

Access Services 2022 Board Retreat Report



Presented to: Martin Gombert, Board Chair; Andre Colaiace, Executive Director;
F Scott Jewel, COO; Alvina Narayan, Manager, Training and Development

Presented by Insight Strategies: Teri Fisher, CEO & Managing Partner + Carita Ducre, Managing Partner

Date: August 25, 2022

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Insight Strategies Organizational Health & High-Performance Framework[®]



Insight Strategies Mission

As trusted partners...we cultivate greatness in organizations and people by improving performance, affecting culture, and raising the bar.

Insight Strategies Transit-Specific Vision Statement

To be the “go-to” trusted partner for strategic and leadership impact... from the breakroom to the boardroom.

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About this Report

This report summarizes the results of the Access Services (Access) 2022 Board Retreat, facilitated by Insight Strategies, Inc. (Insight).

Background

In May 2021 Access released an RFP for a Board Retreat Facilitator. Insight responded and was awarded the contract in June 2021. Insight began conducting interviews with Board Members and Staff but, due to the COVID-19 pandemic and the desire to hold the retreat in-person, the interview process was put on hold. The project resumed in 2022 and Insight facilitated the Board Retreat on August 15, 2022.

Engagement Objectives

- Align as a Board and team
- Reflect on recent changes in the industry
- Look forward – discuss the future of Access
- Conduct a SWOT² Analysis
- Discuss the Board's Governance Model
- Provide update on Access' DEI Policy

Insight's Key Deliverables

- I. Conduct Assessment
- II. Facilitate a Retreat between Board and Staff
- III. Consult on Recommendations and Next Steps
- IV. Provide a Post-Retreat Report

I. Assessment Overview

Time Frame

1:1 interviews began in July 2021 but were paused due to the fluctuations in health guidelines caused by the ongoing COVID-19 pandemic. 1:1 interviews resumed in July-August 2022.

Consultant Personnel

Insight Strategies' team members who conducted the interviews and authored this report include:

Teri Fisher, CEO & Managing Partner	Consultant, Analyst, Project Oversight/Quality Control, Interviewer
Carita Ducre, Managing Partner & Senior Consultant	Data Interpretation, Analyst, Writer, Editor
June Nakayama, Jr. Consultant	Data Analysis
Catie Butler, Operations Manager	Reporting, Logistics

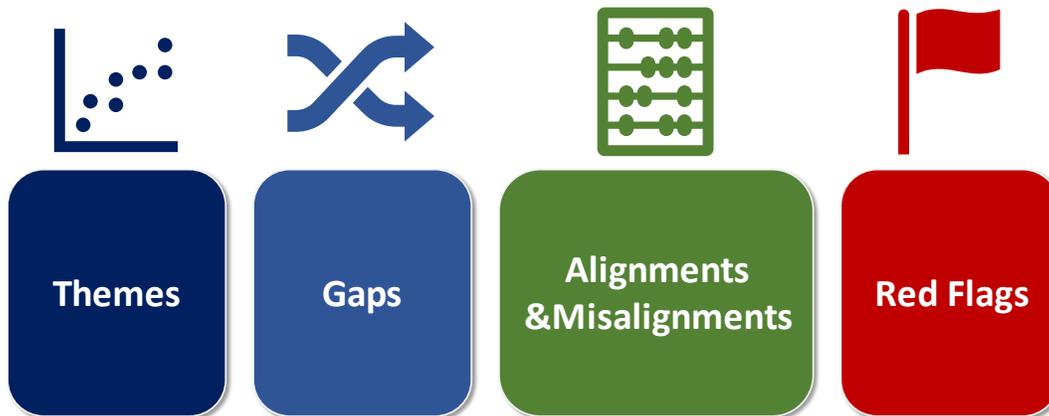
1:1 Interview Assessment Questions

- 1) Tell me about your background with the Agency.
- 2) In your own words (if you were explaining it to someone new to the area), why does Access Services exist?
- 3) What is your perception of the Agency's top 2 strengths?
- 4) What is your perception of the Agency's top 2 improvement areas?
- 5) What are your impressions of three challenges the Agency is facing now/or in the future?
- 6) What are your thoughts around the impacts of COVID?
- 7) What are your thoughts about the new governance structure/model that the Board has implemented over the last year?
 - a. Is it working for you?
 - b. Do you feel engaged?
 - c. Any downsides that you've noticed?
- 8) Board Processes: Please rate each of the following statements on a scale of 1-5. Explain rating.
 - a. Board meetings are run efficiently and effectively
 - b. Agency's fiscal health is regularly reviewed, and necessary Board actions are taken thoughtfully and quickly.
- 9) To what degree does communication between Agency staff and the Board meet your expectations?
- 10) What is your understanding of the Board's top five roles and responsibilities?
- 11) Is there anything else you'd like to share?

1:1 Interview Assessment Participants

Role	# of Interviews
Board Members	9
Staff	8
Total # of Interviews	17

What we look for in assessments...



Executive Headlines

Committed, engaged, and dedicated staff

“Staff’s dedication to their work, high commitment, high engagement”

Pride in service quality and adaptability

“Access thrived in COVID. Activated the EOC. Meal deliveries. Got a lot of press from Mayor and the Public. Perceived as Heroes. Built a lot of public trust”

The Board appreciates Andre

“Andre is good at communicating— checking in with members for feedback before putting money and effort into things”

Board Meetings Efficient and Effective = 4.3/5

Perception for a need of facilities

“Agency doesn’t own facilities, so contractors have to find own facilities”

Opportunity for alignment on board roles and responsibilities

Top 5 did emerge, however 21 comments are uncategorized

Top 2 improvement areas clear, but wide variety exists

Top 2 did emerge, however 10 comments are uncategorized

Opportunity to revisit mission & vision

Majority of comments on why Access exists were compliance related

Improvement Areas

Improvement areas from staff *(not in any particular order)*

- More staff
- Diversity of staff
- Salary increase
- Process improvement
- Records management
- Advancement/succession planning
- Facilities
- Messaging to community
- Return to work
- Technology

Common Ground

- Diversity
- Facilities
- External communication and messaging

Improvement areas from Board *(not in any particular order)*

- Finances
- Control growth
- Accessible materials
- Facilities
- Fleet
- Being proactive
- Program reevaluation
- Communication with Board
- Board makeup
- DEI focus
- Relationship with Metro
- Communication with stakeholders

Board Roles and Responsibilities

Perception of STAFF

1. Strategy planning and execution
2. Fiscal/Financial oversight
3. Ensure customer needs are met
4. Leadership & Guidance
5. Ensure ADA compliance
6. Be prepared for Board meetings
7. Community Involvement/Advocacy
8. Develop and guide policy
9. Operations oversight
10. Accountability- holding others accountable
11. Innovation
12. Professional in their own area
13. Support agency, employees
14. Fairness and DEI for employees
15. Supply agency with ED

Common Ground

1. Ensure customer needs are met
2. Fiscal/Financial oversight
3. Strategy planning and execution
4. Leadership & Guidance
5. Community involvement/advocacy
6. Develop and guide policy
7. Accountability- holding others accountable
8. Ensure ADA compliance
9. ED performance
10. Fairness & DEI for employees

Perception of BOARD

1. Fiscal/Financial oversight
2. Community involvement/advocacy
3. External communication
4. Strategic planning and execution
5. Ensure ADA compliance
6. Ensure customer needs are met
7. On time performance
8. Safety
9. Fairness and DEI for employees
10. Be prepared for Board meetings
11. Accountability- holding others accountable
12. Good stewards of the environment
13. Develop and guide policy
14. Collaborate with staff and among Board
15. Leadership & Guidance

II. Retreat Output

Retreat Participants

First Name	Last Name	Title
Andre	Colaiace	Executive Director
Elizabeth	Zambrano	Manager, Human Resources
Bruce	Frink	Sr. Manager, Financial Planning & Analysis
Brian	Selwyn	Manager, Procurement & Contract Admin.
Alvina	Narayan	Manager, Training & Development
Rick	Streiff	Senior Manager, Fleet Design & Maintenance
Rogelio	Gomez	Senior Manager, Operations
Susanna	Cadenas	Manager, Customer Relations
David	Foster	Manager, Eligibility
F Scott	Jewell	Director, Administration
Matthew	Avancena	Director, Planning and Coordination
Randy	Johnson	Director, Government Affairs & Outreach
Michael	Greenwood	Chief Operations Officer
Hector	Rodriguez	Deputy Executive Director
Bill	Tsuei	Director, Information Technology
Adrian	Aguilar	Board Director
Doran	Barnes	Board Director
Lee	Burner	Board Director
Andrew	Del Castillo	Board Director
Theresa	DeVera	Board Director
Martin	Gombert	Board Director
Dolores	Nason	Board Director
John	Troost	Board Director
Giovanna	Gogreve	Board Director
Vincent	Ewing	Legal Counsel

Retreat Agenda

Access Services Board Workshop AGENDA

-  **Participants:** Access Services Board Members and Executive Staff
-  **Location:** Huntington Gardens
-  **Date:** Aug 15, 2022
-  **Facilitators:** Teri Fisher | Insight Strategies CEO and Managing Partner, Carita Ducre | Managing Partner and Senior Consultant

Purpose: Board Alignment and Strategic Review; Review Governance Model; Discuss DEI Policy

10:15am Opening Remarks – Board Chair

Welcome, Opening Remarks, Introduce Insight Strategies – Andre

Set the Stage: Objectives, Session Agreements, Safety Message – Insight Strategies

Board and Staff Introductions

Activity

Discuss Access Services' Successes—last two years

Introduce Insight Strategies' Organizational Health & High-Performance Framework©

11:30am Break (10 min)

State of the Paratransit Industry & State of Access Services

Understand the Psychology of Change

Share Assessment Findings

12:30pm Lunch (45 minutes)

Share Assessment Findings *Continued*

Discuss Access's Strategic Direction (including a SWOT² analysis—strengths, weaknesses, opportunities, threats, trends) **INCLUDES 10 MINUTE BREAK**

Review Access Services' governance model; delineate roles & responsibilities of the Board and staff

Discussion of Access' Diversity, Equity, and Inclusion Plan

4:45pm Close, Next Steps, Session Evaluations

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vFinal

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Note: Highlighted sections reflect what's included in the report.

Insight's Organizational Health & High- Performance Framework



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State of the Industry/State of Access

Please See Appendix A

Updated Facilities Plan

Please see Appendix B

SWOT² Analysis

The process for the SWOT² analysis was to split the large group into four smaller groups – each tasked with brainstorming ideas on one aspect of the SWOT² (i.e., Strengths, Weaknesses, Opportunities, and Threats).

The small groups:

- Choose a scribe, a facilitator, and a presenter
- Brainstormed on ideas relative to their assigned aspect of the SWOT²
- Presented the results of their brainstorm to the larger group for questions and input

The large group:

- Facilitated a discussion/debate on the most important things to focus on or pursue given limited resources (time, money, people)
- Narrowed down and prioritized the most important items for consideration moving forward
 - This process was conducted only for weaknesses and opportunities
 - The prioritization process was facilitated using the Modified Delphi Approach to building group consensus – *dots were used to place votes based on the criteria in the section below*

What to Consider/Cite Guidelines

In the areas of Weaknesses and Opportunities, and prior to the discussion/debate and prioritizing, the following criteria was given to consider:

- What's best for the customer
- What's best for Access
- Paratransit State of the Industry update, and State of Access Services update
- Changes that have occurred in the world and lives
- Insight Strategies' Assessment Data
- Access' Short Range Transit Plan
- Access' DEI Policy and Plan
- Peer Reviews
- Best practices
- Insight Strategies organizational Health & High-Performance Framework©
- Impact on employees, staff, and contractors
- Cite data where possible

Strengths

- Service Quality
 - KPI's
- Flexibility
 - Adaptability/meal deliveries/vaccines
 - Troubleshooting (location evaluation)
- Quality of Staff (continuity)
 - Engagement/expertise
- Quality of Contractors (Contract mgmt. drivers)
- Engagement with Riders (CAC/QSS/Meeting/Board/Survey)
- Partnership
 - Board/METRO/Transit partners
- Costs
- Technology

Weaknesses

Freq.	Topic
24	Facilities
19	Lack of drivers
17	Salary <ul style="list-style-type: none"> ● Access staff + providers ● Below market
13	% of Taxis – Dedicated/Non-dedicated
10	Diversity within the Agency, including women
6	Disability sensitivity
5	TNC's <ul style="list-style-type: none"> ● Lack of regulations/equity ● For wheelchairs – no WAV
4	Routing <ul style="list-style-type: none"> ● Exc. long trips
3	ADA Old (20+ years)
2	Lack of accountability by providers <ul style="list-style-type: none"> ● Focused on KPI vs Customer Service
0	Legal exposure

Opportunities

Freq.	Topic
24	Olympics and Paralympics <ul style="list-style-type: none"> ● Increased visibility ● Facility funding ● Purchase additional rolling stock
15	Succession planning <ul style="list-style-type: none"> ● Advancement opportunities
13	Review and assess existing processes and programs
12	Seed money for facilities
8	Federal/funding opportunity
8	Leverage tech investments
6	Fleet electrification - EVs
4	Other models (TNCs)
3	Best practices <ul style="list-style-type: none"> ● Peer surveys/reviews ● Various committees, committee engagements
2	Stakeholder Communications <ul style="list-style-type: none"> ● Funding partners ● Political offices
2	Strengthen taxi relationships (leverage Andre's new position as Commissioner)
2	TNC Partnerships
1	Staff/Rider Input <ul style="list-style-type: none"> ● Staff/contractor survey
1	Vendor outreach
1	FTA relationship to Access funding
1	New elections – Mayor & Supervisor
0	Relationships with CAC – build on it

Threats

- Ridership
- Funding (lack of dedicated funding)
- Resources (drivers/vehicles)
 - Supply chain
- Pandemics/Natural disasters
- Sustainability/priorities
- Political position of Metro Board
- Legislative decisions

Governance Model Review

(+) Positive	(Δ) Constructive
1. Board run committees + staff assist 2. Increase staff access to Board members 3. Understanding of processes better, i.e., consent calendar 4. Committee rotations – increase understanding of whole operation	1. Less connected 2. Not hearing other side “placed” in committee 3. Cursory view of complex and important issues = less informed in decision-making
Same time commitment Virtual Element (+) (Δ)	

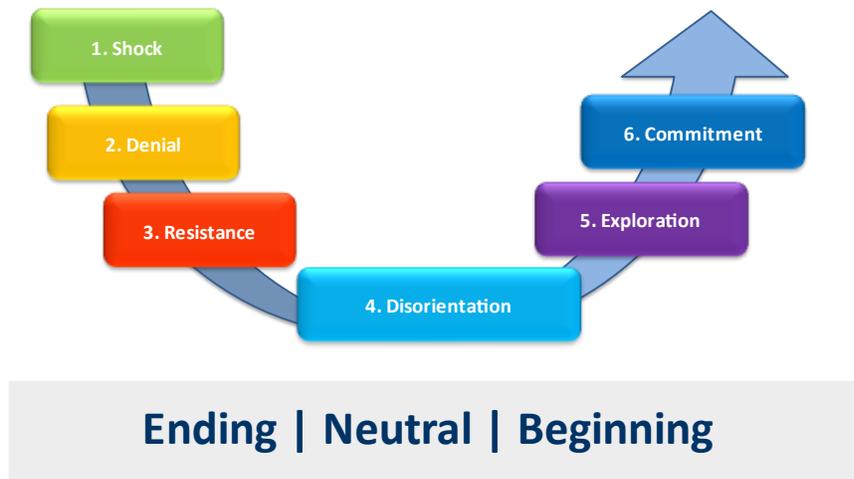
Ideas

- Committee minutes provided prior to BOD mtg and/or oral report
- Committee coach/mentor to assist with effectiveness
- Six months of in person
- Rotate committees or assign per value add
 - ↳ Then revisit
- Possibly more than 1 workshop per year

Access’ DEI Policy and Plan

Please see Appendix C

The Psychology of Change



III. Recommendations and Next Steps

Insight's Pre-Workshop Insights & Observations

(Not in priority order, (+) = positive comments, (Δ) = Improvement opportunities, (~) = neutral comments)

1. Frequent communication between Board and staff (+)
2. Multiple comments praising Executive Director's leadership and communication skills (+)
3. Staff are dedicated, engaged and committed to the agency's work (+)
4. In the assessment, customer service and advocacy were in the top 5 Board roles and responsibilities (+)
5. Opportunity for alignment on Board roles and responsibilities and agency's top 2 improvement areas (Δ)
6. Perception of a need to acquire own facilities (~)
7. Board feels customer service is a part of roles and responsibilities, yet main reasoning for "why Access exists" is compliance (Δ)
8. Past Board dynamic – some residue (~)

Insight's Post-Workshop Insights & Observations

(Not in priority order)

1. Relationship between Board and Staff was respectful and portrayed a healthy dynamic where people were free to discuss openly
2. A participant highlighted that the customer experience, i.e., "disability sensitivity," wasn't prioritized as highly as more strategic items. Opportunity to incorporate ADA/disability sensitivity training for Access staff and contractors.
3. Relative to the SWOT² Analysis/Weakness/Salary: Insight recommends providing employees with a Total Compensation and Rewards spreadsheet to show the big picture (not just salary) of being employed by Access. *Background: Sometimes employees don't consider "Total Compensation and Rewards." To address this need, another Southern California-based transit agency provides employees with a spreadsheet of "Total Rewards" including benefits, pension, stipends for going back to school, workplace environment, work/life balance, etc.*
4. Relative to the SWOT²/Opportunities/Review and Assess Existing Processes and Programs: the ED noted that Access does review and assess existing processes and programs. Therefore, Insight recommends Access provide more visibility/updates to the Board on the effectiveness of the existing programs and processes or notify them when programs and processes are reviewed and the outcome(s)
5. Relative to the SWOT² Analysis/Opportunities/Advancement Opportunities: Insight recommends looking at succession planning, as it was noted as an opportunity during the SWOT². Further, when asked about "additional areas of interest" in the session evaluation, top rated areas included leadership competency development; leadership development; succession planning, transition planning and talent management; and organizational and employee assessments (see Appendix D: Session Evaluation Recap)

6. The two most valuable components of the workshop were the SWOT² Analysis and the group coming together in-person to brainstorm and discuss the future of Access (see Appendix D: Session Evaluation Recap)
7. 100% of attendees said YES when asked if they “intend to apply at least one thing they learned in the session [today]” (see Appendix D: Session Evaluation Recap)
8. Every participant signed their name to the evaluation, which indicates a high-level of ownership

Insight's Pre & Post-Workshop Recommendations

(Not in priority order)

1. Create a new *mission* statement—reflect the heart of the matter—and *vision* statement
2. Address constructive comments from the Board relative to the governance model
3. Communicate the results of the assessment and workshop to key stakeholders with corresponding commitments and next steps
4. Be proactive about *how* to work through the dynamic tension that naturally exists on a Board
5. Take an opportunity at a future meeting, to address and agree upon the Board's top 5 roles and responsibilities, and a plan to adopt and activate those roles and responsibilities
6. Further vet the highest voted items from the SWOT² - *weaknesses and opportunities* using the *What to Consider/Cite Guidelines* (see p. 11)

Recommended Next Steps

- Finalize the report
- Share the finalized report with the Board Chair, Executive Director, and COO
- Share the report with the full Board and Access Staff
- See other recommendations/take action

Appendix A: State of the Industry/State of Access



State of Paratransit Industry

Operations

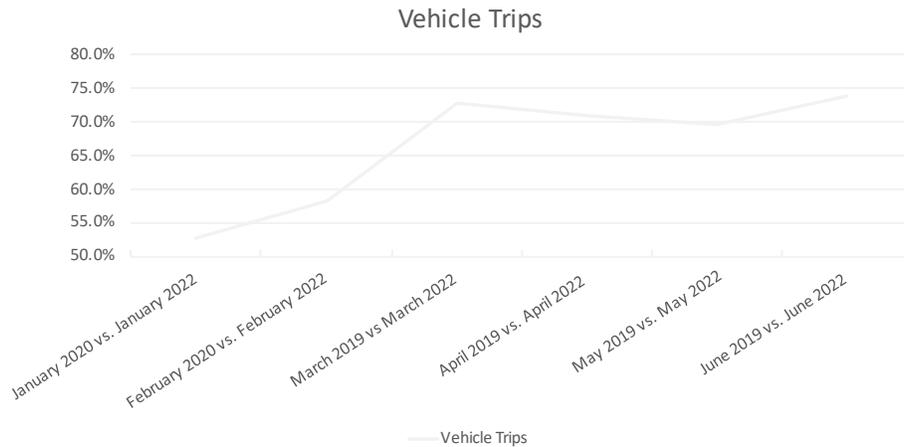
- > Ridership is recovering but demand is uneven
- > Driver shortages are leading to operational difficulties at peak times
- > Vehicle shortages caused by long lead time for replacement
- > Many systems either using or studying TNCs/microtransit as a supplementary program separate from ADA paratransit

Other Issues

- > Fareless debate is a national debate—impacts on paratransit are often not addressed
- > Paratransit software market is in flux (Routematch)
 - > Agencies looking for alternatives to legacy software providers (Adept/Trapeze)
 - > Smaller entrants more focused on rideshare/microtransit (Spare/Via)

State of Access Services

By the end of the fiscal year, system ridership was at 73.9% of prepandemic levels



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Performance Report Card

Key Performance Indicator	Standard	FY22	July 22*
On Time Performance	≥ 91%	89.8%	92.6%
Excessively Late Trips	≤ 0.10%	0.14%	0.03%
Excessively Long Trips	≤ 5%	3.6%	3.6%
Missed Trips	≤ 0.75%	0.59%	0.39%
Denials	≤ 0	6	0
Access to Work On Time Performance	≥ 94%	95.8%	97.1%
Average Hold Time (Reservations)	≤ 120	66	63
Calls On Hold > 5 Min (Reservations)	≤ 5%	3.2%	2.7%
Calls On Hold > 5 Min (ETA)	≤ 10%	2.8%	1.8%
Complaints Per 1,000 Trips	≤ 4.0	3.2	2.8
Preventable Incidents	≤ 0.25	0.20	-
Preventable Collisions	≤ 0.75	0.74	-
Miles Between Road Calls	≥ 25,000	58,746	-

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*Preliminary

Contractor Hiring Update

- Labor challenges may be easing; Board-approved wage increases are helping and driver hiring has surged
- New starting driver wages are now at least \$19/hour in all six service regions
- Contractor Hiring Assistance Plan efforts continue
 - Hiring info on side of revenue vehicles
 - Promotion of hiring opportunities on reservation hold message and Access website
 - Ads on Facebook/Next Door
 - Email to riders and stakeholders via Constant Contact
 - Metro providing Access contractor hiring info to successful driver candidates
- 244 new drivers added in last 3 months

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Expansion of Subcontracting Capacity

- In May, Access' Contractor in the Northern Region began using SilverRide
- In July, the Board approved moving forward with a pilot project that could see use of other TNCs like Uber and noncertified taxis featuring a rider opt-in process
 - Working group will be formed shortly
- Staff now working to expedite certification of additional taxi drivers regulated by the City of Los Angeles
- Access' Executive Director now a Commissioner for the City of Los Angeles' Taxicab Commission

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Working with the community

- CAC Subcommittees have been working on a variety of issues to improve service
- The Operations Subcommittee completed a thorough review of KPIs and service standards and a revamping of lost & found procedures
- The Same Day Subcommittee developed a framework for future same day service (since put on hold)
- The Communications Subcommittee has developed an outline for a rider-facing video to provide tips on making reservations
- A new subcommittee to focus on eligibility was recently launched

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Accessible Traveler Mobile App

FTA Mobility for All Grant- Accessible Traveler Mobile App

- > Awarded \$330,000 on June 5, 2020
- > 18-month project began late June 2021
- > Integrating online reservations
- > Adding additional functionality beyond ride tracking



Accessible Autonomous Vehicle

FTA Transit Bus Automation Strategic Partnership Accessible Autonomous Vehicle (AAV) Pilot

- > Awarded \$125,000 on August 2, 2019



Accessible Low Floor Electric Vehicle

- > Developed in partnership with Sunset Vans (Corona, CA)
- > First of its kind in the United States
- > Access will test in ADA service



Appendix B: Updated Facilities Plan



Facility Ownership

- Economic Benefits
 - More competitive procurements
 - Less cost over life of the facility vs. leasing
 - Retain infrastructure improvements
 - Competitive grants
- Operational Benefits
 - Long-term growth planning
 - Lower impact on operations in case of service provider change
 - Avoid loss of facility due to lease expiration

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Land Acquisition/Strategy

- Commercially Owned
 - Size and type of property is commonly used by first/last mile delivery firms
 - Market is tight across most regions with properties mostly being closed within a few weeks on the market
 - Farther west a property is, the larger cost impact on both purchase and construction costs
- Government Owned
 - More properties coming to market
 - Priority is low-cost housing due to Surplus Land Act
 - Potential to bypass as Access is a public entity

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Funding

Facilities Development and Construction fund

- Direct COVID-19 reimbursements received from the Federal Emergency Management Agency (FEMA)
- Direct COVID-19 reimbursements received from the City of Los Angeles
- Direct reimbursements received from MediCal
- Any other funds that may be appropriated by the Access Services Board of Directors or the Los Angeles County Metropolitan Transportation Authority (Metro) for this purpose
- Awarded facility construction grants

Multi-decade initiative

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Projected Construction Costs

Region	Low Model	High Model
Antelope Valley	\$15,187,100	\$18,504,500
Eastern Region	\$40,445,300	\$53,545,100
Northern Region	\$32,408,900	\$43,753,500
Southern Region	\$58,725,800	\$80,841,500
Western Region	\$29,363,900	\$39,566,300

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Next Steps

- Have identified city owned site in Lancaster
 - Developing conceptual statement of probable cost
 - Present to Board in 2/3 weeks to receive negotiating authority
 - Get updated appraisal from City
 - Return to Board for purchase approval
- Continue to work with Griffin Structures to identify potential sites
- Continue to identify funding opportunities (grants, Olympics, etc.)

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Appendix C: Access Services DEI Progress Report



Future External Initiatives & Goals

- Operations
New services - Inter-Agency Connections Project
- Technology
Continue to advance and streamline technology
- Disadvantaged Business Enterprise (DBE)
Contracting Opportunities
- Customer Surveys
Collect essential information

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Future Internal Initiatives & Goals

- Workforce
Staff Diversity
Employee Handbook
- Educating Access & LA County
DEI classes
- Governance
Mission, Vision & Values Statement

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Appendix D: Session Evaluation Recaps

Course Content:						
Participants were asked to rate the following questions on a scale of 1 to 5 (1=strongly disagree, 5=strongly agree):						
	1	2	3	4	5	Avg
1. Overall, this session was valuable to me and worth my time				4	12	4.7
2. Overall, the content contained appropriate activities, material, and lectures				3	13	4.8
3. This course will positively impact my role with ACCESS				4	12	4.7
4. I intend to apply at least ONE thing I learned today (circle yes or no) What is ONE thing you intend to apply? <ul style="list-style-type: none"> ● SWOT² ● Communicate frequently to all parties ● Succession planning (x2) ● Psychology of Change (x2) Apply/review with team ● Organizational culture ● External Communications ● Be cognizant of my language ● Focus on opportunities 						
5. Which learning activities were <u>most effective</u> in helping you understand and apply the content? Why? SWOT² (x9) <ul style="list-style-type: none"> ● SWOT Exercise ● SWOT - Prioritizing ● SWOT - Taking ideas, concepts etc. + bear fruit in the future ● SWOT Analysis ● SWOT - Learning from BOD; Staff perspective ● SWOT Analysis priorities of group was very interesting and useful ● SWOT Analysis was very informative ● SWOT Analysis helps focus board on what agency should be prioritizing ● SWOT allowed look at org from 10000 ft perspective and from other viewpoints Getting the group together/brainstorm together (x4) <ul style="list-style-type: none"> ● Group exercise got different perspectives ● In person contact ● Forced us to think about various aspects of our role ● Forced discussion between staff and board members 	YES 100%		NO 0%			
6. Which learning activities were <u>least effective</u> in helping you understand and apply the content? Why? <ul style="list-style-type: none"> ● Did not go over all the slides ● Intros ● The cycle of change model was great. The mask example may not have been the best to illustrate the model ● This Org could benefit from another 1–2-day session to flesh out a strategic plan focused on meeting priorities identified in these planning sessions 						

Presenter's Facilitation Skills:

Participants were asked to rate the following questions on a scale of 1 to 5 (1=strongly disagree, 5=strongly agree):

	1	2	3	4	5	Avg
7. The presenter had a solid understanding of materials presented				1	15	4.9
8. The presenter made me feel comfortable to communicate freely and honestly				1	15	4.9
9. The presenter handled questions in a concerned, knowledgeable, and professional manner					16	5.0
10. Comments about the facilitators:						
<ul style="list-style-type: none"> ● Did a great job ● Both Insight reps did a great job handling meeting ● Excellent facilitators ● Overall was great ● Willing to learn ● Both benefited by extensive experience with public transit agencies ● Awesome 						

Insight Strategies – Other Offerings: Participants were asked to check/circle services that interest them or their organization

1	Consulting	1	Keynote Presentations	3	Team Building
1	Training	3	Executive & Board Retreats	1	1:1 Coaching

Insight Strategies – Areas of Interest: Participants were asked to check/circle topics that interest them or their organization

	Accountability vs. Victim Mindset	1	Delegation Skills	3	Motivation, Reward & Recognition
1	Agility and Adaptability in Your Organization	3	Developing Future Leaders	1	Negotiating & Sales
4	Assessments: Organizational & Employee	2	Ethics & Compliance	2	Performance Management
2	Attracting & Retaining Top Talent		Goal Development, Cascading & Organizational Alignment		Power Speaking & Presentation Skills for Women
	Behavior Based Interviewing & Recruiting Strategies		Influencing & Persuasion	1	Presentation Skills
1	Business Writing	5	Leadership Competency Development	2	Strategic Thinking & Planning
1	Career Pathing & Development	5	Leadership Development	1	Strategic Workforce Planning & Development
1	Conflict Resolution and/or Mediation	1	Leading & Creating High Performing Teams	4	Succession Planning, Transition Planning & Talent Management
2	Culture Development or Change		Managing Upwards		Time & Priority Management
2	Customer Service Skills	1	Millennials/Generational	2	Vision, Mission, and Values Development

Appendix E: Session Agreements

Session Agreements

1. Be here now
2. Participate Fully
3. Discussion is as important as the output
4. “I” Statements
5. Have an open mind/no judgements
6. Allow for dynamic tension
7. Be introspective and self-reflective
8. Start/Break/End on Time
9. Collaborate
10. Manage tangents (parking lot)
11. Get Creative & Have fun

Virtual Agreements:

12. Raise hand icon
13. Your instruction will follow group in person instruction