

Strategic Business Plan



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Executive Summary

In late 2017, the Crawford Area Transportation Authority (CATA), using technical assistance from the Northwest Commission, initiated a strategic business planning process to improve public transportation in Crawford and Venango Counties, Pennsylvania. The Strategic Business Plan focuses on CATA as an organization and documents a shared vision and specific initiatives that will be undertaken to improve the governance, management, and operations of public transit in Crawford and Venango Counties.

Through a multi-step process that involved CATA staff and its Board of Directors, the Strategic Business Plan identified four strategic perspectives to improve over the next five years:

- **Workforce**
- **Operations and Service**
- **Finance**
- **Stakeholders/Riders**

Goals were created for each of these four perspectives to guide CATA staff in improving the organization. These goals are:

- Attract and Retain a Qualified Workforce
- Implement and Integrate Cutting-Edge Technologies
- Document and Promote Awareness of HR Policies
- Engage in Board Development
- Standardize Operations
- Improve and Introduce New Service
- Improve Maintenance and Actively Manage Assets
- Diversify Revenue through New and Expanded Partnerships
- Pursue Regional Coordination
- Document Finance Policies and Procedures
- Create and Implement a Marketing and Outreach Plan
- Identify the Unmet Transportation Needs of the Communities we Service
- Enhance the Customer Experience

Each goal has multiple objectives and action steps that must be completed to accomplish the goal and ultimately improve the four strategic perspectives. Objectives have been assigned a performance output or measure, a timeframe for implementation, and a key staff member who is responsible for implementation. Progress made toward implementing the strategic business plan and achieving the agency's goals will be tracked and reported quarterly by CATA staff.

Agency Overview

The Crawford Area Transportation Authority (CATA) was incorporated as a municipal authority in 1979 to provide public transportation services to the people of Crawford County. In 2017, recognizing the need to improve public transportation regionally, CATA entered into an agreement with the Venango County Commissioners to manage and operate public transportation in Venango County, service historically provided by the Venango County Transportation Office (VCTO). In 2018, Venango County Transit officially merged with CATA, changing the composition of the organization and adding a Venango County representative to the governing Board.

Today, CATA provides fixed route bus transportation in and around the cities of Meadville, Titusville, Saegertown, Franklin, Oil City, and Seneca, and door-to-door transportation throughout the two counties through the Shared-Ride demand response program.

CATA is comprised by a fleet of 65 vehicles consisting of traditional 30' and 35' heavy-duty buses, smaller body-on-chassis buses to provide more customized service, and accessible min-vans. CATA carefully selects vehicles to appropriately serve the number of customers that need transportation while being efficient in the utilization of resources.

CATA is a pillar of the Crawford and Venango County communities. CATA regularly partners with local businesses and institutions to support ongoing initiatives and to move people to work, school, and events. Each year, CATA spends more than \$1.5 million purchasing products and services from over 50 Pennsylvania businesses.

In 2018, CATA officially opened a new state of the art Operations and Maintenance facility in Meadville. This new facility brings all Meadville-based vehicles under roof in one location with full control over maintenance services. In addition, CATA has introduced Compressed Natural Gas (CNG) vehicles into the Meadville fixed route service. As part of a PennDOT Public Private Partnership (P3) project to bring CNG fueling stations to transit agency locations across the Commonwealth, CATA has 3 CNG buses operating in fixed route service along with on-site CNG fueling station. CATA has plans to eventually convert all buses to this clean, Pennsylvania-produced fuel.



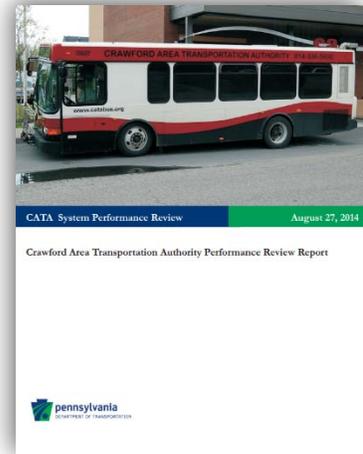
Act 44 Transit Agency Performance Review

Act 44 of 2007 was a comprehensive overhaul of transportation funding in Pennsylvania, notably increasing public transportation funding and providing a dependable, dedicated funding source for the future. As a condition of receiving increased and stable state funding, the Pennsylvania General Assembly required the Pennsylvania Department of Transportation (PennDOT) to conduct performance reviews for all fixed route agencies on a regular cycle (5 years) to identify ways to improve efficiency, effectiveness, and enhance the overall management of public transportation.

Crawford County

CATA underwent an Act 44 performance review in 2014, with the final report published in August of that year. CATA received an overall positive review, with many best practices noted that were shared with similar transit agencies around the Commonwealth. These best practices included:

- CATA has a General Manager and staff that are actively involved in industry groups, like the Pennsylvania Public Transportation Association (PPTA), and serve as advisors to other transit agencies, such as the Endless Mountains Transportation Authority.
- CATA is an active participant in regional organizations and is a leader in transit agency regionalization.
- CATA has partnered with the Erie Metropolitan Transit Authority (EMTA) to provide heavy maintenance services on large bus engines, reducing costs for both agencies and allowing CATA's staff to focus on running repairs without needing an in-house expert in engine repair.



The report also identified “opportunities for improvement” to enhance agency performance and overall management. A few of these opportunities for improvement included:

- Develop a comprehensive Strategic Information Technology plan
- Develop a formal strategic plan (completed through this document)
- Develop performance targets for all key agency functions
- Improve marketing and conduct non-rider surveys to understand and attract new riders
- Develop a process for cost allocation between various modes and services
- Partner with the Northwest Commission to augment staff with and leverage technical skills and capacity not available in-house (completed through this document)

Venango County

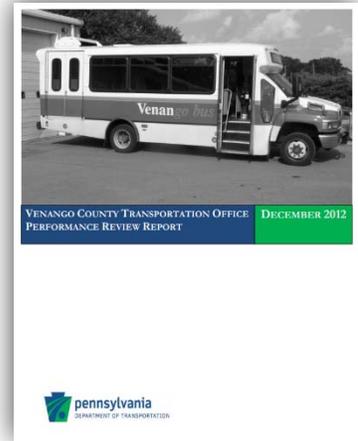
Venango County Transportation Office (VCTO) underwent an Act 44 performance review in 2012, with the final report published in December of that year. VCTO was scheduled for a second performance review in 2017, however due to merger with CATA, the performance review was postponed.

In the performance report, VCTO was commended for having an active advisory committee to provide input to management on fixed route and shared-ride issues. The organization was also recognized for their transition from contracted service to in-house service that resulted in improved quality and substantially lower costs, a trend that is not common in the transit industry.

The report identified many “opportunities for improvement” to enhance agency performance and overall management. These opportunities for improvement included the following:

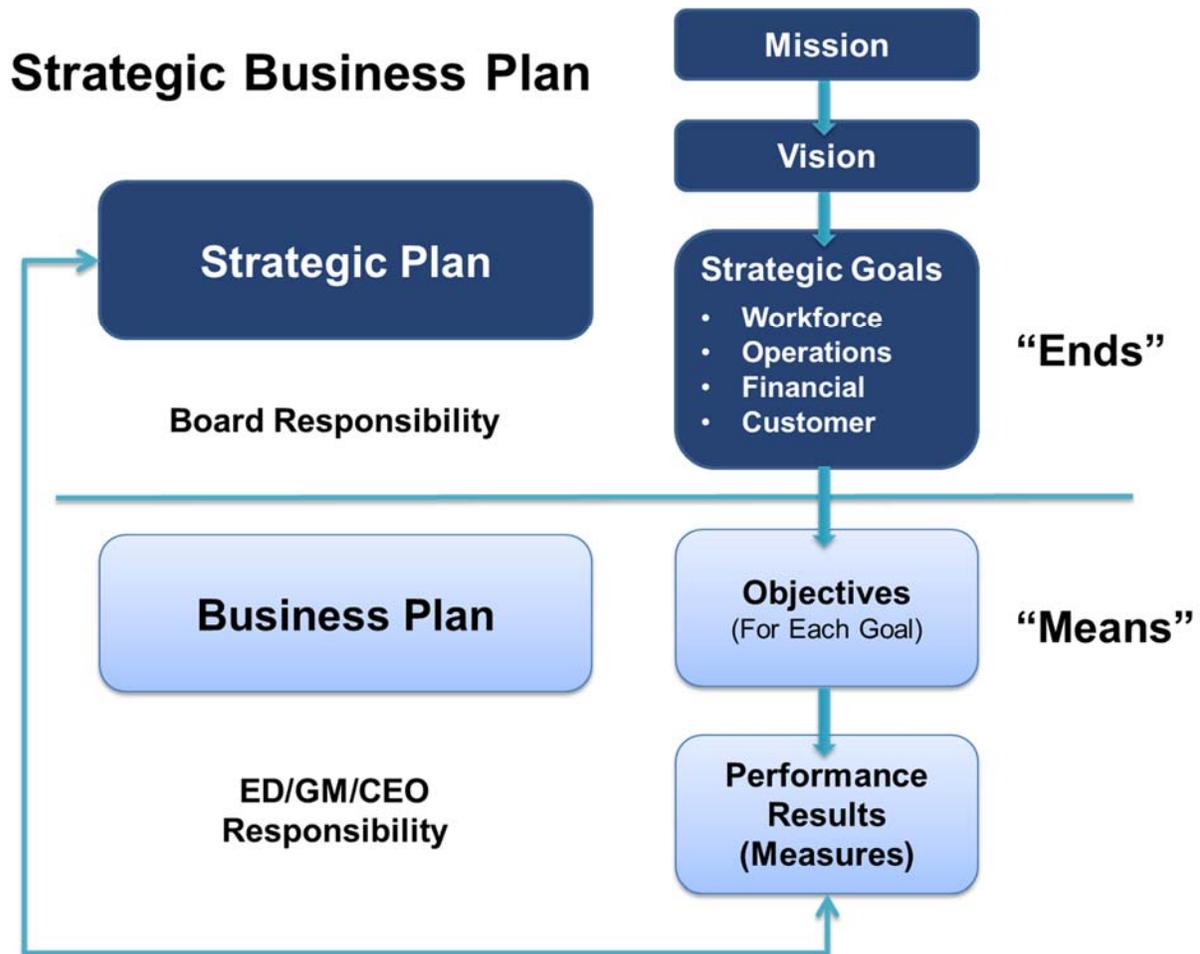
- VCTO does not have a formal strategic plan in place to guide the agency
- Management levels (staffing) should be evaluated considering the substantial increase of in-house staff
- The existing maintenance facility is inadequate for the current use and needs of the organization
- A lack of technology hinders advancement of the organization
- VCTO should improve marketing and communications to attract new riders

These major observations through the CATA and VCTA performance reviews have been used as a resource throughout the development of the strategic business plan and are important to note in preparation for a future Act 44 Performance Review of CATA.



Strategic Business Plan

Strategic Plans are created and used by organizations worldwide to guide management actions and ensure that all levels of the organization are advancing in a shared direction. Strategic Plans are intended to identify the “ENDS,” or outcomes (Strategic Goals), that the organization intends to achieve and are “owned” by the Board of Directors. Conversely, Business Plans document the “MEANS,” or the activities that are to be completed to attain the “ENDS.” Business Plans are generally created and “owned” by management and staff. This Strategic Business Plan combines these two functions and is specifically designed to overcome potential organizational accountability issues and to facilitate the Board’s decision-making for the next five years. It also serves as a plan to attain the performance targets set in the Act 44 Performance Review.



Strategic Planning Approach

The CATA Strategic Business Plan followed a prescribed process designed to quickly achieve an action-oriented plan to advance public transportation in Crawford and Venango Counties. The process focused on engaging CATA senior staff and the Authority's Governing Board to define and develop the Strategic Business Plan and to ensure that the overall direction, philosophy, and purpose of the plan was a product of the Board. During the process, a committee was engaged consisting of CATA staff and Board members (strategic planning committee) to proceed through the phases of the strategic planning process, which included:

- **Situational Analysis**
- **Agency strengths, weaknesses, opportunities, and threats (SWOT)**
- **Mission & Vision Confirmation**

The committee then worked to document key themes to address the findings of the SWOT analysis and to achieve the mission and vision of the organization. The key themes were formed into Goals with short-term, discreet Objectives that form a blueprint for major agency activities over the next five years. Finally, the committee worked to assign each Objective to a CATA staff member for tracking and management.

The most critical element of strategic planning is continuous monitoring and updating to encourage accountability and follow-through. This document should be reviewed quarterly by the Board and updated annually to reflect accomplishments, challenges, and reflect the present conditions in Crawford and Venango Counties.

Situational Analysis

A situational analysis is the first step in the strategic planning process. It identifies the realities (or situation) of the organization. The situational analysis includes an overview of the services provided, current financial position, system performance, customers, markets, and trends that affect the organization. The situational analysis is a key step to narrowing the focus of a strategic planning process and identifying priority areas.

CATA operates service throughout Crawford and Venango counties. In Crawford County, CATA operates eight year-round fixed routes and two seasonal routes. Service is operated Monday – Saturday from approximately 7am to 10pm. Major areas served include Meadville and the surrounding area, Titusville, Saegertown, as well as special/seasonal services for Allegheny College and the Crawford County Fair.

In Venango County, CATA operates five year-round fixed routes. Service is operated Monday – Saturday from approximately 7:30am to 5:00pm. Major areas served include Cranberry, Franklin, Oil City, and Seneca.

CATA, since taking over operation of transit service in Venango County, has made continual improvement to services, routes, and stops to maximize productivity while best serving residents of Crawford and Venango Counties. These improvements have begun to make a positive impact on both operations.

Performance Trends

Understanding the performance of CATA over a period of years is a foundational element of the strategic business plan as it highlights positive trends that contribute to success and helps identify negative trends that threaten the sustainability of the organization.

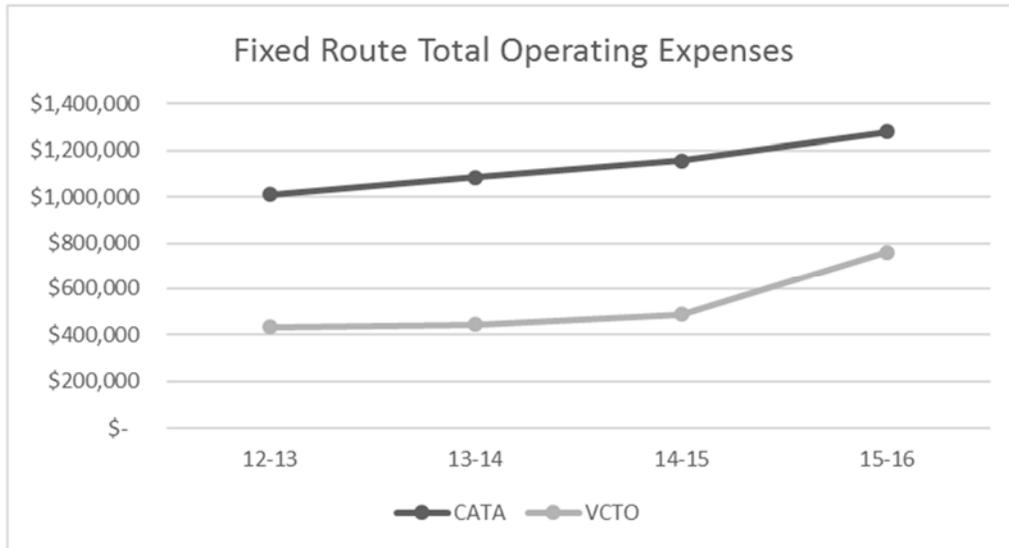
The merging of CATA and VCTO naturally complicates the performance trend review. To fully understand the current performance, data is presented in two ways:

- CATA and VCTO performance is analyzed independently for a trend period from Fiscal Year (FY) 2012-13 to FY 2015-16. This trend covers the years immediately prior to entering into the management agreement and subsequent full consolidation.
- CATA and VCTO data is then summed and analyzed for a trend period from FY 2012-13 to FY 2016-17. This allows a clear picture of what the impact of the management agreement was which went into effect on July 1, 2016. It is reflected in the change between FY 2015-16 and FY 2016-17.

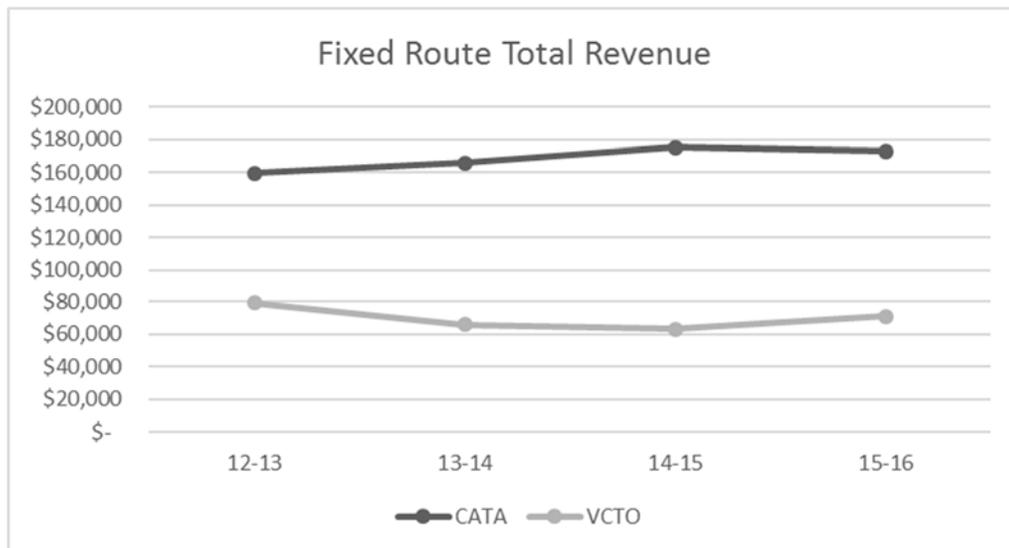
Overall, the merger of CATA and VCTO has had a positive impact on both organizations, particularly in the fixed route service by decreasing operating expenses and stabilizing revenue while providing a platform to increase ridership. The Shared-Ride service is a challenge with rising expenses and declining ridership, however the larger size of the organization should help stabilize the unpredictable nature of Shared-Ride while encouraging better management through specialized staff, as has been seen in other consolidations in Pennsylvania.

Fixed Route Financial Performance

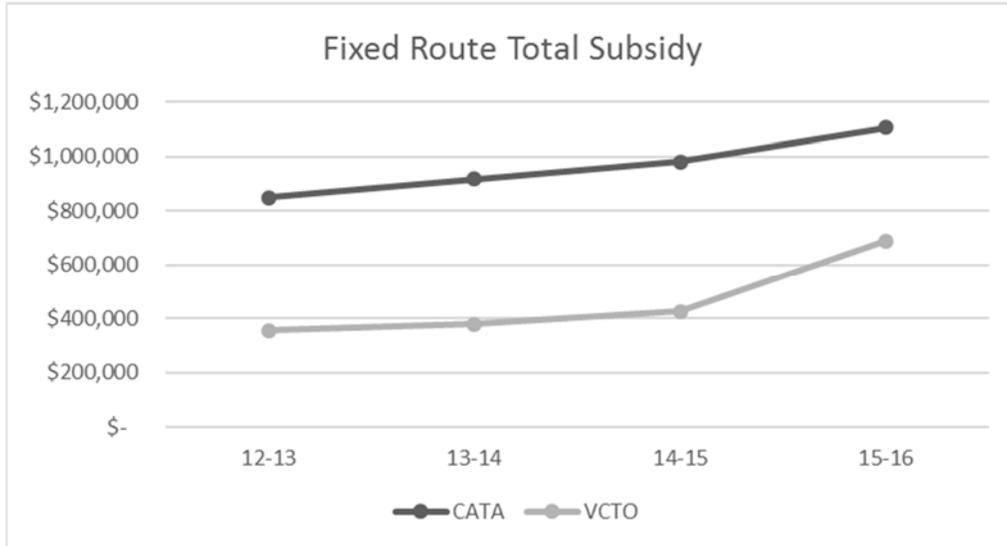
In the fixed route system, CATA operating expenses increased approximately 8% per year prior to the merger. VCTO expenses increased an average of 21% year, with a more than 50% increase in FY 2015-16.



During the same period, revenue increased slightly for CATA, albeit with a slight decline in FY 2015-16. For VCTO, revenues decreased overall, however a slight increase occurred in FY 2015-16.

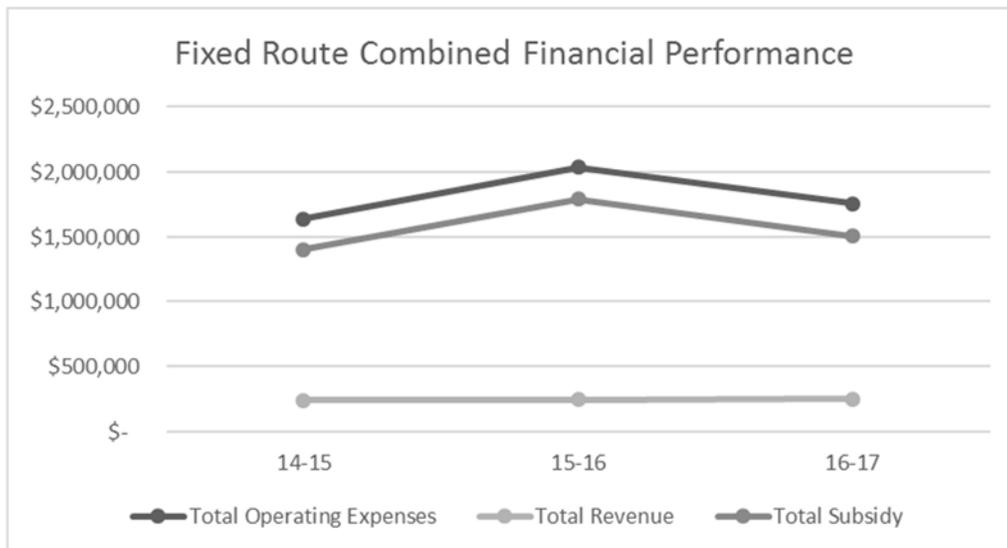


Over the trend period, the subsidy required to cover the full operating expenses stayed relatively consistent with expenses, rising in all years from FY 2012-13 to FY 2015-16.



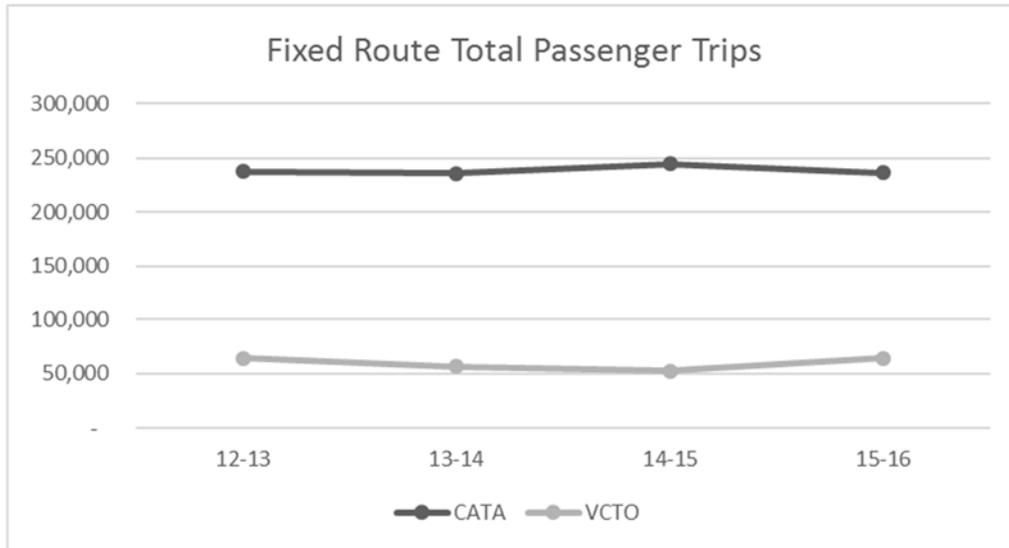
The trends of expenses increasing greater than revenue is consistent with many agencies of comparable size and scope throughout Pennsylvania. This fiscal reality creates a challenge to maintain the viability of the organization in the long term, and creates an environment where service cuts may be required in the future.

Following the management agreement between CATA and VCTO at the start of FY 2016-17, total expenses decreased by approximately 14%, while operating revenue increase by 2%. If this trend continues, or at least becomes flat, the long-term outlook for CATA is significantly better than if the agencies remained independent.

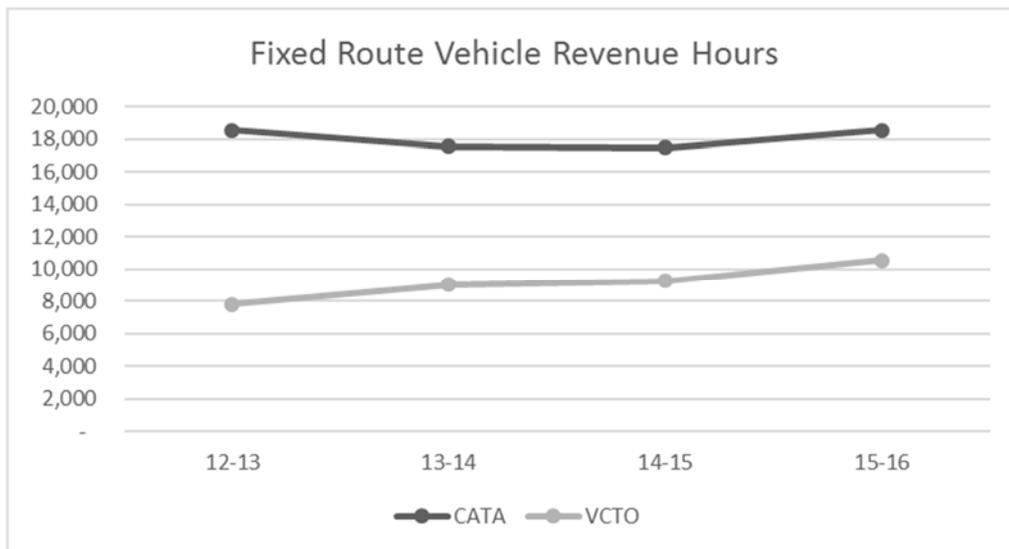


Fixed Route Operating Performance

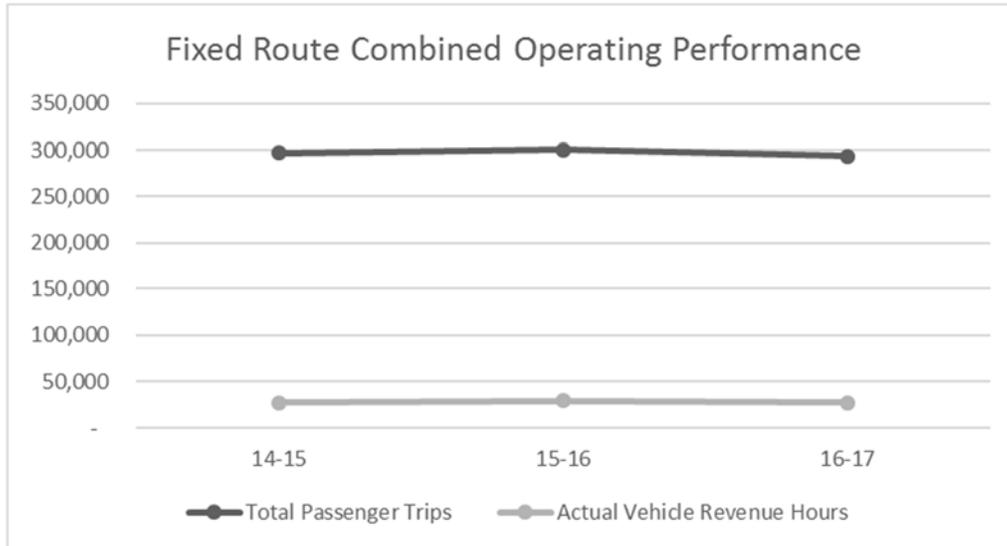
Ridership for both CATA and VCTO was mostly flat during the from FY 2012-13 to FY 2015-16, with minor variations throughout the period.



Over the same time period, CATA looked for ways to become more efficient and reduce revenue hours (the amount of service provided) in FY 2013-14 and FY 2014-15 before increasing service again in FY 2015-16. VCTO increased revenue hours every year over the trend period. When taken with ridership to create a measure of efficiency (passengers per revenue hour), CATA held mostly steady with a decline of 0.20% annually, while VCTO lost an average of 9.53% passengers per revenue hour annually.

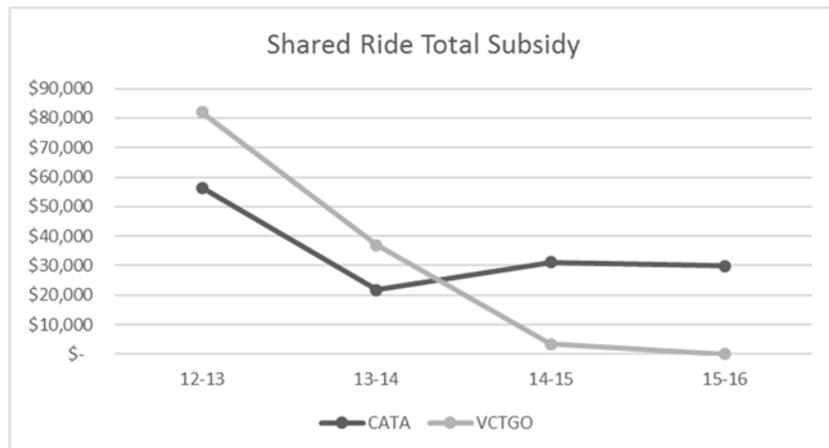
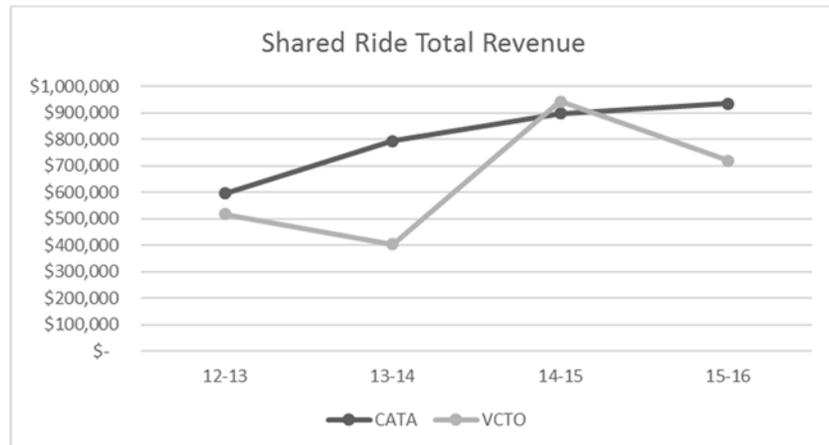
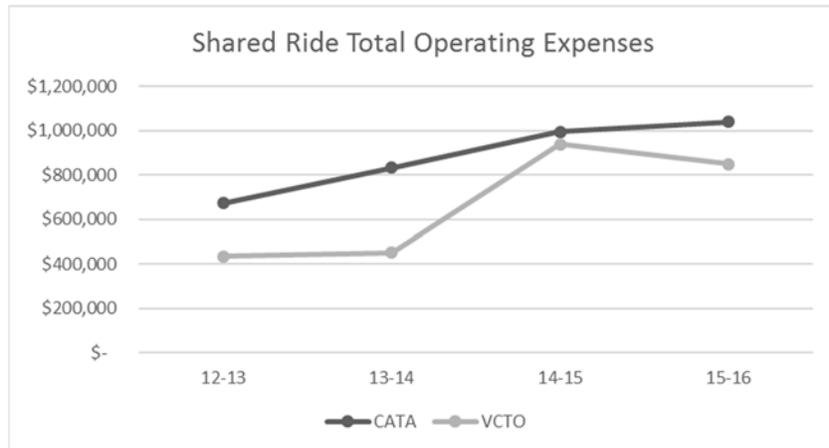


Following the merger in 2016, CATA and VCTO experienced a slight decrease in combined ridership, consistent with individual trends. However, a corresponding reduction in revenue hours led to CATA increasing productivity by 5%, bucking the recent trends of both organizations.

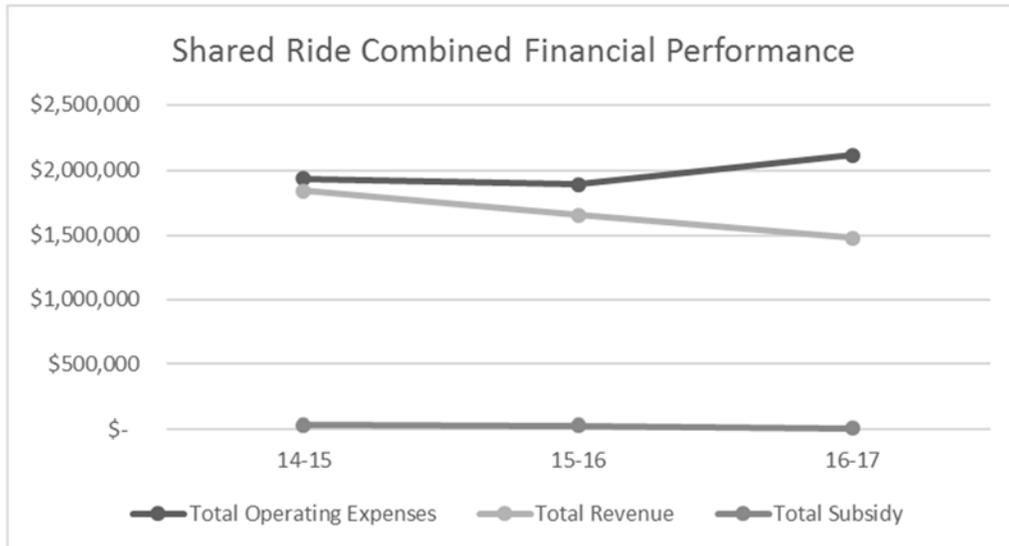


Shared-Ride Financial Performance

Shared-Ride is a unique program in Pennsylvania, built on a trip-reimbursement model that is designed to create a cost-neutral program that does not require external subsidy. From FY 2012-13 to FY 2015-16, both CATA and VCTO experienced increasing operating expenses. Expenses were offset with corresponding increases in operating revenue, as the program is designed. As a result, both CATA and VCTO were able to reduce their subsidy use over the period, with VCTO completely eliminating it by FY 2015-16 and CATA holding constant at approximately \$30,000 in subsidy.

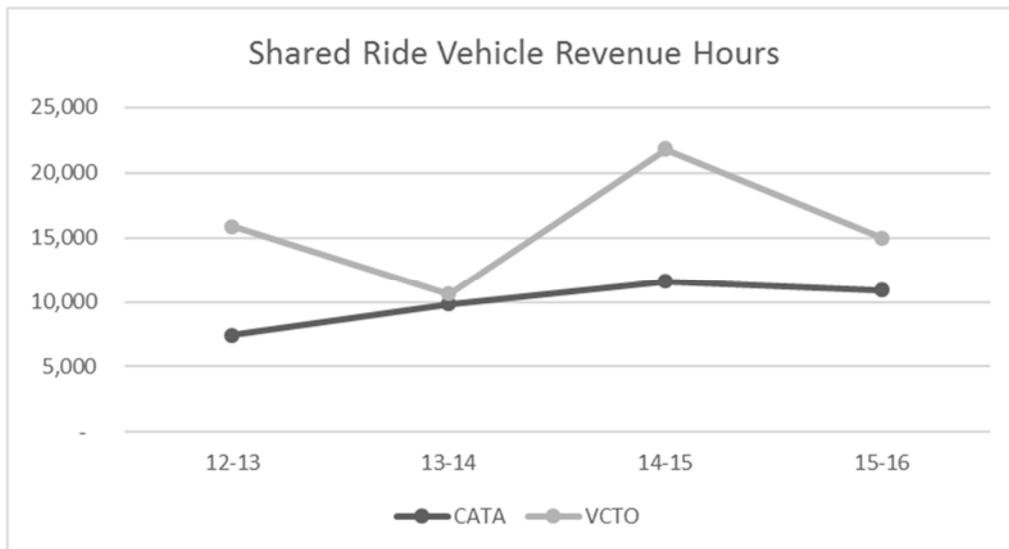
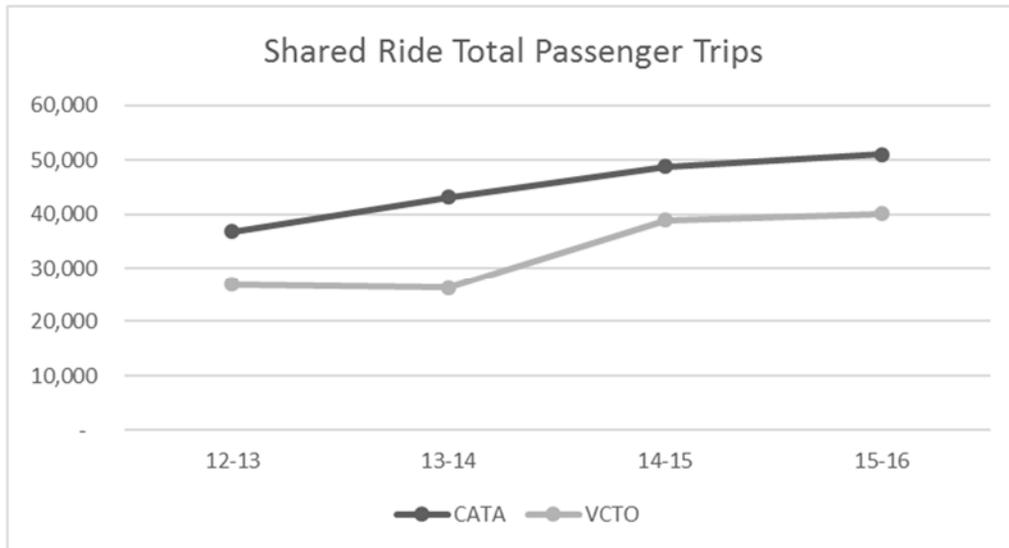


Following the merger of the organizations, costs continued to rise while revenue declined. However, CATA was able to continue to reduce subsidy required in FY 2016-17 by utilizing excess revenue generated through private transportation in years prior. CATA must ensure that expenses stay in-line with revenue over the coming year or discuss the need for a fare increase with PennDOT funding partners.



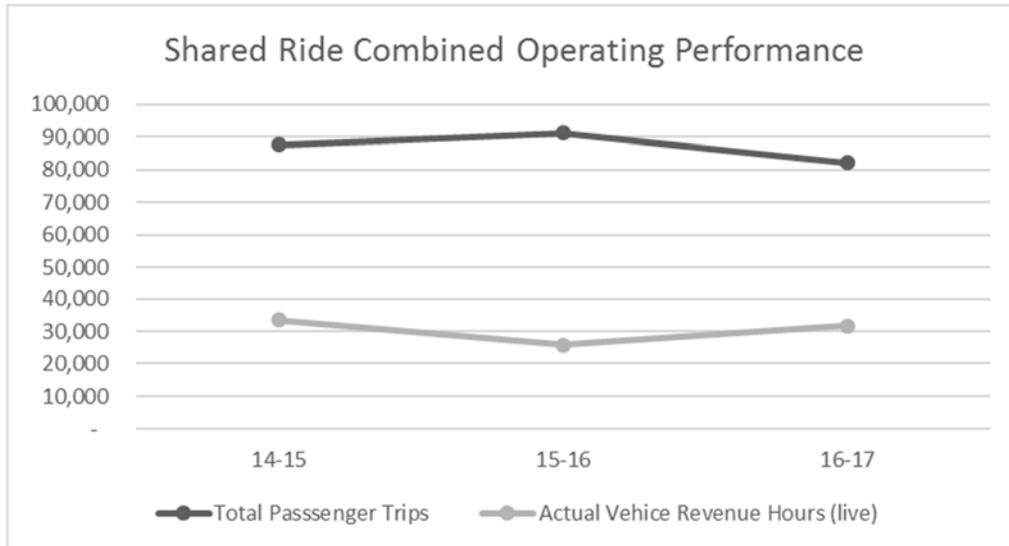
Shared-Ride Operating Performance

From FY 2012-13 to FY 2015-16, ridership increased for both CATA and VCTO. Consistent with ridership increases, both organizations increased their revenue hours over the same period. Revenue hours is a particularly difficult number to report for shared-ride, and as such there are some assumed inaccuracies. In general, efficiency of Shared-Ride is capped at approximately 3-4 passengers per revenue hour, so more riders necessitate more revenue hours. Over the trend period, CATA maintained approximately 4.5 passengers/revenue hour, with VCTO ranged from 1.7 passengers/revenue hour in FY 2012-13 to 2.7 passengers/revenue hour in FY 2015-16.



Following the merger, CATA experienced a decline in total passenger hours with an increase in revenue hours. It should be noted that CATA implemented EcoLane paratransit scheduling software in 2016, while VCTO was already operating on the system. It is common to see a short-term decline in ridership as staff and customers get accustomed to the new system.

Overall, efficiency of the combined CATA and VCTO was approximately 2.6 passengers/revenue hour in FY 2016-17. CATA should continue to work to improve ridership and efficiency of the combined system now that EcoLane has been fully functioning for more than 1 year.



Other Trends

Throughout the strategic planning process, general trends emerged that form a picture of Crawford and Venango Counties and impact both the current state and future of public transportation. The following is a list of trends that affect the agency on an ongoing basis. These trends were identified by the CATA Governing Board, and through other research completed during the course of developing the strategic business plan.

- Continually aging population
- Services are moving out of town and into more remote/harder to serve areas
 - Healthcare dispersing/personalized care
- Senior center participation has declined
- The rise in social networks and widespread adoption is changing how people communicate
- Ridership demographics are changing, people are driving later in life
- Increased competition from other transportation services/modes
- Senior-related housing is growing less isolated lowering the need for transportation
- Difficult to find employees for CATA
- Increase in number of people receiving government services
- Challenging rural geography (widespread population and difficult topography)
- The eventual emergence of connected and autonomous vehicles (driverless cars) is both an opportunity and a challenge to future public transportation
- Drug/opioid epidemic impact on employment, riders, and safety and security

Mission Statement

Mission statements communicate the purpose of the organization to both external stakeholders and the organization's workforce. Mission statements are core elements of both planning and implementation. They serve as a means for managers and others to make decisions. Statements must be clear, concise, relevant, and easy to understand.

The mission statement answers the questions:

- What do we do?
- How do we do it?
- Whom do we do it for?
- What value do we provide?

CATA's mission statement was created by the Board and is regularly reviewed to ensure it stays true to the organization. The current mission statement is:

CATA's mission is to provide safe, reliable, and efficient public transportation services throughout all of Crawford and Venango Counties.

This statement serves as a litmus test for goals, objectives, and measures. Each goal must relate to the stated mission. All elements of the statement must be reflected in the strategic business plan.

Vision Statement

A vision statement is a clear, compelling, and shared picture of the future an organization seeks to create. It clarifies the purpose and direction of the organization and tests the assumptions made in the mission statement development process, including:

- What are Crawford and Venango Counties' aspirations for public transportation services?
- What services are provided and what populations are served?
- What roles/functions will CATA and other agencies/partners have?

CATA's vision is:

CATA envisions becoming a leader in mobility options in Northwest Pennsylvania.

SWOT Analysis

The first step in a SWOT analysis considers both the current internal and external aspects of the organization. The Strengths and Weaknesses are internal; they relate to the important controllable characteristics of MRB as an organization. Opportunities and Threats are external to the organization, and therefore beyond the Authority’s control.

The CATA SWOT analysis was conducted at the outset of the strategic business planning process and it served as an invaluable tool to engage the committee members in critical thinking about CATA’s current situation and future opportunities for its growth and positive economic impact to the region. Figure 1 provides a description of the SWOT elements and their relationships. Table 1, which follows, provides a summary of the SWOT analysis findings as identified by the planning group in their discussions.

<p>STRENGTHS</p> <ul style="list-style-type: none"> ▪ <u>Internal Positives</u> accomplished particularly well or unique assets of the airport or the organization, especially in comparison to competitive and comparable airports or organizations. <p><i>Strengths need to be preserved, built on, and leveraged.</i></p>	<p>WEAKNESSES</p> <ul style="list-style-type: none"> ▪ <u>Internal Challenges</u> that (1) are not accomplished particularly well; (2) hinder or prevent desired performance; or (3) are acutely lacking or need to be improved. <p><i>Weaknesses need to be addressed and remedied.</i></p>
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> ▪ <u>External Positives</u> that could help realize the mission and vision for the airport. ▪ May be identified by studying changes or trends within the industry, the marketplace, or the community. <p><i>Opportunities need to be seized or capitalized on.</i></p>	<p>THREATS</p> <ul style="list-style-type: none"> ▪ <u>External Challenges</u> that could threaten the realization of the airport’s mission and vision. ▪ Typically identified by studying changes or trends within the industry and the local marketplace. <p><i>Threats need to be managed or, if possible, eliminated.</i></p>

Figure 1: SWOT Analysis Elements

INTERNAL	POSITIVES	CHALLENGES
	<p><u>STRENGTHS</u></p> <ul style="list-style-type: none"> • Leadership • Physical infrastructure/new facilities • Funding (Federal, State, and Local) • Progressive organization that is forward thinking • Good relationships with agencies like PennDOT • Good local partnerships • Employees that care for the people served • Engaged and knowledgeable Board • Ability to be flexible to changing situations • Merger with VCTO • Reputation at multiple levels (local, statewide, & nationally) • Vehicle fleet is well maintained • Strongly qualified staff in key positions • Competitive benefits package including incentive program • CATA policies and procedures (others look at them as models) 	<p><u>WEAKNESSES</u></p> <ul style="list-style-type: none"> • Relatively new staff that have a learning curve • Facility costs have increased • Funding at all levels • Employee turnover • Finding and retaining quality employees • Subject to Harrisburg political impasse and impacts on funding • Wage competitiveness in the transportation industry • Identifying additional funding streams • Outreach and marketing of CATA services
EXTERNAL	POSITIVES	CHALLENGES
	<p><u>OPPORTUNITIES</u></p> <ul style="list-style-type: none"> • Expanding/providing service in other counties (Warren, Forest) • Education and promoting CATA's services—coordinated approach is needed 	<p><u>THREATS</u></p> <ul style="list-style-type: none"> • Competing agencies like Liberty Mobility and others • Potential funding loss at state and federal level • Gov. oversight regulations increasing with an associated cost of compliance • Cost of healthcare are rising • Perception of CATA • Changing transportation needs based on demographics and social change • Increased growth/expansion = greater spatial separation of services/facilities • Geography • Other agencies looking to CATA to help meet their needs • Aging population

Table 1: SWOT Results

Key Themes and Strategic Areas of Focus

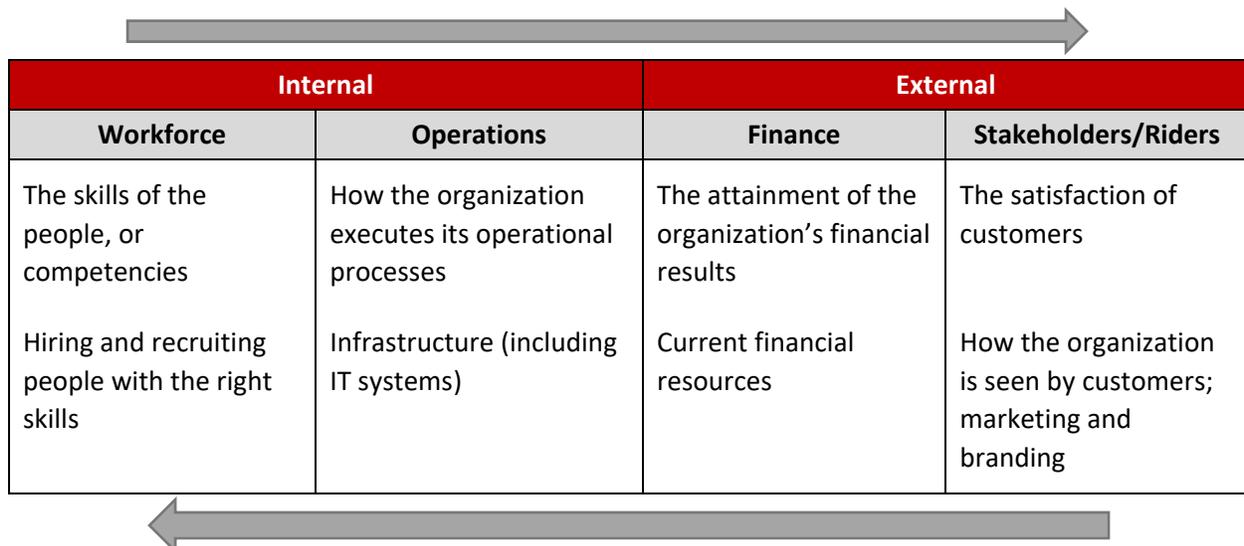
The second step in a SWOT analysis focuses on major areas of emphasis, that is, identified priorities and goals **based on how strengths and weaknesses address threats and opportunities**:

- Where an organizational strength meets an external opportunity, it can *capitalize* on the situation.
- Where an organizational strength meets an external threat, it can mitigate the threat and *turn around* the situation.
- Where an organizational weakness meets and external opportunity, it can *improve* its performance.
- Where an organizational weakness meets an external threat, it must expend resources to *defend* itself until a weakness can be turned into a strength.

Using the information in the SWOT analysis, broad themes can be developed that lead toward the development of strategic goals and objectives for the authority to work on over the next three to five years. These broad themes include:

- Attract new riders by serving new markets and encouraging partnerships
- Improve service delivery and respond to competition by offering new services
- Improve customer perceptions, experience, and outreach
- Staff recruitment and training
- Foster a culture for an informed and involved board
- Pursue active marketing and re-branding
- Increase institutional partnerships
- Improve revenues
- Increase use of technology

The transition from the SWOT themes to the Strategic Goals involves categorizing these into four organizational perspectives (or strategy areas), which correspond to common organizational responsibilities of CATA staff and the Board. The four perspectives—workforce/personnel, operations and service, finance, and stakeholders/riders—are not independent, but rather support each other to achieve the authority’s mission and vision. For example, a skilled workforce will successfully execute operations and attract riders, which leads to a financial stable organization.



As presented in **Table 3**, the SWOT analysis results and the four organizational perspectives (strategy areas) were then used to formulate strategic goals upon which to chart CATA’s future.

Table 3 – Strategy Areas and Strategic Goals

Strategy Areas	Strategic Goals
Workforce/Personnel	<ul style="list-style-type: none"> • Attract & Retain a Qualified Workforce • Implement and Integrate Cutting-Edge Technologies • Engage in Board Development
Operations & Service	<ul style="list-style-type: none"> • Standardize Operations • Improve and Introduce New Service • Improve Maintenance and Actively Manage Assets • Implement and Integrate Cutting-Edge Technologies
Finance	<ul style="list-style-type: none"> • Diversify Revenue through New and Expanded Partnerships • Pursue Regional Coordination • Document Finance Policies and Procedures
Stakeholders/Riders	<ul style="list-style-type: none"> • Create & Implement a Marketing and Outreach Plan • Enhance Customer Service and Engagement • Enhance the Customer Experience

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Strategic Goals and Objectives

Strategic goals represent the primary areas of work for the organization over the next five years. Goals are specific enough to be measured but broad enough to stretch the organization to achieve better results. Goals must support the CATA mission and advance the organization towards achieving the vision that was set at the beginning of the strategic planning process. Each goal consists of objectives and strategic actions, small steps that must be taken to achieve the goal identified. Objectives are assigned to specific staff members who are responsible for managing their completion.

Workforce and Personnel

Workforce and personnel goals support all agency endeavors and focus on the most basic resource of the agency: its people. An opportunity exists in these goals to align talent with current and future needs. CATA’s workforce and personnel goals are:

Goal W-1: Attract & Retain a Qualified Workforce	
Objectives	Related Strategy Areas
A. Develop a staff recruitment plan, focused by position, that identifies skills needed and potential sources for obtaining those skills	All Strategy Areas
B. Conduct regular assessments of employees & the organization	All Strategy Areas
C. Develop an education and training plan by employee category	All Strategy Areas
Goal W-2: Implement and Integrate Cutting-Edge Technologies	
Objectives	Related Strategy Areas
A. Investigate implementing ECCA Benefits Module for employee online enrollment/benefits management	Workforce/Personnel
B. Utilize ECCA Training Tracker	Workforce/Personnel
C. Document and maintain comprehensive system of policies and procedures for HR department	Workforce/Personnel
D. Publish Monthly Newsletter through ECCA employee portal	Workforce/Personnel
Goal W-3: Document and Promote Awareness of HR Policies	
A. Maintain a comprehensive system of policies and procedures for the HR department	Workforce/Personnel
Goal W-3: Engage in Board Development	
Objectives	Related Strategy Areas
A. Establish continuing education requirements for the Board (i.e.: conference attendance, etc.)	Workforce/Personnel
B. Complete PennTrain Board Training Modules	Workforce/Personnel

Operations and Service

Operations and service goals reflect the need for CATA to develop internal systems and processes that support its mission, including both customer and financial stewardship goals. It must also take advantage of advances in technology to increase its internal productivity. CATA’s operations and service goals are:

Goal O-1: Standardize Operations	
Objectives	Related Strategy Areas
A. Improve bus stops and shelters	Operations/Service, Stakeholders/Riders
B. Improve Fare System	All Strategy Areas
C. Document and maintain comprehensive system of policies and standard operating procedures for all critical departments and processes	Workforce/Personnel, Operations/Service
D. Implement Unified Dispatch Center	Workforce/Personnel, Stakeholders/Riders, Operations/Service
Goal O-2: Improve and Introduce New Service	
Objectives	Related Strategy Areas
A. Implement Lifeline Service Model	Workforce/Personnel, Stakeholders/Riders, Operations/Service
B. Identify additional transportation options	Workforce/Personnel, Stakeholders/Riders, Operations/Service
C. Identify and Track Performance Metrics for new service	Workforce/Personnel, Stakeholders/Riders, Operations/Service
Goal O-3: Implement and Integrate Cutting-Edge Technologies	
Objectives	Related Strategy Areas
A. Pursue CNG vehicles for shared-ride fleet	All Strategies
Goal O-4: Improve Maintenance and Actively Manage Assets	
Objectives	Related Strategy Areas
A. Maintenance and improvement of vehicles	All Strategies
B. Maintenance and improvements to facilities	All Strategies

Finance

Finance goals provide a path to funding customer and market outcomes. This includes goals both in productivity and revenue as well as seeking financial support for the operations and workforce initiatives necessary to achieve customer goals. CATA's finance goals are:

Goal F-1: Implement and Integrate Cutting-Edge Technologies	
Objectives	Related Strategy Areas
A. Integration of repair & maintenance, payroll and accounting software	Finance, Operations/Service
Goal F-2: Diversify Revenue through New and Expanded Partnerships	
Objectives	Related Strategy Areas
A. Pursue Bus Wrap advertisements	Finance, Stakeholders/Riders, Operations/Service
B. Streamline revenue collection from agencies and rider	Operations/Service, Stakeholders/Riders
C. Improve relationship with current sponsors	Finance, Operations/Service, Stakeholders/Riders
D. Pursue Route Guarantees through public/private partnerships, grants, etc.	Finance, Stakeholders/Riders, Operations/Service
Goal F-3: Pursue Regional Coordination	
Objectives	Related Strategy Areas
A. Implement NW Region Transportation Studies	All Strategy Areas
B. Pursue cooperative agreements for improved service	Finance, Operations/Service, Stakeholders/Riders
Goal F-4: Document Finance Policies & Procedures	
Objectives	Related Strategy Areas
A. Revise and document finance procedures	Finance

Stakeholders/Riders

Stakeholder/Rider goals reflect outcomes that will drive long-term sustainability in the marketplace and support a customer-centric culture. CATA’s stakeholder/rider goals focus on determining customer needs and expectations, and on identifying and engaging stakeholders and new markets. CATA’s stakeholder/rider goals are:

Goal S-1: Create and Implement a Marketing and Outreach Plan	
Objectives	Related Strategy Areas
A. Develop consumer outreach and education initiatives and document in a Marketing and Outreach Plan	Stakeholders/Riders
B. Train and Engage frontline staff with implementing and improving Marketing and Outreach Plan	Stakeholders/Riders
C. Establish CATA as a recognized leader in the community	Finance, Stakeholders/Riders
Goal S-2: Identify the Unmet Transportation Needs of the Communities we Serve	
Objectives	Related Strategy Areas
A. Conduct outreach to public/community groups	Stakeholders/Riders, Operations
B. Implement customer surveys to identify customers’ preferences and satisfaction levels	Stakeholders/Riders, Operations
C. Develop and maintain Advisory Boards that are appointed from selected municipalities, county, or others	Stakeholders/Riders, Operations
Goal S-3: Enhance the Customer Experience	
Objectives	Related Strategy Areas
A. Pursue PennDOT FRITS Deployment	All Strategies
B. Implement Customer Information System Process	Stakeholders/Riders
C. Implement Customer Comment Process	Stakeholders/Riders

Implementation and Communication

The most critical element to a strategic business plan is implementation and accountability. Strategic business plans are working documents that guide an organization and form the basis for every decision made.

To focus on implementation and accountability, an implementation matrix was developed and is included on the following pages. The implementation matrix identifies each Goal and assigned Strategic Objective and couples it with an output or measure by which CATA staff and board members will know when, and where possible how well, an objective is accomplished. Furthermore, a staff-level owner is assigned who has ultimate responsibility for the successful close-out of each action strategy.

As time progresses, the CATA staff should update the implementation matrix on a quarterly basis and use it as a tool for implementation reporting. Annually, the entire strategic business plan should be re-evaluated to confirm direction and adjust as necessary to reflect the realities of Crawford and Venango Counties, and the transit industry as a whole.

Strategy Area	Goal	Objective	Strategic Actions	Implementation Date	Output/Measure	Owner	Area of Impact (Strategy Area)	Issues and Actions
Workforce/Personnel	W-1: Attract & Retain a Qualified Workforce	A: Develop a staff recruitment & retention plan, focused by position, that identifies skills needed and potential sources for obtaining those skills and methods for retaining employees	1. Document staff recruitment policies & procedures	Year 2	95% of positions filled at all time. Turnover targets met.	HR	All Strategy Areas	
			2. Implementation of Mentoring program	Year 3				
		B: Conduct regular assessments of employees & the organization	1. Assessments completed at least annually	Initiated in Year 1, Ongoing afterwards	Review 100% of employees annually	HR	All Strategy Areas	
			2. Conduct exit interviews	Year 1				
	3. Implement 360 feedback program		Year 3					
	C: Develop an education and training plan by employee category	1. Education and Training Plan	Year 3	100% of employee positions covered	HR	All Strategy Areas		
	W-2: Implement and Integrate Cutting Edge Technologies	A: Investigate implementing ECCA Benefits Module for employee online enrollment/benefits management	1. Employees successfully go through open enrollment through online portal	Year 1	95% online enrollment rate	HR	Workforce/Personnel	
		B: Utilize ECCA Training Tracker	1. Employee training is entered into system to allow computer generated reports	Year 2	80% of employee training through online sources	HR	Workforce/Personnel	
		C: Publish Monthly Newsletter through ECCA employee portal	Newsletter will publish online only	Year 1	Newsletter online monthly	HR	Workforce/Personnel	
	W-3: Document and Promote Awareness of HR Policies	A: Maintain a comprehensive system of policies and procedures for HR department	1. Document HR policies and procedures	Year 2	HR policies up-to-date	HR	Workforce/Personnel	
			2. Design and implement processes to determine compliance with policies and procedures	Year 3				
	W-4: Engage in Board Development	A: Establish continuing education requirements for the Board (i.e.: conference attendance, etc.)	1. Identify requirements and opportunities to meet requirements	Year 3	Continuing education requirements	GM, HR	Workforce/Personnel	
B: Complete PennTrain Board Training Modules		1. Board engagement and completion	Year 2 and as new board members added	100% completion by all board members	GM, HR	Workforce/Personnel		
Operations & Service	O-1: Standardize Operations	A: Improve bus stops and shelters	1. Implement Bus Stop/Shelter Guidelines identified in 2017 study	Year 3	Improvement in state-of-good repair and ADA accessibility	OM, PM	Operations/Service, Stakeholders/Riders	
			2. Standardize ticketing and fare structure across the counties	Year 4				
		B: Improve Fare System	1. Align Fare Policies regionally	Year 2	Single fare structure/media	OM, PM	All Strategy Areas	
			2. Standardize ticketing and fare structure across the counties	Year 4				
			3. Implement New Technology in conjunction with FRITS deployment	Year 5				
		C: Document and maintain comprehensive system of policies and standard operating procedures (SOPs) for all critical departments and processes	1. Document agency policies and procedures	Year 1	Single set of policies and SOPs	OM, PM	Workforce/Personnel, Operations/Service	
	2. Documentation of standard operating procedures in each department		Year 3					
	3. Design and implement processes to determine compliance with policies and procedures		Year 4					
	D: Implement Unified Dispatch Center	1. Unified call taking, information and dispatch	Year 1	Single Dispatch center	OM	Workforce/Personnel, Stakeholders/Riders, Operations/Service		
	O-2: Improve and Introduce New Service	A: Implement Lifeline Service Model	1. Lifeline FR Services	Year 1	New services launched	GM, PM	Workforce/Personnel, Stakeholders/Riders, Operations/Service	
			2. Guaranteed SR Service Zones	Year 2				
		B: Identify additional transportation delivery options	Determine appropriateness of Park & Ride, Van Pools, Commuter Runs, etc.	Year 3	Deployment of new transportation services (1 by end of year 5)	GM, PM	Workforce/Personnel, Stakeholders/Riders, Operations/Service	
		C: Identify and Track Performance Metrics for new service	1. Identify Key Performance Indicators (KPIs) and Goals	Year 1	KPIs at or above goals	OM, PM	Workforce/Personnel, Stakeholders/Riders, Operations/Service	
	2. Semi-annual scorecard presented		Year 1					
	O-3: Implement and Integrate Cutting-Edge Technologies	A: Pursue CNG vehicles for shared ride fleet	Identify efficiencies for cost savings and environmental concerns of CNG	Year 2	Number of CNG vehicles	GM, MM	All Strategy Areas	
	O-4: Improve Maintenance and Actively Manage Assets	A: Maintenance and improvement of vehicles	1. Establish benchmarks productivity tracking (miles between road calls, PM compliance, etc.)	Year 2	Productivity metrics	MM	All Strategy Areas	
2. Improve coordination between multiple maintenance facilities			Year 3					
B: Maintenance and improvements to facilities		1. Establish PM schedule for facilities and equipment	Year 1	Achievement of State-of-good-repair	MM	All Strategy Areas		
		2. Maintain a state-of-good-repair, as defined by management	Ongoing					
		3. Identify potential improvements and related cost savings	Year 3					

Strategy Area	Goal	Objective	Strategic Actions	Implementation Date	Output/Measure	Owner	Area of Impact (Strategy Area)	Issues and Actions
Financial	F-1: Implement and Integrate Cutting-Edge Technologies	A: Integration of repair & maintenance, payroll, and accounting software	1. Create standard cost codes and maximize direct allocation	Year 3	Full integration through standard cost codes	GM, FM, MM	Finance, Operations/Service	
	F-2: Diversify Revenue through New and Expanded Partnerships	A: Pursue Bus Wrap advertisements	1. Identify target industries	Ongoing	% of buses wrapped and revenue generated earned	GM, PM	Finance, Stakeholders/Riders, Operations/Service	
		B: Streamline Revenue collection from agencies	1. Identify electronic billing and payment	Year 2	Amount of time to bill and receive payment	PM, OM	Operations/Service, Stakeholders/Riders	
		C: Improve relationship with current sponsors	1. Work with sponsor of customer trips to evaluate current process and make improvements	Ongoing	100% engagement annually	GM, OM	Finance, Operations/Service, Stakeholders/Riders	
		D: Identify and obtain a funding/grants from non-traditional sources	1. Identify non-traditional transit sources	Ongoing	Annual grants/funding received			
		E: Pursue Route Guarantees through public/private partnerships, grants, etc.	1. Receive guarantees for Titusville-Meadville, Saegertown-Conneaut Lake, and Conneautville	Year 4	Revenue generated	GM, PM	Finance, Stakeholders/Riders, Operations/Service	
	F-3: Pursue Regional Coordination	A: Implement NW Region Transportation Studies	1. Pursue implementation of NW Regionalization Study	Ongoing	Study recommendations implemented	GM, PM	All Strategy Areas	
			2. Implement priorities from NW Coordinated Human Service Transportation Plan	Ongoing				
		B: Pursue cooperative agreements for improved service	1. Identify opportunities for Cooperative Agreements	Ongoing	Number of cooperative agreements	GM, PM	Finance, Operations/Service, Stakeholders/Riders	
		2. Implement cooperative agreements to improve/expand service	Year 2					
	3. Identify regional partners outside of transit to assist with greater mobility options	Year 2						
F-4: Document Finance Policies & Procedures	B: Revise and Document Finance procedures	1. Update Chart of Accounts, Review Fare collection procedures	Year 1	Revised Finance Policies	GM, PM	Finance, Operations/Service		
Stakeholders/Riders	S-1: Create & Implement a Marketing and Outreach Plan	A: Develop consumer outreach and education initiatives and document in a Marketing and Outreach Plan	1. Marketing and Outreach plan developed	Year 1	Increased brand recognition as shown through non-rider survey results	OM, PM	Stakeholders/Riders	
			2. Outreach process communicated to senior management and Board	Year 1				
		B: Train and Engage frontline staff with implementing and improving Marketing and Outreach Plan	1. Identify and integrated into management action plan	Year 2	95% recognition of marketing and outreach plan goals/strategies by frontline employees	GM, OM	Stakeholders/Riders	
		C: Establish CATA as a recognized leader in the community	1. Develop "lunch and learn" sessions	Year 2	Increased brand recognition and respect as shown through non-rider survey results	GM, PM	Finance, Stakeholders/Riders	
			2. Facilitate Annual Rural Transit Retreat	Ongoing				
	3. Pursue CATA Leadership Series		Year 3					
	S-2: Identify the Unmet Transportation Needs of the Communities we Serve	A: Conduct outreach to public/community groups	1. Maintain a calendar of public outreach activities (active)	Ongoing	At least 2 outreach activities per month	OM, PM	Stakeholders/Riders, Operations	
			2. Attend and be visibly present at community events (passive)	Ongoing				
		B: Implement customer surveys to identify customers' preferences and satisfaction levels	1. Conduct surveys on an annual basis (PPTA survey every 2-3 years and CATA survey in interim years)	Ongoing	Annual survey results	OM, PM	Stakeholders/Riders, Operations	
	C: Develop and maintain Advisory Boards that are appointed from selected municipalities, county, or others	1. Establish advisory board structure and recommend members	Ongoing	Quarterly reports to the Board of Directors	OM, PM	Stakeholders/Riders, Operations		
2. Meet on a regular basis (quarterly or semi-annually)								
S-3: Enhance the Customer Experience	A: Pursue PennDOT FRITS Deployment	1. Establish implementation date and schedule with PennDOT	Year 4	ITS Deployment	OM	All Strategy Areas		
	B: Implement Customer Information System Process	1. Deploy technology to streamline the process	Year 5	Monthly reports to Board of Directors on customer served	OM	Stakeholders/Riders		
		2. Establish and track metrics, including hold time, number of people serviced, website traffic, and others						
C: Implement Customer Comment Process	1. Deploy technology to streamline the process	Year 1	Reports on customer comments, quarterly	OM	Stakeholders/Riders			

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