



Pittsburgh Regional Transit

STRATEGIC PLAN WORKPLAN  
FINANCE DIVISON  
Establish The Foundation  
Year 1 (FY26)

## Table of Contents

|  |    |
|--|----|
| <b>CHAMPION .....</b>  | 4  |
| Create Efficiency & Accountability .....   | 5  |
| Prioritize Financial Stability .....   | 5  |
| Manage Cost .....  | 5  |
| Pursue External Operational Funding .....  | 6  |
| Advocate for additional discretionary funding .....  | 7  |
| Implement Operational Efficiencies .....   | 8  |
| Implement and enhance data architecture, data intelligence, and data governance .....                                | 8  |
| Evaluate structures and workflows to ensure the successful execution of the strategic plan and long-term goals ..... | 9  |
| Be A Good Neighbor .....   | 10 |
| Prepare for infrastructure resilience .....  | 10 |
| Reduce waste and negative environmental impact on our region .....   | 10 |
| Ensure service and processes are fair and balanced .....   | 11 |
| Evaluate capital investments and increase capital improvement budget to ensure it is fair and balanced .....         | 11 |
| <b>SUPPORTER .....</b>   | 12 |
| Create Efficiency & Accountability .....   | 13 |
| Implement operational efficiencies .....   | 13 |
| Bundle capital projects to improve efficiency and minimize disruptions to customers .....                            | 13 |
| Grow Ridership .....   | 14 |
| Expand access to service .....   | 14 |
| Address key operational space needs .....  | 14 |
| Develop and build on existing partnerships in the community .....  | 15 |

|   |    |
|---|----|
| Partner with external stakeholders to increase transit-support in community ..... | 15 |
| Support Our Workforce .....   | 16 |
| Enhance workforce skills and adaptability.....                                    | 16 |
| Enhance succession planning programs.....   | 16 |

# CHAMPION

Section

# Create Efficiency & Accountability

| OBJECTIVE (CEA #1)  |            |            |                  |                   |                    |  |
|---|------------|------------|------------------|-------------------|--------------------|--|
| Prioritize Financial Stability                            |            |            |                  |                   |                    |  |
| STRATEGY (CEA 1.1)  |            |            |                  |                   |                    |  |
| Manage Cost   |            |            |                  |                   |                    |  |
| KEY PERFORMANCE INDICATORS (KPIs)                         |            |            |                  |                   |                    |  |
| amount of revenue, and cost savings                       |            |            |                  |                   |                    |  |
| ACTION ITEMS   TASKS                                      | Start Year | Start Date | End Date         | Champion Division | Supporter Division | Assigned To:   |
| Identify significant revenue enhancements or cost savings | FY26       | 7/1/25     | 7/2/26 - Ongoing | Finance           | ALL                | Dave McCarthy/<br>Sean Trageser<br>(Budget Operating Side) |
| Implement budget software                                 | FY26       | 7/1/25     | 7/2/26           | Finance           | AIS                | Dave McCarthy  |
| ADDITIONAL NOTES  |            |            |                  |                   |                    |  |
|   |            |            |                  |                   |                    |  |

YEAR 1 (FY26) ESTABLISH THE FOUNDATION

**OBJECTIVE (CEA #1)**

Prioritize Financial Stability

**STRATEGY (CEA 1.2)**

Pursue External Operational Funding

**KEY PERFORMANCE INDICATORS (KPIs)**

TBA

| ACTION ITEMS   TASKS | Start Year | Start Date | End Date | Champion Division | Supporter Division | Assigned To:  |
|----------------------|------------|------------|----------|-------------------|--------------------|---------------|
| State Funding -      | FY26       | Started    | 8/26/25  | Finance           | COMMS              | Curtis Conrad |

**ADDITIONAL NOTES**

**OBJECTIVE (CEA #1)**

Prioritize Financial Stability

**STRATEGY (CEA 1.3)**

Advocate for additional discretionary funding

**KEY PERFORMANCE INDICATOR (KPI)**

# of grants applied

| ACTION ITEMS   TASKS   | Start Year | EST. Start Date | EST. End Date    | Champion Division | Supporter Division | Assigned To:    |
|--|------------|-----------------|------------------|-------------------|--------------------|-----------------|
| Define grant monitoring process  | FY26       | 7/1/25          | 7/2/26           | Finance           | Planning           | Kathryn Simpson |
| Work collaboratively with innovative funding committee to create a streamlined processes for grants to aligning applications to increase success rates | FY26       | 7/1/25          | 7/2/26 - Ongoing | Finance           | Planning           | Kathryn Simpson |

**ADDITIONAL NOTES****YEAR 1 (FY26) ESTABLISH THE FOUNDATION**

**OBJECTIVE (CEA #2)**

Implement Operational Efficiencies

**STRATEGY (CEA 2.1)**

Implement and enhance data architecture, data intelligence, and data governance

**KEY PERFORMANCE INDICATORS (KPIs)**

NA

| ACTION ITEMS   TASKS                                 | Start Year | Start Date | End Date | Champion Division | Supporter Division | Assigned To: |
|--|------------|------------|----------|-------------------|--------------------|--------------|
| Document and update finance processes and procedures | FY26       | 7/1/25     | 7/2/26   | Finance           | ALL                | Nicole Snell |

**ADDITIONAL NOTES**

**OBJECTIVE (CEA #2)**

Implement Operational Efficiencies

**STRATEGY (CEA 2.2)**

Evaluate structures and workflows to ensure the successful execution of the strategic plan and long-term goals

**KEY PERFORMANCE INDICATORS (KPIs)**

Creation of SOP

| ACTION ITEMS   TASKS   | Start Year | Start Date | End Date | Champion Division | Supporter Division | Assigned To: |
|--|------------|------------|----------|-------------------|--------------------|--------------|
| Ensure budget processes lines up with the strategic plan by creating a SOP | FY26       | 7/1/25     | 7/2/26   | Finance           | ALL                | Nicole Snell |

**ADDITIONAL NOTES**

# Be A Good Neighbor

| OBJECTIVE (BGN #1)   |            |            |          |                    |                    |              |
|--|------------|------------|----------|--------------------|--------------------|--------------|
| Prepare for infrastructure resilience                        |            |            |          |                    |                    |              |
| STRATEGY (BGN #1.1)  |            |            |          |                    |                    |              |
| Reduce waste and negative environmental impact on our region |            |            |          |                    |                    |              |
| KEY PERFORMANCE INDICATORS (KPIs)                            |            |            |          |                    |                    |              |
| # of projects completed with renewable sources               |            |            |          |                    |                    |              |
| ACTION ITEMS   TASKS   | Start Year | Start Date | End Date | Champion Division  | Supporter Division | Assigned To: |
| Transition to 100% renewable electricity sources by 2030     | FY26       | 7/1/25     | 6/30/30  | Strategy & Finance | Legal, AIS         | Ryan Warsing |
| ADDITIONAL NOTES   |            |            |          |                    |                    |              |

YEAR 1 (FY26) ESTABLISH THE FOUNDATION

**OBJECTIVE (BGN #2)**

Ensure service and processes are fair and balanced

**STRATEGY (BGN 2.1.)**

Evaluate capital investments and increase capital improvement budget to ensure it is fair and balanced

**KEY PERFORMANCE INDICATORS (KPIs)**

# of new funding sources

| ACTION ITEMS   TASKS                        | Start Year | Start Date | End Date | Champion Division | Supporter Division     | Assigned To:                 |
|---|------------|------------|----------|-------------------|------------------------|------------------------------|
| Create a rubric for scoring capital project | FY26       | 7/1/25     | 7/2/26   | Finance           | Planning & Engineering | Greg O'Hara & Amy Silbermann |

**ADDITIONAL NOTES**

# SUPPORTER

Section

## Create Efficiency & Accountability

| OBJECTIVE (CEA #2)  |            |            |                  |                   |                    |              |
|---|------------|------------|------------------|-------------------|--------------------|--------------|
| Implement operational efficiencies  |            |            |                  |                   |                    |              |
| STRATEGY (CEA 2.3)  |            |            |                  |                   |                    |              |
| Bundle capital projects to improve efficiency and minimize disruptions to customers |            |            |                  |                   |                    |              |
| KEY PERFORMANCE INDICATORS (KPIs)   |            |            |                  |                   |                    |              |
| # of project bundled - or what efficiencies have we accomplished                    |            |            |                  |                   |                    |              |
| ACTION ITEMS   TASKS  | Start Year | Start Date | End Date         | Champion Division | Supporter Division | Assigned To: |
| Bundle capital projects to improve efficiency and minimize disruptions to customers | FY26       | 7/1/25     | 7/2/26 - Ongoing | Development       | Finance            | Greg O'Hara  |
| ADDITIONAL NOTES  |            |            |                  |                   |                    |              |

## Grow Ridership

| OBJECTIVE (GR #2)  |            |            |          |                        |                        |              |
|--|------------|------------|----------|------------------------|------------------------|--------------|
| Expand access to service   |            |            |          |                        |                        |              |
| STRATEGY (GR #2.2)   |            |            |          |                        |                        |              |
| Address key operational space needs                              |            |            |          |                        |                        |              |
| KEY PERFORMANCE INDICATORS (KPIs)                                |            |            |          |                        |                        |              |
| TBA  |            |            |          |                        |                        |              |
| Action Items   Tasks   | Start Year | Start Date | End Date | Champion Division      | Supporter Division     | Assigned To: |
| Complete Facilities Master Plan and Park and Ride Strategic Plan | FY26       | Started    | 11/1/25  | Development & Strategy | Finance, Legal & Comms | Seth Davis   |
| ADDITIONAL NOTES   |            |            |          |                        |                        |              |

### OBJECTIVE (GR #3)

Develop and build on existing partnerships in the community

### STRATEGY (GR #3.1)

Partner with external stakeholders to increase transit-supportive policies

### KEY PERFORMANCE INDICATORS (KPIs)

Comp plan(s) completion & # of transit supportive policies

| ACTION ITEMS   TASKS   | Start Year | Start Date | End Date    | Champion Division      | Supporter Division     | Assigned To:                |
|--|------------|------------|-------------|------------------------|------------------------|-----------------------------|
| Advocate for transit-supportive development across the region, working with partners to proactively influence important land-use and development decisions where appropriate | FY26       | Started    | 7/2/26 - 28 | Development & Strategy | Finance, Legal & Comms | Derek Dauphin & Moira Egler |

### ADDITIONAL NOTES

# Support Our Workforce

| OBJECTIVE (SOW #2)  |            |            |          |                        |                        |                   |
|---|------------|------------|----------|------------------------|------------------------|-------------------|
| Enhance workforce skills and adaptability   |            |            |          |                        |                        |                   |
| STRATEGY (SOW #2.1)   |            |            |          |                        |                        |                   |
| Enhance succession planning programs  |            |            |          |                        |                        |                   |
| KEY PERFORMANCE INDICATORS (KPIs)   |            |            |          |                        |                        |                   |
| TBA   |            |            |          |                        |                        |                   |
| ACTION ITEMS   TASKS  | Start Year | Start Date | End Date | Champion Division      | Supporter Division     | Assigned To:      |
| Create a job shadow program whereby non-rep can volunteer or shadow all divisions | FY26       | Started    | 7/2/26   | Development & Strategy | Finance, Legal & Comms | Danielle Jacobson |
| ADDITIONAL NOTES  |            |            |          |                        |                        |                   |
|   |            |            |          |                        |                        |                   |