

TOLEDO AREA REGIONAL TRANSIT AUTHORITY



# Quarterly Performance Review: 2024 Q4

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# Performance Management Cadence: 2024

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

Nov 2024	Dec 2024	Jan 2025	Feb 2025
Virtual Monthly Tactics Review	Virtual Monthly Tactics Review	Q4 Performance Review Virtual	Presentation to the Board

# Success Outcome Status: 2024 Q4

Success Outcome	Points	Success Definition	Status
<b>Employee Ownership</b>	35	<ul style="list-style-type: none"><li>• Complete 1 Employee Ownership survey to inform the 2025 budget.</li><li>• Create an employee retention action plan by the end of 2024.</li></ul>	<ul style="list-style-type: none"><li>• <b>Complete!</b></li><li>• <b>Complete!</b></li></ul>
<b>Customer Experience</b>	30	<ul style="list-style-type: none"><li>• Complete 1 Customer Experience survey by the end of 2024. (move to 2 in 2025)</li><li>• Achieve an NPS score at or above the industry average.</li><li>• Adopt a customer experience plan that is reflected in the 2025 budget.</li></ul>	<ul style="list-style-type: none"><li>• <b>Complete!</b></li><li>• <b>Bus: 57   Move: 59   Flex: 57</b></li><li>• <b>Complete!</b></li></ul>
<b>Financial Health</b>	20	<ul style="list-style-type: none"><li>• Create and adopt an outcome-based budget for 2025.</li></ul>	<ul style="list-style-type: none"><li>• <b>Complete!</b></li></ul>
<b>Community Betterment</b>	15	<ul style="list-style-type: none"><li>• Complete 1 Community Betterment survey by the end of 2024. (move to 2 in 2025)</li><li>• Create and adopt a CEO approved Community Betterment strategy by the end of 2024.</li></ul>	<ul style="list-style-type: none"><li>• <b>Complete!</b></li><li>• <b>Complete!</b></li></ul>

# Organizational Scorecard: 2024 Q4

Success Outcome	Goal Points	2024 Q1 Points	2024 Q2 Points	2024 Q3 Points	2024 Q4 Points
Employee Ownership	35	8.8	17.5	35.0	<b>35.0</b>
Customer Experience	30	35.6	35.6	35.6	<b>35.6</b>
Financial Health	20	6.0	8.0	18.8	<b>20.0</b>
Community Betterment	15	11.3	11.5	15.0	<b>15.0</b>
	<b>100</b>	<b>61.7</b>	<b>72.6</b>	<b>104.4</b>	<b>105.6</b>

**105.6 / 100  
points earned**

# Organizational Scorecard:

## Employee Ownership

Metric	Definition	Goal	Owner	Goal Points	Q4 Results	Points Earned
<b>Employee Engagement Index</b>	The overall employee engagement score (%) as defined by 4 key factors indicated in an employee survey. The 4 key factors are: (1) the % of employees who feel they <b>understand what success looks like</b> for TARTA and how they contribute to that success; (2) the % of employees that <b>believe they have the resources/tools necessary</b> to perform their duties; (3) the % of employees that <b>feel their supervisors provide feedback</b> on their performance; (4) and the % of employees who <b>believe they work in a safe environment</b> where their perspective is invited.	Establish Baseline	Ursula	15	56	15
<b>Employee Retention Plan</b>	Create an employee retention action plan by the end of 2024.	Yes	Ursula	20	Complete	20
<b>Total Goal Points:</b>				<b>35</b>		<b>35</b>

# Organizational Scorecard:

## Customer Experience

Metric	Definition	Goal	Owner	Goal Points	Q4 Results	Points Earned
<b>Net Promoter Score (Bus)</b>	Promoters minus Detractors. On a scale of 0-10 of how likely to recommend TARTA to others; Promoters are 9-10 and Detractors 0-6.	28	Rick	8	57	10.4
<b>Net Promoter Score (TARPS)</b>	Promoters minus Detractors	51	Rick	8	59	9.3
<b>Net Promoter Score (Flex)</b>	Promoters minus Detractors	Establish Baseline	Rick	6	57	6.0
<b>On-Time Performance - Perception (Bus)</b>	The percent of customers who are satisfied or very satisfied with the bus arriving on schedule.	67%	Rick	4	79%	4.7
<b>On-Time Performance - Perception (TARPS)</b>	The percent of customers who are satisfied or very satisfied with the bus arriving within the scheduled pickup window.	69%	Rick	4	95%	5.2
<b>Total Goal Points:</b>				<b>30</b>		<b>35.6</b>

# Organizational Scorecard:

## Financial Health

Metric	Definition	Goal	Owner	Goal Points	Q4 Results	Points Earned
<b>Cost per Hour</b>	Overall operating expenses divided by total revenue hours across three modes.	Establish Baseline	Rick	6	\$143.98	6
<b>Future Sustainability</b>	Months of operating cost on hand.	6.0	Sean	6	6.0	6
<b>Outcome-Based Budget</b>	Create and adopt an outcome-based budget for 2025.	Yes	Laura	8	Complete	8
<b>Total Goal Points:</b>				<b>20</b>		<b>20</b>

# Organizational Scorecard:

## Community Betterment

Metric	Definition	Goal	Owner	Goal Points	Q4 Results	Points Earned
<b>Community Betterment Perception</b>	The percent of the community that agree or strongly agree that TARTA makes the Toledo community better.	Establish Baseline	Sam	4	91%	4
<b>Population Access</b>	The percent of the total population within a 10-minute walk of transit (bus stop + flex zone) in the service area.	Establish Baseline	Sean	2	88%	2
<b>Job Connectivity - Actual</b>	The percent of Lucas Co. and Rossford residents within a 45-minute transit commute of at least one of the 11 most concentrated job centers in the service area.	Establish Baseline	Sean	5	85%	5
<b>Job Connectivity - Perception</b>	The percent of the community that agree or strongly agree that TARTA provides access to jobs in the community.	Establish Baseline	Sam	4	79%	4
<b>Total Goal Points:</b>				<b>15</b>		<b>15</b>



# Performance Management Cadence: 2025

Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	Jul 2025
<b>Virtual Monthly Tactics Review</b>  <b>Present Results to Board</b>	<b>Virtual Monthly Tactics Review</b>	<b>Q1 Performance Review (in-person)</b>	<b>Virtual Monthly Tactics Review</b>  <b>Present Results to Board</b>	<b>Virtual Monthly Tactics Review</b>	<b>Q2 Performance Review (virtual)</b>
Aug 2025	Sep 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026
<b>Virtual Monthly Tactics Review</b>  <b>Present Results to Board</b>	<b>2026 Success Workshop (2 days, in-person)</b>	<b>Q3 Performance Review (in-person)</b>	<b>Virtual Monthly Tactics Review</b>  <b>Present Results to Board</b>	<b>Virtual Monthly Tactics Review</b>	<b>Q4 Performance Review (virtual)</b>

# 2025 Success Outcomes

Success Outcome	Points 100 total	Success Definition <i>highest priority metric(s) in the Success Outcome</i>	2024 Result	2025 Goal
<b>Employee Ownership</b>	30	<ul style="list-style-type: none"> <li>5% increase in the Employee Engagement Index by the end of 2025, measured by 1 Employee Ownership survey.</li> </ul>	EI = 56	<b>EI = 59</b>
<b>Customer Experience</b>	26	<ul style="list-style-type: none"> <li>5% increase in Net Promoter Score for each mode by the end of 2025, measured by 2 Customer Experience surveys.</li> </ul> <p><i>Bus goal is <b>114%</b> higher than TransPro's Industry Sampled Average of 28</i></p> <p><i>Move goal is <b>22%</b> higher than TransPro's Industry Sampled Average of 51</i></p>	Bus = 57 Move = 59 Flex = 57	<b>Bus = 60</b> <b>Move = 62</b> <b>Flex = 60</b>
<b>Financial Health</b>	24	<ul style="list-style-type: none"> <li>6-month operating reserve.</li> <li>Implement a 5-year Capital Plan and a 5-year Operational Forecast by the end of 2025.</li> <li>Establish a capital reserve fund with up to 10% of sales tax revenue by the end of 2025.</li> </ul>	<ul style="list-style-type: none"> <li>6 months</li> <li>1-year outcome-based budget</li> <li>0%</li> </ul>	<ul style="list-style-type: none"> <li><b>6 months</b></li> <li><b>5-year Capital and Operations</b></li> <li><b>10%</b></li> </ul>
<b>Community Betterment</b>	20	<ul style="list-style-type: none"> <li>91% of the community believe TARTA makes the community better, measured by 2 Community Betterment surveys (including stakeholder focus groups).</li> <li>46% of jobs are within a 45-minute transit commute of every resident in Lucas County and Rossford.</li> <li>Reduce emissions by 5.6%.</li> </ul>	<ul style="list-style-type: none"> <li>91%</li> <li>41% / 60-minutes</li> <li>Not tracked</li> </ul>	<ul style="list-style-type: none"> <li><b>91%</b></li> <li><b>46% / 45-minutes</b></li> <li><b>5.6%</b></li> </ul>