



WCT System Performance Review

December 10, 2013

## City of Washington Transit Performance Report

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## AGENCY PROFILE

<b>Agency Name</b>	<b>Washington City Transit (d.b.a. WCT or City Transit)</b>	
<b>Year Founded</b>	<b>1989</b>	
<b>Reporting Fiscal Year End (FYE)</b>	<b>2012</b>	
<b>Service Area (square miles) *</b>	<b>33</b>	
<b>Service Area Population *</b>	<b>61,634</b>	
<b>Type of Service Provided</b>	<b>Fixed-Route Bus</b>	<b>ADA Demand Response</b>
<b>Vehicles Operated in Maximum Service**</b>	5	2
<b>Annual Revenue Miles of Service**</b>	174,021	19,226
<b>Annual Revenue Hours of Service**</b>	11,438	2,175
<b>Annual Total Passenger Trips**</b>	40,760	4,799
<b>Annual Total Senior Lottery Trips**</b>	12,636	0
<b>Employees (full-time/part-time)**</b>	Subcontracted	
<b>Total Annual Operating Cost**</b>	\$903,392	\$207,876
<b>Total Annual Operating Revenues**</b>	\$73,512	\$8,398
<b>Total Annual Operating Revenue / Total Annual Operating Cost</b>	8.1%	4.0%
<b>Administrative Cost / Total Operating Cost</b>	22.8%	9.8%
<b>Operating Cost / Revenue Mile</b>	\$5.19	\$10.81
<b>Operating Cost / Revenue Hour</b>	\$78.98	\$95.58
<b>Passengers / Revenue Hour</b>	3.56	2.21
<b>Total Annual Operating Revenue / Revenue Hour</b>	\$6.43	\$3.86
<b>Operating Cost / Passenger</b>	\$22.16	\$43.32

\*Source: NTD FYE 2011

\*\*Source: dotGrants FYE 2012

## EXECUTIVE SUMMARY

In July 2007 the Pennsylvania Legislature passed Act 44, establishing a framework for a PennDOT driven transit agency performance review process. The purpose of a review is to assess efficiency and effectiveness of service, financial stability, and general management/business practices. The assessment makes transit agencies aware of improvement opportunities and identifies best practices that can be shared with other transit agencies.

The Act 44 transit performance review of Washington City Transit (d.b.a. WCT) was conducted in June 2013. The performance review focused on fixed-route urban bus. This report addresses Act 44 established performance criteria specifically related to fixed-route bus services – WCT trends and a comparison of WCT to peers, targets for future performance (performance reviews are conducted on a five-year cycle), and opportunities for improvement which should assist WCT in meeting the future targets. This report also addresses the management and general efficiency and effectiveness of services.

After receipt of this performance review report, WCT will develop an action plan which identifies the steps WCT will take to meet the agreed to Act 44 performance criteria targets by FY 2017-18. The general goals are to maximize efficiency and promote cost savings, improved service quality, and increased ridership and revenue. The action plan should focus on the most critical areas for the agency, as prioritized by WCT management and its governing board.

A draft action plan is due to the Department within 60 days of receipt of this report. PennDOT will work with WCT to agree on a plan which requires WCT City Commission approval to be submitted as the final action plan. WCT must report at least quarterly to the governing body and PennDOT on the progress of the action plan, identifying actions taken to date, and actions to be implemented. WCT's success will be measured in part on meeting performance targets established through this review (see *Five-Year Performance Targets*, p. vii).

### ACT 44 PERFORMANCE DETERMINATION

Act 44 performance factors were analyzed to quantify WCT's fixed-route bus performance in comparison to its peer agencies in FY 2010-11 and over a five year trend period from FY 2005-06 to FY 2010-11 (the most recent NTD data available at the time of the peer selection). Peers were selected through an analytical process and were agreed to in advance by WCT.

A transit agency's performance can fall into two categories: "In Compliance" or "At Risk." The following criteria are used to make the determination:

- "At Risk" if more costly than one standard deviation **above** the peer group average in –
  - Single-year and five-year trend for Operating Cost / Revenue Vehicle Hour
  - Single-year and five-year trend for Operating Cost / Passenger
- "At Risk" if worse than one standard deviation **below** the peer group average in –
  - Single-year and five-year trend for Passengers / Revenue Vehicle Hour
  - Single-year and five-year trend for Operating Revenue / Revenue Vehicle Hour

An analysis of the eight key criteria mandated by Act 44 was conducted and **it was determined that WCT is “In Compliance” for five of the eight criteria and “At Risk” for three.** The peer comparison process as applied to Act 44 criteria (below, in bold typeface) revealed the following:

### ***In Compliance***

1. **FYE 2011 operating cost / revenue vehicle hour** ranks sixth best of the 13 transit agencies in the peer group and is better than the peer group average.
2. The **five-year trend for operating cost / revenue vehicle hour** is the sixth lowest rate of cost increase in the peer group is only slightly worse than the peer group average.
3. **FYE 2011 operating revenue / revenue vehicle hour** ranks 10<sup>th</sup> out of 13 peers and is about half that of the peer group average.
4. The **five-year trend for operating revenue / revenue vehicle hour** ranks 11<sup>th</sup> out of 13 and is declining at about three times that of the peer group average.
5. The **five-year trend for operating cost / passenger** is the third worse of the peer group average ranking 11<sup>th</sup> of the 13 peers. This is largely attributable to declines in ridership while costs have increased.

### ***At Risk***

1. **FYE 2011 passengers / revenue vehicle hour** ranks as the worst of the 13 transit agencies in the peer group.
2. The **five-year trend of passengers / revenue vehicle hour** ranks worst of the 13 transit agencies in the peer group.
3. **FYE 2011 operating cost / passenger** ranks worst of 13 and is largely attributable to low ridership.

A summary of the specific Act 44 measures and their values are presented in the following table.

<b>Performance Criteria</b>	<b>Fiscal Year End</b>	<b>Determination</b>	<b>Rank (of 13)</b>	<b>Comparison to Peer Avg.</b>	<b>Value</b>	<b>Peer Average</b>
<b>Passengers / Revenue Hour</b>	2011	<b>At Risk</b>	13	Worse	3.59	10.44
	Trend	<b>At Risk</b>	13	Worse	-3.71%	-0.21%
<b>Operating Cost / Revenue Hour</b>	2011	<b>In Compliance</b>	6	Better	\$74.59	\$76.27
	Trend	<b>In Compliance</b>	6	Worse	1.72%	1.11%
<b>Operating Revenue / Revenue Hour</b>	2011	<b>In Compliance</b>	10	Worse	\$5.65	\$7.82
	Trend	<b>In Compliance</b>	11	Worse	-7.62%	-2.36%
<b>Operating Cost / Passenger</b>	2011	<b>At Risk</b>	13	Worse	\$20.79	\$8.67
	Trend	<b>In Compliance</b>	11	Worse	5.64%	1.43%

## GENERAL FINDINGS

In accordance with Act 44, findings are indicated as “opportunities for improvement” or “best practices.” Improvement opportunities identify tasks that may be undertaken to increase the efficiency, effectiveness, and/or quality of service of the agency. Best practices are current practices that enhance the efficiency, effectiveness, and/or quality of service of WCT and may be shared with other agencies as techniques for improvement. Major themes are indicated below; detailed recommendations on how these and more detailed issues identified should be addressed are found in the body of the report.

### **OPPORTUNITIES FOR IMPROVEMENT TO ADDRESS IN PART 1 OF THE ACTION PLAN (SEE P. 31)**

1. **Establish a Formal Governance and Oversight Structure-** The City of Washington contracts for the provision of public transportation services, including facilities, maintenance and drivers. WCT is supposed to provide management oversight to the Contractor, but the transit coordinator is also a contracted position, for which there are no formal expectations.
2. **Improve Oversight of Operations-** Since WCT does not directly operate service, it does not oversee the day-to-day operations of its service providers. As such, there is a need for assurances that services provided in the City’s name meet acceptable standards. WCT should establish formal oversight procedures that can readily identify where service is not meeting expectations so that shortcomings can be addressed by both parties.
3. **Develop Performance Targets for All Key Agency Functions-** The City of Washington should develop a formal set of performance targets and measure where current service is in relation to the targets. Then, if necessary, WCT should develop a performance enhancement strategy for all key agency functions.<sup>1</sup> Performance measures are objective indicators of different activities of the agency that can be used to strengthen management decision making, achieve results, and support accountability. Performance targets are stipulated under Act 44, and are intended to motivate the organization to improve performance. These targets have not been set for most agency or contractor functions. This recommendation is consistent with MAP-21 and general trends in the transit industry where performance-based evaluation is rapidly becoming the norm.

## FINANCIAL REVIEW

For the FYE 2008 to FYE 2012 period, local governments and GG&C have contributed to help cover WCT’s operational funding requirements. WCT has used most of those amounts in any given year to balance its budget and comply with state requirements. Farebox revenues as a percentage of operating cost remain much lower than seen in other transit systems in the Commonwealth. Nevertheless, WCT has been able to build up adequate cash reserves to cover unexpected operational expenses and any funding irregularities. The City should continue to take appropriate actions such as obtaining additional local match, controlling costs and increasing carryover reserves to continuously improve WCT’s financial health.

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<sup>1</sup> See Page 19 for a list of key functional areas.

## FIVE-YEAR PERFORMANCE TARGETS

This transit agency performance report outlines areas where improvements may be made to enhance the overall quality, effectiveness, and efficiency of the transit system. As a result of the performance review, a set of “performance targets” has been established and detailed on page 16. These performance targets are required to comply with Act 44 and represent minimum performance levels that WCT should work to achieve for each Act 44 performance criteria during the next review cycle (i.e., five years from the date of this report). These performance targets were created using historical data analyzed during the five-year trend analysis as well as the most current audited “dotGrants” information available (FYE 2012). Standards were extrapolated to FYE 2018 and are designed to be aggressive, yet achievable. They are summarized as follows:

Performance Criteria	Fiscal Year End (FYE)				Target Annual Increase
	2010	2011	2012	2018 Target	
Passengers / Revenue Hour	3.53	3.59	3.56	4.26	3.0%
Operating Cost / Revenue Hour	\$69.76	\$74.59	\$78.98	\$94.31	3.0%
Operating Revenue / Revenue Hour	\$5.40	\$5.65	\$6.43	\$7.67	3.0%
Operating Cost / Passenger	\$19.74	\$20.79	\$22.16	\$22.16	0.0%

## NEXT STEPS

Upon final transmission of the performance review report, Act 44 regulations stipulate that WCT “...shall develop and submit to the Department within 90 days...a strategic action plan that focuses on continually improving the system to achieve the established minimum performance targets.” The action plan should outline corrective action that will be taken to address “Opportunities for Improvement” – as prioritized by the WCT oversight board and management.

Functional area “opportunities for improvement” are areas in which improvement may result in cost savings, improved service quality, and ridership and/or revenue increases. Improvements in these areas will assist in the achievement of the performance targets by directly addressing areas that affect Act 44 performance criteria. It should be noted that many functional areas are interrelated, and the action plan should establish a comprehensive program that focuses on actions that address the larger issues within WCT.

The template for the Action Plan has been provided as an Appendix to this report (pp. 31-35). This template includes three parts:

- **Part 1- Executive Summary Findings Template** (p. 31) is where WCT should address its proposed actions to address the “*Opportunities for Improvement*” findings in the Executive Summary (pp. vi-vi).
- **Part 2- Act 44 Performance Metric Findings Templates** (pp. 32-34) is where WCT should address its proposed actions to address the “*Opportunities for Improvement*” findings that directly affect the Act 44 performance metrics (pp.19-22).
- **Part 3- Other Actions to Improve Overall Performance Template** (p. 35) should be used to address the “*Other Findings that Impact Overall Agency Performance*” identified starting on p. 22.

Management should use the format provided in Appendix A to develop its proposed draft Action Plan.

It should be noted that specific actions identified may partially address the broadly noted opportunities for improvement found in the **“General Findings”** (pp. vi-vi). Some actions will be quickly implementable while others may take several discrete steps to achieve over a longer period of time. The template provides a simple-to-follow order of key findings. WCT must select, prioritize and schedule its intended actions using the template.

WCT must submit the proposed draft Action Plan using the format provided in **Appendix A: Action Plan Improvement Strategies** to the Department for comment. The proposed draft Action Plan may then be revised based on consultation between WCT management and the Department. The finalized Action Plan then must be approved by the City Commission and formally submitted to PennDOT. Subsequently, WCT management must report at least quarterly to the City Commission and the Department on progress towards accomplishing the Action Plan including actions taken in the previous quarter and actions planned for coming quarter(s).

# INTRODUCTION

## PURPOSE

In July 2007 the Pennsylvania Legislature passed Act 44, establishing a framework for a performance review process for all public transportation agencies receiving state financial assistance. This report documents the findings and observations of the public transportation agency performance review for Washington City Transit (d.b.a. WCT).

Performance reviews are conducted to emphasize the importance of good management, proactive planning, and efficient service, which maximize the effectiveness of federal, state, and local funding. In addition, other important goals of the review process and this document are to:

- Find, document, and publicize best practices that contribute to efficient, high-quality public transit service delivery, encouraging other Pennsylvania transit agencies to apply them as appropriate.
- Provide guidance to transit agencies on cost-effective ways to improve efficiency, effectiveness, and quality of service.
- Identify and document legal, institutional, or other barriers beyond the control of the transit agency that may impede efficiency in service delivery and management.

## PERFORMANCE REVIEW PROCESS

In June 2013, an Act 44 mandated performance review was initiated for WCT. PennDOT, with consultant assistance, conducted the review according to the steps outlined below:

1. Initial notification of performance review selection and transmission of document request
  - Review of available data and requests for what should be “off-the-shelf” information that may not be publicly available.
2. Peer selection
  - A set of peers used for comparative analysis was jointly agreed upon by WCT and PennDOT.
3. Act 44 performance criteria analysis
  - Performance criteria mandated by Act 44 were analyzed for the peer group.
  - Additional performance criteria were calculated for informative purposes to help guide the on-site review.
4. On-site review
  - On-site review was conducted on June 5 and June 6, 2013.
  - An interview guide customized for WCT’s service was used for the review.
  - Topics covered during the interview process included:
    - Governance
    - Contracted Service
    - Management
    - Human/Labor Relations
    - Finance
    - Procurement
    - Operations and Scheduling
    - Maintenance
    - Safety and Security
    - Customer Service
    - Information Technology
    - Capital Programming
    - Marketing and Public Relations
    - Planning

## AGENCY DESCRIPTION

The City of Washington began subsidizing fixed route bus transit operations in the late 1970's. In 1989, the City started service with GG&C (a local contractor) and the service since has been dubbed "City Transit" or WCT. WCT receives local financial support from the City of Washington and, in coming years, from South Strabane Township. Washington City Transit is governed by the City of Washington's Mayor and Council Members.

WCT provides two types of fixed-route service. Local service within the City of Washington and nearby communities is branded as the "Hopper." Commuter service to Pittsburgh is branded as "Metro." Hopper and Metro services are operated Monday through Saturday.

The City owns all fixed-route public transit vehicles and related equipment and administers the public transit services using independent contractors. These independent contractors report directly to the City and oversee WCT's daily administration. The City subcontracts with two independent operators, GG&C and Washington Rides, to provide both fixed-route and ADA complimentary paratransit services respectively.

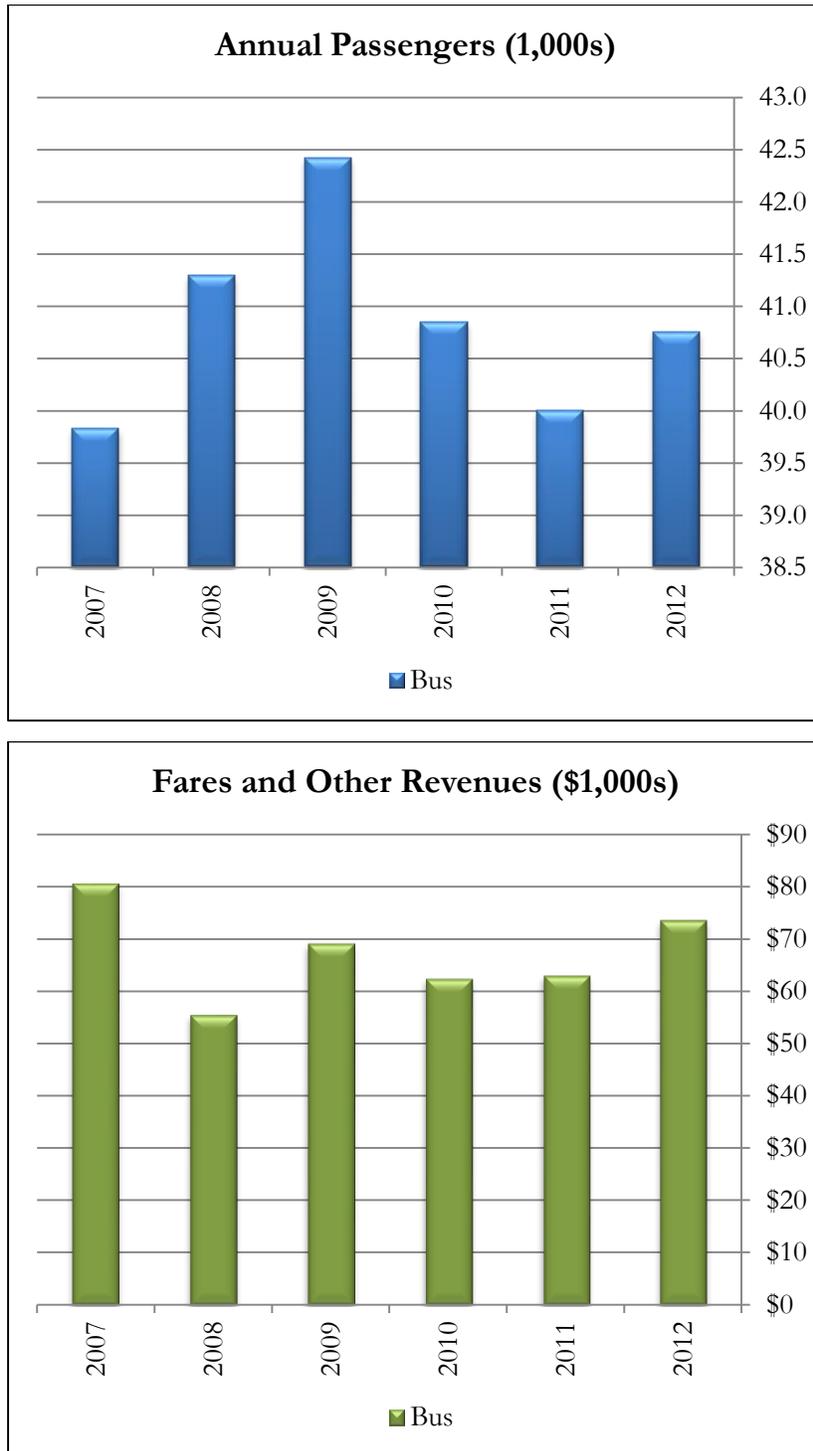
**Exhibit 1** and **Exhibit 2** present fixed-route bus statistics for WCT derived from PennDOT dotGrants Legacy Reports. Fixed-route bus service includes both the local "Hopper" service and the "Metro" commuter service.

Important observations evident from the trends in demand, revenues, and operating characteristics for the Legacy reporting period of Fiscal Year End (FYE) 2007 through 2012 are as follows:

1. WCT's annual fixed-route ridership is very low and hovers between 40,000 and 42,000 passengers per year. In 2012, ridership decreased from previous highs by about 2.5%. To some extent, this reflects the mix of commuter and local service where fewer passengers board commuter service per revenue hour of operation.
2. WCT's operating revenue is relatively high given its relatively low ridership. This is because the one-way commuter fares to Pittsburgh can be up to \$5.00 per trip. In-town fares are \$1.50. The higher fares and other revenues in 2007 reflect senior fare subsidies which were reported as farebox revenue in 2007 and prior years.
3. Revenue hours of service increased by more than 10% between 2007 and 2012. This was largely due to an expansion of commuter service into Pittsburgh.
4. Total operating costs increased by about 25% between 2007 and 2012 going from about \$723,700 to \$903,400 annually.

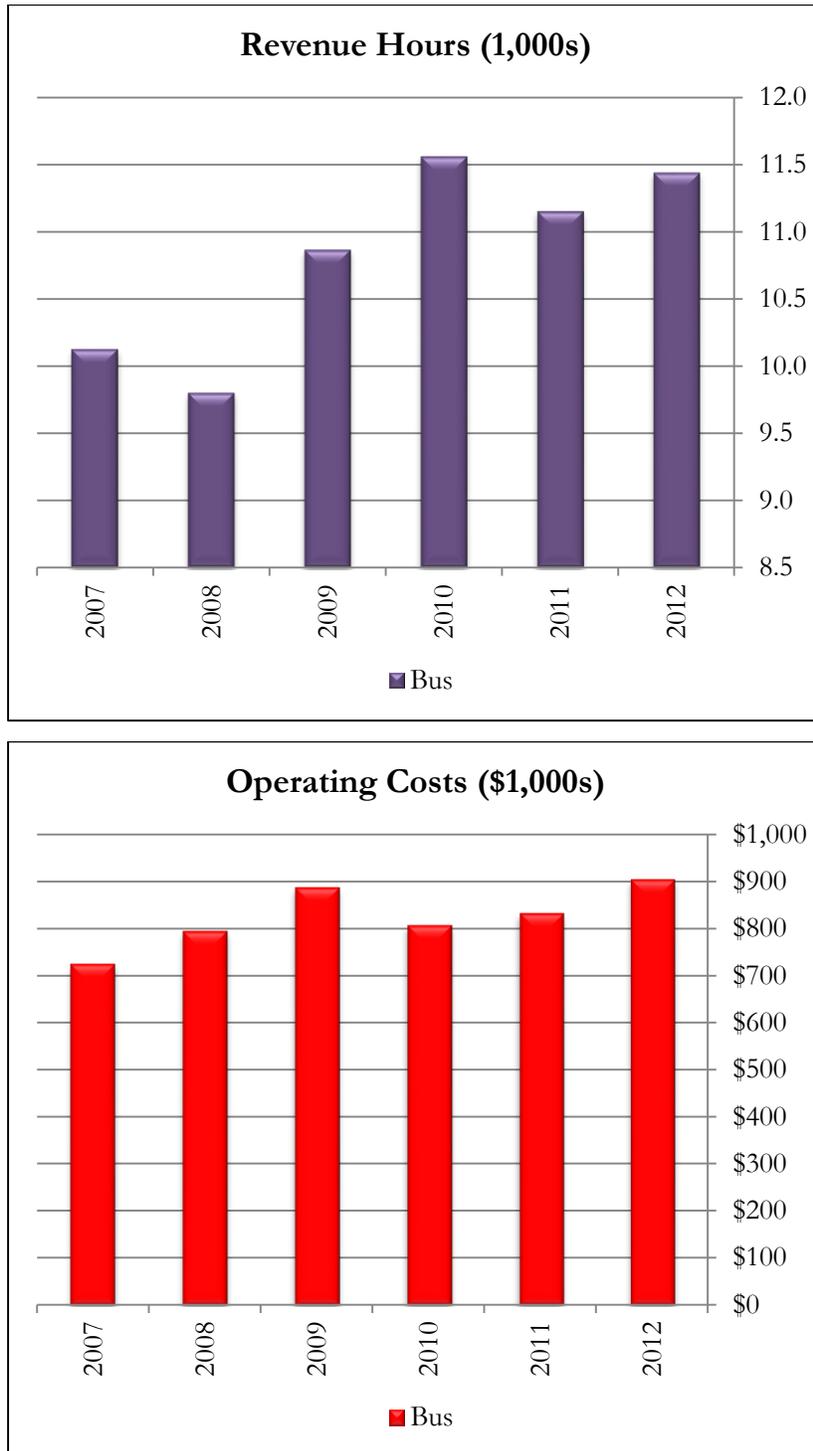
The conclusions that can be drawn from the combination of Exhibits 1 through 4 are that: added services have increased costs greater than the increase in revenue received from higher fares; and, additional service did not result in substantial ridership increases through fiscal year end 2012.

Exhibit 1: WCT Fixed-Route Passengers and Revenues FYE 2007-2012



Source: PennDOT Legacy Reporting System (dotGrants)

Exhibit 2: WCT Fixed-Route Revenue Hours of Service and Operating Costs FYE 2007-2012



Source: PennDOT Legacy Reporting System (dotGrants)

## ACT 44 PERFORMANCE ASSESSMENT

Act 44 establishes the framework for a performance review process as follows:

*“The Department may conduct performance reviews of an award recipient under this section to determine the effectiveness of the financial assistance. Reviews shall be conducted at regular intervals as established by the Department in consultation with the management of the award recipient. After completion of a review, the Department shall issue a report that: highlights exceptional performance and identifies any problems that need to be resolved; assesses performance, efficiency, and effectiveness of the use of the financial assistance; makes recommendations on follow-up actions required to remedy any problem identified...”<sup>2</sup>*

The law sets forth the following performance criteria to be used to satisfy its objectives<sup>3</sup>:

- Passengers / revenue vehicle hour;
- Operating cost / revenue vehicle hour;
- Operating revenue / revenue vehicle hour;
- Operating cost / passenger; and,
- Other items as the Department may establish.

Performance criteria are to be compared for both the system being reviewed and for a group of five or more peers by mode, determined by considering the following: <sup>4</sup>

- Revenue vehicle hours (car hours for rail and fixed guideway);
- Revenue vehicle miles (car miles for rail and fixed guideway);
- Number of peak vehicles; and,
- Service area population.

The law further instructs PennDOT to prepare a five-year trend analysis for the local transportation organization under review and the peer systems by performance criteria and by mode, and make a determination of “In Compliance” or “At Risk” status based on findings.

### PEER SYSTEM SELECTION

A list of tentative peers was submitted to WCT management for review and comment. After discussions were complete, the following 12 peer systems, in addition to WCT, were included in subsequent analyses for peer comparison purposes:

1. Fond du Lac Area Transit (Fond du Lac, WI)
2. City of Turlock (Turlock, CA)
3. City of Petaluma (Petaluma, CA)
4. City of Loveland Transit (Loveland, CO)
5. East Chicago Transit (East Chicago, IN)
6. Port Arthur Transit (Port Arthur, TX)
7. City of Middletown - Middletown Transit System (Middletown, OH)

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<sup>2</sup> Title 74 Pa. C.S.A. §1513 (e)

<sup>3</sup> Title 74 Pa. C.S.A. §1513 (f)

<sup>4</sup> 67 Pa Code Chapter 427, Annex A . §427.12(d)(1)(i), Jan 2011.

8. Targhee Regional Public Transit Authority (Idaho Falls, ID)
9. Brunswick Transit Alternative (Brunswick, OH)
10. Borough of Pottstown - Pottstown Area Rapid Transit (Pottstown, PA)
11. DUFASST (Dubois, PA)
12. Butler Transit Authority (Butler, PA)

## ACT 44 FIXED-ROUTE COMPARISONS AND FINDINGS

Comparison of WCT with the selected peer systems was completed using NTD-reported data and dotGrants Legacy statistics. Due to its consistency and availability<sup>5</sup> for comparable systems, the NTD FYE 2011 Reporting Year database was selected as the primary data source used in the calculation of the five-year trend Act 44 metrics:

- Passengers / revenue vehicle hour
- Operating cost / revenue vehicle hour
- Operating revenue / revenue vehicle hour
- Operating cost / passenger

The definition of the variables used in the calculations is as follows:

- *Passengers*: Annual unlinked passenger boardings by mode for both directly-operated and purchased transportation.
- *Operating Costs*: Annual operating cost of services provided (excluding capital costs) by mode for both directly-operated and purchased transportation.
- *Operating Revenue*: Total annual operating revenue generated from farebox and other non-state, non-federal sources by mode for both directly-operated and purchased transportation.
- *Revenue Vehicle Hours*: The total annual number of “in-service” hours of service provided by mode for both directly-operated and purchased transportation.
- *Average*: Unweighted linear average of all values being measured across all peer transit agencies, including WCT.
- *Standard Deviation*: Standard deviation of all values being measured across all peer transit agencies, including WCT.

Act 44 stipulates that metrics fall into two categories: “In Compliance” and “At Risk.” The following criteria are used to make the determination:

- “At Risk” if more costly than one standard deviation **above** the peer average in:
  - The single-year or five-year trend for Operating Cost / Revenue Vehicle Hour
  - The single-year or five-year trend for Operating Cost / Passenger
- “At Risk” if performing worse than one standard deviation **below** the peer group average in:
  - The single-year or five-year trend for Passengers / Revenue Vehicle Hour
  - The single-year or five-year trend for Operating Revenue / Revenue Vehicle Hour

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<sup>5</sup> NTD data is available for almost every urbanized area transit system in the United States. The latest data available at the time of the Peer Selection was for Fiscal Year End (FYE) 2011.

If an agency is within these limits, it is considered “In Compliance.” However, if an agency is “At Risk” for any given criterion, it must very closely monitor the effectiveness of remedial strategies identified in the action plan so as to achieve “Compliance” prior to the next performance review<sup>6</sup>.

Detailed results of the WCT analysis and peer comparison are presented in the **Fixed-Route Bus Performance Comparisons** section below and can be summarized as follows:

### Exhibit 3: Act 44 Compliance Summary

Metric	FYE 2011 Single Year	Five-Year Trend
Passengers / Revenue Hour	<b>At Risk</b>	<b>At Risk</b>
Operating Cost / Revenue Hour	In Compliance	In Compliance
Operating Revenue / Revenue Hour	In Compliance	In Compliance
Operating Cost / Passenger	<b>At Risk</b>	In Compliance

### FIXED-ROUTE BUS PERFORMANCE COMPARISONS

For the 12 peer systems plus WCT, NTD data were extracted and summarized for each of the required Act 44 metrics. Measures were put into histograms and tables for visual inspection, statistical analyses, and ordinal ranking purposes. The single-year results of these analyses are presented in **Exhibit 4, Exhibit 5, Exhibit 6, and Exhibit 7**. Five-year trend analyses are presented in **Exhibit 8, Exhibit 9, Exhibit 10, and Exhibit 11**.

For measures relating to passengers or operating revenue, ordinal rankings are based on a highest-to-lowest system. For measures relating to operating cost, ordinal rankings are based on a lowest-to-highest system. Thus a ranking of “1<sup>st</sup>” consistently indicates that the agency scores best amongst its peers and a ranking of “13<sup>th</sup>” indicates that it performs the poorest on any given metric.

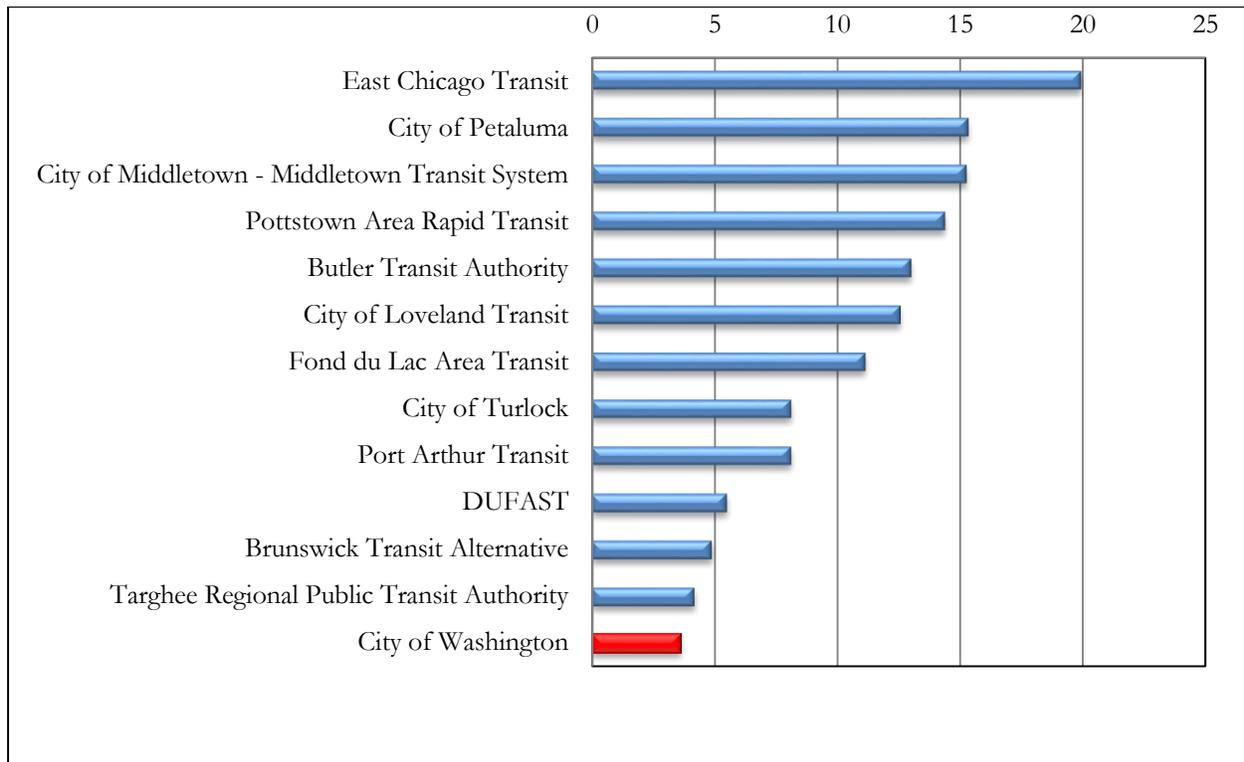
The findings presented in the exhibits can be summarized as follows:

1. WCT’s FYE 2011 passengers / revenue hour figure is the lowest of all the transit agencies in the peer group. Passengers / revenue hour have been declining at about the steepest rate of the peer group as well. Management’s efforts should focus on reversing this trend.
2. WCT’s FYE 2011 operating cost / revenue vehicle hour is slightly better than the peer group average. Operating cost / revenue hour has increased at a rate slightly above the peer group.
3. WCT’s 2011 operating revenue / revenue vehicle hour ranks as the 4<sup>th</sup> worst of the 13 peers. The trend between FYE 2006 and FYE 2011 indicates that operating revenue / revenue vehicle hour is declining at a rate much greater than that of the peers.
4. WCT has the highest FYE 2011 operating cost / passenger of the peer group. The trend of cost / passenger is about 4 times that of the peer group average. The high operating cost per passenger is largely due to very low ridership as operating costs are comparable to the peer group.

These findings provided a basis for further investigation during the on-site interviews and functional area reviews. Those findings are presented in the next section of the report.

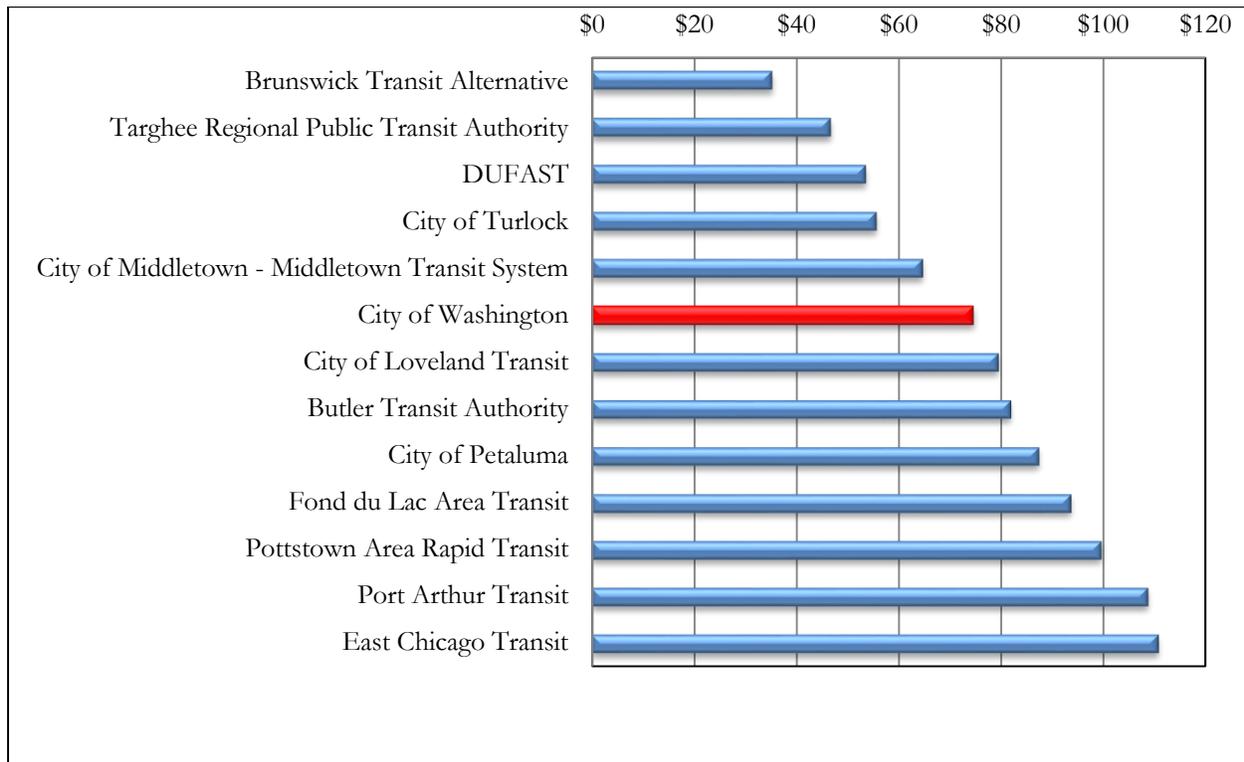
<sup>6</sup> Act 44 identifies potential financial penalties for agencies determined “At Risk” during the review process that are not subsequently determined “In Compliance” within 5 years of the original “At Risk” finding.

## Exhibit 4: Fixed-Route Passengers / Revenue Vehicle Hour FYE 2011



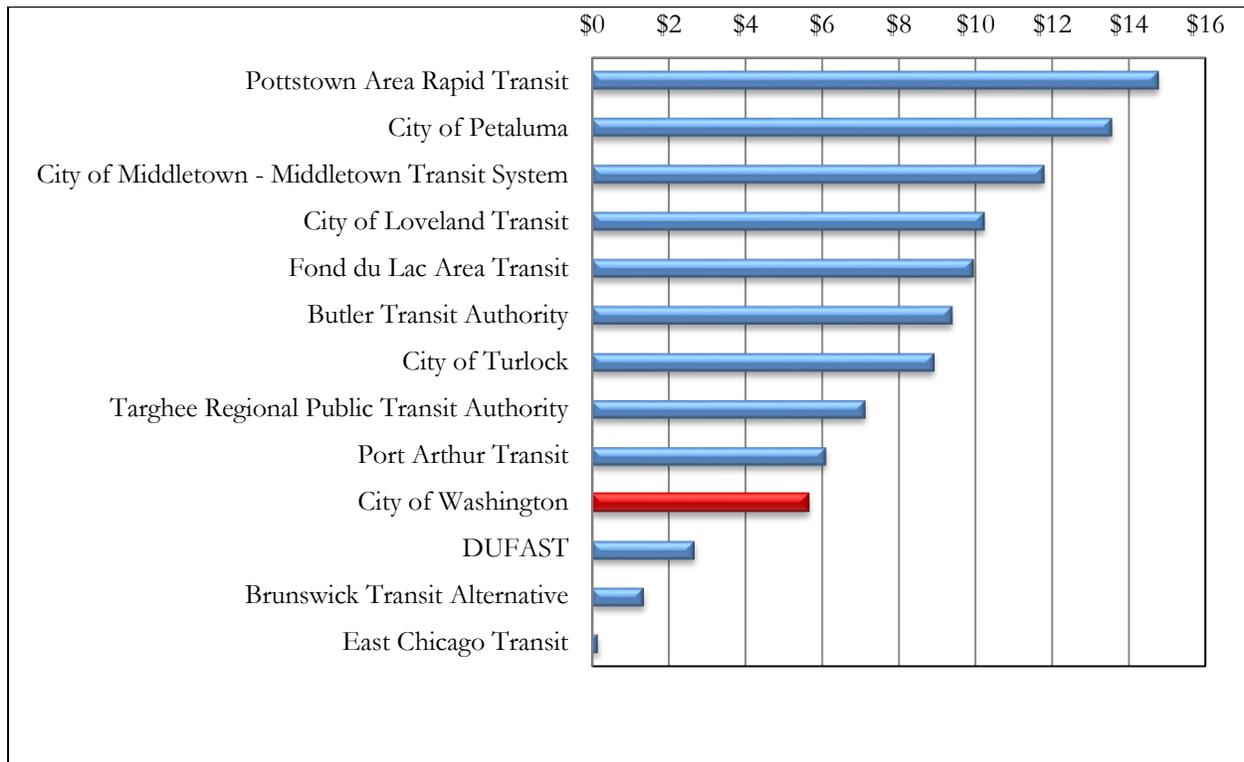
Passengers / Revenue Vehicle Hour		
System	Value	Rank
East Chicago Transit	19.88	1
City of Petaluma	15.30	2
City of Middletown - Middletown Transit System	15.22	3
Borough of Pottstown - Pottstown Area Rapid Transit	14.35	4
Butler Transit Authority	12.97	5
City of Loveland Transit	12.54	6
Fond du Lac Area Transit	11.11	7
City of Turlock	8.10	8
Port Arthur Transit	8.10	9
DUFAS	5.50	10
Brunswick Transit Alternative	4.88	11
Targhee Regional Public Transit Authority	4.18	12
<b>City of Washington</b>	<b>3.59</b>	<b>13</b>
<i>Average</i>	10.44	
<i>Standard Deviation</i>	5.12	
<i>Average - 1 Standard Deviation</i>	5.32	
<i>Average + 1 Standard Deviation</i>	15.56	
<b>Act 44 Compliance Determination</b>	<b>At Risk</b>	
<b>Better or Worse Than Peer Group Average</b>	<b>Worse</b>	

## Exhibit 5: Fixed-Route Operating Cost / Revenue Vehicle Hour FYE 2011



Operating Cost / Revenue Vehicle Hour		
System	Value	Rank
Brunswick Transit Alternative	\$35.29	1
Targhee Regional Public Transit Authority	\$46.67	2
DUFAST	\$53.56	3
City of Turlock	\$55.61	4
City of Middletown - Middletown Transit System	\$64.64	5
<b>City of Washington</b>	<b>\$74.59</b>	<b>6</b>
City of Loveland Transit	\$79.42	7
Butler Transit Authority	\$81.81	8
City of Petaluma	\$87.32	9
Fond du Lac Area Transit	\$93.62	10
Pottstown Area Rapid Transit	\$99.52	11
Port Arthur Transit	\$108.68	12
East Chicago Transit	\$110.74	13
<i>Average</i>	<i>\$76.27</i>	
<i>Standard Deviation</i>	<i>\$23.94</i>	
<i>Average – 1 Standard Deviation</i>	<i>\$52.32</i>	
<i>Average + 1 Standard Deviation</i>	<i>\$100.21</i>	
<b>Act 44 Compliance Determination</b>	<b>In Compliance</b>	
<b>Better or Worse Than Peer Group Average</b>	<b>Better</b>	

## Exhibit 6: Fixed-Route Operating Revenue / Revenue Vehicle Hour FYE 2011



Operating Revenue / Revenue Vehicle Hour		
System	Value	Rank
Pottstown Area Rapid Transit	\$14.77	1
City of Petaluma	\$13.55	2
City of Middletown - Middletown Transit System	\$11.78	3
City of Loveland Transit	\$10.22	4
Fond du Lac Area Transit*	\$9.94	5
Butler Transit Authority	\$9.38	6
City of Turlock	\$8.91	7
Targhee Regional Public Transit Authority	\$7.12	8
Port Arthur Transit	\$6.10	9
<b>City of Washington</b>	<b>\$5.65</b>	<b>10</b>
DUFAST	\$2.69	11
Brunswick Transit Alternative	\$1.37	12
East Chicago Transit	\$0.17	13
<i>Average</i>	<i>\$7.82</i>	
<i>Standard Deviation</i>	<i>\$4.52</i>	
<i>Average – 1 Standard Deviation</i>	<i>\$3.30</i>	
<i>Average + 1 Standard Deviation</i>	<i>\$12.34</i>	
<b>Act 44 Compliance Determination</b>	<b>In Compliance</b>	
<b>Better or Worse Than Peer Group Average</b>	<b>Worse</b>	

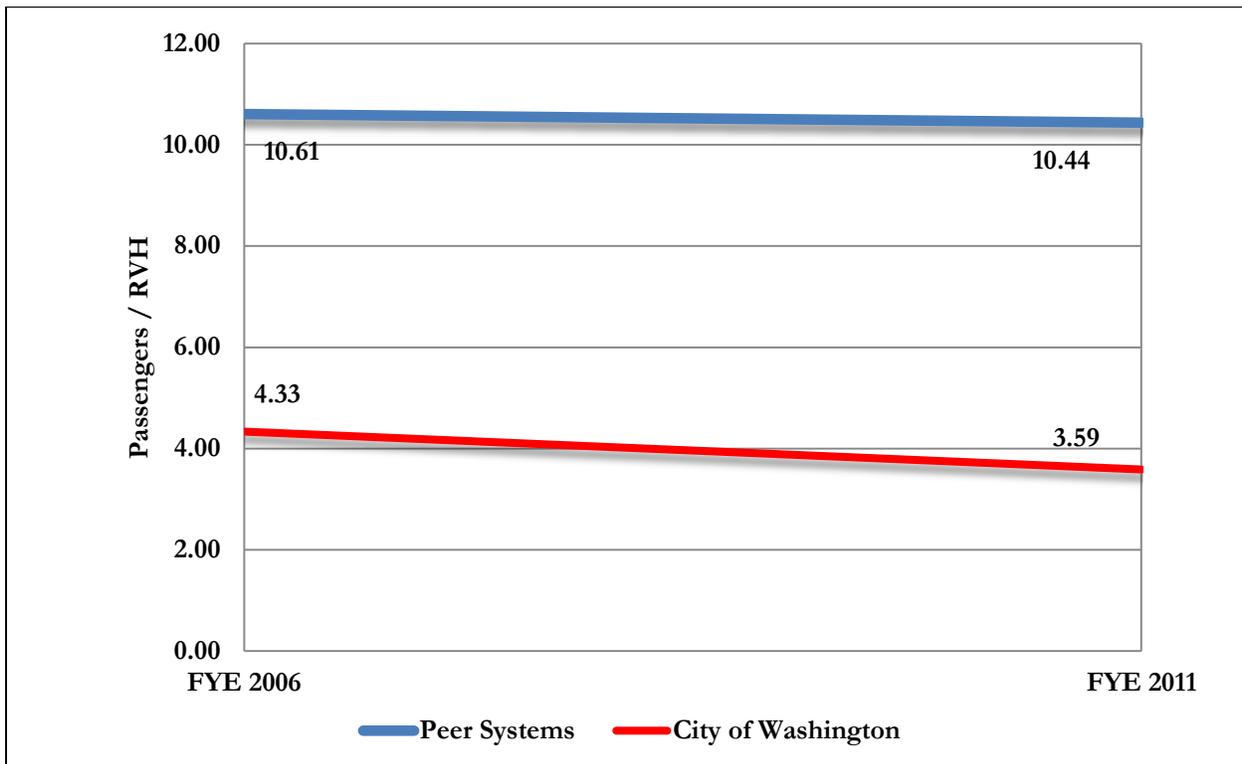
\* NTD reported “Other Revenues” were excluded from Fond du Lac Transit as the values were inconsistent with farebox revenues reported.

**Exhibit 7: Fixed-Route Operating Cost / Passenger FYE 2011**



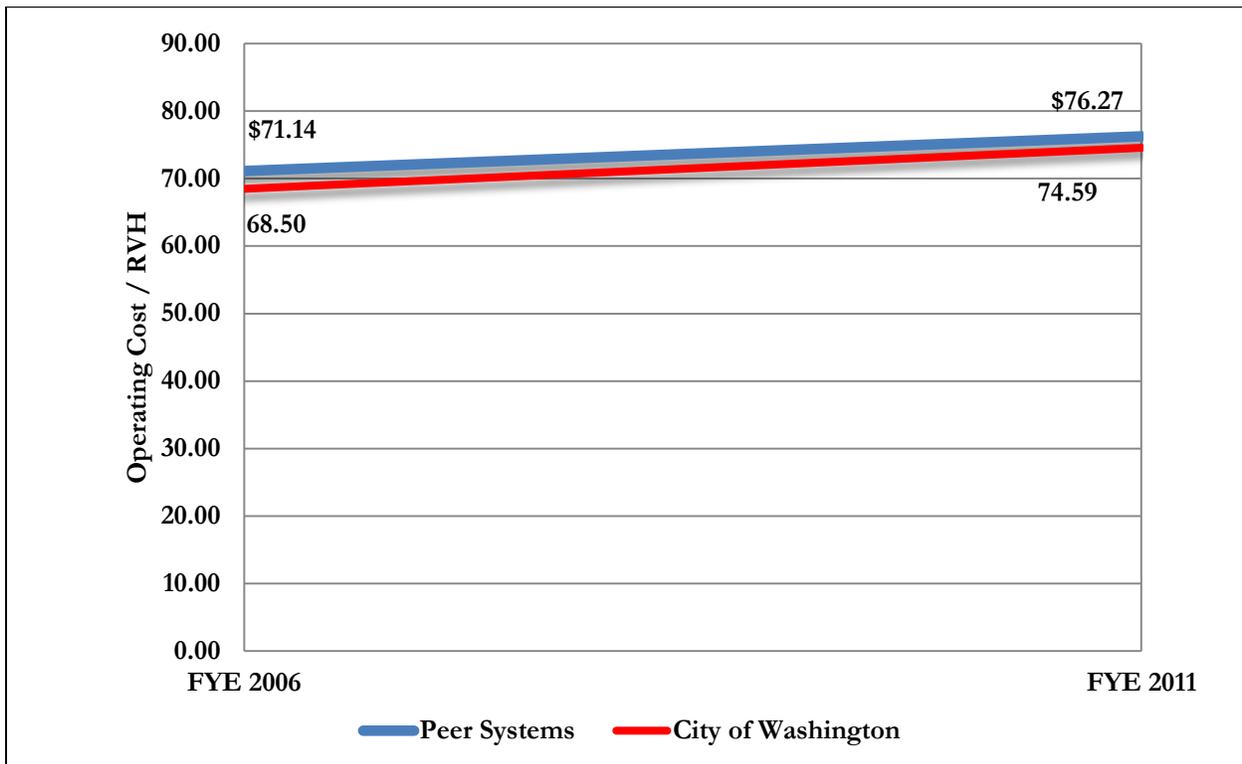
Operating Cost / Passenger		
System	Value	Rank
City of Middletown - Middletown Transit System	\$4.25	1
East Chicago Transit	\$5.57	2
City of Petaluma	\$5.71	3
Butler Transit Authority	\$6.31	4
City of Loveland Transit	\$6.33	5
City of Turlock	\$6.86	6
Pottstown Area Rapid Transit	\$6.93	7
Brunswick Transit Alternative	\$7.23	8
Fond du Lac Area Transit	\$8.43	9
DUFAST	\$9.75	10
Targhee Regional Public Transit Authority	\$11.17	11
Port Arthur Transit	\$13.42	12
<b>City of Washington</b>	<b>\$20.79</b>	<b>13</b>
<i>Average</i>	<i>\$8.67</i>	
<i>Standard Deviation</i>	<i>\$4.42</i>	
<i>Average - 1 Standard Deviation</i>	<i>\$4.25</i>	
<i>Average + 1 Standard Deviation</i>	<i>\$13.09</i>	
<b>Act 44 Compliance Determination</b>	<b>At Risk</b>	
<b>Better or Worse Than Peer Group Average</b>	<b>Worse</b>	

Exhibit 8: Fixed-Route Passengers / Revenue Vehicle Hour Trend FYE 2006-2011



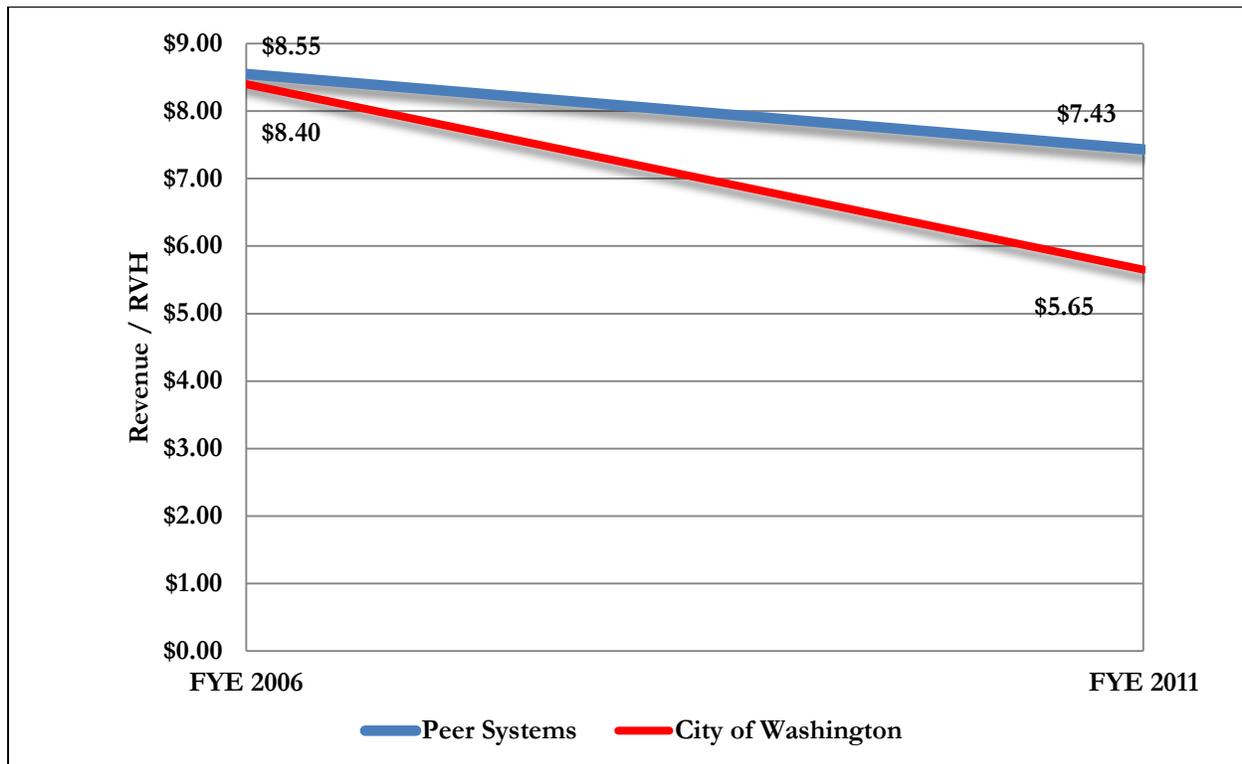
Passengers / Revenue Vehicle Hour		
System	Value	Rank
Brunswick Transit Alternative	7.17%	1
City of Petaluma	2.51%	2
Port Arthur Transit	2.31%	3
Targhee Regional Public Transit Authority	0.84%	4
Butler Transit Authority	0.55%	5
Pottstown Area Rapid Transit	0.53%	6
Fond du Lac Area Transit	-0.38%	7
DUFAST	-1.26%	8
City of Loveland Transit	-1.80%	9
City of Middletown - Middletown Transit System	-2.48%	10
City of Turlock	-3.37%	11
East Chicago Transit	-3.63%	12
<b>City of Washington</b>	<b>-3.71%</b>	<b>13</b>
<i>Average</i>	-0.21%	
<i>Standard Deviation</i>	3.07%	
<i>Average - 1 Standard Deviation</i>	-3.28%	
<i>Average + 1 Standard Deviation</i>	2.86%	
<b>Act 44 Compliance Determination</b>	<b>At Risk</b>	
<b>Better or Worse Than Peer Group Average</b>	<b>Worse</b>	

Exhibit 9: Fixed-Route Operating Cost / Revenue Vehicle Hour Trend FYE 2006-2011



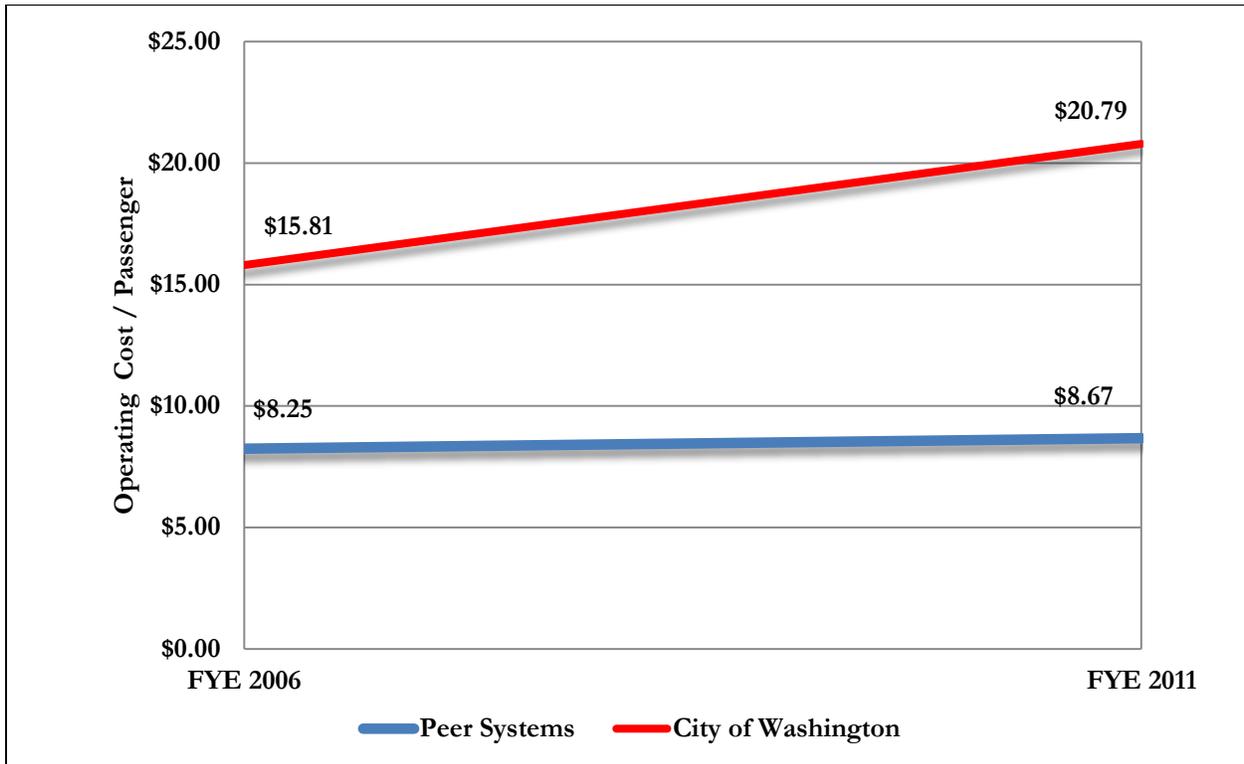
Operating Cost / Revenue Vehicle Hour		
System	Value	Rank
Brunswick Transit Alternative	-6.87%	1
East Chicago Transit	-5.01%	2
City of Petaluma	-2.69%	3
City of Turlock	-2.63%	4
DUFAST	-0.89%	5
<b>City of Washington</b>	<b>1.72%</b>	<b>6</b>
City of Middletown - Middletown Transit System	1.83%	7
Butler Transit Authority	2.72%	8
Port Arthur Transit	2.80%	9
Fond du Lac Area Transit	4.31%	10
City of Loveland Transit	4.39%	11
Pottstown Area Rapid Transit	5.15%	12
Targhee Regional Public Transit Authority	9.59%	13
<i>Average</i>	<i>1.11%</i>	
<i>Standard Deviation</i>	<i>4.56%</i>	
<i>Average - 1 Standard Deviation</i>	<i>-3.45%</i>	
<i>Average + 1 Standard Deviation</i>	<i>5.67%</i>	
<b>Act 44 Compliance Determination</b>	<b>In Compliance</b>	
<b>Better or Worse Than Peer Group Average</b>	<b>Worse</b>	

Exhibit 10: Fixed-Route Operating Revenue / Revenue Vehicle Hour Trend FYE 2006-2011



Operating Revenue / Revenue Vehicle Hour		
System	Value	Rank
City of Turlock	7.35%	1
East Chicago Transit	6.46%	2
Pottstown Area Rapid Transit	3.84%	3
City of Petaluma	2.19%	4
Brunswick Transit Alternative	1.58%	5
City of Middletown - Middletown Transit System	0.76%	6
Fond du Lac Area Transit	-1.30%	7
Port Arthur Transit	-1.59%	8
City of Loveland Transit	-5.36%	9
Butler Transit Authority	-7.05%	10
<b>City of Washington</b>	<b>-7.62%</b>	<b>11</b>
Targhee Regional Public Transit Authority	-10.79%	12
DUFAST	-15.08%	13
<i>Average</i>	<i>-2.36%</i>	
<i>Standard Deviation</i>	<i>11.19%</i>	
<i>Average - 1 Standard Deviation</i>	<i>-13.56%</i>	
<i>Average + 1 Standard Deviation</i>	<i>8.83%</i>	
<b>Act 44 Compliance Determination</b>	<b>In Compliance</b>	
<b>Better or Worse Than Peer Group Average</b>	<b>Worse</b>	

Exhibit 11: Fixed-Route Operating Cost / Passenger Trend FYE 2006-2011



Operating Cost / Passenger		
System	Value	Rank
Brunswick Transit Alternative	-13.10%	1
City of Petaluma	-5.07%	2
East Chicago Transit	-1.44%	3
DUFAST	0.37%	4
Port Arthur Transit	0.48%	5
City of Turlock	0.77%	6
Butler Transit Authority	2.16%	7
City of Middletown - Middletown Transit System	4.42%	8
Pottstown Area Rapid Transit	4.60%	9
Fond du Lac Area Transit	4.71%	10
<b>City of Washington</b>	<b>5.64%</b>	<b>11</b>
City of Loveland Transit	6.31%	12
Targhee Regional Public Transit Authority	8.68%	13
<i>Average</i>	<i>1.43%</i>	
<i>Standard Deviation</i>	<i>5.69%</i>	
<i>Average - 1 Standard Deviation</i>	<i>-4.26%</i>	
<i>Average + 1 Standard Deviation</i>	<i>7.11%</i>	
<b>Act 44 Compliance Determination</b>	<b>In Compliance</b>	
<b>Better or Worse Than Peer Group Average</b>	<b>Worse</b>	

## FIVE-YEAR FIXED-ROUTE PERFORMANCE TARGETS

Act 44 requires that PennDOT and all local transit agencies establish five-year performance targets for each of the following four core metrics:

- Passengers / Revenue Hour
- Operating Cost / Revenue Hour
- Operating Revenue / Revenue Hour
- Operating Cost / Passenger

These metrics are intended to improve both the effectiveness and efficiency of service delivery. PennDOT uses the most recent audited and agency-verified values for passengers, operating costs and operating revenues by mode as the “baseline” from which to develop the targets. Five year targets are then developed based on realistic and achievable expectations of improvement.

***Passengers / Revenue Hour*** is a measure of effectiveness of transit service. All else equal, passengers may increase due to successful marketing, customer service, improved route planning and natural growth. Declines in passengers / revenue hour can occur in spite of overall ridership increases due to the introduction of relatively inefficient service. Substantial improvements can be realized through the reduction of relatively inefficient services.

Typically PennDOT suggests a minimum targeted increase of 2% per year in passengers / revenue hour of service. This target is recommended because: it is consistent with statewide historic trends; it is achievable; and, it encourages agencies to better match service delivery with customer needs. However, because WCT has such low ridership, a more aggressive target of 3% growth per year has been established to help WCT achieve compliance on ridership for the next performance review.

***Operating Cost / Revenue Hour*** quantifies the efficiency of service delivery. To some extent, costs can be / should be managed through good governance, proactive management and effective cost containment. PennDOT suggests a target of no more than 3% per year increase in operating cost / revenue hour of service. WCT’s target has been set to rate of 3% per year due to its historical ability to contain costs and its extensive use of part-time drivers by its subcontractors. The need for additional effective oversight may also impact the transit budget.

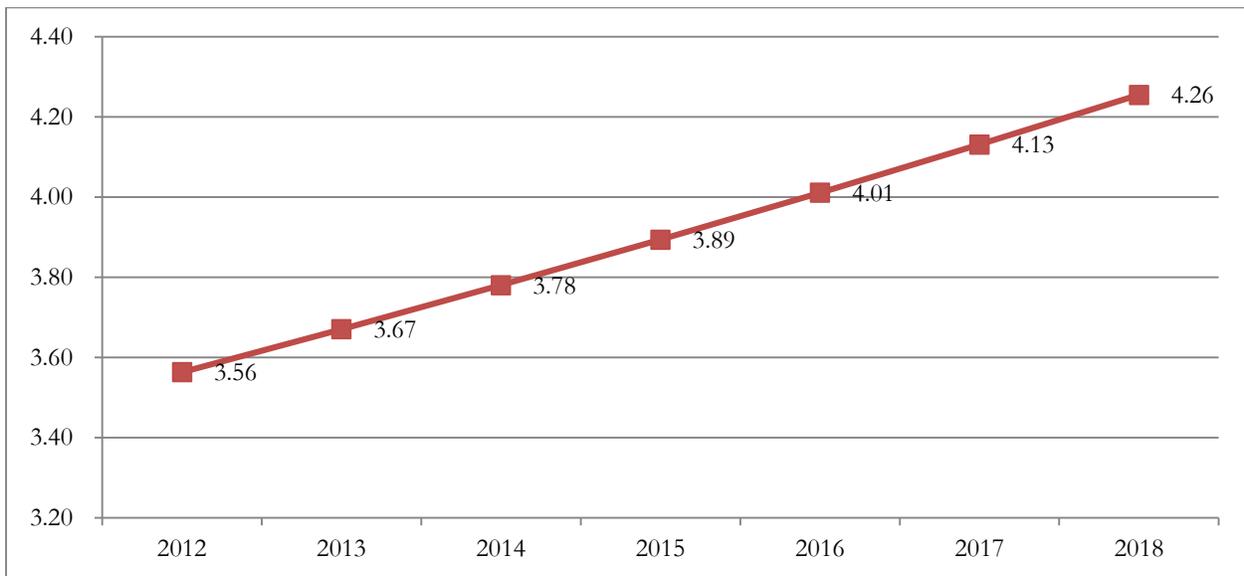
***Operating Revenue / Revenue Hour***, like operating cost / revenue hour, tries to ensure an agency remains financially solvent in the long run. Operating revenue is composed of fares and other non-subsidy revenues. The target is set to be the same as passenger / revenue hour (3%) to make sure that revenue increases keep pace or exceed cost increases.

***Operating Cost / Passenger*** captures both the efficiency and effectiveness of transit service delivery. The target is set to be equal to the difference between maximum operating cost / revenue increase (3%) less the minimum passengers / revenue hour goal (3%), or no change

These performance targets represent the minimum performance level that WCT should achieve for each Act 44 criteria during the next performance review cycle- five years from the date of this report. The performance targets were created using historical data analyzed during the five-year trend analysis as well as the most current certified audit information available. Standards were extrapolated to FYE 2018 and are designed to be aggressive, yet achievable. Performance targets will be agreed to between PennDOT and WCT before they are finalized so that expected anomalies are reflected in the standards. The suggested performance targets for WCT’s Act 44 metrics are presented in **Exhibit 12, Exhibit 13, Exhibit 14, and Exhibit 15.**

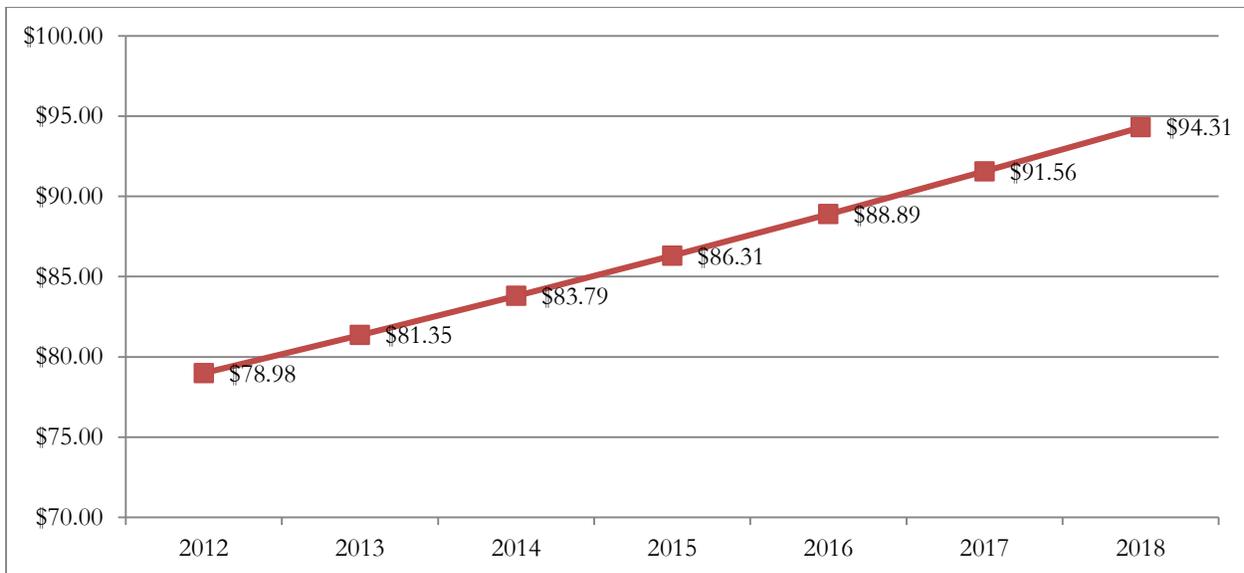
**Exhibit 12: Fixed-Route Passengers / Revenue Hour Performance Targets**

FYE 2018 Target..... 4.26  
 Interim Year Targets ..... Annual increase of at least 3.0%



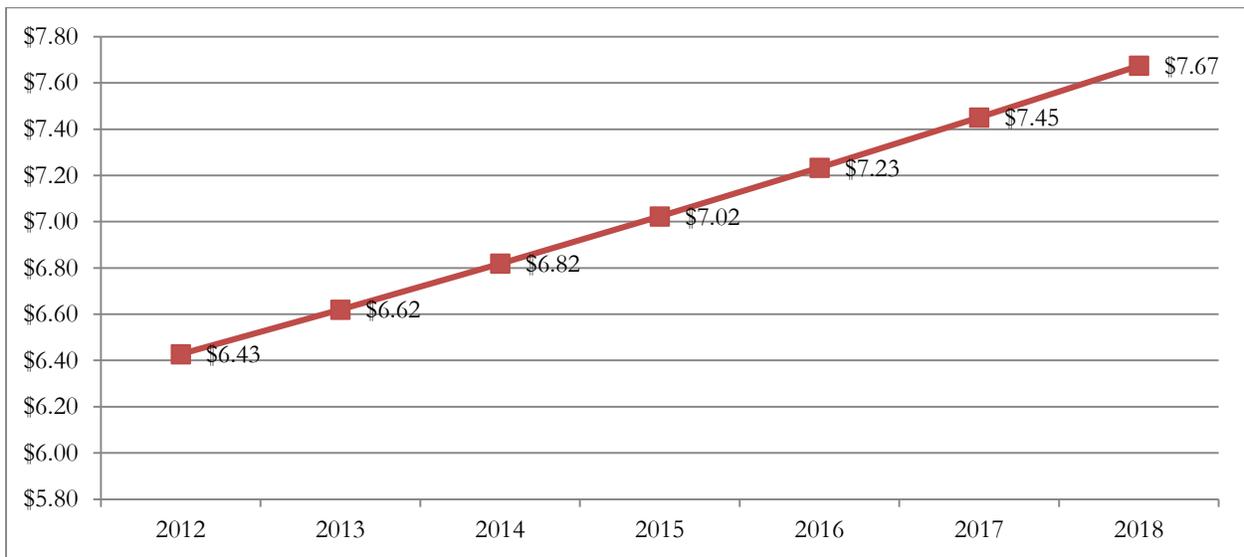
**Exhibit 13: Fixed-Route Operating Cost / Revenue Vehicle Hour Performance Targets**

FYE 2018 Target.....\$94.31  
 Interim Year Targets ..... Annual increase of no more than 3.0%



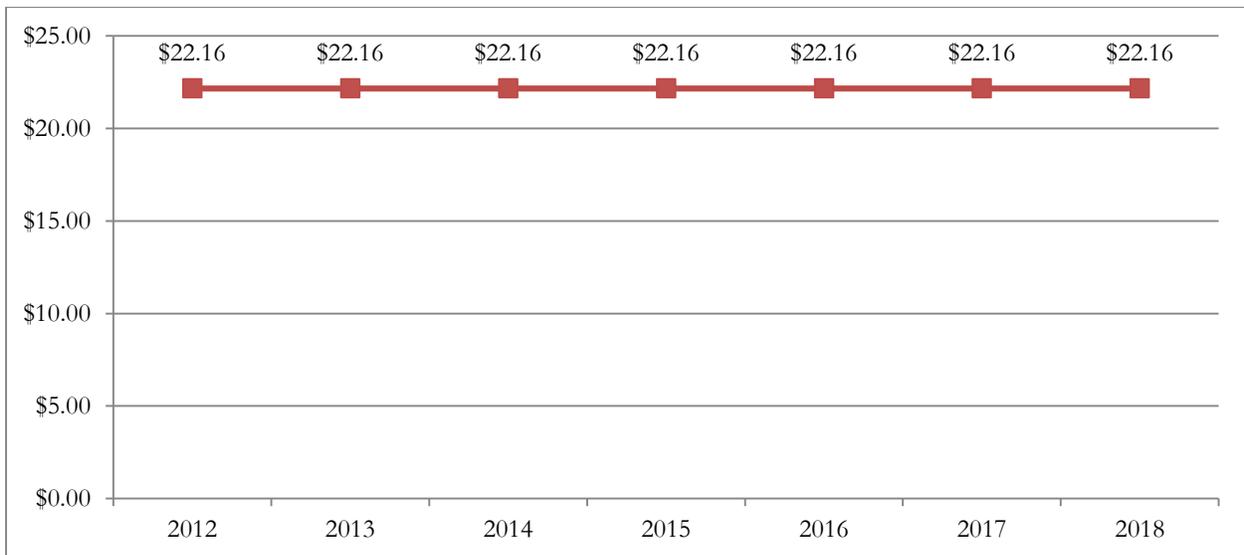
**Exhibit 14: Fixed-Route Operating Revenue / Revenue Vehicle Hour Performance Targets**

FYE 2018 Target..... **\$7.67**  
 Interim Year Targets ..... **Annual increase of at least 3.0%**



**Exhibit 15: Fixed-Route Operating Cost / Passenger Performance Targets**

FYE 2018 Target..... **\$22.16**  
 Interim Year Targets ..... **No Change**



## FUNCTIONAL REVIEW

Functional reviews are used to determine the reasons behind performance results found in the Act 44 comparisons, to find “best practices” to share with other transit agencies, and to identify opportunities for improvement that should be addressed in the Action Plan (see **Appendix A: Action Plan Improvement Strategies**). A total of 15 functional areas were reviewed through documents received from the agency (see **Appendix B: Documentation Request to General Manager**) and interviews conducted on-site. The functional areas are as follows:

1. **Governing Body** – Responsibilities include setting vision, mission, goals, and objectives; management oversight; recruiting and retaining top management personnel; and advocacy for the agency’s needs and positions.
2. **General Management** – Responsible for the day-to-day operations of the agency. Manage, monitor, analyze, direct, and plan for the future with regard to all functional areas. Inform and report to the Governing Body, and implement governing body direction.
3. **Contracted Service** – A review of the elements of service delivery provided by private contractors and a review of the relationship between WCT and the contractors.
4. **Human Resources** – Responsible for employee retention, recruitment, training, performance reviews, grievance procedures, employee benefits, and labor relations.
5. **Finance** – Includes budgeting, accounting, cash flow management, revenue handling, and insurance.
6. **Procurement** – Includes acquisition of rolling stock, vehicle parts, non-revenue capital items (i.e., office equipment) and other operations-related items.
7. **Operations** – Includes management of daily service operations, on-street supervision and control, dispatching, and general route management.
8. **Maintenance** – Includes vehicle and non-vehicle maintenance management, procedures, and performance.
9. **Scheduling** – Includes route and driver scheduling and decision-making, pay premium considerations, general management, procedures, and performance.
10. **Safety and Security** – Includes vehicle and passenger safety, facility security, and emergency preparedness.
11. **Customer Service** – Includes management, procedures, and performance related to current and future customers of the fixed-route system and other topics such as service information and complaint handling processes.
12. **Information Technology** – Includes automated mechanisms for in-house and customer service communication including future plans for new technology.
13. **Capital Programming** – Includes assessing and programming current and future capital needs reflecting both funded and unfunded projects. Includes the Transportation Improvement Plan (TIP), 12-Year Capital Plan, 20-Year Long-Range Transportation Plan (LRTP), and Transit Development Plan (TDP).
14. **Marketing and Public Relations** – Includes maximizing current markets and expanding into new markets. Includes managing the perception of the agency by the public at-large to encourage current and future ridership.
15. **Planning** – Includes analysis of information to effectively plan for changes to the system in the short-, medium-, and long-term horizons, to help ensure continued success.

The functional review findings are organized by a brief description of the Act 44 variables guiding the performance review: passengers, fare and other non-subsidy revenues, and operating costs. These 15 areas work together to effectively meet the needs of passengers, to deliver high-quality service in a cost-effective manner and to provide resources that will adapt to changing needs.

The following sections summarize the ways which service can be delivered more efficiently and effectively in ways that are sensitive and responsive to the community's needs, maximize productivity, direct service hours effectively, control operating costs, and achieve optimum revenue hours. The observations garnered during the review process are categorized as *Best Practices* or *Items to Address in the Action Plan*. Best Practices are those exceptional current practices that are beneficial and should be continued or expanded.

*Items to Address in the Action Plan* are recommendations which have the potential to maximize productivity, to direct service hours effectively, to control operating costs, and to achieve optimum revenue levels which will enhance the system's future performance overall for one or more of the Act 44 fixed-route performance factors. For the convenience of WCT, Action Plan templates have been included in this document (pp. 31-35). It should be noted that specific actions may partially address the broadly noted opportunities for improvement found in the "**General Findings**" (pp. vi-vi). Some actions will be quickly implementable while others may take several discrete steps to achieve over a longer period of time. The template does however provide a simple-to-follow order of key findings of this report that should be addressed in the Action Plan.

## **OPPORTUNITIES TO INCREASE FIXED-ROUTE RIDERSHIP**

Act 44 defines "passengers" as unlinked passenger trips, or passenger boardings, across all routes in the fixed-route transit system. Increases in ridership directly represent how effectively management has matched service levels to current demand for service.

### **BEST PRACTICES**

1. WCT has a new, modern website. The website allows riders to sign up for "rider alerts" that notify them of any service changes or disruptions. The use of such technology to inform riders of operations is a cost-effective way to communicate important information to WCT's customers.

### **ELEMENTS TO ADDRESS IN PART 2-A OF THE ACTION PLAN (SEE P. 32)**

1. Bus stop signage is poorly maintained in general and completely lacking at one quarter of all stops. While WCT has received new signs, they do not have the resources at their disposal to install them. Clearly demarked and well maintained bus stop signage raises awareness of a transit system in the community resulting in increased ridership. As a subunit of City government, WCT should have the resources available to it to install and adequately maintain bus stop signage. Expending the funds to purchase the signs without the resources to install them is also a waste of taxpayer funds.
2. Over half of the WCT ridership comes from the commuter service which can be characterized as an expanding market. However, due to mechanical breakdown issues with some vehicles, service disruptions in the commuter service have been reported. WCT should examine its spare vehicle requirements for both the commuter and local service and ensure that either it or the subcontractor has adequate spare vehicles available that are suited to both types of

service it provides. Service disruptions undermine passenger confidence in the system decreasing demand both in the short and long term.

3. The “Hopper” service has particularly poor ridership. WCT should undertake an assessment of that service to identify why it performs so poorly, address the underlying issues, or find a more cost effective way to meet the mobility needs within the community.
4. Some of the park and ride (PnR) facilities used by WCT are in very poor condition. WCT should inventory the PnR facilities it uses and work with the owners of the lots to bring them to an adequate state of maintenance.
5. WCT has a small marketing budget used to promote its services. WCT should evaluate its marketing budget and the effectiveness of its marketing to maximize return on investment and overall ridership.

## **OPPORTUNITIES TO INCREASE FIXED-ROUTE REVENUES**

Act 44 defines “revenues” as all non-subsidy revenues generated to help fund the operation of a transit system. The largest contributors to this are typically farebox revenues, route guarantees, interest on accounts, and advertising revenues.

### **ELEMENTS TO ADDRESS IN PART 2-B OF THE ACTION PLAN (SEE P. 33)**

1. WCT currently lacks a farebox recovery goal and a formal fare policy. As a result, less than 10% of WCT’s operating costs are funded through the farebox. WCT should establish a realistic farebox recovery goal, in line with industry standards, then develop a fare policy that ensures WCT recovers a targeted percentage of operating costs on each service it provides. Farebox recovery can then be used as one criteria when evaluating potential service changes.
2. WCT has agreed to participate in the regional smart card initiative. However, it has not formalized revenue sharing arrangements with other partners in the initiative. WCT should work with its partners to formalize revenue sharing arrangements so as to make passenger fares seamless between WCT and PAAC. By doing so, passengers and revenue will likely increase for both agencies.
3. Currently, WCT has few passenger stop shelters and does not generate advertising revenue from them. WCT should explore the revenue potential of advertising both on its vehicles and at shelters.

## **OPPORTUNITIES TO CONTROL OPERATING COSTS**

Act 44 defines “operating costs” as the non-capital costs incurred in the day-to-day operations of a transit system. Labor, maintenance, and operating costs such as fuel, tires and lubricants contribute to this measure in significant ways. Many transit agencies have noted cost increases much higher than the general rate of inflation. Compounding this is the reality that operating subsidies are not likely to increase at a comparable rate. Controlling operating cost increases is one key to maintaining current service levels.

**ELEMENTS TO ADDRESS IN PART 2-C OF THE ACTION PLAN (SEE P. 34)**

1. WCT provides more than \$70,000 in funds to their contractor annually for customer service. On the other hand, the contract between the City and the contractor requires the City to be in charge of complaints and suggestions. Having both entities manage customer service issues is expensive and potentially confusing to passengers. **WCT should evaluate how customer service is managed and how much is spent on it.**
2. Some of WCT's vehicles are used beyond their design life. Older vehicles have higher maintenance costs. **WCT management should develop a financial plan that allows vehicles to be replaced at the end of their design life (12 years).**
3. There is periodic interest in the Washington County area of combining service provided by WCT and Washington Rides. WCT's management and City Council should **explore the potential and benefits of combining these services** as there may be economies of scale that could be realized through coordinated service delivery.

**OTHER FINDINGS THAT IMPACT OVERALL AGENCY PERFORMANCE**

“Other Findings” is a collection of findings from the functional review that may, if addressed, improve current or future operations. While not directly tied to Act 44 measures, actions to address these findings will result in a more seamless operation and greater operational efficiencies.

**BEST PRACTICES**

1. WCT's contracted service provider supplies an “accident protocol kit” on all vehicles. The kit contains a camera, witness cards and other supplies for a driver to use if he or she is involved in a crash. Providing drivers readily available tools to document incidents can minimize insurance risk exposure to fraudulent claims and associated costs.

**ELEMENTS TO ADDRESS IN PART 3 OF THE ACTION PLAN (SEE P. 35)**

1. WCT's transit coordinator reports difficulty getting timely management reports from their contract service provider. Such reports are necessary both for funding agencies as well as for general oversight purpose. Future contract service agreements should have provision and penalties for not providing timely management reports from contractors.
2. WCT lacks formal performance goals for its contractors and employees assigned to oversee its services. Performance goals can serve to focus and fine-tune the operation and promote high-quality service. This will become even more important as WCT opens and staffs its intermodal center. WCT should incorporate performance metrics and a periodic performance review process in all service contracts and for all future employees.
3. To effectively manage contract service providers, the transit coordinator position should have clearly defined responsibilities, authority to enforce contract terms and required reporting to a City representative.
4. WCT's contract does not have a formal street supervision process. Such processes provide assurance that service is delivered on-time and of appropriate quality. Future contracted

service agreements should include a requirement for a documented street supervision process that is mutually agreed upon by the City and the contractor.

5. Standard practice in the transit industry is that an operator has documented procedures and formal protocols to handle events that occur while providing service. Currently, WCT's contract service provider lacks formal documentation that it would provide to staff to manage operations. WCT's contract service provider should be required to have an operations manual, operator manual and formal dispatch procedures agreed to by the City and the contractor. The contract service agreement should spell out the requirements for compliance and the consequences of non-compliance.
6. Neither WCT nor its subcontractor have a dedicated IT staff or staff qualified to maintain its new farebox software. Poor oversight of the contractor and a lack of IT resources to quickly resolve any technical issues has resulted in missing ridership data and a lack of quality control mechanisms for ridership reports that are used to distribute Act 44 funds. WCT and its contractor should review their respective oversight and IT support arrangements to ensure no substantial lapses in accurate ridership data recur.
7. The earliest bus runs of the day have no supervisor on duty when the first trip starts. WCT and the subcontractor should work together to ensure that supervisors are on duty during all operating hours.

## FINANCIAL REVIEW

In an era of increasing costs and limited funding opportunities, many transit agencies are entering a difficult period. Many are pressed to reduce service while increasing fares just to make ends meet. It is in the interest of the Commonwealth to monitor the financial health of transit agencies before manageable financial problems become much larger challenges. With more than 40 transit agencies in the Commonwealth funded by Act 44, PennDOT needs information to assess where financial difficulties can be predicted so that a corrective course of action can be taken before financial challenges seriously impede the ability of local transit agencies to deliver service.

The challenge in assessing the “financial health” and trajectory of transit agencies without first-hand knowledge of day-to-day operations is that much of the information regarding financial indicators is often dated and relies on “end of year” indicators. Furthermore, costs, such as fuel, can vary widely year-to-year or even week-to-week. Funding sources, while more predictable, can change depending on the availability of federal funds, tax collections or funding formulae.

This financial review focuses on “high-level” snapshot and trend indicators to determine if additional scrutiny is warranted by reviewing audited information where available, other financial reports and budgets. The review assesses the following:

- High-Level Indicators of Financial Health
- Total Agency-wide Operational Expenditures and Funding
- Fixed-Route Funding
- Paratransit Funding
- Balance Sheet Findings

### HIGH-LEVEL INDICATORS OF FINANCIAL HEALTH

Several high-level indicators of financial health and stability have been examined to determine WCT’s current state. As shown in **Exhibit 16**, WCT is in line with industry goals and targets for all high-level financial indicators.

WCT receives local contributions that amount to 12.0% of operating costs which equates to a 14.9% match of local funds to state funds (FYE 2012). Historically much of the local matching amount was sponsored by GG&C, the contractor for WCT’s service. In coming years, due to Act 44 requirements, local contribution amounts will steadily increase to replace GG&C’s contribution. Management reports some concerns with finding sufficient local match and has started to identify potential funding sources.

**Exhibit 16: High-level Financial Indicators**

<b>Indicator</b>	<b>WCT Value<sup>7</sup></b>	<b>Assessment Criteria / Rationale</b>	<b>Source</b>
Cash Reserves / Annual Operating Cost	72.8%	The combined target should be 25%+. This provides flexibility to account for unexpected cost increases or service changes.	FYE 2012 Audit
State Carryover Subsidies / Annual Operating Cost	58.1%		
Actual Local Match / Required Match	100%	Target 100%+. Local match that exceeds required minimums gives a transit agency flexibility to change service and to accommodate unexpected cost changes.	FYE 2012 Audit
Accounts Payable (AP) 90+ days	0.0%	Target should be 0% over 90 days. Larger values indicate cash flow concerns.	Ledger Detail Report 2/28/13
Accounts Receivable (AR) 90+ days	0.0%	Target should be 0% over 90 days. Larger values can cause cash flow problems.	Ledger Detail Report 2/28/13
Operating Debt / Annual Operating Cost	0.0%	Target should be 0%. Low debt amounts reduce borrowing costs.	FYE 2012 Audit
Credit available/ Annual Payroll	0.0%	Target should be 15%+ if other cash reserves are low. This gives the ability to cover payroll due to unexpected delays in accounts receivable.	FYE 2012 Audit

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<sup>7</sup> Values reported as end of reporting period balances.

## TOTAL AGENCY-WIDE OPERATIONAL EXPENDITURES AND FUNDING

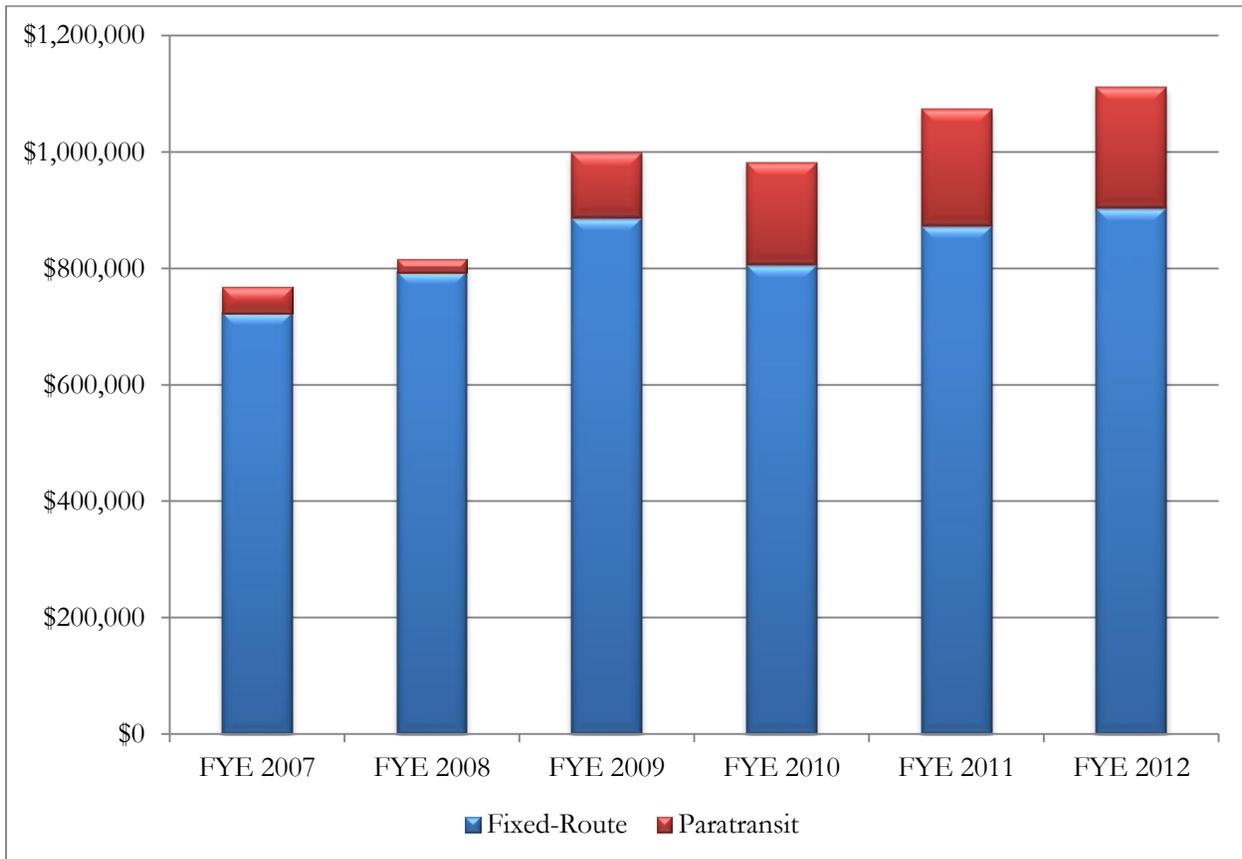
As shown in **Exhibit 17**, WCT has grown from a \$0.8 million per year operation in FYE 2007 to a \$1.1 million per year operation in FYE 2012. Approximately 81.3% of WCT’s operational expenses are for fixed-route service. The remaining operational expenses are for ADA paratransit service (18.7%), as shown in **Exhibit 18**.

WCT’s operational funding comes from a variety of sources including state funds, lottery funds, local funds and passenger fares. Since FYE 2008, WCT has not used federal funds to finance either its fixed-route or paratransit operations (**Exhibit 19**). Passenger fares have remained a small, albeit stable, share of income, accounting for approximately 8.1% of operating income. State funding remains the largest funding source for WCT (**Exhibit 20**) accounting for more than 80% of total operating income. Local funding is in line with Act 44 requirements.

**Exhibit 17: WCT Total Operating Expense by Service Type (FYE 2007 – FYE 2012)**

Expense by Service Type	FYE 2007	FYE 2008	FYE 2009	FYE 2010	FYE 2011	FYE 2012
Fixed Route	\$0.7	\$0.8	\$0.9	\$0.8	\$0.9	\$0.9
Paratransit	\$0.0	\$0.0	\$0.1	\$0.2	\$0.2	\$0.2
<b>Total (\$ millions)</b>	<b>\$0.8</b>	<b>\$0.8</b>	<b>\$1.0</b>	<b>\$1.0</b>	<b>\$1.1</b>	<b>\$1.1</b>

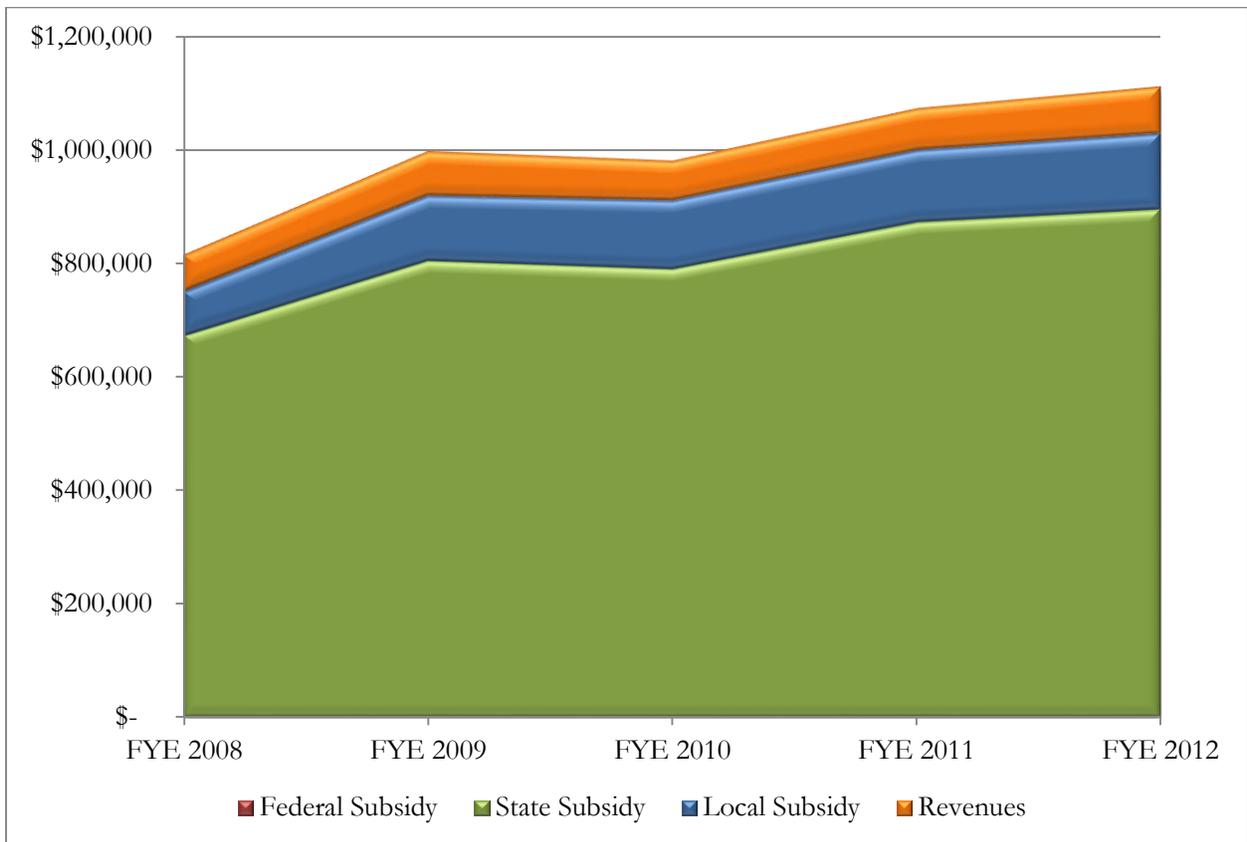
**Exhibit 18: WCT Share of Agency-wide Operating Expenses by Mode**



**Exhibit 19: Agency-wide Operational Funding by Source (FYE 2008 – FYE 2012)**

Share of Funding	FYE 2008	FYE 2009	FYE 2010	FYE 2011	FYE 2012
Federal Subsidy	0.0%	0.0%	0.0%	0.0%	0.0%
State Subsidy	82.4%	80.6%	80.5%	81.3%	80.6%
Local Subsidy	9.7%	11.6%	12.4%	11.9%	12.0%
Other Subsidy (Misc.)	0.0%	0.0%	0.0%	0.0%	0.0%
Revenues (Non-Subsidy)	7.9%	7.8%	7.1%	6.8%	7.4%
Local Subsidy / State Subsidy	11.7%	14.3%	15.3%	14.6%	14.9%

**Exhibit 20: WCT Reported Agency-wide (Fixed-Route + Paratransit) Operational Funding (FYE 2008 – FYE 2012)**



## FIXED-ROUTE FUNDING

WCT's historic and proposed fixed-route funding is derived from general revenues and government subsidies. Direct Passenger fares have covered between 7.0% and 8.1% of total operating revenues (**Exhibit 21**). Based on the FYE 2010 to FYE 2012 dotGrants reporting, WCT operated using current year funding with excess state funding being "carried over." WCT does not show any excess local contribution to operating expense. The total local carryover match available at the end of FYE 2012 was \$24,033. Section 1513 carryover has increased from \$549,640 in FYE 2010 to \$645,746 in FYE 2012.

### Exhibit 21: Fixed-Route Funding

Funding Category	FYE 2008	FYE 2009	FYE 2010	FYE 2011	FYE 2012
<b>Revenues</b>					
Passenger Fares	\$55,412	\$68,936	\$62,390	\$64,981	\$73,512
Advertising	\$70	\$100	\$0	\$0	\$0
Charter	\$0	\$0	\$0	\$0	\$0
Route Guarantee	\$0	\$0	\$0	\$0	\$0
Other Misc.	\$0	\$0	\$0	\$0	\$0
<b>Subtotal</b>	<b>\$55,482</b>	<b>\$69,036</b>	<b>\$62,390</b>	<b>\$64,981</b>	<b>\$73,512</b>
<b>Subsidies</b>					
Federal Operating Grant	\$0	\$0	\$0	\$0	\$0
Act44 (1513) State Prior	\$0	\$0	\$340,782	\$445,208	\$488,364
Act44 (1513) Current	\$660,608	\$715,058	\$303,670	\$259,004	\$233,235
Municipal Prior	\$0	\$0	\$0	\$4,911	\$0
Municipal Current*	\$77,596	\$102,544	\$99,427	\$98,214	\$108,281
Act3 BSG Grant (State)	\$0	\$0	\$0	\$0	\$0
Act3 BSG Grant (Local)	\$0	\$0	\$0	\$0	\$0
Special-(Federal)	\$0	\$0	\$0	\$0	\$0
Special-(State)	\$0	\$0	\$0	\$0	\$0
Special (Local)	\$0	\$0	\$0	\$0	\$0
<b>Subtotal</b>	<b>\$738,204</b>	<b>\$817,602</b>	<b>\$743,879</b>	<b>\$807,337</b>	<b>\$829,880</b>
<b>Total Funding</b>	<b>\$793,686</b>	<b>\$886,638</b>	<b>\$806,269</b>	<b>\$872,318</b>	<b>\$903,392</b>
<b>Passenger Fares/ Total Funding</b>	<b>7.0%</b>	<b>7.8%</b>	<b>7.7%</b>	<b>7.4%</b>	<b>8.1%</b>

Source: PennDOT dotGrants Reporting System

\*Includes subsidies from the City of Washington, GG&C and the Township of South Strabane.

## PARATRANSIT FUNDING

WCT's paratransit funding is small and limited to ADA and shared ride services which are currently subcontracted to Washington Rides. State operating subsidies represent the largest contribution towards paratransit operating costs (**Exhibit 22**) covering more than three quarters of expenses in FYE 2012. The total paratransit program has grown from \$22,621 in FYE 2008 to \$207,876 in FYE 2012. Local funding covers approximately 12% of total paratransit costs while farebox revenues cover less than 5%.

### Exhibit 22: Non-Fixed Route (ADA Paratransit) Funding

Category	FYE 2008	FYE 2009	FYE 2010	FYE 2011	FYE 2012
<b>Revenues</b>					
Passenger Fares	\$8,775	\$8,766	\$7,487	\$8,019	\$8,398
<b>Subtotal</b>	<b>\$8,775</b>	<b>\$8,766</b>	<b>\$7,487</b>	<b>\$8,019</b>	<b>\$8,398</b>
<b>Subsidies</b>					
Act 44 (1513) State Prior	\$0	\$0	\$74,806	\$104,432	\$114,554
Act 44 (1513) State Current	\$12,391	\$89,975	\$71,077	\$64,245	\$59,524
Municipal Current	\$1,455	\$12,934	\$21,825	\$24,190	\$25,400
<b>Subtotal</b>	<b>\$13,846</b>	<b>\$102,909</b>	<b>\$167,708</b>	<b>\$192,867</b>	<b>\$199,478</b>
<b>Total Funding</b>	<b>\$22,621</b>	<b>\$111,675</b>	<b>\$175,195</b>	<b>\$200,886</b>	<b>\$207,876</b>

Source: PennDOT dotGrants Reporting System

## BALANCE SHEET FINDINGS

Review of balance sheets from WCT shows that the agency maintains very large cash reserves (**Exhibit 23** and **Exhibit 24**) amounting to 72.8% of annual operational expenses in FYE 2012. This margin between current assets and liabilities is larger than seen in many other transit agencies in the Commonwealth and has been increasing since FYE 2009. WCT does not have employees nor inventory making this value even more significant. The \$48,265 grants receivable amount in FYE 2012 represents capital grants that were yet to be paid at the time of the audit.

## CONCLUSIONS

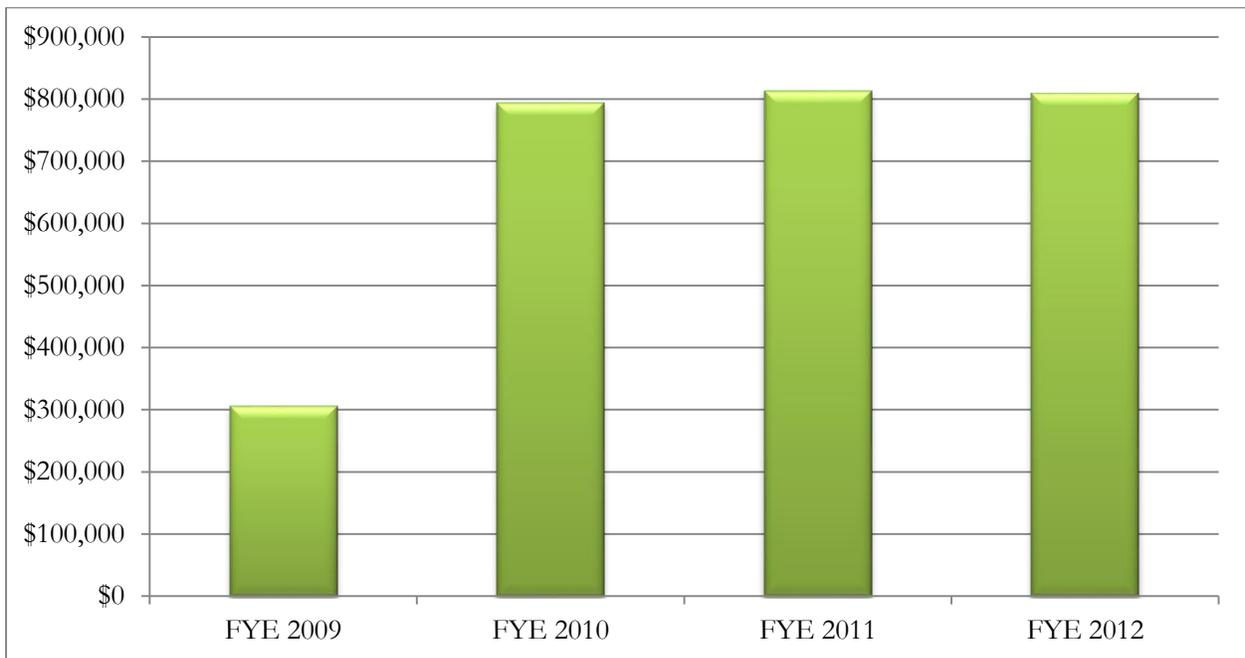
For the FYE 2008 to FYE 2012 period, local governments and GG&C have contributed to help cover WCT's operational funding requirements. WCT has used most of those amounts in any given year to balance its budget and comply with state requirements. Farebox revenues as a percentage of operating cost remain much lower than seen in other transit systems in the Commonwealth. Nevertheless, WCT has been able to build up adequate cash reserves to cover unexpected operational expenses and any funding irregularities. The City should continue to take appropriate actions such as obtaining additional local match, controlling costs and increasing carryover reserves to continuously improve WCT's financial health.

**Exhibit 23: WCT Balance Sheet Summary (FYE 2009 – FYE 2012)**

<b>Balance Sheet Report</b>	<b>FYE 2009</b>	<b>FYE 2010</b>	<b>FYE 2011</b>	<b>FYE 2012</b>
Cash Equivalent Balance	\$306,052	\$793,803	\$813,768	\$808,959
Grants Receivable (including capital)	\$0	\$0	\$0	\$48,265
Other Accounts Receivable	\$409,726	\$44,245	\$159	\$6,157
Inventory Value	\$0	\$0	\$0	\$0
Pre-paid Expenses	\$0	\$0	\$0	\$6,000
Accounts Payable (including capital)	\$258,746	\$221,829	\$145,360	\$149,175
Accumulated Absences/Payroll	\$0	\$0	\$0	\$0
Line of Credit	\$0	\$0	\$0	\$0
Credit Used	\$0	\$0	\$0	\$0
Total Operating Expense	\$998,313	\$981,464	\$1,073,204	\$1,111,268
Cash Eqv. Bal / Total Operating Exp.	30.7%	80.9%	75.8%	72.8%
Line of Credit / Total Operating Exp.	0.0%	0.0%	0.0%	0.0%
Current Assets	\$715,778	\$838,048	\$813,927	\$869,381
Current Liabilities	\$258,746	\$221,829	\$145,360	\$149,175
Net Current Assets	\$457,032	\$616,219	\$668,567	\$720,206

Source: Annual Audit Reports and dotGrants

**Exhibit 24: WCT End-of-Year Cash Equivalent Balance (FYE 2009 – FYE 2012)**



## APPENDIX A: ACTION PLAN IMPROVEMENT STRATEGIES

### PART 1- EXECUTIVE SUMMARY FINDINGS TEMPLATE

IMPROVEMENT OPPORTUNITY	WCT Actions	Estimated Initiation Date	Estimated Completion Date
Establish formal governance and oversight structure (p. vi)			
Improve oversight of operations (p. vi)			
Develop performance targets for all key agency functions (p. vi)			

*Note: Include additional pages as necessary.*

**PART 2- ACT 44 PERFORMANCE METRIC FINDINGS TEMPLATES**

**A. ACTIONS TO INCREASE PASSENGERS / REVENUE HOUR TEMPLATE**

Recommendation (page)	WCT Action	Estimated Initiation Date	Estimated Completion Date
Finish installation of bus stop signage (p. 20)			
Examine spare vehicle requirements in light of the types of service provided (p. 20)			
Examine poor performance of Hopper service and find a cost-effective solution to meeting the community’s needs (p. 21)			
Inventory park and ride facilities then bring them to an adequate state of maintenance (p. 21)			
Evaluate marketing budget and return on investment (p. 21)			

**B. ACTIONS TO INCREASE OPERATING REVENUE / REVENUE HOUR TEMPLATE**

Recommendation (page)	WCT Action	Estimated Initiation Date	Estimated Completion Date
Establish farebox recovery goal and fare policy (p. 21)			
Work with other regional transit service providers to formalize revenue sharing arrangements so the full benefits of the regional smart card initiative can be realized (p. 21)			
Assess need for and revenue potential of additional passenger shelters (p. 21)			

**C. ACTIONS TO REDUCE OR CONTAIN OPERATING COST / REVENUE HOUR TEMPLATE**

<b>Recommendation (page)</b>	<b>WCT Action</b>	<b>Estimated Initiation Date</b>	<b>Estimated Completion Date</b>
Evaluate customer service process and associated expenditures to remove any redundancies (p. 22)			
Develop a financial plan to replace vehicles at the end of their design life (p. 22)			
Periodically reexamine the potential of regional consolidation of fixed-route and paratransit services (p. 22)			

**PART 3- OTHER ACTIONS TO IMPROVE OVERALL PERFORMANCE TEMPLATE**

Recommendation (page)	WCT Action	Estimated Initiation Date	Estimated Completion Date
Incorporate requirements and penalties for missing or late management reports in any subsequent service contracts (p. 22)			
Establish formal performance goals for employees, contractors and contract employees (p. 22)			
Clearly define transit coordinator responsibilities, authority and reporting requirements to a City representative (p. 22)			
Develop a formal street supervision process that is enforceable in any future service contracts (p. 22)			
Require contracted service providers have a formal operations manual, operators’ manual and documented dispatch procedures (p. 23)			
Review IT resources to ensure competent and timely maintenance of new farebox software (p. 23)			
Ensure operations supervisors are available during all hours of operation (p. 23)			

## APPENDIX B: DOCUMENTATION REQUEST TO GENERAL MANAGER

<u>CITY OF WASHINGTON - PA DEPT. OF TRANSPORTATION</u>		5/9/2013
<u>2013 TRANSIT PERFORMANCE REVIEW - DATA REQUEST</u>		
	Info.	NOTES
<b>BACKGROUND</b>		
	<b>Provided</b>	
Enabling legislation, ordinances, compacts or charters		City became a grantee in the '80's - cannot find any documentation to provide.
Brief history of agency	<b>X</b>	
Service Days & Hours	<b>X</b>	Enclosed route schedules
General Agency Information	<b>X</b>	
<b>GOVERNANCE/GENERAL MANAGEMENT</b>		
List of current governing body & contact information	<b>X</b>	Provided on Organizational Chart
Mayor & Council Members Terms	<b>X</b>	
Governing body minutes for last 12 months	<b>X</b>	
Background/Contract for General Manager	<b>X</b>	
Organizational Chart / Roles & Responsibilities	<b>X</b>	
Succession Plan		Not Available
<b>OVERSIGHT &amp; REVIEWS</b>		
2 most recent annual reports from CEO to governing board		Besides meeting monthly with Mayor & Council, they are provided with Annual Audit Reports & Budgets for Review (these documents are contained in the "Finance" Section)
Recent Reviews	<b>X</b>	FTA Triennial Review was performed in 2011
<b>HUMAN RESOURCES</b>		
All collective bargaining agreements, etc.	<b>X</b>	Although the City's current contractor is non-unionized, the FTA requires that we provide union information for the Port Authority of Allegheny County due to provision of service into Pittsburgh. This information is enclosed.
Stikes or work stoppages	<b>N/A</b>	
Reports filed regarding union operations, etc.	<b>N/A</b>	
Cost of benefits broken down, etc.	<b>N/A</b>	All services are currently subcontracted and no benefits are provided.
Turnover rate by position	<b>N/A</b>	
Operator hiring & performance review procedures	<b>X</b>	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.

City of Washington 2013 Performance Review

<b>FINANCE</b>		
Operating & Capital Budgets for current fiscal year	<b>X</b>	
Official Bond Statements for most recent issuances	<b>N/A</b>	
Audited Financial Statements for past 5 years	<b>X</b>	
Profit/Loss/Cash Flow Statements for each of the past 12 mos.		See audited financial statements & other reports contained herein.
Operating revenues & expense details for last 2 years	<b>X</b>	Internal monitoring sheets
Accounts Receivable and Accounts Payable Reports	<b>X</b>	Enclosed sample report of what is received from City Finance Dept.
<b>PROCUREMENT</b>		
Procurement policy & procedures	<b>X</b>	Contained in City's Policies & Procedures document
<b>CONTRACTING</b>		
Contracts involving purchased transportation	<b>X</b>	
Contracts for the provision of services or special operations	<b>N/A</b>	
Contracts for tire services, management services, etc.	<b>X</b>	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.
Contract management plan		Info.contained in Policies & Procedures & Provision of Service contracts
<b>OPERATIONS</b>		
Operations Manual	<b>X</b>	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.
Operators Manual	<b>X</b>	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.
Emergency & inclement weather operational plans & procedures	<b>X</b>	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.
Dispatch procedures	<b>X</b>	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.
On-Street supervision procedures	<b>X</b>	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.
Service standards for new & existing service - provide description	<b>X</b>	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.
Significant seasonal variations in service supplied	<b>X</b>	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.
Identify & provide relevant documents regard any present & future operations challenges	<b>X</b>	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.
<b>FARES &amp; FARE SECURITY</b>		
Listing of fare by type & media	<b>X</b>	
Plans for changes in fare media	<b>X</b>	Only changes planned are the implementation of the Smart Card regional program and this is currently pending.
Monthly fare revenue by category & by patron type	<b>X</b>	PLEASE REFER TO NOTATION CONTAINED HEREIN

City of Washington 2013 Performance Review

Fare handling policy & procedures	X	PLEASE NOTE: In light of recent farebox installation, the enclosed policy is in draft form and is currently being addressed.
Commuter choice program description, etc.	X	Only program is non-revenue generating - Emergency Ride Home Program
<b>MAINTENANCE</b>		
Maintenance plan, programs & procedures	X	Supplied contractor's vehicle maintenance plans from proposal
Fixed Route Fleet Roster	X	
End of Year Parts Inventory	X	No parts inventory - enclosed is the asset inventory
Building condition appraisals	N/A	
Ongoing asset maintenance programs		Besides vehicle maintenance, no other programs available
<b>OPERATIONAL SCHEDULING/PLANNING</b>		
Scheduling Manual		Not available
Maps & schedules (system wide & route specific)	X	Contained in "Background Information" section
RM & RH for Charter Service	N/A	
Short Range Operational Plan	X	Information included with "Capital Programming"
Long Range Transit Plan	X	Information included with "Capital Programming"
<b>SAFETY &amp; SECURITY</b>		
Summary of Worker Comp Claims - by year - last 5 years	X	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.
Accident/Incident Policy & Definitions	X	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.
Property collisions & other reportable - past 6 years	X	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.
Personal injuries & fatalities - past 6 years	X	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.
On-board criminal activities - past 6 years	X	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.
Property criminal activities - past 6 years	X	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.
Safety training and collision reduction plans	X	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.
Emergency Preparedness / Operations Continuity Plan	X	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.
List of safety or security issues or concerns	X	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.
Number of vehicles & sites with security monitoring	X	PROVIDED BY CONTRACTOR: GG&C BUS CO., INC.
Records of safety meetings for past 2 years	X	Not available - hold monthly meetings along with school bus drivers as schedules allow. Otherwise hold at least quarterly meetings with transit drivers.

City of Washington 2013 Performance Review

<b>CUSTOMER SERVICE</b>		
Fixed route ADA compliance reports	<b>N/A</b>	Unaware of such report
Recent customer service surveys & actions to address	<b>X</b>	Please note that several surveys have been perform over the past 3 years as part of service improvements & route restructuring (samples are enclosed). The results and actions are contained in a Route Study Report which is also enclosed.
Complaint Procedures policy	<b>X</b>	
Customer service metrics	<b>X</b>	
<b>INFORMATION TECHNOLOGY</b>		
Computer disaster recovery plan		Not available
Computer security procedures		Not available
Data collection technology/programs	<b>N/A</b>	
<b>CAPITAL PROGRAMMING</b>		
Short & long term capital programs or plans	<b>X</b>	
Contact information for any assets operated & maintained by others	<b>X</b>	GG&C Bus Company, Inc., John Lenzner, Owner, Pam Honaker, Manager 724-222-2320 - jlenzner@ggcbus.com or phonaker@ggcbus.com
Real estate fixed assets	<b>N/A</b>	
Real estate plans	<b>X</b>	Construction of Intermodal Transit Facility
<b>MARKETING &amp; PUBLIC RELATIONS</b>		
Service area demographics, customer profiles, marketing docs.	<b>X</b>	Demographic information is also contained in the Route Study under the "Customer Service" section
Local news clippings from past 5 years	<b>X</b>	
Current marketing program and policies		No written policies currently exist
Public involvement plan; notices; attendance rosters (recent 2 yrs.)	<b>X</b>	
Reports, input, recommendations, etc. from ridership, groups, etc.	<b>X</b>	Also contained in the Route Study under the "Customer Service" section

