CapMetro

STRATEGIC PLAN

FY2024

CORE VALUES

Safety, Equity, Innovation, Transparency and Sustainability

Mission

To empower, enhance and serve the region and its communities through the responsible delivery of high-quality public transportation.

Vision

CapMetro is integral to the region and its communities, providing connectivity, fostering economic activity and ensuring safe, environmentally sustainable and equitable access to opportunity.

TERMINOLOGY

Below is a brief overview of some key terms used throughout the document.

1 **Strategic Goals** are broad, high-level statements that articulate the overarching direction the organization aspires to achieve. These Board of Director-adopted goals are designed to encapsulate the broad impacts desired by CapMetro, providing a framework for guiding decision-making and resource allocation.

2 **Strategic Objectives** are specific targets that reflect the outcomes CapMetro aims to achieve. Objectives facilitate focused planning, execution, and evaluation of strategic efforts.

3 **Agency Priorities** represent the essential actions identified for the current year to drive our goals and objectives forward. These priorities serve as the primary drivers for resource allocation and focus within the organization. Each priority is accompanied by a specific definition of success, often measured by metrics, to ensure clarity and accountability. They encapsulate the results or achievements that leadership aims to accomplish, predominantly relying on the agency's implementation efforts.

4 **Strategies** are specific and high-level approaches that outline how the organization intends to make progress toward its strategic objectives. These strategies encompass distinct projects or steps deemed necessary to successfully deliver on identified priorities. Strategies serve as the roadmap guiding CapMetro's efforts to achieve its overarching goals and objectives.

3 **PRIORITY**
Stand up a Transit Police Department
Create the transit police department.

GOAL & OBJECTIVES

1 **Customer**
Provide a convenient, desirable, and accessible option for mobility in the region and its communities.

A Provide a reliable and safe transit service.

2 **B** Continue to improve the customer experience.

C Ensure the system is accessible for everyone in the region.

EXECUTIVE CHAMPION
Gardner Tabon

4 **EXAMPLE STRATEGIES**

- Establish the police facility by continuing to collaborate with Facilities and IT to ensure the completion of the necessary infrastructure.
- Collaborate with P&C on recruitment plan to establish standards and ensure the hiring process for sworn personnel is well-structured.
- Launch the recruitment plan and hire officers.
- Launch engagement and awareness campaign to inform the community and stakeholders about the department's presence and purpose before the arrival of sworn officers.
- Establish department mission, vision, core values, procedures, org. chart, etc.
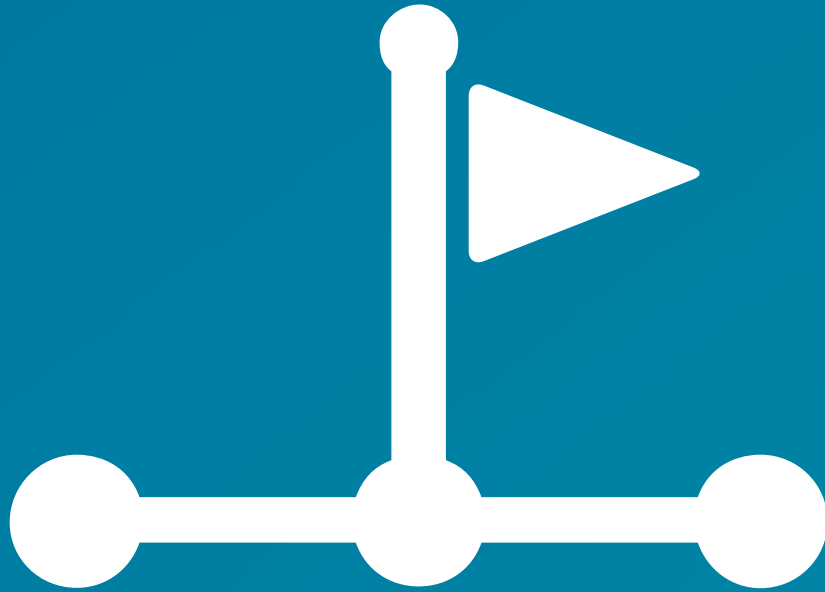
HOW WE'RE MEASURING SUCCESS

- Achieve TCOLE certification (y/n)
- Establish police facility (y/n)
- Launch recruiting campaign (y/n)
- Attract diverse pool of qualified candidates (y/n and demographics)
- Monitor media coverage and sentiment analysis to gauge the public perception of the department.

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FY2024 STRATEGIC GOALS & OBJECTIVES

Strategic Goals	Strategic Objectives

Customer
Provide a convenient, desirable, and accessible option for mobility in the region and its communities.

A Provide a reliable and safe transit service.

B Continue to improve the customer experience.

C Ensure the system is accessible for everyone in the region.

Community
Demonstrate our value to a growing region by collaborating with partners and communities.

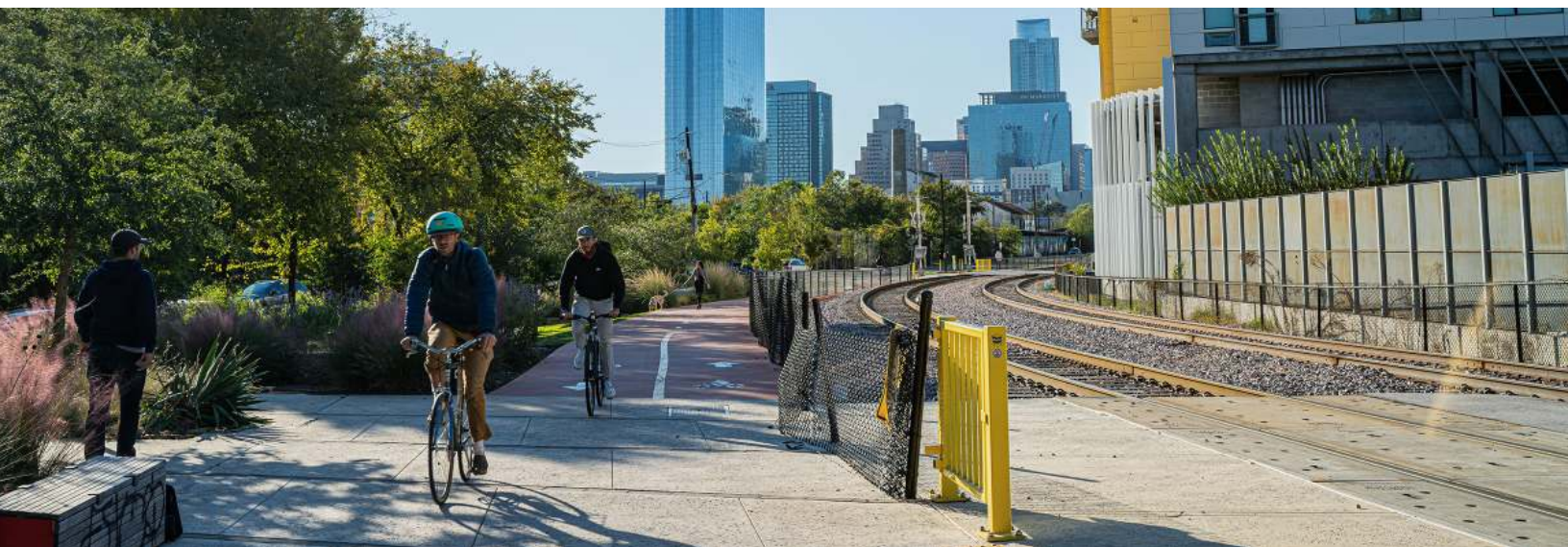**D** Support sustainable growth through improved access to jobs, services and opportunities.

E Continue to improve the environment by transforming into a fully carbon-neutral transit agency by 2040.

F Engage the community, customers and stakeholders in a constant process to reflect their input in the transit system and respond to immediate needs.

G Foster community conversations to improve regional mobility.

Workforce
Invest in a productive and valued workforce.

H Recruit, hire and develop an engaged workforce from a diverse talent community.

I Foster an inclusive, collaborative culture that develops a diverse and engaged workforce.

J Expand and develop a highly skilled workforce to meet the changing needs of the agency and community.

Org. Effectiveness
Deliver responsibly and sustainably on the mission.

K Be a fiscally responsible and transparent steward of public funds.

L Advance the culture of safety throughout the organization.

M Balance investments while prioritizing a state of good repair.

FY2024 AGENCY PRIORITIES

Stand up a Transit Police Department

Gardner Tabon

Create the transit police department.

Safety & Emergency Management

Gardner Tabon

Elevate CapMetro's safety culture by equipping the organization with the skills to lean into and take ownership of their role in Safety Management Systems and Emergency Management.

Service Excellence » Customer Experience

Andy Skabowski

Develop and implement procedures, initiatives, and programs to enhance service delivery & drive improvements to customer experience.

Strengthen Organizational Foundations

Kerri Butcher

Promote continuous improvement throughout the organization by optimizing processes, strengthening cross-functional collaboration, and strategically formulating a comprehensive implementation roadmap that encompasses all agency multiyear projects and plans.

Project Connect

Sharmila Mukherjee

Continue implementation of the Project Connect program through mindful and transparent delivery of capital projects and services, and coordination with partners.

Fare Strategy

Catherine Walker

Plan for and establish an equitable and ultramodern fare system architecture to reduce confusion and inefficiencies and ensure accessibility for our riders.

Agency Trust, Presence & Reputation

Leroy Alloway

Proactively and strategically engage with elected officials, stakeholders, and the community across Central Texas to address needs, challenges, and value of public transportation as part of the overall regional transportation system, helping to promote the agency's role, presence, and goodwill.
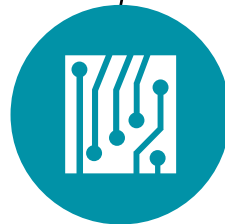
Digital Transformation

Catherine Walker

Transform our use of technology into an influential catalyst, driving process improvement and enhancing reliability across the organization.

## Invest in Talent

Benjamin Sims

Support our organization by equipping CapMetro staff with the skills needed to succeed and grow by cultivating a leadership culture centered on accountability, inclusivity, and respect and ensuring our organization is recruiting and retaining needed talent.

Project Delivery

Dave Kubicek

Amplify CapMetro's project delivery efficiency by ensuring timely and budget-conscious execution through enhanced communication and seamless collaboration.
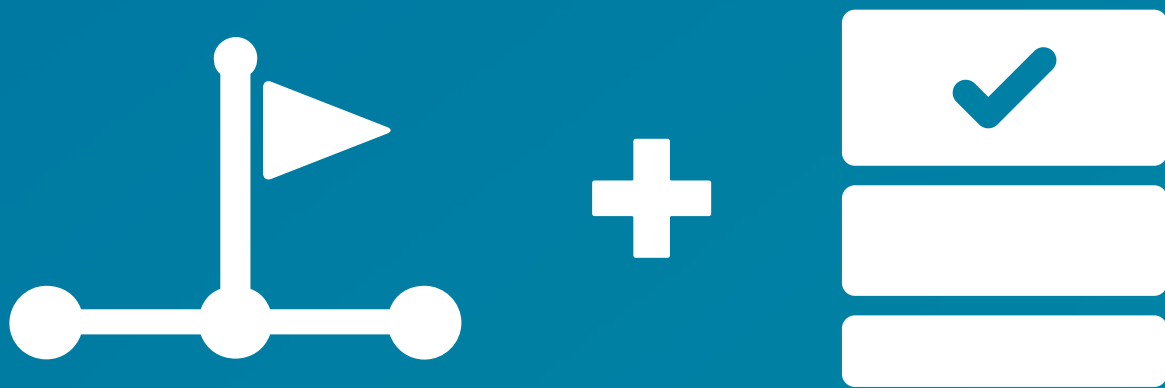
BRINGING GOALS AND PRIORITIES TOGETHER

Stand up a Transit Police Department

Create the transit police department.

GOAL & OBJECTIVES

Customer

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A Provide a reliable and safe transit service.

B Continue to improve the customer experience.

C Ensure the system is accessible for everyone in the region.

EXECUTIVE CHAMPION
Gardner Tabon

EXAMPLE STRATEGIES

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- Collaborate with P&C on recruitment plan to establish standards and ensure the hiring process for sworn personnel is well-structured.

- Launch the recruitment plan and hire officers.

- Launch engagement and awareness campaign to inform the community and stakeholders about the department's presence and purpose before the arrival of sworn officers.

- Establish department mission, vision, core values, procedures, org. chart, etc.

HOW WE'RE MEASURING SUCCESS

- Achieve TCOLE certification (y/n)

- Establish police facility (y/n)

- Launch recruiting campaign (y/n)

- Attract diverse pool of qualified candidates (y/n and demographics)

- Monitor media coverage and sentiment analysis to gauge the public perception of the department.

Service Excellence >> Customer Experience

Develop and implement procedures, initiatives, and programs to enhance service delivery and drive improvements to customer experience.

GOAL & OBJECTIVES

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EXECUTIVE CHAMPION
Andy Skabowski

EXAMPLE STRATEGIES

- Develop comprehensive Service Reliability Plans to improve service reliability and enhance the customer experience.

- Implement a proactive maintenance improvement plan to maintain equipment and infrastructure.

- Leverage customer surveys to drive service enhancements.

- Establish regular feedback mechanisms to understand employee concerns and improve the employee experience, which impacts the customer experience.

- Foster strong partnerships with Service Providers to enhance the quality and reliability of services.

- Develop initiatives to show the benefit and value of transit as part of a broader strategy to engage and retain customers.

- Acknowledge and address the perception gap to align customer and community perceptions with agency perceptions.

- Foster strong partnerships with local and state government agencies to ensure accessibility and coordination efforts in service delivery.

HOW WE'RE MEASURING SUCCESS

- Complaints/100,000 miles
- OTP
- MDBF
- Accidents/100,000 miles
- # of preventable accidents.

Project Connect

Continue implementation of the Project Connect program through mindful and transparent delivery of capital projects and services and coordination with partners.

GOAL & OBJECTIVES

Community

Demonstrate our value to a growing region by collaborating with partners and communities.

D Support sustainable growth through improved access to jobs, services and opportunities.

E Continue to improve the environment by transforming into a fully carbon-neutral transit agency by 2040.

F Engage the community, customers, and stakeholders in a constant process to reflect their input in the transit system and respond to immediate needs.

G Foster community conversations to improve regional mobility.

EXECUTIVE CHAMPION
Sharmila Mukherjee

EXAMPLE STRATEGIES

- Develop Real Estate/Assets Strategy in a strategic approach to manage resources for Project Connect, both in the short and long term.

- Develop Program implementation and prioritization for non-light rail elements, including fully developing cost estimates and local funding sources.

- Deliver CapMetro program components.

- Partner with ATP to ensure CapMetro participation in the design, environmental clearance, and planning for operational readiness of Austin Light Rail.

HOW WE'RE MEASURING SUCCESS

- On time, on budget delivery of CapMetro program components (y/n)

- CapMetro Rapid lines included in January 2025 service change (y/n)

- Customer satisfaction/community survey measures

Agency Trust, Presence and Reputation

Proactively and strategically engage with elected officials, stakeholders, and the community across Central Texas to address needs, challenges, and value of public transportation as part of the overall regional transportation system, helping to promote the agency's role, presence and goodwill.

GOAL & OBJECTIVES

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EXECUTIVE CHAMPION
Leroy Alloway

EXAMPLE STRATEGIES

- Develop and implement a Comprehensive Brand Awareness Campaign that educates, informs, and helps shape the community awareness of CapMetro's services, mission, and values.

- Establish strong community & civic representation by working with civic organizations, community events, and advocacy groups with active engagement by agency staff representatives.

- Pursue education integration by collaborating with educational institutions to create internships and other opportunities with appropriate materials and outreach design to engage students in agency projects & initiatives.

- Clearly define and communicate CapMetro's value proposition, emphasizing how the services the agency provides benefit the community locally and across the Central Texas region.

- Maintain constant and meaningful engagement with local, state, and federal elected officials who inform and engage with various aspects of CapMetro operations, plans, and programs.

HOW WE'RE MEASURING SUCCESS

- Total number of civic organizations, advocacy groups, neighborhood groups, and related institutions where CapMetro has an active presence (sponsorship/staff participation)

- Total number of elected official and member and partner city interactions (local/regional/state/federal) over the course of FY2024

- % increase in survey results showing awareness / perception / reputation of CapMetro (year over year change) in the annual Community Perception Survey

- Total educational institutions engaged, by type and location in the service area, over the course of FY2024

- % increase in year-over-year customer satisfaction

Invest in Talent

Support our organization by equipping CapMetro staff with the skills needed to succeed and grow by cultivating a leadership culture centered on accountability, inclusivity, and respect and ensuring our organization is recruiting and retaining needed talent.

GOAL & OBJECTIVES

Workforce

Invest in a productive and valued workforce.

H Recruit, hire, and develop an engaged workforce from a diverse talent community.

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J Expand and develop a highly skilled workforce to meet the changing needs of the agency and community.

EXECUTIVE CHAMPION
Benjamin Sims

EXAMPLE STRATEGIES

• Design and implement a comprehensive learning and development program that aligns with our organizational values and culture, fostering a growth-oriented environment while equipping our workforce with the necessary skills for future success.

• Formulate a forward-looking workforce plan aimed at identifying crucial skills and addressing skill gaps to ensure we have the right talent in place to meet the evolving demands of our current and future roles.

• Establish a robust framework dedicated to identifying and nurturing successors and High Potential employees, providing tailored development opportunities that cultivate a pipeline of capable and diverse leaders prepared to lead CapMetro into the future.

• Employ onboarding tools and experiences to streamline and enhance the assimilation of new employees into CapMetro, creating a seamless and engaging integration process that promotes productivity and engagement from day one.

• Establish a comprehensive change management framework that empowers our employees to embrace and adapt to organizational changes seamlessly, with a focus on fostering an inclusive and diverse workplace culture.

• Implement a standardized, scalable approach to assess and address learning needs throughout the organization to cultivate a learning-oriented culture that maximizes individual potential and propels our organization towards long-term success.

HOW WE'RE MEASURING SUCCESS

• Overall workforce diversity

• Diversity and participation rate employes in successor/HIPO talent pool

• Diversity of employees receiving promotions

• DEI related measure in employee engagement survey

• Turnover/retention rate

• Employee engagement survey scores (CapMetro and Services Providers)

• Total number, and type, of interactions with member and partner cities over the course of FY2024

Safety and Emergency Management

Elevate CapMetro's safety culture by equipping the organization with the skills to lean into and take ownership of their role in Safety Management Systems and Emergency Management.

GOAL & OBJECTIVES

Org. Effectiveness

Deliver responsibly and sustainably on the mission.

K Be a fiscally responsible and transparent steward of public funds.

L Advance the culture of safety throughout the organization.

M Balance investments while prioritizing a state of good repair.

EXECUTIVE CHAMPION
Gardner Tabon

EXAMPLE STRATEGIES

- Develop and execute strategies to deepen organizational understanding of safety and emergency management plans and practices, with a focus on empowering all levels of the organization.
- Refine safety and security data and implement a data-sharing strategy.

HOW WE'RE MEASURING SUCCESS

- Safety Incidents (All Modes)
- Number of employees engaged in drills, trainings, etc.
- Number of employees trained on EOC functions
- Number of times EOC activated per year, along with days open

Strengthen Organizational Foundations

Promote continuous improvement throughout the organization by optimizing processes, strengthening cross-functional collaboration, and strategically formulating a comprehensive implementation roadmap that encompasses all agency multiyear projects and plans.

GOAL & OBJECTIVES

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EXECUTIVE CHAMPION
Kerri Butcher

EXAMPLE STRATEGIES

- Develop and commit to CapMetro's long-range agency plan with an agency-wide strategy and plan implementation roadmap to ensure all topic-area plans (i.e., Sustainability Plan, Capital Plan, Facilities Plan) are aligned with CapMetro's long-range vision and overarching goals through evaluation and prioritization of each plan.

- Develop a comprehensive stakeholder engagement strategy that includes cross-functional input from various depts. within the agency to enhance understanding and implementation of plans.

- Prioritize business operations excellence and process documentation by formalizing SOPs for operations, P&C Day to Day Business, and new software (ERP, DEAP, EPPM) to ensure consistent and reliable processes within the organization.

- Establish IT Governance with roles and responsibilities of all departments in projects with an IT component by developing and implementing processes to ensure roles can be systematized for consistency and understanding.

- Prioritize finance-capital budget by developing and implementing strategies that assist in analyzing expenditures and project delivery to make decisions about allocating resources effectively.

HOW WE'RE MEASURING SUCCESS

- Completed long-range agency plan and plan implementation roadmap (y/n)

- Business Operations Excellence and Process Documentation/Reporting:
  - Delivered processes w/stakeholder input that are documented, flexible, & repeatable
  - P&C Day to Day Business Processes - measure = internal customer/employee satisfaction score
  - Operating Procedures - improved operating efficiency measures
  - Meaningful utilization of the systems to produce the reporting and decision-making data expected at full implementation

- Measurable progress on various KPIs and Metrics included in agency plans

Fare Strategy

Plan for and establish an equitable and ultramodern fare system architecture to reduce confusion and inefficiencies and ensure accessibility for our riders.

GOAL & OBJECTIVES

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EXECUTIVE CHAMPION
Catherine Walker

EXAMPLE STRATEGIES

- Revisit and restructure contracts to optimize partnerships and agreements to support the fare strategy.

- Revisit CapMetro for Business for expanding fare options.

- Prioritize outreach by engaging with customers and promoting the adoption of Amp, contributing to the 20% customer adoption goal.

- Develop a strategy and timeline to systematically evaluate and consolidate fares by reviewing all fare programs, media, and types.

- Ensure upcoming fare and technology systems are coordinated, thoughtful, and move us towards a restructured, easy-to-navigate fare system (i.e., MetroBike, Spare, Amp, etc.).

HOW WE'RE MEASURING SUCCESS

- Formally rolling out Amp with a big communications push and achieving 20% customer adoption

- Sunset old fare types and media (y/n)

- Finish implementation of Sparelabs technology (y/n)

- Customer satisfaction-related measure on fares and technology

Digital Transformation

Transform our use of technology into an influential catalyst, driving process improvement and enhancing reliability across the organization.

GOAL & OBJECTIVES

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EXECUTIVE CHAMPION
Catherine Walker

EXAMPLE STRATEGIES

- Develop a comprehensive strategy to map out the existing software solutions and assess their compatibility with the digital transformation objectives.

- Conduct a thorough assessment of the organization's digital transformation needs by identifying areas where technology can enhance efficiency, improve customer experience, and streamline operations.

- Ensure teams are equipped with the necessary skills and mindset for agile product development through training.

- Use effective change management and communication to help promote the adoption of new ways of working.

- Implement prioritization strategy to guide how technology projects are selected and ranked based on their alignment with business goals and resource availability.

- Ensure accessible top-down technology.

HOW WE'RE MEASURING SUCCESS

- Number of new software deployed in FY24 compared to FY23
- Funds spent on agency software licenses year over year

Project Delivery

Amplify CapMetro's project delivery efficiency by ensuring timely and budget-conscious execution through enhanced communication and seamless collaboration.

GOAL & OBJECTIVES

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EXECUTIVE CHAMPION
Dave Kubicek

EXAMPLE STRATEGIES

- Review delivery processes to ensure streamlined project delivery and efficiency.

- Ensure efficient delivery and utilization of local and grant funding.

- Ensure long-range agency plan and plan implementation roadmap is accurately captured and informing the agency capital portfolio.

- Develop governance for schedules, reporting, and forecasting.

HOW WE'RE MEASURING SUCCESS

- Agency Capital Schedule Forecast versus Actual per Annual Review

- Individual Capital Projects Programed Schedules versus Actuals Status Schedule

- CapMetro Capital Project Budgeted Funds Programmed versus Actuals Fund Spend

- Grants Project Budgeted Funds versus Actuals Fund Spend

ENTERPRISE DATA ANALYTICS PLATFORM

The Enterprise Data Analytics Platform is meticulously designed to furnish our internal teams with reliable and accessible data from a centralized location. Accessible organization-wide, this platform serves as a comprehensive repository for current and historical ridership data, among other pertinent metrics.
We encourage all employees to utilize this invaluable resource for informed insights and strategic alignment.

https://capmetro.sharepoint.com/sites/capmetrocentral/SitePages/Performance-Corner.aspx