental justice principles (prioritizing implementation based on current pollution burden)</p> <p>22Q1 – ZEB Transition Plan assessment of service, fleet and facilities</p> <p>22Q2 – ZEB Transition Plan report issued</p>	
Hire a Lead FTE position for Electric Bus Infrastructure	Q4 2021 – Q1 2022	E/F in partnership with HR
Identify resource requirements and strategies for meeting these requirements [zero-emissions bus fleet]	22Q1 – Scope ZEB Transition Plan WO2 – Financial Plan	Identify resource requirements and strategies for meeting these requirements [zero-emissions bus fleet]
Participation in the FTA's Sustainable Transit for a Healthy Planet Challenge. Transit agencies will develop climate action strategies with measurable goals to achieve greenhouse gas (GHG) emission targets.	<p>July 30, 2021 Deadline for transit agencies to sign up for the challenge.</p> <p>July 2021 – March 2022 Participate in webinars to learn from FTA and transit agency stakeholders on actions transit agencies can take to reduce their GHG emissions.</p> <p>April 15, 2022 Deadline for agencies to submit their climate action strategies with measurable goals to achieve GHG emission targets. Agencies can submit their completed plans to FTA at FTAclimateinitiative@dot.gov.</p> <p>April 22, 2022 FTA event to showcase the challenge results and transit agency success stories.</p>	
Decrease emissions in our operations and establish robust reporting program	Q3- Use identified metrics and key performance indicators developed in the milestone for tactic 1 to report progress in the annual report and other venues and forums.	Bus Maintenance and Strategic Initiatives (Rachel and Eric Lind) to provide specific data collection and data analysis tasks; assist with KPI identification (task 1 milestone).

	Q2/Q4 - Build understanding of how vehicle fleet procurement scenarios may reduce emission and the impacts on residents living near our stops and routes.	Safety, Marketing and Communications departments will participate in promoting low emission equipment; they will also offer suggestions for safety related equipment that is sustainable and environmentally safe. E & F Sustainability work group to provide utility and facility data for KPIs and metrics on facilities
Continuous improvement of existing strategies and application of best practices from previous work/improvements across the system	2022: Bring on-line MBG with commissioning of building system controls, rainwater capture system startup, solar thermal panel programming/monitoring. Creation of design guidelines (or performance standards/targets); utilizing data analytics from building performance for sustainability to base Owner's Project Requirements and stay current with SB2030, MNB3.	Sustainability work group, E&F PMs and Leads

Action	Milestones (2021-2022)	Uncommitted Resources
Define and Establish Sustainable Project Development, Inclusion, and Assessment Program	Q3 and ongoing: identify opportunities and include in 2022-2027 CIP request. Define CIP mechanism for ensuring sustainability opportunities in new projects are identified and assessed for technical and economic feasibility. Develop mechanism for defining sustainable project requirements in consultant SOWs and RFPs.	Funds to support identified opportunities or add to existing projects to add more to them. Consider non-revenue zero emission fleet conversion funding (proposed a new funding source for sustainability initiatives within the CIP budget)
Hire a Lead FTE position for Electric Bus Infrastructure	Q4 2021 – Q1 2022	Lead FTE position for Electric Bus Infrastructure

WE DEVELOP STRATEGIC PARTNERSHIPS THAT CAN SUPPORT OUR SUSTAINABILITY EFFORTS.

STRATEGIES

1. Seek partnerships with public utility providers, advocates, peer agencies, state legislators, and other stakeholder to develop and resource zero emissions fleet goals
2. Use input from partners to develop sustainability plans and objectives
3. Develop a communications strategy to share progress with partners and employees

Action	Milestones (2021-2022)	Resources
<p>Adoption of diverse funding strategies to leverage and augment the use of typical Transportation funding streams, broadening the scope of typical revenue sources. Monitor federal plans including American Jobs Plan and new Transportation Authorization (FAST Act expires 9/30/21)</p> <p>Local, State, and National Programs, American Lung Assoc, MPCA and OES (Grants and RLF)</p>	<p>21Q2: Apply for FY21 Low or No Emissions grant and Congressional Directed Spending for electric buses. 21Q2: Conduct outreach to further support ZEB funding 22Q1 – Scope ZEB Transition Plan WO2 – Financial Plan including survey of available funding opportunities 22Q2/3 – Apply for FY22 grant opportunities for ZEB projects</p>	<p>Work with Finance (Ed Petrie) and Grants (Julie Matthews) to identify financial resources and broader revenue streams; develop clear ties to the budget.</p> <p>Council wide sustainability awareness through internal meetings and external dialog with government agencies, NGOs and possibly private entities</p>

GOAL 5: WE ARE GREAT PLACE TO WORK AND BUILD A CAREER

OUR WORKPLACE IS POSITIVE AND INCLUSIVE - FREE FROM RACISM, HARASSMENT, AND RETALIATION.

STRATEGIES

1. Implement policies and procedures related to workplace culture
2. Prioritize and begin addressing the E&I team workforce recommendations
3. Use employee feedback and engagement to change policies practices that will improve the workplace culture
4. Use measures and employee engagement strategies and surveys to evaluate progress

Action	Milestones (2021-2022)	Resources
Communicate expectations to all levels their responsibility in creating a positive and inclusive workplace; build skills and support implementation.	<p>Q3 2021 GM communicates expectations to management and staff that racism, harassment etc... will not be tolerated; that complaints will be reported immediately, that everyone has a responsibility to saying something</p> <p>Q1 2021 All levels of management complete IDI training</p> <p>Q3 2021 All levels of management complete baseline racial equity training</p> <p>Q1 2022 All staff complete baseline racial equity training</p> <p>Q1 2022 develop diversity, equity and inclusion training for 2022</p>	<p>GM and Directors communicate expectation and lead by example</p> <p>Managers and supervisors communicate expectations to staff</p> <p>HR and OEO provide training, handle logistics</p> <p>Equity staff provide training</p> <p>Communications promote training opportunities</p> <p>Equity and Inclusion Team provide resources and support to training</p> <p>Managers/supervisors hold discussions with employees to apply knowledge into the workplace</p>
Support policy and procedure owners in updating policies and procedures related to workplace culture, educate and train staff on existing, updated and new workplace culture policies and procedures	<p>Q3 2021 Identify OEO, HR and PEA's schedule for updating policies and procedures related to workplace culture. These were identified as high priorities to update.</p> <ul style="list-style-type: none"> • Respectful workplace • Discrimination and harassment • Complaint investigation 	<p>Respective policy and procedure owners responsible for updating</p> <p>Policies and Procedures Review Committee review and provide comments in a timely fashion</p>

	<p>Ongoing assigned staff review and comments on drafts within the 10-day review period</p> <p>Q1 and Q2 2022 conduct training on updated P&P</p>	<p>Katie Driscoll coordinate review and keeping the process moving in Policy Central</p> <p>Robin Caufman coordinate MT reviews as drafts are prepared</p> <p>Policy Central automatically informs people of policies impacting their work that are updated or created</p> <p>HR, OEO and LOD to prepare training materials</p> <p>MC communications prepare key messages and communications about new or updated policies</p> <p>MT Communications amplify MC communications training opportunities</p>
<p>Communicate to staff about updated or new policies and procedures in Policy Central</p>	<p>Q3 2021 GM set expectations that managers communication information to their direct reports in a timely manner (within 2 days for each level)</p> <p>Q3 2021 MT Communications create SOP for how we inform employees about new policies and procedures</p> <p>Q1 2022 Use internal communication strategies to get word to all levels of staff</p>	<p>MC Communications prepares key messages about P&P</p> <p>MC Communications and Creative Services prepare materials</p> <p>MT amplifies MC communications Insight articles, HR Connect article re HR policies</p> <p>GM, Directors set expectations</p> <p>Managers expected to communicate to their direct reports.</p>
<p>Train managers on Performance measures related to core competencies of all levels of</p>	<p>Q3 2021 Develop training program and hold Ask HR type sessions for various levels or core competencies</p>	<p>HR and LOD</p>

management and staff, prioritize those that impact workplace culture such as Values Differences and Drives Engagement	Q4 2021 Managers more familiar with core competencies and use in the 2021 performance review	Robin Caufman to provide coordination with MT division about Ask HR sessions Communications promote materials already on the website regarding core competences
Work with HR and Equity staff to develop Inclusion Score Card that would be used as supporting documentation in the Performance measures, such as Value Differences and Drives Engagement.	Q3 2021 create equity score card work group Q4 2021 draft equity score card Q1 2022 conduct training on equity score card Q1 2022 write equity into 2022 work plans for all managers; conduct training for managers of managers on how to apply the equity score card Q4 2022 apply equity score card for 2022 performance reviews	Robin Caufman work with Equity staff to develop process and training E&I team to provide input and feedback on the development HR provide technical assistance and training
Support agencywide Equity Dashboard <ul style="list-style-type: none"> • Workforce demographics, hires, applicants, promotions and separation • MCUB • AA • Regional 	Q2 2021 Develop prototype Q2 2021 seek feedback on breakdown and presentation Q3 2021 implement, report quarterly Q1 2022 annual report	HR IS OEO MC Communications Strategic Initiatives establish metrics for MT MT Assess success of transit equity initiatives using data available through the Dashboard
Participate in agency wide Employee Engagement Survey, analyze data, identify issues and create action plans to address	Q2 create working group and develop survey Q3 implement survey Q4 analyze and report data 2022 implement action plan to address identified gaps	HR develop survey Strategic Initiatives and Administration support

WE ATTRACT, HIRE, TRAIN AND RETAIN A TALENTED AND DIVERSE WORKFORCE

STRATEGIES

1. In collaboration with Human Resources create specific strategies, standards, tools to recruit and hire a diverse workforce.
2. Create documentation requirements for hiring managers and human resources staff to ensure that diverse workforce recruitment standards are met.
3. Develop and use measures to evaluate whether strategies are having the desired impact of attracting a diverse candidate pool and resulting in a more diverse workforce.

4. Invest in developing skills in and communicating expectations to managers and supervisors
5. Be intentional about building careers paths and room for growth and development of employees
6. Identify barriers to training and subject matters needed to develop training programs that better fit front line staff needs

Action	Milestones (2021-2022)	Resources
Set expectations that managers will take steps to hire a diverse workforce	Q3 2021 develop expectations Q4 2021 communicate expectations Q4 2021 prepare materials to assist managers such as best practices	HR prepares outline with expectations GM, Directors set expectations and communicate to their managers and supervisors Equity staff to research best practices E&I team to brainstorm ideas
Create Recruitment and Selection Score Card, provide training and implement (develop 2021, implement in 2022)	Q2 2021 draft Recruitment and Selection Score Card Q3 2021 communications and training, report Score Card training attendance and completion Q4 2021 implement Q1 2022 prepare 2021 summary report	HR creating, Todd Rowley the lead LOD develop and provide training on the Recruitment and Selection Score Card Communications develop with HR internal communications about the Recruitment and Selection Score Card HR Talent Management Staff to complete the score card following each new hire ECM to work with HR to create annual summary of the overall outcome
Develop metric of success	Q4 2021 develop metrics for measuring progress Q1 2022 report, quarterly after that report and communicate report to staff	OEOs AA report HR hiring reports

		<p>OEO and HR Present to stakeholders including Direct reports, Senior Staff, E&I team, AWT, Met Council, EAC, others?</p> <p>MT Communications include MT HR equity report in internal communications</p>
<p>Develop managers/supervisors training program to address commonly identified issues and opportunities for improvement from the Recruitment and Selection Score Card data</p>	<p>Q2 2022 provide HR training classes on key performance indicators (collaboration, equity, engagement, etc...) leading up to annual reviews</p> <p>Q3 2021 survey staff re manager/supervisor skills - what they are good at and what could use improvement</p> <p>Q3 2021review hiring manager survey responses to identify common issues</p> <p>Q4 2021 Develop outline for classes and develop materials, incl. survey for effectiveness/usefulness of training</p> <p>Q1 2022 Require managers/supervisors to take training</p> <p>Q3 2022 resurvey staff to see if responses changed</p>	<p>GM/Directors set and communicate expectations of managers/supervisors</p> <p>HR/LOD create training materials</p> <p>Strategic Initiatives/Admin create survey</p> <p>MT Communications promote training</p>
<p>Work with OEO to identify priority Affirmative Action issues and create Transit-specific strategies to address</p>	<p>Q1 2022 identify issues based on Q1 report</p> <p>Q2 2022 Prioritize issues and develop work plan to identify specific strategies</p>	<p>HR and OEO identify AA issues</p> <p>MT works with OEO to prioritize issues</p> <p>OEO and MT develop specific strategies</p>
<p>Provide more opportunities to learn about job postings and careers paths within Metro Transit</p>	<p>Q2 2021 implement internal position info sessions</p> <p>Q3 2021 work with managers on developing series of sessions re various careers and career paths within Metro Transit</p> <p>Q4 2021 host series of sessions on careers paths within different departments</p> <p>Q4 2021 review current mentoring and training programs and determine if there are opportunities for new approaches to develop women and POC</p>	<p>E&I/HR cohost internal position info sessions</p> <p>E&I/HR cohost series of sessions on types of jobs and careers paths at Metro Transit</p> <p>MT Communications promote sessions, mentorship opportunities</p>

<p>Creating working group to identify barriers to training for front line staff and propose solutions</p>	<p>Q3 2021 create working group of front line staff Q4 2021 engage front line workers to identify barriers Q1 2022 review data with working group, brainstorm solutions Q1 2022 working group proposes solutions Q2 work with LOD and management on implementing solutions</p>	<p>HR/LOD/Admin create support working group E&I to help identify staff for working group Strategic Initiatives/Admin/E&I support data gathering 5-10 front line staff to participate in working group MT Communications promote survey, communicate strategies</p>
<p>Create strategic hiring and workforce development plans to position for SWLRT operations</p>	<p>Q4 2021 Finalize SWLRT start up staffing work plan Q4 2021 Develop working group to develop recruitment and hiring strategic plan Q1 2022 Hire HR Business Partner to serve as lead for strategic plan and implementation Q1 2022 Develop hiring and working force development plan Q4 2022 Hire HR Talent Management staffer to support recruitment of 250+ new employees</p>	<p>LOD/Bus Ops/Rail Ops/E&F management develop program HR to oversee recruitment and hiring process</p>

WE ADAPT TO CHANGING WORKPLACE STANDARDS AND EXPECTATIONS INFORMED AND ACCELERATED BY THE PANDEMIC EXPERIENCE

STRATEGIES

1. Develop a return to on-site work plan
2. Apply lessons learned from the pandemic to the workplace

Action	Milestones (2021-2022)	Resources

Establish Metro Transit standards and procedures for return to on-site work for June through Labor Day	Q2 2021 Metro Transit vision	Robin developed email and tracking system Managers to collect data on their staff by June 4
Develop a telework policies and strategy that makes Met Council and Metro Transit an effective transit agency and attractive employer	Q2 2021 Procedure draft + supporting forms Q3 2021 P&P committee Q3 2021 ECM process for remote work agreement Q3 2021 communicate to staff Q3 2021 Implement	HR develop Policies and Procedures Review Committee review and approve, Katie Driscoll coordinate review And adds to Policy Central Policy Central communicates to all staff ECM develops work flow for telework agreement form and approvals Robin Cauffman coordinate MT reviews as drafts are prepared Communications helps communicate
Provide training resources for remote workers, managers <ul style="list-style-type: none"> • Management training re managing remote workers • Staff training re expectations of remote work 	Q3 2021 Complete training for ALL managers (100% within quarter) that have direct reports as remote workers or hybrid Q3 2021 Employee training	HR, LOD conduct training Communications promote training GM, Director set and communicate expectations
Establish Metro Transit standards and procedures for return to on-site work for the long-term	Q2 2021 Develop process, develop survey for managers to send to staff Q3 2021 Finalize MT guidance for telework based on Met Council telework P&P Q3 2021 Managers survey staff Q3 2021 Managers develop staffing plan Q3 2021 Managers and employees go through the telework form and agreement process	Robin develop process and draft guidance Direct reports and HR provide feedback GM approves final guidance Robin sends email to Directors to work with their managers on next steps

<p>Develop a facility plan that addresses space needs necessary to support changes to workplace policies and standards</p>	<p>Q2 2021 consultant hired for change management and best practices Q2 2021 make minor modifications for interim RTO Q2 2021 hire design consultant for FTH modifications Q3 2021 Develop or update general guidelines for work space or update such as cleaning, spacing, meetings, etc Q3 2021 Consultants start to develop detailed plan for FTH remodel based on staff plans for onsite work Q3 2021 review and make any adjustments to front line staff facilities to meet long term and changing CDC guidelines Q4 2021 into 2022 incorporate changes into FTH redesign 2022-2023 construction</p>	<p>E&F develop plans, manage contracts Design consultants prepare design plans Department directors provide their RTO plans and space needs</p>
<p>Conduct lessons learned exercise from the pandemic including but not limited to communications, technology</p>	<p>Q2 2021 conduct risk assessment Q3 2021 create proposal for conducting lessons learned, what questions do we want to ask? Q4 2021 create working group across the agency Q2 2022 prepare draft report</p>	<p>E&F, Safety conduct risk assessment Business Continuity lead lessons learned</p>
<p>Develop technology plan and remote work guidelines that improve staff effectiveness and budget efficiency</p>	<p>Q4 2021 Hire Business Technology Group lead and business analysts Q1 2022 Update technology strategic plan</p>	<p>Information Services in partnership with the Metro Transit Business Technology Group will plan, vision, and budget IS support procurement, installation, and ongoing support ECM support document and data management Administration oversee the document management planning and implementation</p>

CORE ELEMENT 1: WE MEANINGFULLY ADVANCE EQUITY INSIDE OUR ORGANIZATION AND THROUGHOUT THE REGION

CONTRIBUTE TO REGIONAL EQUITY THROUGH THE TRANSIT SERVICE WE PROVIDE.

STRATEGIES

1. Conduct equity evaluations of services and service changes, including Title VI service equity analysis, and quarterly equity evaluations of services changes
2. Use public engagement to understand rider and potential rider needs and inform service changes.

Action	Milestones (2021-2022)	Resources
Produce and regularly update Service Equity Evaluation	<p>Q1 2021 Completed initial report and presented to Senior Staff, EAC Transportation Subcommittee, and Transportation Committee</p> <p>Late Q2 2021 Post online</p> <p>By Q3 2021 integrate in 2022 budget development</p> <p>By end of 2021, work with Equity Advisory Committee Transportation Subcommittee and other stakeholders to assess the Service Equity Evaluation</p>	<p>Led by Service Development in partnership with Strategic Initiatives</p> <p>E&I Unit will be responsible for coordinating EAC and other stakeholder input</p>
Review and strengthen approach to Title VI analysis		Led by Service Development E&I Team supported TBI methods
Continue transit investments that improve mobility for Black, Indigenous and People of Color (BIPOC) and lower-income communities	<p>Q1 2021 Council adopted Network Next</p> <p>Q2 2021 TAB awarded \$25M for F Line</p> <p>Q2 2021 Additional \$57.5M appropriated for E Line and beyond</p>	Led by Capital Programs
Listening & Learning Through Crises 2021	Q3 2021	Led by Outreach & Engagement

DESIGN PROGRAMS TO IMPROVE TRANSIT ACCESS, UTILIZATION, AND QUALITY, WITH EQUITY GOALS/DESIRED OUTCOMES EXPLICITLY BUILT INTO PROGRAM DESIGN

STRATEGIES

1. Identify ways to strengthen existing programs that improve people’s lives.
2. Create structures and processes to identify new opportunities/develop new programs to meet riders’ needs/reduce barriers to transit access/increase utilization. (requires public engagement and other tactics to understand riders’ needs.)

Action	Milestones (2021-2022)	Resources
Develop regular reporting of program outcomes to assess progress (TAP, Better Bus Stops, HAT, and others as developed/identified)	Q2 2021 – Include in initial Equity Report (June 2021) Q3 2021 – Develop recurring reporting plan Q4-on – Implement recurring reporting and assessment	Equity & Inclusion unit
Develop clearer processes to draw from public engagement and customer feedback to inform and shape decision making	Q1-Q3 – Early scoping of opportunities By Q4 2021 – Formalize plan, kick off	Equity & Inclusion unit will lead Will require partnership with Outreach & Engagement and Customer Relations

Action	Milestones (2021-2022)	Uncommitted Resources
Secure authority for and implement administrative citations for fare evasion <i>See also Goal #2</i>	Work ongoing since Q1 2019 Q3 2021 – work through Governor’s policy initiative process to reintroduce the bill in 2022	Chief of staff coordinating with Government Affairs, MTPD, Finance, and other departments; Funding for sfy 2022-2025 is secured.

BUILD AND INVEST IN ORGANIZATIONAL PRACTICES CRITICAL TO EQUITABLE PROCESSES AND OUTCOMES

STRATEGIES

1. Develop clearer standards for applying an equity lens to operations, planning, and investments
2. Improve transparency and accountability by establishing transit equity metrics, regular progress reports, and other tactic
3. Assess and address organizational capacity to support DEI work
4. Develop external partnerships critical to contributing to the advancement of regional equity
5. Regularly engage with employees to understand concerns and opportunities to advance DEI, including developing recommendations and tracking and communicating back progress
6. Support DEI-related work identified in other Strategic Framework areas, including Goal 2 and 5

Action	Milestones (2021-2022)	Resources
Develop and apply equity lens to budget development	<p>June 2020 – required by GM</p> <p>Q1 2021 – Service Equity Evaluation led by Service Development serves as basis for understanding how the operations budget supports transit service that equitably serves the region</p> <p>Q1-Q3 – 2022 operations budget development</p>	Finance and chief of staff
Measure and report on Transit Equity metrics in addition to metrics in Service Equity Evaluation	<p>June 2020 – required by GM</p> <p>June 2021 – formalize work (establish executive sponsor, project team, scope, etc.)</p> <p>Q3-Q4 – partner with EAC subcommittee and potentially do more engagement to understand what measures meaningful and what success/progress targets we should set</p> <p>By end of 2021 – initial information on website (?)</p>	Led by Strategic Initiatives (per June 2020 GM Directive) in close collaboration with E&I Unit

<p>Engage employees on DEI concerns and opportunities</p>	<p>June-September 2020 E&I Team solicited employee input and developed September-December 2021 DEI Internal Engagement</p> <p>2021 HR employee engagement survey involvement TBD</p>	<p>E&I Unit and Team</p> <p>Strategic Initiatives involved in employee engagement survey</p>
<p>Increase transparency by improving communications on DEI work</p>	<p>June 2021 – complete initial “equity progress report”</p> <p>Q3-Q4 2021 – improve E&I MetNet and Metro Transit website site to make it a clearinghouse to navigate and track all DEI work underway at Metro Transit</p> <p>Ongoing – develop and execute plan to ensure information on MetNet is fresh</p> <p>Ongoing – identify opportunities to proactively communicate beyond E&I MetNet site</p>	<p>E&I Unit, Drew Kerr. Sharon Feiner</p>
<p>Define “transit equity” and develop tools for analysis and decision making “equity”</p>	<p>June 2020 – GM required “equity” to be filled out as part of Thrive Lens Analysis section of Council business items</p> <p>By Q4 2021– develop shared definition of “transit equity” and initial tool or other resources</p> <p>Ongoing – informal coaching and question answering for staff preparing business items</p>	<p>Transit Equity Senior Manager</p>

<p>Support Equity & Inclusion Team’s work</p>	<p>Beginning Q4 2020 and ongoing through 2022 – Provide E&I Team updates on status of 2020 Recommended Action Steps</p> <p>Q1 2021 – Charter Updated, New Members Onboarded</p> <p>Q2 2021 – E&I Team work plan</p> <p>Q4 2021- Align Strategic Framework</p>	<p>E&I Unit, led by Sarah Berres</p>
<p>Address staffing capacity needs to support DEI work</p>	<p>Q1 2021 – Drew Kerr promoted to Communications Manager to elevate internal communications needs</p> <p>May 2021 – Sam O’Connell promoted to Assistant Director-Community Affairs</p> <p>June 2021 – New Transit Equity Senior Manager onboarded</p> <p>Q2 and Q3 2021 –Further assessment needed; additional staffing changes would be made for 2022 budget</p>	<p>Chief of staff, working closely with Director of Administration and Transit Equity Sr Manager to identify additional needs</p>
<p>Develop partnerships to contribute to advancing equity in our region</p>	<p>Q1 2021 – Began working directly with Equity Advisory Committee subcommittee on public transportation</p> <p>By Q4 2021 the Transit Equity Sr Manager will develop a plan to work with external partners (both in the region and forging relationships with peer agencies)</p>	<p>E&I Unit, Transit Equity Sr Manager, and chief of staff</p>
<p>Provide support to Metro Transit managers and units</p>	<p>Q2 2021 Beginning Conversations on Race underway</p>	<p>E&I Unit, led by Rachel Cagle</p>

	Q3 Develop list of resources, facilitation, coaching services to further units' DEI work	
Ensure Metro Transit is connected to HR-led DEI training	Beginning Q4 2020, all MT managers and supervisors required to take IDI training Q1 2021 Implicit bias training Q2 2021 GM's Direct Reports complete Later 2021 – support HR in Racial Equity Training	E&I Unit, led by Rachel Cagle
Increase contracting and purchasing with disadvantaged and underutilized businesses	Review performance metrics like 'Percent of expenditures using MCUB vendors'	

Action	Milestones (2021-2022)	Uncommitted Resources
Improve DBE and MCUB utilization, including developing data and reports to understand current performance and identify additional opportunities.	Q3 2022– scoping/conversations	

CORE ELEMENT 2: WE EFFECTIVELY COMMUNICATE AND ENGAGE WITH OUR CUSTOMERS, STAKEHOLDERS, AND EMPLOYEES.

WE ARE INTENTIONAL ABOUT SEEKING FEEDBACK FROM COMMUNITY MEMBERS, STAKEHOLDERS AND EMPLOYEES AND USING WHAT WE LEARN TO MAKE DECISIONS.

STRATEGIES

1. Use demographic assessments of target audiences to identify tactics to meet community communication needs
2. Use engagement approaches such as person to person that remove barriers to community member participation
3. Use ongoing dialogue and seek new ways to communicate with and learn about the needs of our communities and how best to meet those needs
4. Use relationships with diverse communities to better inform transportation decision making
5. Create repository of community feedback that is accessible across departments
6. Seek input from front line staff on customer observations and feedback
7. Provide opportunities for staff to share ideas, issues, and concerns

Action	Milestones (2021-2022)	Resources
<p>Create template for marketing/communication/engagement project managers to use to complete a demographic assessment of project area to identify target audience</p>	<p>Q3 2021 create template</p> <p>Q3 2021 share with internal stakeholders and how to use to identify stakeholders and use in development of engagement tactics</p>	<p>RA GIS staff create and maintain data tool</p> <p>Outreach or marketing lead prepare template</p> <p>Project leads compile data from survey Outreach staff include in master plan</p>
<p>Review Metro Transit wide data collecting Set goals for each engagement, communications and marketing project and monitor progress and outcomes</p>	<p>Q2 2021 Create working group to identify current data collection, how it is being use and what data we really need (discovery)</p> <p>Q3 2021 develop comprehensive and coordinated data collection plan for 2022</p>	<p>Data collectors: Community Affairs/Outreach/CR, Marketing and TI, Comms</p> <p>Data Analysis: Strategic Initiatives</p> <p>Data users: SD, BRT, E&F, Ops, MTPD</p>

	<p>Q4 2021 Create SOP for surveying/data collection that includes roles and responsibilities, setting goals and planned use of data</p> <p>Q4 identify point person for coordinating surveys</p> <p>Q1 2022 Onboard data analyst to support analysis, use and distribution</p>	
<p>Create more streamlined and coordinated process to ensure we are marketing to and engaging with diverse communities</p>	<p>Q3 2021 Identify shared goals and vision</p> <p>Q3 2021 Develop SOP for identifying lead and coordinating across departments</p> <p>Q3 2021 Create intake tool so project managers wanting to engage the community can complete and have identify person to review and assign requests</p> <p>Q4 2021 create toolkit of best practices and standard templates and post on MetNet</p> <p>Q3 2021 Create master plan templates to be used for all external communications, marketing and engagement project that identifies audience, demographics, goals and strategies</p>	<p>Strategic planning: CoS, Marketing, TI, CR, Outreach, Creative Services, Communications, E&I</p> <p>Form: Admin/ECM</p>
<p>Develop plan for more and regular use of ethnic media for easy access and use in engagement activities; secure annual contract for ads, social media and other uses</p>	<p>Q2 2021 set up matrix</p> <p>Q2 2021 gather data, do research</p> <p>Q2 2021 conduct focus group on use of ethnic media</p> <p>Q3 2021 share matrix with internal stakeholders and how to use the resource, who to contact</p>	<p>Kathryn Lehinger</p>

	Ongoing maintain and update as media added or change	
Implement a Customer Relationship Management Database (CRM) for coordinating efforts with external stakeholders and tracking communication	Q3 2021 Support IS in procuring MS Dynamics Q3 2021 Identify contact lists Q4 2021 Work with IS in setting up the system 2022 Training 2022 use and build out with additional functions	IS procurement and set up CRM programmer to set up Pam Steffen work with CRM programmer to program based on MT contact lists
Continue to identify community groups and build relationships through the geographically assigned outreach staff	Q2 2021 Develop list of all of the contact lists we maintain Q2 2021 finalize contract with Microsoft on Dynamics 365 CRM Q3 2021 IS hire consultant to implement CRM Q3 2021 Begin to develop CRM and setting up contacts Ongoing: Continue to develop list of community groups and continue to engage with them	Customer relations Outreach staff E&I Marketing IS/ECM development of the CRM
Conduct lessons learned analysis of engagement and communications strategies used mid-2020 to mid-2021 to determine what strategies worked at getting diverse feedback	Q2 2021 establish working work Q3 2021 compiles data Q4 2021 draft lessons learned Q1 2022 finalize lessons learned	Outreach Marketing Comms
Create internal repository with all engagement summaries and data analysis tools for staff to review and glean public input from	Q2 2021 create MetNet page with all engagement summaries Ongoing add as reports Q3 2021 work with strategic Initiatives to develop one data tool	Nasser Nasser, Sam, Eric Lind

<p>Make public engagement summaries available to the public including how the information is being used</p>	<p>Q1 2021 Create engagement summary template to use for all engagement projects Q2 2021 Engagement summary reports posted to project website Q2 2021 Going forward, post all engagement summaries within 2 months of the engagement project ending</p>	<p>Outreach staff to prepare summary reports Eric Lind to prepare data analysis tools Creative services to proof summary report Outreach staff to add to website</p>
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COMMUNITY MEMBERS, STAKEHOLDERS, AND EMPLOYEES HAVE READY ACCESS TO RESPONSIVE, ACCURATE AND TIMELY INFORMATION.

STRATEGIES

1. Regularly push out agency performance/messages/stories through available channels
2. Ensure employees know how to direct customers to the correct resources
3. Identify and invest in ways to communicate faster and more effectively
4. Improve communication strategies to mitigate impact of projects, project changes, and unplanned service disruptions on customers
5. Improve consistency in customer communication across departments
6. Publicize all forms of information sources and sharing to improve accessibility to information

For employees...

7. Serve as a trusted source of information by communicating frequently and openly with staff
8. Account for differences in employee access to email, MetNet, and other sources
9. Routinely seek input from employees to gauge the effectiveness of internal communications
10. Communicate what we are doing, why we are doing it, and how these actions support agency priorities with clear, precise, and plain language

Action	Milestones (2021-2022)	Resources
<p>Launch metrotransit.org/performance of key performance indicators. (Specific customer facing KPIs to be determined with consultation with Performance Teams and Executive Mgt Team)</p>	<p>Q3 2021 Develop webpage and initial design for sharing ridership data Q4 2021 Develop content/design (ridership and additional metrics) and launch ridership information Q1 2022 Launch additional metrics (beyond ridership)</p>	<p>Creative Services Strategic Initiatives (Ridership: Eric Lind; Other Metrics: Eric Lind and Rachel Dungca) Communications Performance Teams Executive Sponsors</p>

Develop Insights stories and/or other internal communications on upcoming public initiatives to ensure employees are aware of resources to better support communications with external audiences	Q4 2021 Develop process for determining which initiatives to focus additional	Internal Communications Marketing Outreach
Convene a working group to identify gaps in communication to customers (turnaround time, message consistency, etc.) AND budget/staff needed to address priority gaps including those requiring improved or new technology	Q4 2021 Working group Q4 2021 Plan development begins Q1 2022 Measurement criteria established Q2 2022 Recommendation Implementation begins	Creative Services, Transit Information, Customer Relations, Marketing, Communications, Community Outreach, Equity and Inclusion
Review/update internal stakeholder lists/SOPs for customer communication efforts	Q4 2021 Provide updated stakeholder and SOP list Q4 2022	Transit Information, Street Operations, Customer Relations, Communications, Marketing, Community Outreach
Regularly engage with OEO on ways to communicate new accessibility features to customers	Q4 2021 Provide update on features communicated Q2 2022 Q4 2022	Guthrie Byard, Marketing, Creative Services, Transit Information, Equity and Inclusion team
Coordinate with Equity Work Group to determine best practices RE: translations	Q4 2021 - Best Practices document published	Equity Work Group
Regularly feature articles about accessibility features (web, alternate formats of printed materials, etc.) in Connect	Q4 2021 provide quarterly update on activities Q1 2022 Q2 2022 Q3 2022 Q 4 2022	Drew Johnson (Connect editor)
Promote Language Line via social	Q4 2021 provide quarterly update on activities Q1 2022 Q2 2022 Q3 2022	Ryan Miller

	Q4 2022	
Create and operationalize an internal communications plan to establish Standard Operating Procedures and encourage best practices (areas of focus to include worksite postings, staffing announcements, employee feedback)	Q3 2021 Develop plan with input from Communications, Admin, Direct Reports and E+I Team Q3 2021 Complete and share draft for review/comment Q4 2021 Finalize and promote plan	Communications Manager
Create team of Communications Ambassadors who will support communication efforts at their worksites	Q2 2021 Draft roles and responsibilities and begin recruitment process Q3 2021 Establish team and begin meeting regularly Q2 2022 provide update and evaluate effectiveness	Communications Manager
Update and organize employee recognition program	Q3 2021 Summarize existing efforts and work with departmental leadership to determine where improvements can be made Q4 2021 Introduce recommended action items and develop a uniform strategy for 2022 and beyond	Communications Manager
Create a master calendar and strategy for in-person internal outreach events in 2022 and beyond	Q3 2021 Develop and propose master calendar Q4 2021 Promote	Communications Manager

STRATEGIC PARTNERSHIPS ARE FOSTERED THAT INFORM, STRENGTHEN, AND SUPPORT METRO TRANSIT’S MISSION AND PRIORITIES.

STRATEGIES

1. Develop an inventory of key relationships and relationship management plans.
2. Identify existing strategic partnership relationships and status in each department
3. Evaluate the status of partner relationships
4. Strategically develop new strategic partnerships to support Metro Transit’s vision and mission
5. Feature strategic partnerships through Metro Transit’s communication and outreach channels

Action	Milestones (2021-2022)	Resources
Identify existing strategic partnership in each office/division/department.	Q3 2021 Each office/division/department identifies 5 – 10 of their priority existing strategic partnerships.	Strategic Team Commitment: Develop a spreadsheet for office/division/department to use as a tool to inventory partnerships.
Evaluate the status of each relationship by identifying goals, benefits, and resources needed to sustain partnership.	Q3 2021 Each office/division/department evaluates their status of priority partnerships based on inventory tool developed by Strategic Team and submits inventory.	Office/Division/Departments Strategic Team
Identify attributes of successful external partnerships and replicate them.	Q4 2021 Stakeholder lists integrated with agency CRM	Strategic Team
Evaluate the need for new strategic partnerships to ensure Metro Transit’s vision and mission is achievable.	<p>Q4 2021 Each office/division/department evaluates the need for modifications to existing partnerships or new strategic partnerships and defines the purpose and benefits of those partnerships.</p> <p>Q1 2022 As part of annual work planning the Strategic Team conducts a gap analysis between existing partnerships and needed partnerships to support Metro Transit vision and mission. Resources directed to close the gap.</p>	<p>Office/Division/Departments Strategic Team General Manager and or designee</p> <p>Equity and Inclusion Team</p>

<p>Ensure Metro Transit’s strategic partnerships support our commitment to diversity, equity and inclusion.</p>	<p>Q1 2022: Equity and Inclusion Team reviews priority inventory partnership lists</p>	<p>Strategic Team</p>
<p>Conduct a peer review of strategic partnerships for new ideas and relevancy.</p>	<p>Q4 2021 Review relevant publications, APTA best practices, TCRB reports and other information</p>	<p>Strategic Team Commitment: Develop a one-pager for office/departments bi- annual report outs to senior leadership.</p>
<p>Regularly report on status of partnerships to ensure benefits are being realized.</p>	<p>Q2 2022 Bi-annually report status on partnership success to meeting mutual goals and/or their change in status.</p>	<p>MT Communications</p>
<p>Feature strategic partnership through Metro Transit’s communication and outreach channels. Internal communications team to feature a strategic partnership on a quarterly basis for their benefits, success, resources need to maintain, and lessons learned.</p>	<p>Q1 2022 Feature partnership identified and promoted Q2 2022 Q3 2022 Q4 2022</p>	<p>Communications Marketing</p>

WE DEMONSTRATE AND COMMUNICATE OUR VALUE TO THE REGION AND DEVELOP A REPUTATION THAT OUR CUSTOMERS, STAKEHOLDERS, AND EMPLOYEES ARE PROUD OF.

STRATEGIES

1. Focus on improving perceptions about attributes of transit that are important to our customers and residents of the region
2. Work with all areas of the agency to develop an active and focused story search process
3. Expand presence in multicultural media
4. Leverage existing relationships to advance the agency’s reputation
5. Managers and Supervisors partner with HR to implement actions that create positive workplace ambassadors

Action	Milestones (2021-2022)	Resources
Brand tracking survey of residents establishes baseline measure for key service attributes (safety, reliability, cleanliness travel time, ease of use) and other reputational measurements.	Q4 2021 - Complete Annual Brand Tracking Survey Results – compare 2021 vs 2020 results. Establish 2022 goals.	Marketing General Manager Executive Staff
Develop strategic marketing/communication plans to enhance positive perceptions around key service attributes (safety, reliability, Cleanliness, travel time, ease of use) and other reputational measures.	Q1 2022 – Develop annual marketing and communications plans to enhance positive perceptions of key attributes	Marketing and Communications
Conduct a reputational risk assessment to determine high risk issues.	Q4 2021 – Complete Reputational Risk Assessment plan and timeline and get approval from GM Q2 2022 – Complete Reputational Risk assessment	Marketing Communications Audit
Identify 10 strategic partnerships from Goal 3 and enhance the positive relationships for the purpose of building Metro Transit’s broader reputation.	Q4 2021 – identify 10 existing external partnerships and measures of success. Q1 2022 – plan and begin implementation Q4 2022 – measure results	Marketing Communications Community Affairs Equity and Inclusion

Utilize staff-generated ideas to produce positive media stories to bolster Metro Transit’s reputation	Q4 2021 – provide update on activities Q1 2022 Q2 2022 Q3 2022 Q4 2022	Communications Marketing Community Affairs Equity and Inclusion
Enter year-long contracts with multicultural media	Q3 2021 – by end of quarter secure contracts with at least 3 media partners Q4 2022 – summary of media purchased	Marketing

CORE ELEMENT 3: WE EVALUATE OUR PERFORMANCE AND FOSTER INNOVATION FOR CONTINUOUS IMPROVEMENT.

USE DATA AND PERFORMANCE EVALUATION TO INFORM OUR ACTIONS AND INVESTMENTS AND TO EVALUATE OUR PROGRESS TOWARDS OUR GOALS

STRATEGIES

1. Set goals that reflect the diverse priorities of our customers, employees, policy makers and partners, with an explicit emphasis on equity.
2. Regularly monitor our performance towards our goals, and work to understand how our work and investments affect our performance
3. Use performance evaluation/performance management approach to guide initiatives, allocate resources, and make investments
4. Track progress on our initiatives, resources, and investments

Action	Milestones (2021-2022)	Resources
Gather broad stakeholder input on goals and outcomes, including the appropriate metrics and targets to determine progress	Q3 2021 - Convene Performance Teams Q4 2021 - Complete internal and external stakeholder outreach for input on goals, metric, and targets	Performance Teams Strategic Initiatives staff
Identify performance measures required for regulatory compliance at the federal, state, and/or regional level	Q4 2021 - Complete list of required performance measures	Performance Teams Direct Reports
Define metrics and targets for each Performance Team	Q1 2022 - Finalize definition of metrics and targets	Performance Teams Strategic Initiatives staff
Develop performance reports <ul style="list-style-type: none"> • Identify data fields required for performance metrics • Develop new data sources as needed • Calculate measures and develop visualizations 	Q2 2022 - Complete development of data sources, performance measures and reports	Performance Teams Strategic Initiatives staff

Develop internal interactive performance reporting tools	Q2 2022 - Complete internal reporting tools	Strategic Initiatives staff
Document linkages between our work and investments (Inputs), our work products (Outputs) and progress towards our goals (Outcomes)	Provide regular updates to Metro Transit leadership (executive team, directors, and/or managers) on a quarterly basis starting in Q1 2022	Performance Teams Strategic Initiatives staff
Identify investments and initiatives to improve performance and make progress towards goals	Provide regular updates to Metro Transit leadership (executive team, directors, and/or managers) on a quarterly basis starting in Q1 2022	Performance Teams
Track and report progress on planned initiatives and investments over time.	Provide regular updates to Metro Transit leadership (executive team, directors, and/or managers) on a quarterly basis starting in Q1 2022	Performance Teams Strategic Initiatives staff
Coordinate initiatives and investments across Strategic Framework implementation, Performance Teams, and department level performance management efforts	Q4 2021 – Complete conversations among Strategic Framework and Performance Team sponsors and develop summary of how work is coordinated.	Performance Teams Strategic Framework executive sponsors Direct Reports

Action	Milestones (2021-2022)	Uncommitted Resources
Collect new data and develop new data sources from existing operational systems	Q2 2022 - Complete development of data sources	Information Services Operational system owners

COMMUNICATE OUR GOALS AND OUR PERFORMANCE

STRATEGIES

1. Develop internal communications plans and resources for our employees so they can understand the success of their work and how their work influences the overall success of Metro Transit.
2. Develop external communications plan and resources for our community and stakeholders so that they can better understand our work and our value to the community.

Action	Milestones (2021-2022)	Resources
Develop communications plan for internal performance reporting	Q1 2022 - Complete internal performance reporting communications plan	Performance Teams Communications System Performance
Develop internal reporting platform and website	Q2 2022 - Complete and launch internal performance reporting platform	System Performance Information Services

FOSTER A CULTURE OF INNOVATION, FACILITATE EXPERIMENTATION, AND SHARE NEW IDEAS WITHIN THE AGENCY

STRATEGIES

1. Establish innovation programs for pilot projects, experiments, and innovations.
2. Develop plans and strategies that formalize implementation of new ideas

Action	Milestones (2021-2022)	Resources
Create of a Technology Innovation Program for technology pilots and proofs-of concept.	Q3 2021: Budget request for technology innovation program Q4 2021: Design program including solicitation, selection, execution, evaluation, and [final decision] of project Q1 2022: Launch program Q3 2022: Begin first projects	Strategic Initiatives-Business Technology Group
Update the Shared Mobility Strategy	Q4 2021: Review of current strategy and progress Q2 2022: Stakeholder engagement Q3 2022: Draft updated strategy	Strategic Initiatives-Shared Mobility Program
Implement North Minneapolis microtransit pilot	Q3 2021: Issue RFP to solicit service Q2 2022: Launch service	Strategic Initiatives-Shared Mobility Program, Service Development, MTS Operations. Funding of \$1.5m.

Develop and distribute a guide for mobility hubs for cities and transit agencies	Q4 2021 completion of guide Q1 2022 distribution of guide Q2 2022 design curriculum for regional stakeholders	Strategic Initiatives-Shared Mobility Program, MTS Planning, Marketing & Transit Information -Commuter Services, Engineering & Facilities – Facility Planning and Urban Design. Guide development is funded.
Submit regional solicitation requests to fund mobility hub pilots and implementation	Q2 2022 submit TDM program request for mobility hub pilots in 2022 Q4 2021 submit Unique Projects category project interest form for mobility hub implementation in 2024 Q2 2022 submit Unique Projects category application	Strategic Initiatives-Shared Mobility Program, Marketing & Transit Information -Commuter Services, Engineering & Facilities – Facility Planning and Urban Design
Implement mobility hub projects	Q3 2022 implement mobility hub pilots if funded through Regional Solicitation	Strategic Initiatives-Shared Mobility Program, Engineering & Facilities – Facility Planning and Urban Design
Test a variety of bike parking facilities at selected transit locations as a mobility hub pilot	Q3 2021 develop plans Q2 2022 implementation	Strategic Initiatives-Shared Mobility Program; Engineering & Facilities – Facility Planning and Urban Design
Create a Technology Community of Practice to bring together technology personnel within Metro Transit to learn and develop skills together, and collaborate on shared technology	Q2 2021 - Form group and establish cadence of communications, meetings, and collaboration tools	Strategic Initiatives – Business Technology Group

Action	Milestones (2021-2022)	Uncommitted Resources
Develop a funding source for the Technology Innovation Program	Q4 2021 – Identify funding for program	Operating and capital funding for the program is not committed.
Implement future microtransit projects	2023 and beyond	Operating funding is not identified for future microtransit services; capital funding is not identified for vehicles to support permanent microtransit services

CORE ELEMENT 4: WE ARE RESPONSIBLE STEWARDS OF A TRANSFORMATIVE AND FINANCIALLY SUSTAINABLE TRANSIT SYSTEM.

WE KEEP STAFF INFORMED OF OUR FINANCIAL OUTLOOK AND ENGAGED IN THE IMPACTS OF TODAY’S FINANCIAL DECISIONS.

STRATEGIES

1. Openly communicate near term and long-term budget outlooks to staff across the agency
2. Include financial management in all department head financial goals
3. Plan operations and administrative commitments to keep within budget parameters
4. Review quarterly agency and department financial reports with direct reports and senior staff
5. Develop processes for early identification of budget issues and interventions
6. Provide training to ensure that budgets are managed prudently and effectively

Action	Milestones (2021-2022)	Resources
Publish financial impacts of service design and ridership	<p>Q4: Annually update with prior year actual results and future year budget (new!) the set of standard metrics used to measure financial efficiency of service relative to service standards (e.g. Boardings per Capita, Annual Service Hours per Capita, Annual Service Miles per Capita, Operating Funding per Capita, Cost per Passenger Trip, Operating Expense per Passenger Mile, Farebox Recovery Ratio, Average Revenue Per Passenger Trip, Boardings per Revenue Hour, Operating Expense per Revenue Hour, Operating Expense per Passenger Mile, Subsidy Per Passenger)</p> <p>Q4: Collaborate with Service Development to set revised future budget targets for financial metrics that are largely driven by budget service decisions; set targets based on ridership forecasts</p>	<p>Director of Finance Senior Manager Finance Budget Department</p> <p>Service Development</p> <p>Bus and Rail Operations</p>

	Q4: Collaborate with Bus and Rail Operations to set revised budget targets for financial metrics that can be influenced by Operations management of labor costs, or other direct costs	
Publish Service Model changes and impacts to the budget including Direct, Indirect and FTE impacts on the operating budget.	Quarterly: Identify changes in the Service Models and any changes related to pandemic impacts. (Service models include Direct Service Expenses supporting the Customer and Indirect Service Expenses Supporting Operations.) Quarterly: Prepare quarterly analysis which will Identify FTE impacts, workforce strategy impacts and budget impacts	
Publish monthly and quarterly department financial reports and analyses for executive team, senior staff and managers <ul style="list-style-type: none"> Identify threats to the operating budget including significant expense or revenue variances. Define the variance as discretionary or fixed and how it rolls up to agency budget. Identify the variance as One Time or On-going 	Monthly: Produce reports for the Executive Team and Senior Staff. Quarterly: Produce reports for the management team.	Director of Finance Senior Manager Finance Budget Department
Prepare multi-year forecasts (referred to as the “Tool Box”). Forecasts respond to multiple “What If” scenarios within the Metropolitan Council Transportation Division. <ul style="list-style-type: none"> List and describe the expense and revenue decisions within our control and influence List and describe the expense and revenue decisions outside of our control Identify and detail the timeline of decisions/impacts 	Quarterly: Update the Council Transportation Division Toolbox with the Council Transportation Division and Regional Administration. <ul style="list-style-type: none"> The update will include bi-annual MVST Forecast Reflect financial impacts from the legislature, State forecasts and year-end financial results Quarterly: List the “Toolbox” choices (and who is responsible for making them) <ul style="list-style-type: none"> Prepare various scenarios and integrate into the communication about the scenarios? 	Director of Finance Senior Manager Finance Budget Department General Manager Chief of Staff Deputy General Manager Capital Programs Director of Service Development?

<p>Provide financial training to Budget Directors, Project Directors, and Budget Managers to ensure Operating and Capital Budgets are managed within available financial constraints.</p>	<p>Q1: Finance and Budget Department to Provide financial training to Budget Directors, Project Directors, and Budget Managers.</p> <ul style="list-style-type: none"> • Train on understanding of the Annual Operating budget worksheets and requests • Provide training on understanding of the Monthly Org Reports which provide Actual VS Budget Results • Provide training on the annual Capital Budget and CIP Process. • Providing training on the quarterly Operating and Capital Amendment Process. • Set goals for adherence to budget for each budget director. Identify process for communicating known or forecasted variances to the Department Head budgets to the Budget Department. • Provide training on Capital Budget worksheets and ROI. <p>Q3-Q4: Develop Financial Training Materials. Consult with LOD if necessary for consultation and support.</p> <p>Quarterly: Schedule Quarterly Followup meetings with each Budget Director to discuss Operating and Capital Budget Variances.</p>	<p>Director of Finance Senior Manager Finance Budget Department LOD</p>

OUR OPERATING AND CAPITAL BUDGET DECISION REFLECT OUR REGION’S TRANSIT PRIORITIES.

STRATEGIES

1. Create standards and structures for identifying fixed and discretionary cost elements in department and agency budgets
2. Identify funding available for realignment with existing and emerging priorities and incorporate into the budget development process
3. Apply an equity lens to the annual and on-going budget decision making processes
4. Seek annual feedback from department heads on the effectiveness of the budget process in supporting priorities

Action	Milestones (2021-2022)	Resources
<p>Publish the current and proposed operating and capital projects and investments linked to Priorities and Strategies</p>	<p>Q1-Q3: Publish the Council adopted operating and capital investments (one-time and ongoing) directly related to Metro Transit Priorities and Strategies. Q1-Q3: Publish list of <u>proposed</u> operating initiatives or capital investments (via the CIP proposals or operating funding requests) that are above/beyond budget current funding levels) related to Priorities and Strategies Q1-Q4: Communicate path for proposed operating and capital projects and investments to be evaluated and funded or deferred.</p>	<p>Director of Finance Senior Manager Finance Budget Department GM Direct reports (priorities and strategies)</p>
<p>Publish annual operating and capital strategy synopsis summarized from the Council Adopted Operating Budget, Capital Budget and CIP. The Synopsis will detail all revenue and expense assumptions and projections</p>	<p>Q3-Q4: Summarize Operating and Capital Budget Strategies, including differences between Fixed and Discretionary costs Q3-Q4: Identify One Time Expenditures and Ongoing Expenditures and impacts to both the Capital and Operating Budgets. Q3-Q4: Identify Ongoing Fixed Costs and any Variable subcomponents. Q3-Q4: Forecast ongoing operating and capital tails. Q3-Q4: Identify potential revenue sources including the size/scope (in collaboration with</p>	<p>Director of Finance Senior Manager of Finance Senior Manager of Budget and Grants Budget Department TOD Office</p>

	TOD, and FTA Region V, peer agencies, and funding partners)	
Apply an equity lens to the annual and on-going budget decision making processes for both Operating and Capital Budgets.	<p>Q1-Q4: Applying an equity lens will be an annual and an ongoing process when making operating and capital budget decisions.</p> <ul style="list-style-type: none"> • Review with Budget Directors consistency of the operating and capital decisions with Council equity goals. • Link budget requests to advancement of equity metrics or equity core element workplan. 	<p>Director of Finance Senior Manager of Finance Budget Department Budget Directors Chief Operating Officer Transit Equity Senior Manager</p>
Seek annual feedback from department heads on the effectiveness of the budget process in supporting priorities”?	<p>Q1: Conduct internal customer satisfaction survey and prioritize areas that need improvement based upon customer feedback.</p> <p>Quarterly: Upon review of quarterly financial results with Budget Directors, followup with internal customer satisfaction questions to ensure continued compliance.</p>	<p>Director of Finance Senior Manager of Finance Budget Department Budget Directors Director of Administration</p>

WE IDENTIFY LIFECYCLE COSTS WHEN MAKING INVESTMENT DECISIONS AND PLANNING FOR THE FUTURE.

STRATEGIES

1. Identify life cycle costs of all new technology investments and incorporate in decision making and budgeting processes
2. Develop and analyze near term and long-term capital maintenance costs and revenues for rail, BRT, ABRT and other significant transit expansion projects
3. Create a reporting structure to inform the Council of true lifecycle costs of transit investments
4. Provide annual capital maintenance outlook report to inform CIP development

Action	Milestones (2021-2022)	Resources
<p>Enhance the CIP selection process with a lifecycle cost worksheet that must be completed by project managers with instructions or inputs used to create a Sustainability and Return on Investment assessment</p>	<p>Q1-Q3: During the Capital Strategies process review Sustainability and Return on Investment which includes a process to establish “Sustainability” and “ROI” assessment.</p> <p>Q1-Q3: Project Managers Create the lifecycle cost worksheet for inclusion with projects in the Annual Capital Budget and CIP Request.</p> <p>Q1-Q3: Finance reviews the lifecycle cost worksheet for Sustainability and ROI Assessment. Ensures follow-up questions and understanding with project managers before inclusion in the Council Authorized Capital Budget.</p> <p>Q1-Q3: Review, update and evaluate the application with stakeholders to ensure it is understood and meets objectives (including providing necessary inputs for Sustainability and ROI assessment created by Finance staff).</p>	<p>Director of Finance Senior Manager Finance Budget Department General Manager Chief Operating Officer Deputy General Manager Capital Programs Chief of Staff</p>

<p>Provide annual capital maintenance outlook report to inform CIP selections (a key input for the CIP selection committee):</p> <ul style="list-style-type: none"> • Provides near term and long-term analysis of capital maintenance costs and revenue sources (Sustainability and ROI assessment) • Displays current CIP or CIP recommendations • Includes clear identification of both funded and deferred projects (Capital Budget and CIP) • Provide Cross reference inclusion with the FTA Asset Management Plan. • Report includes the current Council Approved Table 3 and Table 3A. 	<p>Q1-Q4: Discuss capital maintenance ongoing Capital maintenance. Q1-Q4: Cross reference inclusion with the FTA Asset Management Plan Q1-Q4: Review with Senior Management the Council Adopted CIP and Capital Budget. Q1-Q4: Includes Review of Projects Recommended for Future Funding in Table 3 Q1-Q4: Includes Review of Projects Recommended with no Future Funding Identified in Table 3A Q1-Q4: Evaluate proposed CIP Capital Investments against link to priorities/strategies, sustainability and ROI assessment. Q2 to Q3: Summarize assessments and summaries for each CIP Capital Investment and provide to staff and CIP Selection Review Team.</p>	<p>Director of Finance Senior Manager of Finance Senior Manager Budget and Grants Budget Department Director of Asset Management Plan Manager of Asset Management Deputy General Manager Capital Programs</p>
<p>Document the Asset Management strategies, Investment Strategy and Life Cycle Cost.</p>	<p>Q1 to Q4: Communicate the Asset Management Strategies to Senior Management and Project Managers and provide linkage to project Sustainability and Return on Investment as well as Priorities Q1 to Q4: Contact other Transit Agencies and Discuss ongoing Capital Investments, Capital Maintenance, and Funding Strategies. Q4: Annually provide an update of Investment Strategies and Life Cycle Costs of peer transit agencies. Q3-Q4: Discuss life cycle costs with the Council when presenting the proposed Annual Capital Budget and multi-year CIP.</p>	<p>Director of Finance Senior Manager of Finance Senior Manager Budget and Grants Budget Department Director of Asset Management Plan Manager of Asset Management Deputy General Manager Capital Programs</p>

Create more transparency on technology costs at a department level within Metro Transit, through the use of show-back historical utilization and other reporting.	Q1 2022 - Provide reports to departments	Business Technology Group Strategic Initiatives staff Metro Transit Finance
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