

RTA Board of Trustees

Tuesday, March 18, 2025

Organizational Services & Performance Monitoring Committee

March 18, 2025

4th Quarter 2024 Report

India Birdsong Terry
General Manager, CEO

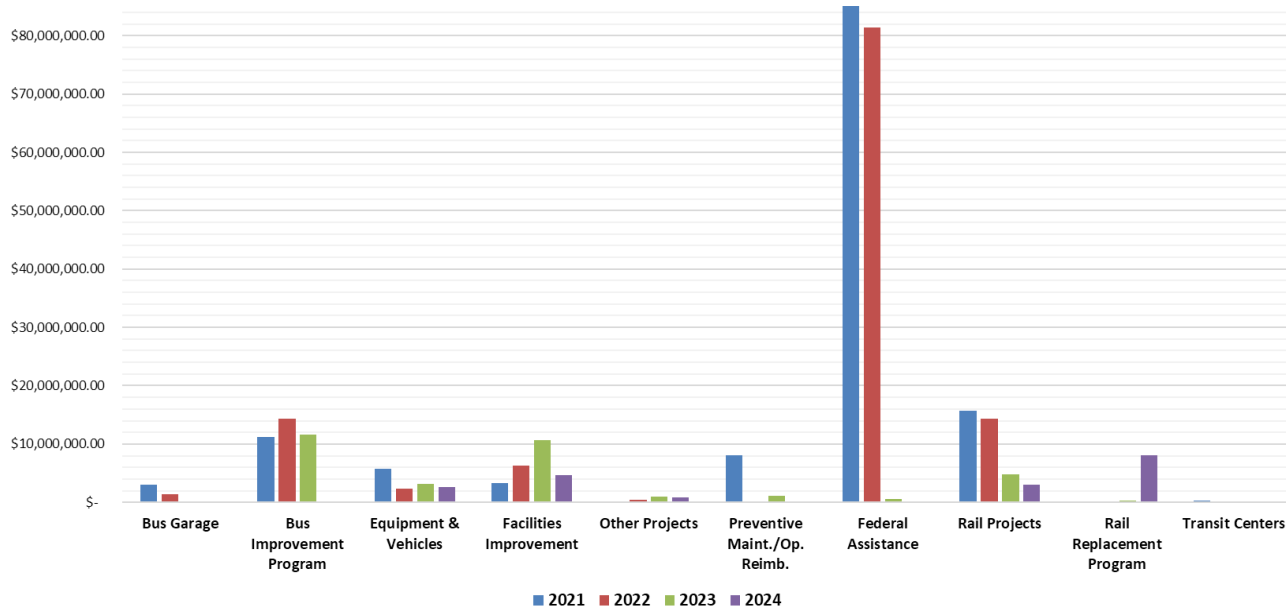
General Fund – 4th Quarter 2024

- Total Revenues: 2.8% higher than budget
 - Passenger Fares – 21.5% higher
 - Sales & Use Tax – 1.4% lower
 - Reimbursed Expenditures – 163.9% higher
 - Received refunds for Fuel, PM, Labor, and other miscellaneous receipts
 - Reserve Fund – \$31.6 million transferred
 - \$30 million from Revenue Stabilization Fund
 - \$1.6 million from Compensated Absences & Health Care
- Operating Expenses: 0.4% lower than amended budget
 - Total personnel costs: 0.08% higher than budget
 - Fuel hedging & utility contracts – continue to help stabilize expenses – 4.3% below amended budget

General Fund – 4th Quarter 2024

- Transfers to Other Funds
 - Reserve Fund:
 - \$11.6 million in Rolling Stock Reserve (\$1.6 million above budget)
 - \$878,615 in 27th Pay
 - Insurance Fund: \$2.5 million
 - Total Transfer to Capital:
 - Bond Retirement Fund: \$6.2 million transferred
 - Capital Improvement Fund: \$16.8 million transferred

Q4 2024 Capital Expenditures by Category



Top 3 categories at year-end:

Rail Car Replacement Program
\$62.0 million

Facilities Improvements
\$16.9 million

Rail Projects
\$12.1 million

Questions



Quarterly Performance Review: **FY24 Q4**

India L. Birdsong Terry, GCRTA General Manager and CEO

Nick Biggar, GCRTA Sr. Dir. of Customer Experience and Performance Management

Ehren Bingaman, TransPro Managing Principal

James Rubin, TransPro Principal

GCRTA Board Meeting

March 18, 2025

Agenda



1. **Performance Management Cadence**
2. **Success Outcome Status**
3. **2024 Organizational Scorecard**
4. **December 2024 Customer Experience Survey Results**

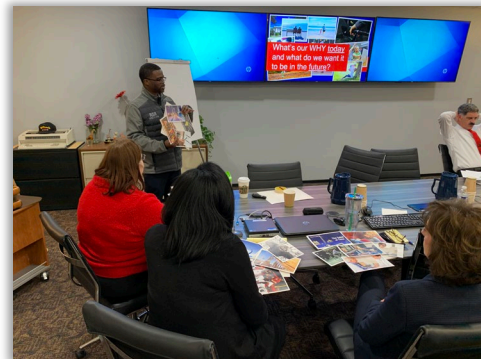
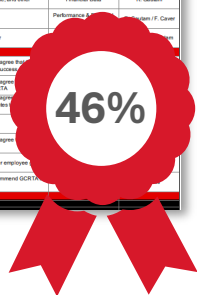
A light rail train is stopped at a station platform. The train is white with blue and red accents. The number '702' is visible on the front. The platform has a red and white checkered pattern. The background shows a modern building with a glass facade.

Performance Management

India Birdsong Terry
Ehren Bingaman

Performance Management Journey

Success Outcomes	Metric	2021 Performance Score	Objective	Goal Range	Definition	Information System	Owner
Customer Experience	Net Promoter Score	20	↑	15	% Promoters minus % Detractors. GM 8-10 make office ready to recommend GCRTA. Promoters are 9-10 and Detractors are 0-6.	Customer Survey	I. Birdsong
	Overall Customer Satisfaction	70%	↑	10	The % of customers who agree or strongly agree that they are satisfied with GCRTA.	Customer Survey	I. Birdsong
	On-Time Performance - Impression	75%	↑	2.5	The % of customers who agree or strongly agree that service is on time.	Customer Survey	F. Coner
	On-Time Performance - Actual	65%	↑	2.5	The % of actual on-time performance.	Performance Data	F. Coner
	Safety - Impression	67%	↑	2.5	The % of customers who agree or strongly agree that GCRTA is safe.	Customer Survey	S. King-Berford
	Safety - Actual	70%	---	2.5	The % of actual compliance with safety performance targets.	Performance Data	S. King-Berford
	Customer Prioritized Metric TBD			TBD		Customer Survey	TBD
Community Value	Customer Prioritized Metric TBD			TBD		Customer Survey	TBD
	TOTAL POINTS			40			
	Community Perception - Access to Service	50%	↑	7.5	The % of community that agree or strongly agree that service is accessible.	Community Survey	J. Patsich
	Community Perception - Access to Employment	65%	↑	7.5	The % of community that agree or strongly agree that GCRTA serves employment centers.	Community Survey	J. Patsich / M. Falek
	Community Perception - Transit Investment Occurs where Needed	60%	↑	7.5	The % of community that agree or strongly agree that transit investment occurs where needed.	Community Survey	M. Schipper / J. Ruman / M. Falek
Financial Sustainability	Ratio of Private Sector Investment to Major Capital Investment	4 to 1	↑	7.5	The ratio of private sector capital investment to GCRTA capital investment.	Performance Data	M. Schipper
	TOTAL POINTS			30			
	Operating Funds to Capital Fund	\$10M	---	8	Reduction of unfunded capital projects by \$10M.	Financial Data	R. Givens
	Operating Expense Covered by Own Source Revenue	15%	---	8	% of total source revenue (paid for as passenger fares, advertising, concessions, investment income, and other non-farefare).	Financial Data	R. Givens
Employee Engagement	Overall Operating Cost/Revenue Hour	\$178	↓	8	The operating cost per revenue hour.	Performance Data	M. Schipper / F. Coner
	Overall Customer/Revenue Hour	19	↑	1	The number of customers per revenue hour.	Performance Data	M. Schipper / F. Coner
	TOTAL POINTS			40			
	Percent Employees Agree - Supervisor Invested in Growth and Success	8%	↑	1.75	The % of employees that agree or strongly agree that Supervisor is invested in their growth and success.	Employee Survey	1.75
	Percent Employees Agree - Understand Vision and Direction	10%	↑	1.50	The % of employees that agree or strongly agree that they understand the vision and direction of GCRTA.	Employee Survey	1.50
	Percent Employees Agree - Understand How Performance Linked to Organization Success	20%	↑	1.50	The % of employees that agree or strongly agree that they understand how their performance contributes to organizational success.	Employee Survey	1.50
	Percent Employees - Found Training Valuable	65%	↑	1.75	The % of employees that agree or strongly agree that training is valuable.	Employee Survey	1.75
Overall Performance Score	Hours of Training per Employee	6%	↑	1.75	The % increase in annual training hours per employee.	Employee Survey	1.75
	Workforce Net Promoter Score	5	↑	1.75	% Promoters minus % Detractors that recommend GCRTA as place to work.	Employee Survey	1.75
	TOTAL POINTS			10			
OVERALL PERFORMANCE SCORE				100			



MANAGEMENT

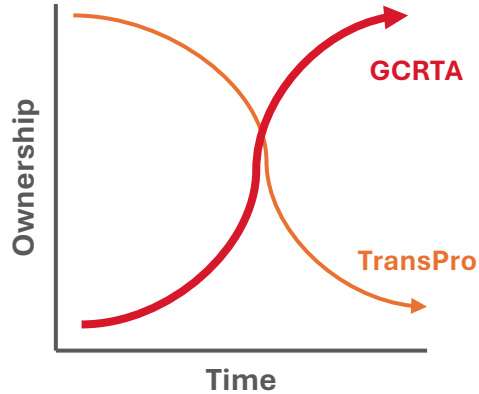
GCRTA selects India Birdsong as top choice for next CEO and GM

GCRTA's Board has entered negotiations with Birdsong who has experience managing transit systems in Chicago and Nashville.

Mischa Wanek-Libman

July 3, 2019

Ownership Shift



We Do, You Watch

We Lead, You Help

You Lead, We Help

You Do, We Watch

Organizational Scorecard: FY24 Q4

Success Outcome	Goal Points	FY 24 Q1 Points	FY24 Q2 Points	FY24 Q3 Points	FY24 Q4 Points
Customer Experience	40	32.3	45.1	42.0	45.0
Community Impact	25	23.7	24.5	24.5	26.1
Employee Investment	20	17.8	19.6	20.5	19.2
Financial Health	15	7.3	12.1	12.1	13.0
100		81.1	101.3	99.1	103.3

103.3 / 100.0
points earned



Success Outcome Status: **FY24 Q4**

Success Outcome	Points	Success Definition	Status
Customer Experience	40	21 Net Promoter Score	42 Net Promoter Score
Community Impact	25	54% Community Perception of Personal Relevance 90% Community Perception of Community Relevance	58% Community Perception of Personal Relevance 92% Community Perception of Community Relevance
Employee Investment	20	95% Vacancy Fill Rate: Operators, Mechanics, Transit Police	90% Vacancy Fill Rate: Operators, Mechanics, Transit Police
Financial Health	15	\$35m Competitive Capital Grants	\$60.8m Competitive Capital Grants

A light rail train, possibly from the RTA, is stopped at a station platform. The train is grey with red and white accents. The number '702' is visible on the front. The background shows a modern building with a glass facade and a clear sky.

Organizational Scorecard

Nick Biggar

Organizational Scorecard: **FY24 Q4**

Success Outcome: **Customer Experience**

Metric	Goal	Owner	Goal Points	Q1 Results	Q2 Results	Q3 Results	Q4 Results	Points Earned
Net Promoter Score	21	Terry	14	10	29	29	42	18.2
Overall Customer Satisfaction	66%	Terry	8	68%	73%	66%	74%	9.0
Personal Safety/Security - Perception	65%	Caver Biggar	5	62%	70%	60%	66%	5.1
On-Time Performance - Impression	72%	Caver Biggar	5	71%	72%	56%	72%	5.0
On-Time Performance - Actual	85%	Caver Biggar	5	84%	82%	80%	83%	4.9
Vehicle Cleanliness - Perception	56%	Caver Biggar	3	56%	54%	48%	53%	2.8
Total Goal Points: 40.0				Total Points Earned: 45.0				

Organizational Scorecard: **FY24 Q4**

Success Outcome: **Community Impact**

Metric	Goal	Owner	Goal Points	Q1 Results	Q2 Results	Q3 Results	Q4 Results	Points Earned
Perceived Value - Personal Relevance	54%	Walker-Minor	4	57%	57%	59%	59%	4.4
Perceived Value - Community Relevance	90%	Walker-Minor	3	89%	89%	92%	92%	3.1
Economy: Ratio of Private Sector Investment to Major Capital Investment	7	Schipper	6	5.14	6.02	5.94	7.74	6.6
Equity: Capital Dollars Invested in Environmental Justice Zones/Communities	77%	Schipper	6	55%	55%	53%	54%	4.2
Environment: Emissions Reduction	8%	Temming	6	18%	11%	14%	13%	7.8
Total Goal Points: 25.0				Total Points Earned: 26.1				

Organizational Scorecard: **FY24 Q4**

Success Outcome: **Employee Investment**

Metric	Goal	Owner	Goal Points	Q1 Results	Q2 Results	Q3 Results	Q4 Results	Points Earned
Vacancy Fill Rate : Operators (Bus, Para, Rail), Mechanics, Transit Police	95%	Fields	8	91%	90%	90%	89%	7.5
Cultivate Internal Talent Pipeline	36%	Fields	4	16%	33%	43%	31%	3.4
Agencywide Retention Rate	90%	Fields	3	98%	99%	94%	95%	3.2
Vacancy Fill Rate : Non-Bargaining	95%	Fields	3	95%	96%	94%	97%	3.1
Supervisor Support	62%	Talley Terry	2	62%	62%	62%	62%	2
Total Goal Points: 20.0				Total Points Earned: 19.2				

Organizational Scorecard: **FY24 Q4**

Success Outcome: **Financial Health**

Metric	Goal	Owner	Goal Points	Q1 Results	Q2 Results	Q3 Results	Q4 Results	Points Earned
Competitive Capital Grants	\$35M	Gautam Schipper	5	\$27M	\$45M	\$55M	\$60.8M	6.5
Operating Expenses	-5%	Gautam	4	-2.7%	2.3%	3.4%	-0.4%	0.3
General Fund Transfer to Capital / Rolling Stock Reserve Fund	\$10M	Gautam	3	\$0	\$10M	\$10M	\$11.6M	3.5
Operating Expenses per Revenue Hour	\$165.00	Caver Gautam	3	\$189.04	\$181.76	\$188.53	180.02	2.7
Total Goal Points: 15.0				Total Points Earned: 13.0				

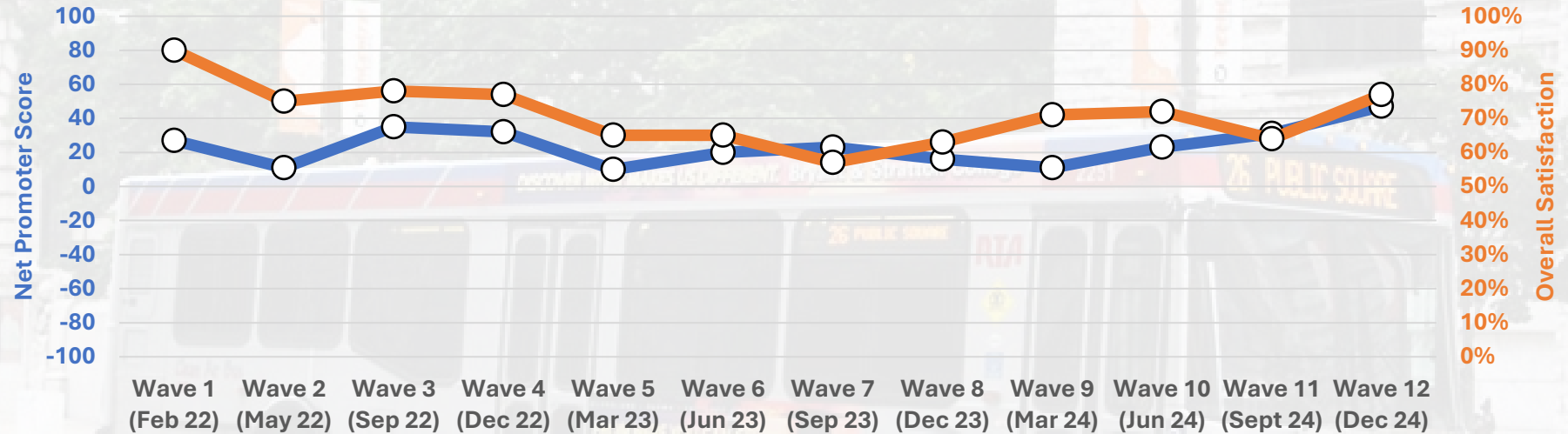
A faded background image of a train at a station platform. The train is grey with red and white stripes. The number '702' is visible on the front. The platform has a yellow and red striped safety line.

December 2024 Customer Experience Survey

James Rubin

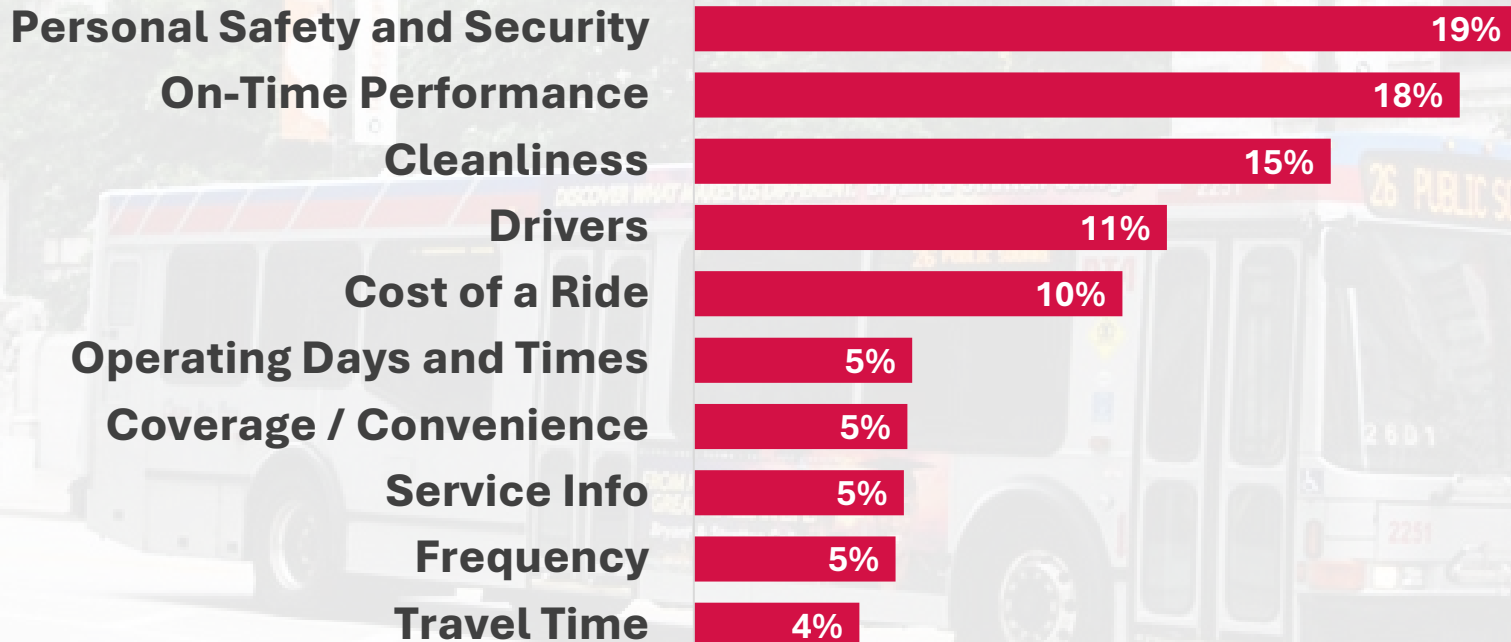
Net Promoter Score & Overall Satisfaction: **Fixed Route Bus**

Time Series

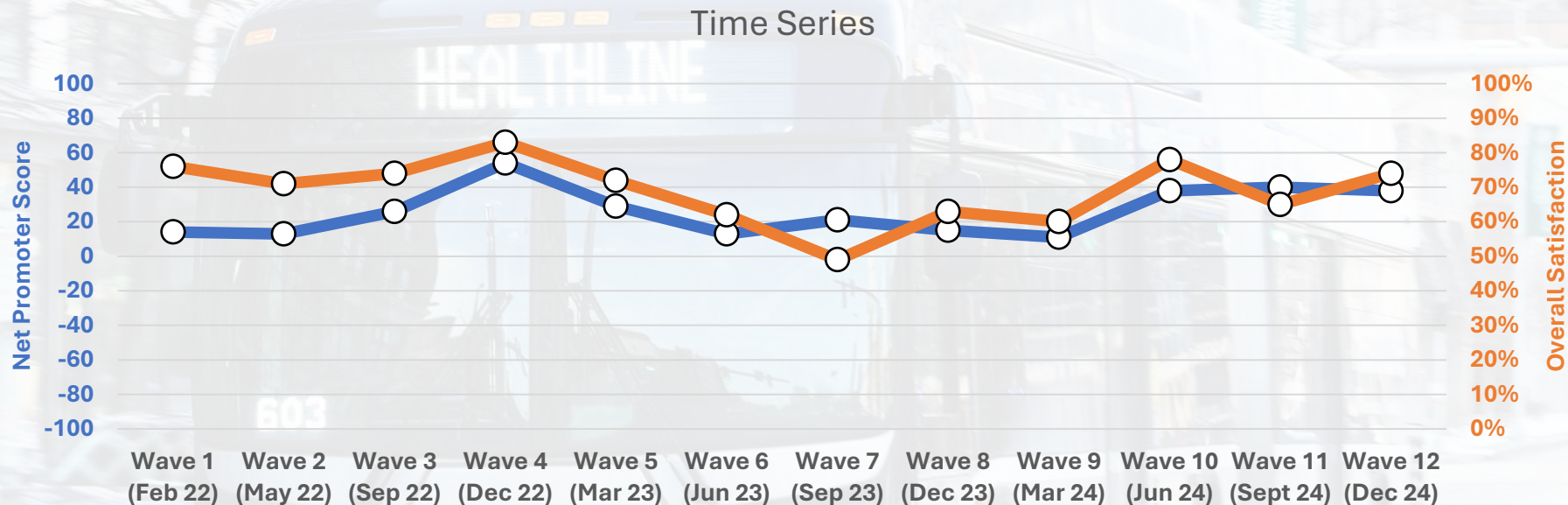


Key Drivers of Customer Experience: **Fixed Route Bus**

Most Important to Customers: Wave 12, December 2024

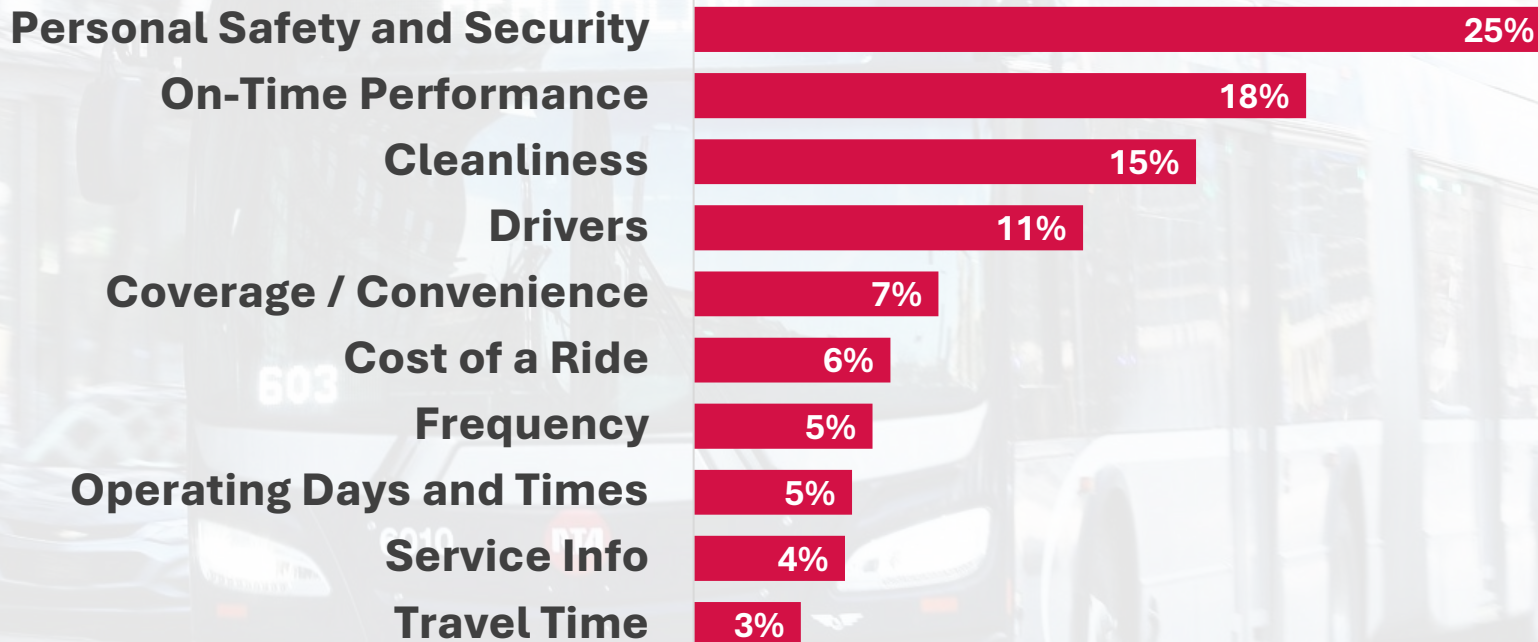


Net Promoter Score & Overall Satisfaction: **Bus Rapid Transit**



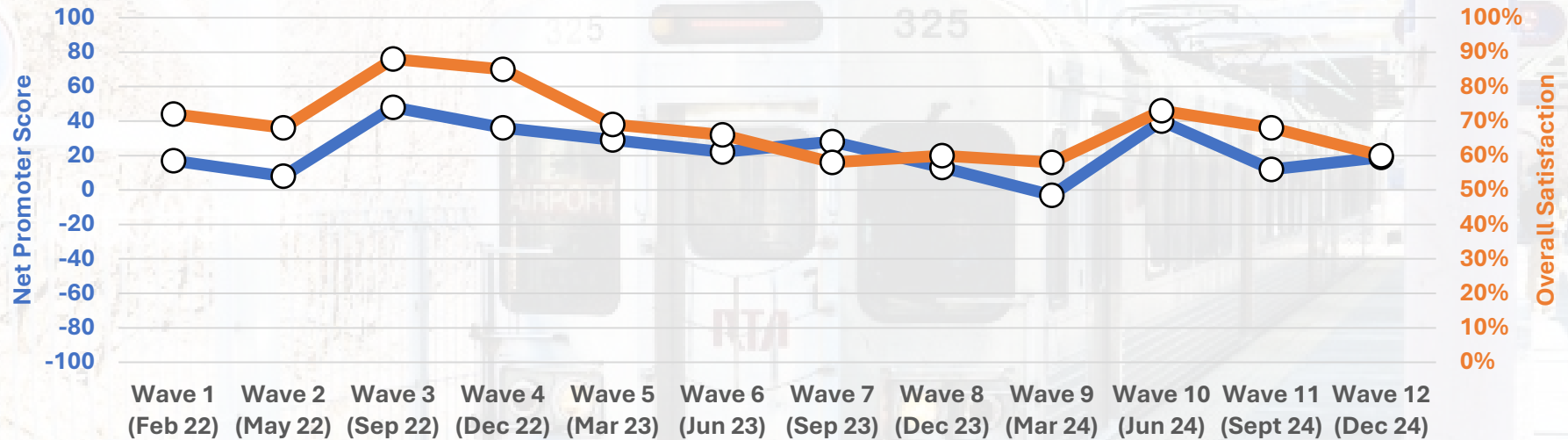
Key Drivers of Customer Experience: **Bus Rapid Transit**

Most Important to Customers: Wave 12, December 2024



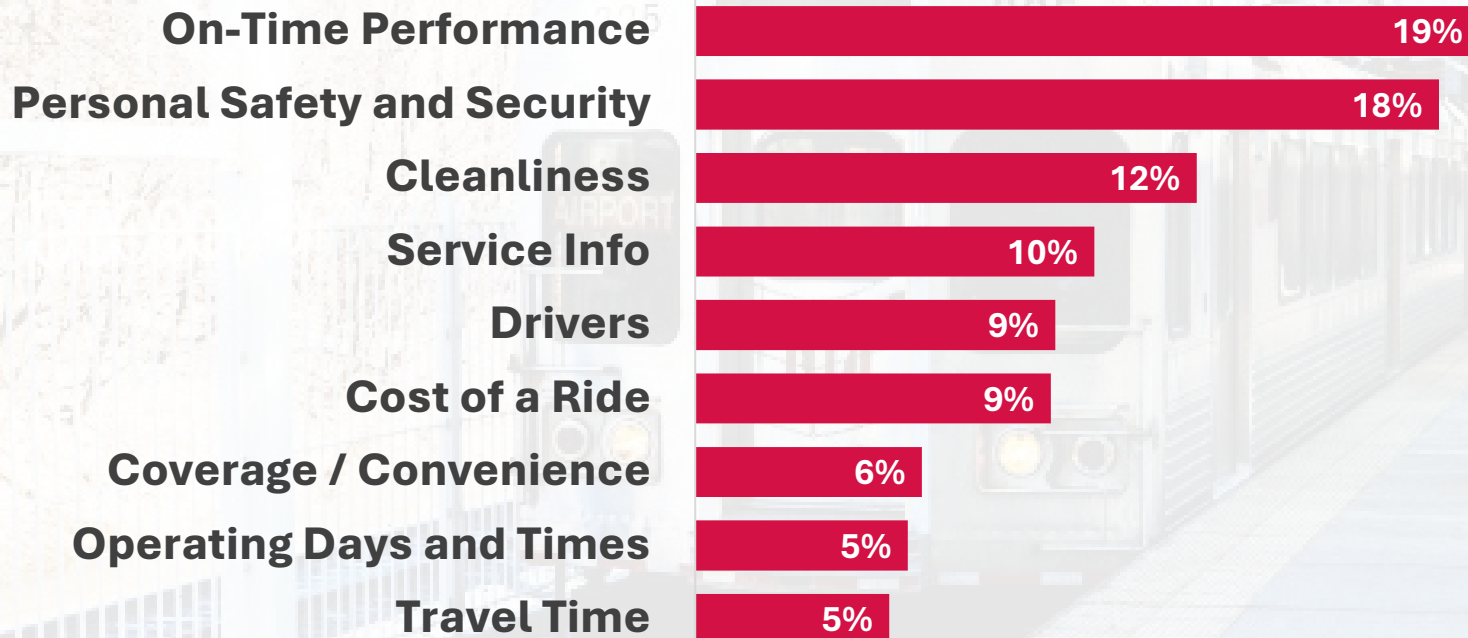
Net Promoter Score & Overall Satisfaction: Rail

Time Series



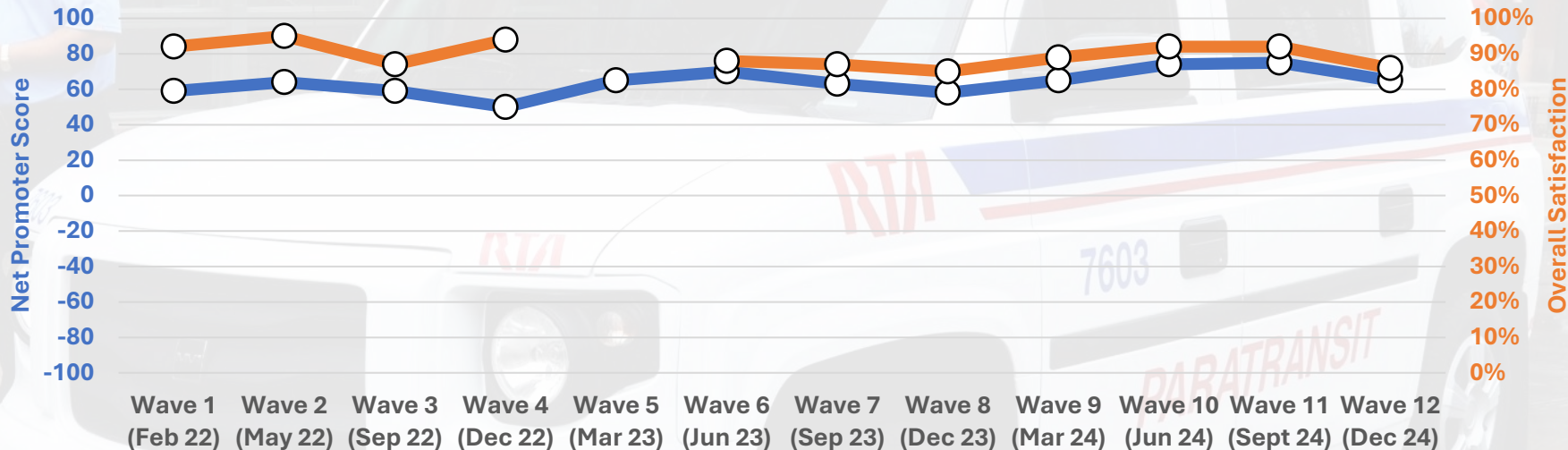
Key Drivers of Customer Experience: Rail

Most Important to Customers: Wave 12, December 2024



Net Promoter Score & Overall Satisfaction: **Paratransit**

Time Series



Key Drivers of Customer Experience: **Paratransit**

Most Important to Customers: Wave 12, December 2024

Personal Safety and Security

40%

Drivers

12%

Travel Time

11%

On-Time Performance

9%

Cleanliness

8%

Scheduling Ease

7%

Cost of a Ride

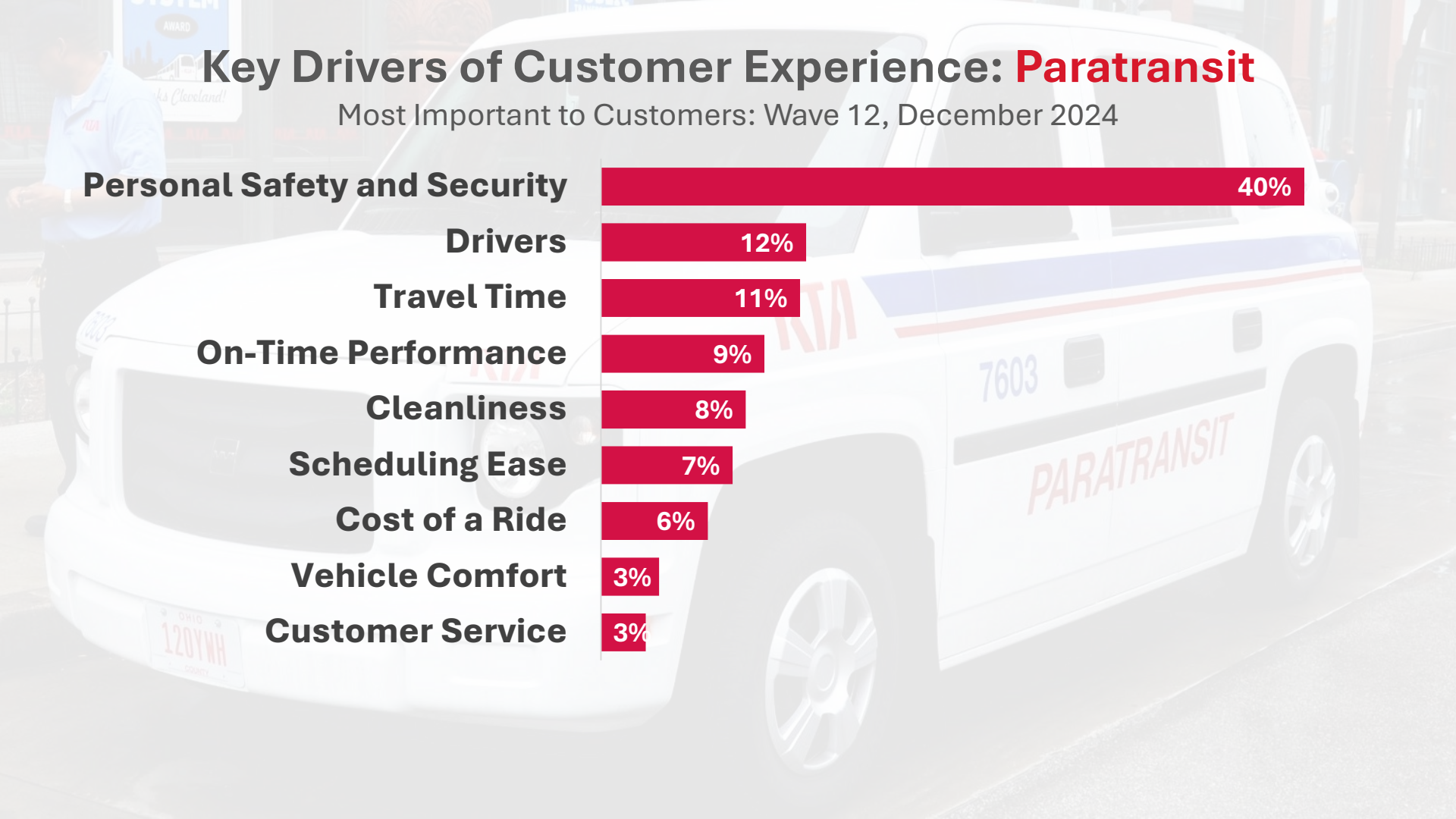
6%

Vehicle Comfort

3%

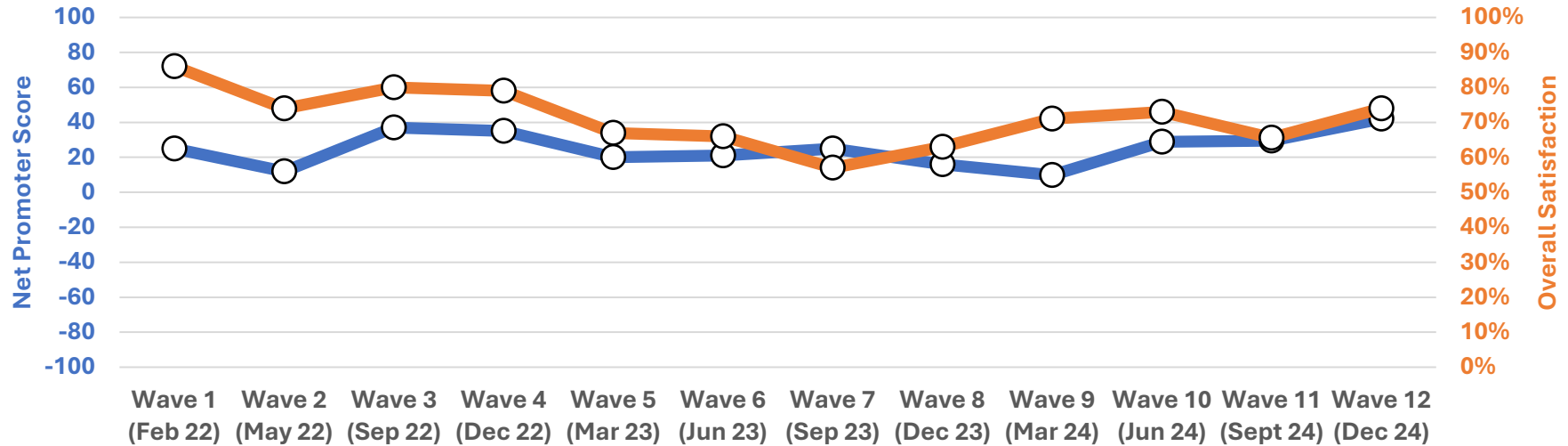
Customer Service

3%



Net Promoter Score & Overall Satisfaction: **Agency**

Time Series



Service or Mode	Percent of Ridership
Fixed Route Bus	70.5%
Bus Rapid Transit	8.9%
Rail	18.2%
Paratransit	2.5%
	100%

A light rail train, possibly a Breda model, is stopped at a station platform. The train is grey with red and white horizontal stripes. The number '702' is visible on the front. The 'RTA' logo is also visible on the front. The platform has a red and white checkered pattern. The background shows a modern building with a glass facade.

Traction Cadence

Nick Biggar

Performance Management Cadence

Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	Jul 2025
Tactics Review	Q4 Performance Review Board Report Tactics Review	Tactics Review	Q1 Performance Review Board Report	Tactics Review	Tactics Review
Aug 2025	Sep 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026
Q2 Performance Review Board Report	Tactics Review	Tactics Review	Q3 Performance Review Board Report	Tactics Review	TBD

Committee of the Whole

March 18, 2025

4th Quarter 2024 Internal Audit Report

March 18, 2025

Annual Meeting

March 18, 2025

Board of Trustees Meeting

March 18, 2025

Public Comments – Agenda Items

- In person
- Phone: 440-276-4600
- Web form at www.riderta.com/events
 - Click/Select meeting event
 - Scroll to bottom to fill out form
 - Comments will be sent to Board and staff

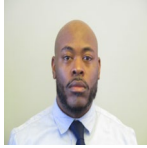
Committee Reports

March 18, 2025

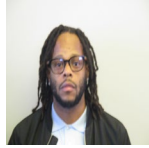
New Hires and Promotions

March 2025

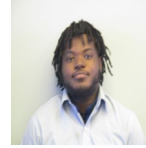
March New Hires



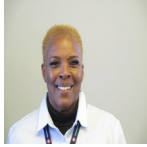
Larelle Goodman
Bus Operator



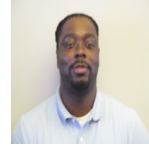
Delbert Harriston
Bus Operator



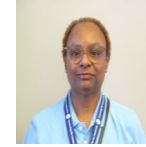
Toriawn Jenkins
Bus Operator



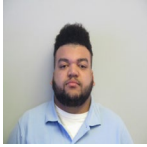
Debra Wright
Bus Operator



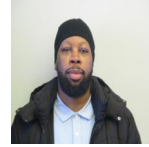
DeAndre Ward
Bus Operator



Barbara Coney
Bus Operator



Jaylen Speight
Bus Operator

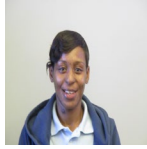


Patrick Robinson
Bus Operator

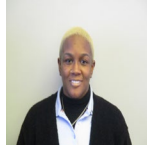


Te'Shawna Coleman
Bus Operator

March New Hires



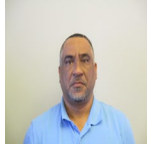
Tamara Ivory
Bus Operator



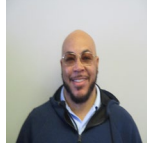
Ronnetta Watkins
Bus Operator



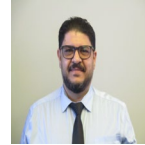
Donyelle Thomas
Bus Operator



Steeve Bunnaman
Bus Operator



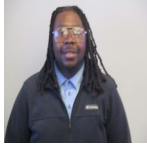
Rolando Terry
Bus Operator



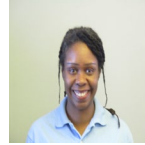
Isam Jasim
Bus Operator (PT)



Ronika Davis
Paratransit Operator



Jayvon Lawson
Paratransit Operator

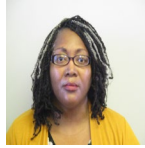


Michelle Myers
Paratransit Operator

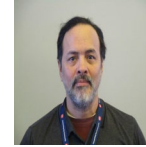
March New Hires



Tanyesha Wilson
Paratransit Operator (PT)



Connie Lee
Payroll Specialist I



Mathew Marcial
Maintainer

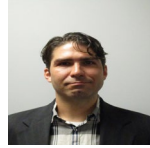


Saravan Kumar Palagiri
Sr. Programmer Analyst

March Promotions



Lisa Townes
District Director - Hayden



Todd Morrison
Engineering Project
Engineer – Bridges



Terry Phillips
Mail Truck Driver



Mark Campbell
Assistant Operating
Instructor



Demetrius Lumpkin
Assistant Operating
Instructor

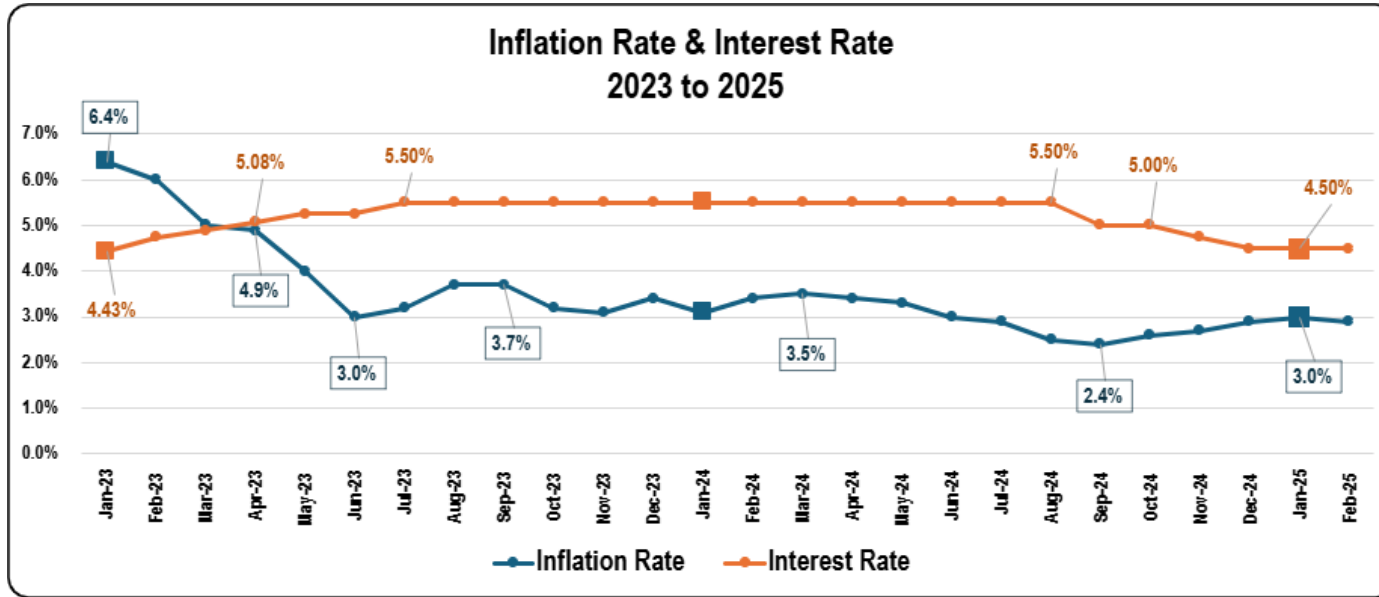
Resolutions

March 18, 2025

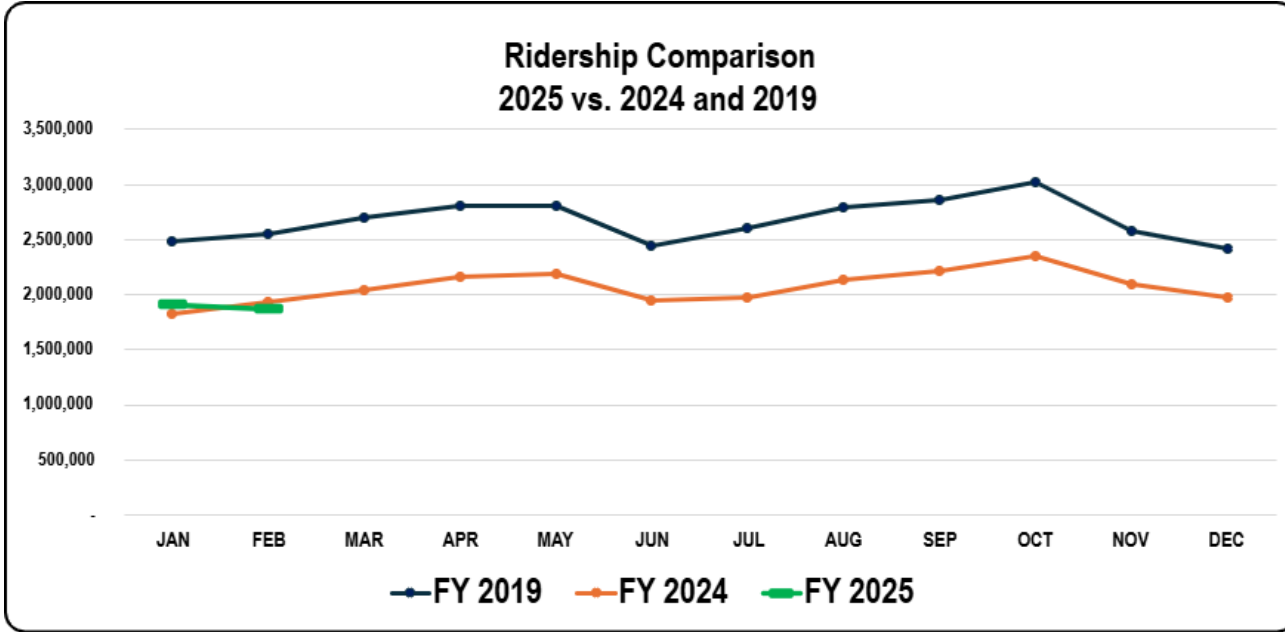
Secretary/Treasurer Update

March 18, 2025

Economic Conditions



Ridership through February 2025



**YTD Ridership
(in millions)**

2019: 5.0

2024: 3.8

2025: 3.8

Passenger Fares

YTD Passenger Fares (in millions)

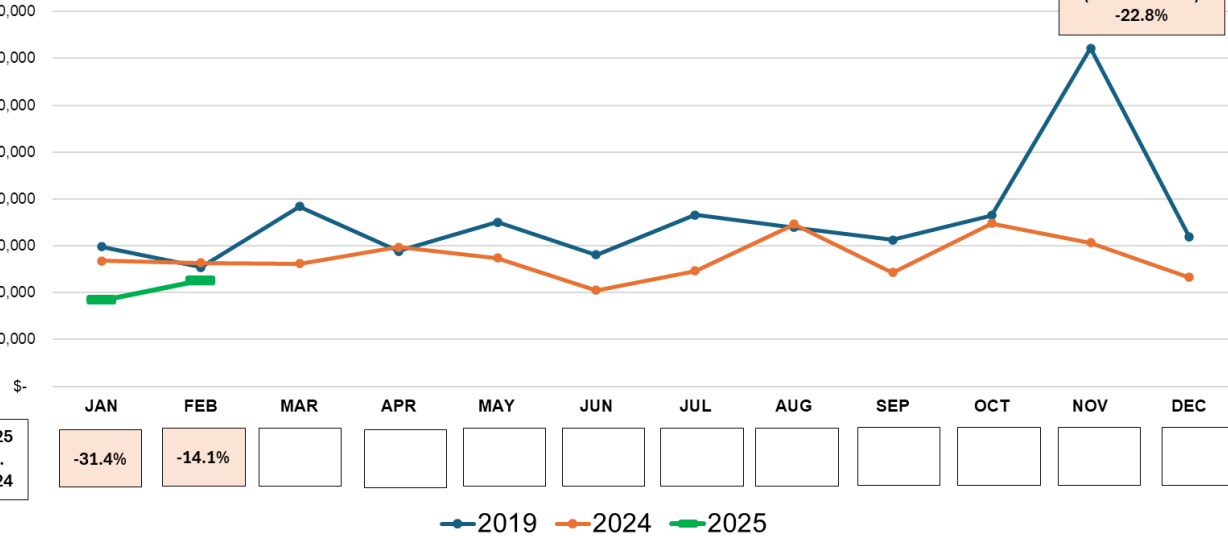
2019: \$5.5

2024: \$5.3

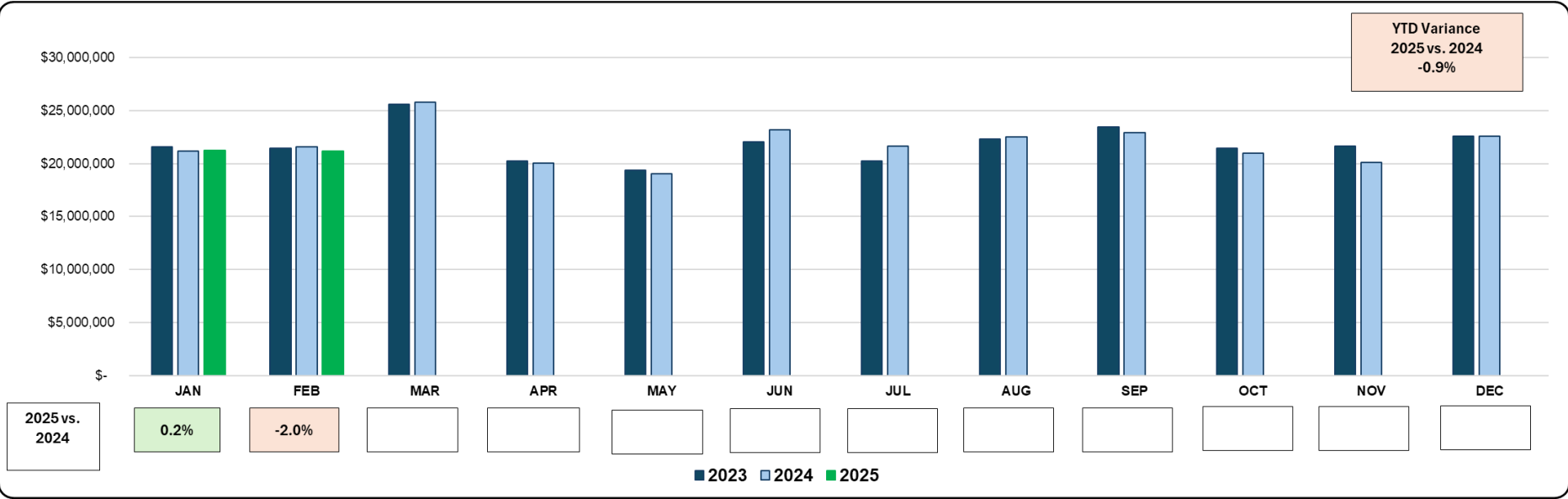
2025: \$4.1

2025 vs. 2024, 2019

YTD Variance
(2025 vs. 2024)
-22.8%



Sales & Use Tax



Selected Data

Total Long-Term Debt – 12/31/2024	\$ 22.3 million
Average Investment Yield – YTD	4.07%
Cash and Investments	
Unrestricted (General Fund)	\$ 27.5 million
Restricted	<u>333.6 million</u>
TOTAL CASH AND INVESTMENTS	<u>\$361.1 million</u>

General Manager, CEO Report

India L. Birdsong Terry

March 18, 2025

Anthony D. Biasiotta - Thank You For Your Service



Pictured are GCRTA Board Trustees Rev. Charles P. Lucas, Paul A. Koomar, Anthony D. Biasiotta, Anastasia A. Elder, Jeffrey W. Sleasman, Deidre McPherson, Emily Garr Pacetti, David E. Weiss, Stephen M. Love, and GCRTA CEO & GM India L. Birdsong Terry

February 24, 2025 | GCRTA Main Office

- Appointed by Cuyahoga County Mayors and Managers
- Joined the GCRTA Board in March 2022, and served a three-year term ending in March 2025
- Chair, Organizational, Services & Performance Monitoring Committee
- Current Mayor, City of Seven Hills

GFOA (Government Finance Officers' Association)



Government Finance Officers Association

January 31, 2025 | GCRTA

Certification of Achievement for Excellence in
Financial Reporting for FY2023 to the GCRTA
Accounting team

- Highest form of recognition in the area of governmental accounting and financial reporting

Protecting Your Crown Conference

CASE WESTERN RESERVE UNIVERSITY
Africana Studies and the Office for Diversity, Equity and Inclusive Engagement Present:

Protecting Your Crown Conference

Join us for this dynamic two-day experience, aiming to empower, embrace and preserve our authenticity and cultural identities and confidently express our truth in various aspects of life.

SPECIAL GUESTS



OPENING PLenary
SHONTEL BROWN
CONGRESSWOMAN



BREAKFAST PLenary
APRIL MILLER ROUSE
CHIEF LEGAL OFFICER, INTEL

Speaking Our Truth: Protecting and Preserving Our Crowns

Closing Plenary Panel
Moderated By
India Birdsong Terry, Greater Cleveland Regional Transit Authority

Featured Panelists
Dana Capers, Fifth Third Bank
Constance Hill-Johnson, Visiting Angels
Lolita Hines, CWRU
Nicole McKinney-Johnson, Cleveland Rape Crisis Center

FEB. 28 & MARCH 1 | **REGISTER NOW**





March 1, 2025 | Case Western Reserve University (CWRU)

- GCRTA General Manager & CEO, India L. Birdsong Terry moderated a panel discussion on Speaking Our Truth: Protecting and Preserving Our Crowns, and her panelists consisted of:
 - Dana Capers, Vice President, Fifth Third Bank
 - Constance Hill-Johnson, Owner & Managing Director, Visiting Angels
 - Lolita Hines, Assistant Vice President, Case Western Reserve University
 - Nicole McKinney-Johnson, President & CEO, Cleveland Rape Crisis Center

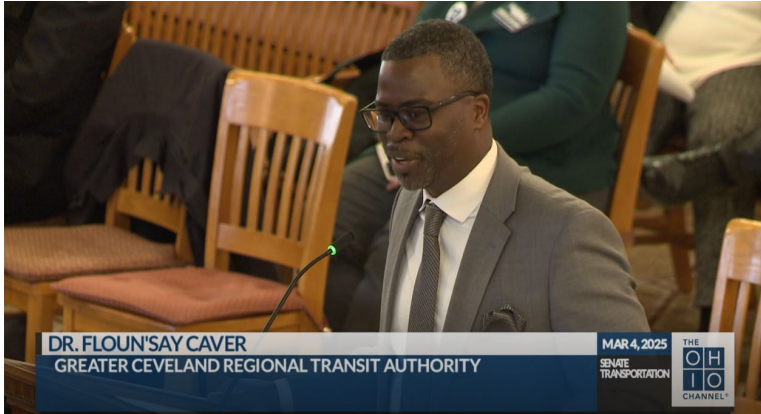
Welcome New Board Member, Marie Gallo



March 4, 2025 | GCRTA Main Office

- Appointed by Cuyahoga County Mayors and Managers
- Mayor, City of Parma Heights
- Serving for a term ending in March 2028

Ohio Senate Transportation Committee Testimony



March 4, 2025 | Columbus Ohio

Dr. Floun'say Caver, Deputy General Manager, Operations

- GCRTA was one of eight public transit agencies to provide testimony in support of House Bill 54 before the Ohio Senate Transportation Committee
- Advocated for increased funding for public transit and greater flexibility with funding for workforce development mobility

<https://ohiochannel.org/video/ohio-senate-transportation-committee-3-4-2025>

CEOs You Should Know Podcast



March 6, 2025 | iHeartMedia Studio Downtown Cleveland

- Cleveland CEOs You Should Know is a podcast featuring leaders of Greater Cleveland who play a part in driving our economy
- Keith Hotchkiss, Regional Market President of iHeartMedia interviewed GCRTA General Manager & CEO, India L. Birdsong Terry to hear insights on her career, and how she succeeds, leads, and motivates her team
- The interview is published to the Cleveland CEOs You Should Know podcast on iHeartRadio, and available on the iHeartRadio app

Transit Police Officers Swearing In Ceremony

March 7, 2025 | GCRTA Main Office Building



- GCRTA welcomed 14 new Transit Police Officers and their families
- Deputy Chief Deirdre Jones administered the Police Officer's Oath to the department's new members
- The new officers are currently being paired with a field training officer where they will learn the operational aspects of the job over the next six months. After successful completion, they will receive their assignments

Theresa Burrage -Thank you for your service!



January 2007 – March 2025

- 18 years of service
- Executive Assistant, Board of Trustees & Executive Department

Questions