



MONROE COUNTY TRANSPORTATION AUTHORITY
PERFORMANCE REVIEW REPORT

JULY 2011

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EXECUTIVE SUMMARY

In July 2007 the Pennsylvania Legislature passed Act 44, establishing a framework for a transit agency performance review process. The purpose of a review is to assess performance and make transit agencies aware of improvement opportunities. The transit review process is an intense, short-duration effort intended to assess a transit system's efficiency, effectiveness, and best practices.

In October 2010, an Act 44 transit performance review was initiated for Monroe County Transportation Authority (MCTA). MCTA was identified to be part of the pilot program for rural agency performance reviews, and is integral in developing procedures and practices for future rural transit agency performance reviews. The performance review considered fixed-route service only (although MCTA also provides shared-ride and paratransit service). This document conveys the results of that performance review and identifies areas where improvements may be made, as well as best practices that may be shared with similar agencies throughout Pennsylvania.

Agency Profile

| | | |
|---|---|-----------------|
| Agency Name | Monroe County Transportation Authority (MCTA) | |
| Year Founded | 1979 | |
| Reporting Year | 2008 | |
| Service Area (square miles) | 611 | |
| Service Area Population | 138,687 | |
| Type of Service Provided | Fixed-Route Bus | Demand Response |
| Vehicles Operated in Maximum Service | 10 | 15 |
| Annual Revenue Miles of Service | 510,034 | 434,685 |
| Annual Revenue Hours of Service | 36,394 | 18,087 |
| Annual Passenger Trips | 320,574 | 60,933 |
| Employees | 92 Total | |
| Annual Operating Budget | \$2,788,743 | \$1,095,702 |
| Annual Fare Revenues | \$703,828 | \$1,041,664 * |
| Farebox Revenues / Total Operating Cost | 25.2% | 95.1% * |
| Administrative Cost / Total Operating Cost | 13% | 26.8% |
| Operating Cost / Revenue Mile | \$5.46 | \$2.52 |
| Operating Cost / Revenue Hour | \$76.63 | \$60.58 |
| Passengers / Revenue Hour | 8.81 | 3.37 |
| Operating Cost / Passenger | \$8.70 | \$17.96 |

ACT 44 PERFORMANCE DETERMINATION

Available documentation and Act 44 metrics were reviewed to quantify MCTA's fixed-route performance with respect to itself over time and to a set of its peers. Peers were selected through an analytical process with interagency coordination between the Pennsylvania Department of Transportation (PennDOT) staff and MCTA.

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

- In Compliance if within one standard deviation **above** the peer group average for –
 - Single-year and five-year trend for operating cost per revenue vehicle hour
 - Single-year and five-year trend for operating cost per passenger
- In Compliance if within one standard deviation **below** the peer group average for –
 - Single-year and five-year trend for passengers per revenue vehicle hour
 - Single-year and five-year trend for operating revenue per revenue vehicle hour

If the agency falls outside of any of the boundaries, it is considered "At Risk" for that criteria and must create an action plan to bring the criteria into compliance prior to the next performance review.

An analysis of the eight key criteria mandated by Act 44 was conducted and ***it was determined that MCTA is "In Compliance" for all eight criteria.*** The peer comparison process as applied to Act 44 criteria (below, in bold typeface), revealed that:

In Compliance

- **2008 passengers per revenue vehicle hour** ranks 10th out of 11 transit agencies in the peer group and is worse than the peer group average.
- **The five-year trend for passengers per revenue vehicle hour** ranks 7th out of 11 and is worse than the peer group average.
- **2008 operating cost per revenue vehicle hour** ranks 8^h out of 11 and is slightly better than the peer group average.
- **The five-year trend for operating cost per revenue vehicle hour** ranks 7th out of 11 and is worse than the peer group average.
- **2008 operating revenue per revenue vehicle hour** ranks 8^h out of 11 and is worse than the peer group average.
- **The five-year trend for operating revenue per revenue vehicle hour** ranks 9th out of 11 and is worse than the peer group average.
- **2008 operating cost per passenger** ranks 9th out of 11 and is more than one standard deviation above the peer group average.
- **The five-year trend for operating cost per passenger** ranks 9th out of 11 and is worse than the peer group average.

At Risk

- None.

| Performance Criteria | | Determination | Rank (of 11) | Comparison to Peer Avg. | Value | Peer Average |
|-------------------------------------|-------|---------------|-----------------|----------------------------|---------|-----------------|
| Passengers / Revenue Hour | 2008 | In Compliance | 10 | Worse | 6.59 | 11.51 |
| | Trend | In Compliance | 7 | Worse | -0.11% | 1.76% |
| Operating Cost / Revenue Hour | 2008 | In Compliance | 8 | Better | \$76.63 | \$78.01 |
| | Trend | In Compliance | 7 | Worse | 8.37% | 5.63% |
| Operating Revenue / Revenue Hour | 2008 | In Compliance | 8 | Worse | \$10.03 | \$16.52 |
| | Trend | In Compliance | 9 | Worse | 1.62% | 12.11% |
| Operating Cost / Passenger | 2008 | In Compliance | 9 | Worse | \$11.63 | \$8.04 |
| | Trend | In Compliance | 9 | Worse | 8.49% | 4.05% |

FUNCTIONAL REVIEW FINDINGS

In addition to the macro-level evaluation of MCTA by the eight Act 44 measures, a functional evaluation of the system was also performed to provide more insight into the system. The performance evaluation consisted of additional document reviews, on-site review, and interviews with key staff.

In accordance with Act 44, findings are additionally 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 MCTA and may be shared with other agencies as techniques for improvement. Major findings are indicated below, with detailed recommendations on how these and other issues identified should be addressed found in the body of the report.

Best Practices

- **MCTA has strong emphasis on safety** – Best practices include a “safety jackpot” as an incentive for driver safety and accident kits for each vehicle which include a defibrillator (p 26).
- **Cutting Edge Public Information** – MCTA utilizes two cutting-edge public information programs: Google Transit and Route Shout. Google Transit allows passengers to plan their trip online via a web application, and Route Shout facilitates real-time route information via text message. It should be noted that due to overwhelming demand, Google Transit is no longer accepting “partner” agencies and MCTA was one of the first agencies in the country to implement the technology (p 22).
- **Management actively pursues other revenue sources** –MCTA generates revenue through mechanisms such as fuel purchase and resale, as well as the operation of bus service for the National Park Service (p 24).
- **Very knowledgeable and active board** – MCTA board members come from diverse experiences and actively participate in governance and advocacy, and clearly understand customer service and their role in the agency. Board members work directly with staff to answer questions and resolve issues (p 26).

- **IT (Information Technology) program well-tailored to needs** – MCTA has a realistic IT program with emphasis on communications with customers, rather than procuring technologies such as Automatic Vehicle Locator (AVL) and Automatic Passenger Counters (APC)—a reasonable approach for an agency of this size (p 24).
- **Concerted focus on Branding** – MCTA has done an excellent job of branding the system (Pocono Pony), and participates extensively in community outreach (p 22).

Opportunities for Improvement

- **Dispose of vehicles no longer in service and/or used for parts** – It was observed that MCTA had numerous surplus vehicles (retired, etc.) stored on the property and an unacceptably high spares ratio which increases the burden on maintenance staff and the facility. These vehicles, where applicable, should be classified as surplus and removed from the property (p 25).
- **Establish fixed-route advisory committee** – MCTA does not have a committee to advise staff on the fixed-route bus system and receive input from the public at-large (p 22).
- **Develop succession plans** – MCTA does not have a documented plan in place to ensure that good practices and skilled leadership will continue beyond the career terms of current employees (p 27).
- **Improved capital planning** – MCTA currently relies on the local Transportation Improvement Plan (TIP) and a 12-year plan for capital planning. MCTA should develop a prioritized list of projects to achieve a state-of-good repair and support justified service expansion as identified through a Transit Development Plan (TDP) or similar service planning document (p 27).
- **Bus storage outdoors with no protection** – Given the weather conditions of the area, outdoor unprotected vehicle storage is not an acceptable solution. Current plans call for covered storage to be constructed as part of the new maintenance facility; however, enclosed storage would be a better solution (p 25).

FIVE YEAR PERFORMANCE STANDARDS

This transit agency performance report outlines critical areas where improvements may be made to improve overall quality, effectiveness, and efficiency of the transit system. As a result of the performance review, a set of “performance standards” has been established and is detailed on page 25. These performance standards are required to comply with Act 44 and represent the Department’s minimum performance level that MCTA should achieve for each Act 44 performance criteria during the next review cycle, five years from the date of this report.

Performance targets were created using historical data analyzed during the five-year trend analysis as well as the most current “dotGrants” information available (FY 2010). Targets were extrapolated to FY 2016 and are designed to be aggressive, yet achievable, and are summarized below:

| Performance Criteria | 2008 Value | 2010 Value | 2015 Target | Average Annual Increase 2010-2015 |
|----------------------------------|------------|------------|-------------|-----------------------------------|
| Passengers / Revenue Hour | 6.59 | 6.61 | 7.10 | 2.86% |
| Operating Cost / Revenue Hour | \$76.63 | \$87.50 | \$111.67 | 5.00% |
| Operating Revenue / Revenue Hour | \$10.03 | \$7.82 | \$9.00 | 2.86% |
| Operating Cost / Passenger | \$11.63 | \$13.23 | \$14.67 | 2.09% |

NEXT STEPS

Upon final transmission of the performance review report, Act 44 regulations stipulate that MCTA, “...shall develop and submit to the Department within 90 days... a strategic action plan focuses on continually improving the system to achieve the established minimum performance standards.” The action plan should outline corrective action that will be taken to address:

- “Opportunities for Improvement” – as prioritized by the MCTA 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 MCTA.

MCTA will submit the action plan to the MCTA governing body for approval, and subsequently submit the final approved strategic action plan to PennDOT. MCTA must report at least quarterly to the governing body and PennDOT on the progress of the strategic action plan, actions taken, and actions soon to be implemented. Reporting may occur on a more frequent basis, to be determined jointly by the Department, MCTA, and the governing body.

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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 Monroe County Transportation Authority (MCTA).

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 October 2010, a transit agency performance review was initiated for MCTA. The performance review proceeded following 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 MCTA 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 October 26 and October 27, 2011.
 - An interview guide customized for MCTA’s service characteristics was used for the review.
 - Topics covered during the interview process included:
 - Background Information
 - Governance
 - Management
 - Finance
 - Procurement
 - Human /Labor Relations
 - Safety and Security
 - Operations and Scheduling
 - Maintenance
 - Information Technology
 - Customer Service
 - Marketing and Public Relations
 - Planning
 - Capital Programming

AGENCY DESCRIPTION

According to MCTA's self-reported description:

*"The Monroe County Transportation Authority (MCTA) was incorporated on October 5, 1979, as a non-profit corporation. The MCTA is a municipal authority as established under the auspices of the Pennsylvania Municipal Authorities Act of 1945, as amended. The MCTA was formed by a group of concerned citizens to provide the community with a safe, dependable, and economical transportation alternative. The MCTA has a nine-member Board of Directors appointed by the Monroe County Commissioners. The fixed-route service program operates with federal, state, and local funds. The Shared Ride program is primarily funded through the state lottery program with significant local support from the Area Agency on Aging."*¹

MCTA's fixed-route system consists of four bus routes serving Monroe County. Routes typically operate with 60- to 180-minute headways.

Taken as a whole, the findings suggest that MCTA needs to find ways to increase ridership while containing costs.

¹ Agency description was provided in large part by MCTA Executive Director Peggy Howarth.

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; and,
Provides an action plan documenting who should perform the recommended actions and a time frame within which they should be performed.”*

The law sets forth performance criteria to be used to satisfy its objectives:

- Passengers per revenue vehicle hour,
- Operating cost per revenue vehicle hour,
- Operating revenue per revenue vehicle hour,
- Operating cost per 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:

- Revenue vehicle hours (car hours for rail and fixed guideway)
- Revenue vehicle miles (car miles for rail and fixed guideway)
- Number of peak vehicles
- 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

The following list was submitted to MCTA management for review and comment. All 10 peer systems, in addition to MCTA, were included in subsequent analyses for peer comparison purposes:

- Schuylkill Transportation System (STS), Pottsville, PA
- Indiana County Transit Authority (IndiGO), Indiana, PA
- Fayette Area Coordinated Transportation (FACT), Uniontown, PA
- Blue Water Area Transportation Commission, Port Huron, MI*
- Muskegon Area Transit System (MATS), Muskegon, MI*
- County of Lebanon Transit Authority (COLT/LT), Lebanon, PA*
- Chemung County Transit System, Elmira, NY*

- South Metro Area Regional Transit (SMART), Wilsonville, OR*
- Ulster County Area Transit, Kingston, NY*
- Middletown Transit District (MTD), Middletown, CT*

*urban transit system

ACT 44 FIXED-ROUTE COMPARISONS AND FINDINGS

MCTA was compared to the selected peer systems using two different sources of data dependent on system type and location:

- National Transit Database (NTD)
 - All transit systems that receive federal funding as an urban operating system must report to NTD.
- DotGrants
 - All Pennsylvania systems are required to report to PennDOT's DotGrants system.

Public transportation organizations are organized into two different categories based largely on service area characteristics as determined by the U.S. Census: urban and rural. Urban transportation organizations receive funding directly from the Federal Transit Administration (FTA), and as a condition of funding must report operating statistics to the National Transit Database (NTD) if qualified by FTA regulations. Conversely, rural transportation providers such as MCTA do not submit information directly to NTD. As a result, there is a significant lack of reliable operating statistics for rural systems.

Rural transportation organizations vary widely in service characteristics based on local transportation demands. In Pennsylvania alone, the smallest rural transit agency operates 1 fixed route vehicle in maximum operations, while the largest operates 26 vehicles. This wide variance in transportation provided means that there are few comparable Pennsylvania rural peers and for this reason, the Act 44 analysis of MCTA relies on urban transportation systems that closely match MCTA to supplement rural peers.

For all Pennsylvania rural peers and MCTA, DotGrants data was used. For all other systems, NTD data was used for comparison purposes. NTD and DotGrants definitions and reporting statistics are identical and the data is comparable for the five-year trend analysis window for:

- Passengers per revenue vehicle hour
- Operating cost per revenue vehicle hour
- Operating revenue per revenue vehicle hour
- Operating cost per 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 MCTA.
- Standard Deviation: Standard deviation of all values being measured across all peer transit agencies, including MCTA.

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

- In Compliance if within one standard deviation **above** the peer group average for –
 - Single-year and five-year trend for Operating Cost / Revenue Vehicle Hour
 - Single-year and five-year trend for Operating Cost / Passenger
- In Compliance if within one standard deviation **below** the peer group average for –
 - Single-year and five-year trend for Passengers / Revenue Vehicle Hour
 - Single-year and five-year trend for Operating Revenue / Revenue Vehicle Hour

If the agency falls outside of any of the boundaries, it is considered “At Risk” for that criteria and must create an action plan to bring the criteria into compliance prior to the next performance review.

Results of the MCTA analysis and the peer analysis are presented in the **Fixed-Route Bus Performance Comparisons** section below and are as follows:

Exhibit 1: Act 44 Measures Findings Summary Table

| Metric | 2008 Single Year | Five-Year Trend |
|-------------------------------------|-------------------------|------------------------|
| Passengers / Revenue Hour | In Compliance | In Compliance |
| Operating Cost / Revenue Hour | In Compliance | In Compliance |
| Operating Revenue / Revenue Hour | In Compliance | In Compliance |
| Operating Cost / Passenger Boarding | In Compliance | In Compliance |

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FIXED-ROUTE BUS PERFORMANCE COMPARISONS

Data was extracted and summarized for each of the required Act 44 metrics for the 10 peer systems plus MCTA. 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 2, Exhibit 3, Exhibit 4, and Exhibit 5**. Five-year trend analyses are presented in **Exhibit 6, Exhibit 7, Exhibit 8, and Exhibit 9**.

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 “1st” consistently indicates that the agency scores best amongst its peers and a ranking of “11th” indicates that it performs the poorest on any given metric.

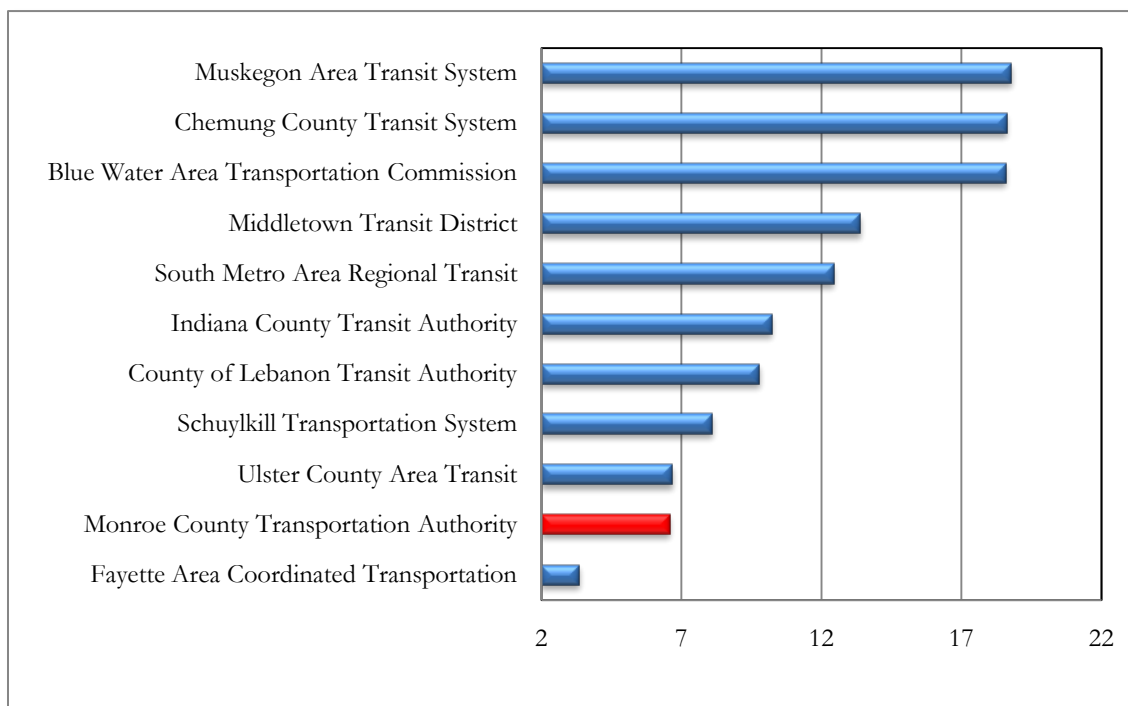
The findings presented in the exhibits can be summarized as follows:

- MCTA’s 2008 **passengers per revenue vehicle hour** ranks 10th out of the 11 transit agencies in the peer group. Passengers per revenue vehicle hour has been slightly decreasing over the trend period.
- MCTA’s 2008 **operating cost per revenue vehicle hour** is slightly better peer group average (8th most costly out of the 11 peers) and is climbing at a rate greater than the peer average.
- MCTA’s 2008 **operating revenue per revenue vehicle hour** is below the peer group average (8th out of 11). The trend between 2003 and 2008 indicates that revenue per revenue vehicle hour is growing marginally while the peer group figure is increasing at a much greater rate.
- MCTA’s 2008 **operating cost per passenger** is below the peer group average (9th out of 11). MCTA’s trend indicates that cost per passenger is rising at a rate more than double the peer group average (8.49% and 4.05% respectively).

Taken as a whole, the findings suggest that MCTA needs to find ways to increase ridership while containing costs.

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.

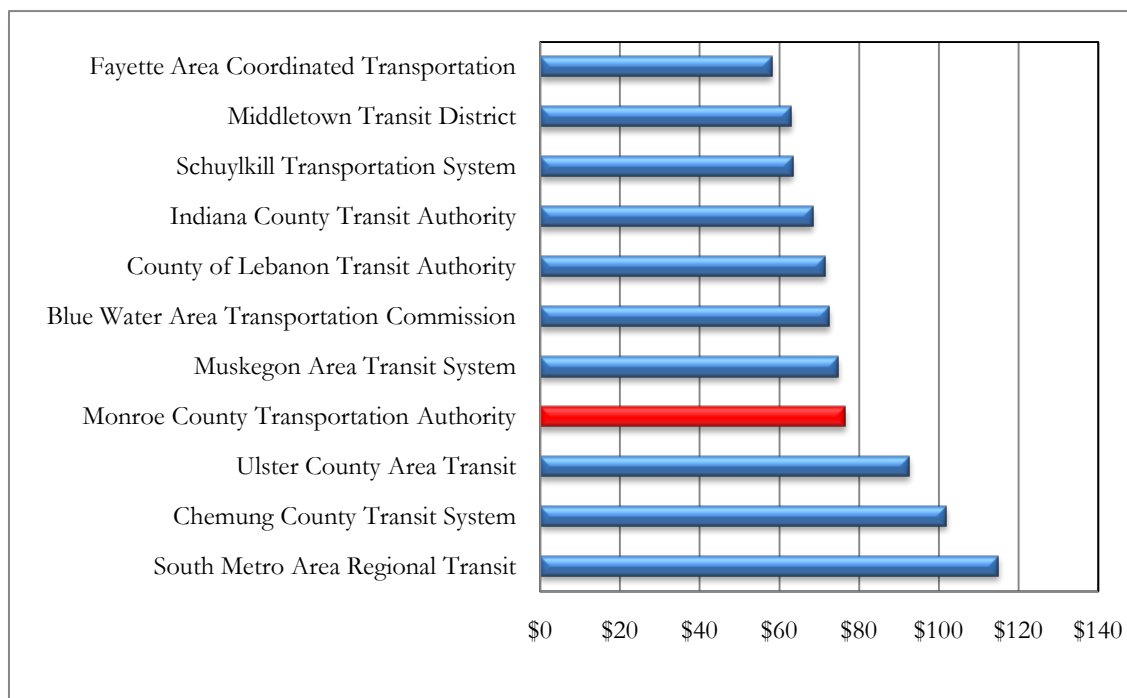
Exhibit 2: 2008 Passengers per Revenue Vehicle Hour (Bus)



| Passengers / RVH | | |
|--|--------------|-----------|
| System | Value | Rank |
| Muskegon Area Transit System* | 18.78 | 1 |
| Chemung County Transit System* | 18.63 | 2 |
| Blue Water Area Transportation Commission* | 18.58 | 3 |
| Middletown Transit District* | 13.40 | 4 |
| South Metro Area Regional Transit* | 12.46 | 5 |
| Indiana County Transit Authority | 10.24 | 6 |
| County of Lebanon Transit Authority* | 9.79 | 7 |
| Schuylkill Transportation System | 8.11 | 8 |
| Ulster County Area Transit* | 6.69 | 9 |
| Monroe County Transportation Authority | 6.59 | 10 |
| Fayette Area Coordinated Transportation* | 3.36 | 11 |
| <i>Average</i> | <i>11.51</i> | |
| <i>Standard Deviation</i> | <i>5.37</i> | |
| <i>Average – 1 Standard Deviation</i> | <i>6.14</i> | |
| <i>Average + 1 Standard Deviation</i> | <i>16.88</i> | |
| Within Standard Deviation | Yes | |
| Better or Worse Than Peer Group Average | Worse | |

*urban transit system

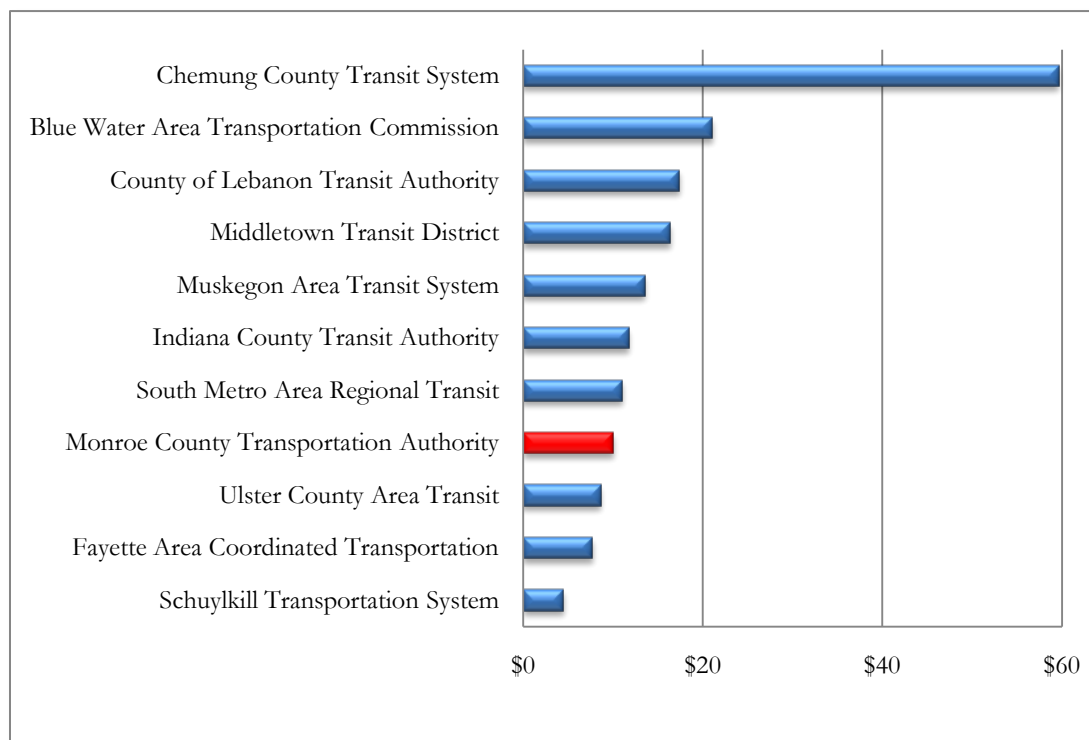
Exhibit 3: 2008 Operating Cost per Revenue Vehicle Hour (Bus)



| Operating Cost / RVH | | |
|--|----------------|----------|
| System | Value | Rank |
| Fayette Area Coordinated Transportation* | \$46.61 | 1 |
| Middletown Transit District* | \$63.00 | 2 |
| Schuylkill Transportation System | \$63.39 | 3 |
| Indiana County Transit Authority | \$68.42 | 4 |
| County of Lebanon Transit Authority* | \$71.63 | 5 |
| Blue Water Area Transportation Commission* | \$72.57 | 6 |
| Muskegon Area Transit System* | \$74.78 | 7 |
| Monroe County Transportation Authority | \$76.63 | 8 |
| Ulster County Area Transit* | \$92.68 | 9 |
| Chemung County Transit System* | \$101.95 | 10 |
| South Metro Area Regional Transit* | \$114.99 | 11 |
| <i>Average</i> | <i>\$78.01</i> | |
| <i>Standard Deviation</i> | <i>\$17.79</i> | |
| <i>Average – 1 Standard Deviation</i> | <i>\$60.22</i> | |
| <i>Average + 1 Standard Deviation</i> | <i>\$95.81</i> | |
| Within Standard Deviation | Yes | |
| Better or Worse Than Peer Group Average | Better | |

*urban transit system

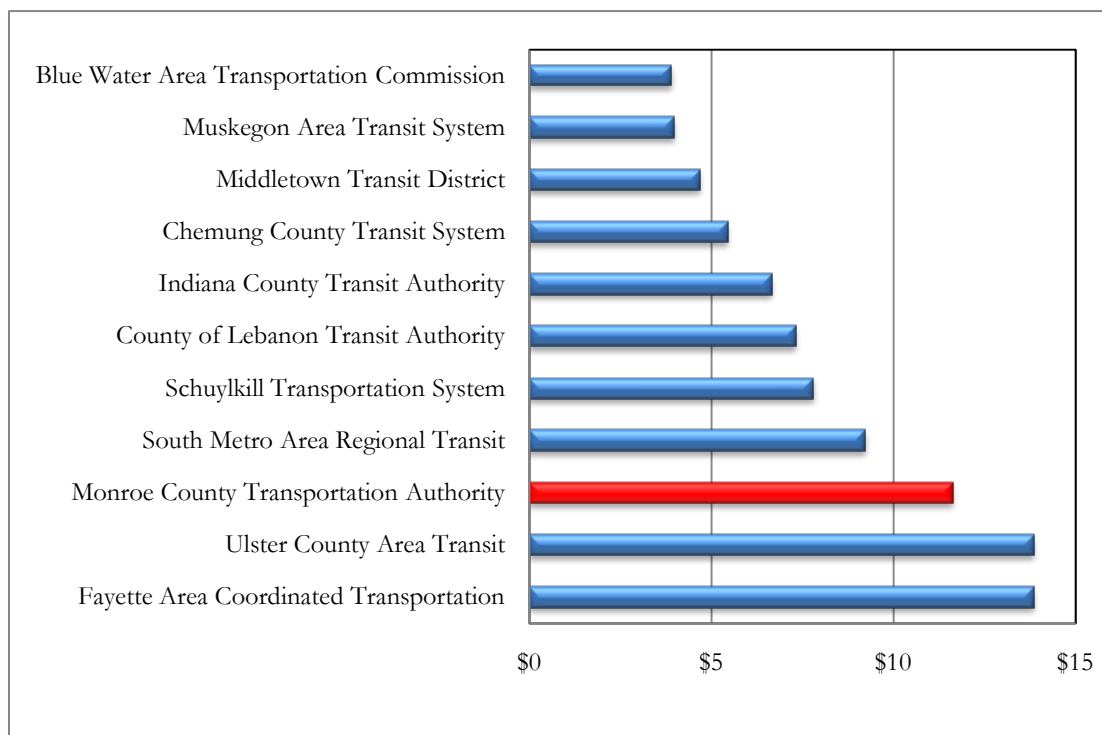
Exhibit 4: 2008 Operating Revenue per Revenue Vehicle Hour (Bus)



| Operating Revenue / RVH | | |
|--|----------------|----------|
| System | Value | Rank |
| Chemung County Transit System* | \$59.62 | 1 |
| Blue Water Area Transportation Commission* | \$21.08 | 2 |
| County of Lebanon Transit Authority* | \$17.41 | 3 |
| Middletown Transit District* | \$16.37 | 4 |
| Muskegon Area Transit System* | \$13.58 | 5 |
| Indiana County Transit Authority | \$11.74 | 6 |
| South Metro Area Regional Transit* | \$11.06 | 7 |
| Monroe County Transportation Authority | \$10.03 | 8 |
| Ulster County Area Transit* | \$8.66 | 9 |
| Fayette Area Coordinated Transportation* | \$7.71 | 10 |
| Schuylkill Transportation System | \$4.49 | 11 |
| <i>Average</i> | <i>\$16.52</i> | |
| <i>Standard Deviation</i> | <i>\$15.06</i> | |
| <i>Average – 1 Standard Deviation</i> | <i>\$1.47</i> | |
| <i>Average + 1 Standard Deviation</i> | <i>\$31.58</i> | |
| Within Standard Deviation | Yes | |
| Better or Worse Than Peer Group Average | Worse | |

*urban transit system

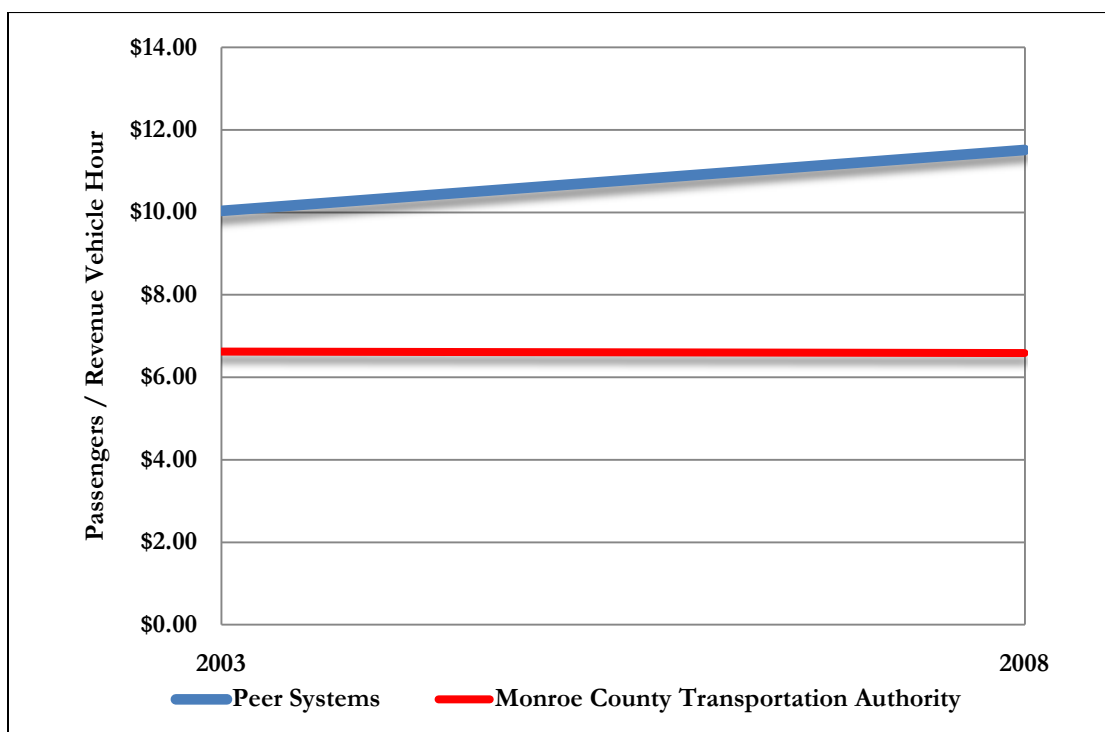
Exhibit 5: 2008 Operating Cost per Passenger (Bus)



| Operating Cost / Passenger | | |
|--|----------------|----------|
| System | Value | Rank |
| Blue Water Area Transportation Commission* | \$3.91 | 1 |
| Muskegon Area Transit System* | \$3.98 | 2 |
| Middletown Transit District* | \$4.70 | 3 |
| Chemung County Transit System* | \$5.47 | 4 |
| Indiana County Transit Authority | \$6.68 | 5 |
| County of Lebanon Transit Authority* | \$7.32 | 6 |
| Schuykill Transportation System | \$7.81 | 7 |
| South Metro Area Regional Transit* | \$9.23 | 8 |
| Monroe County Transportation Authority | \$11.63 | 9 |
| Ulster County Area Transit* | \$13.86 | 10 |
| Fayette Area Coordinated Transportation* | \$13.86 | 11 |
| <i>Average</i> | <i>\$8.04</i> | |
| <i>Standard Deviation</i> | <i>\$3.68</i> | |
| <i>Average – 1 Standard Deviation</i> | <i>\$4.36</i> | |
| <i>Average + 1 Standard Deviation</i> | <i>\$11.73</i> | |
| Within Standard Deviation | Yes | |
| Better or Worse Than Peer Group Average | Worse | |

*urban transit system

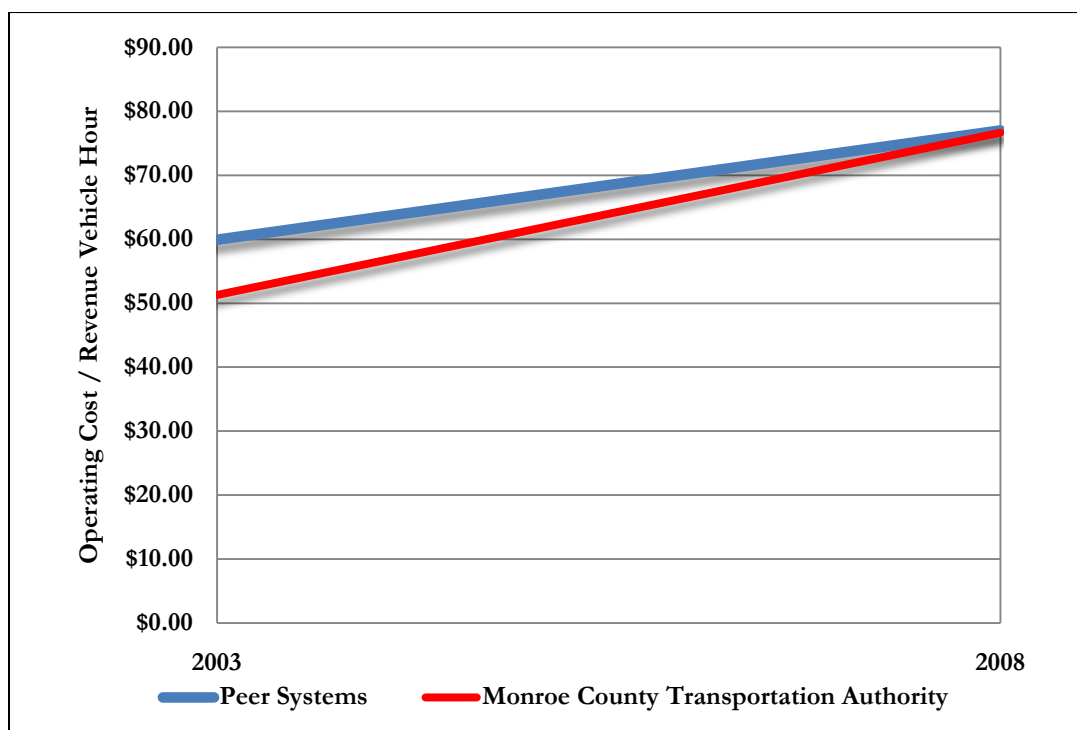
Exhibit 6: Five-Year (2003-2008) Passengers per Revenue Vehicle Hour Trend



| Passengers / Revenue Vehicle Hour | | |
|--|---------------|----------|
| System | Value | Rank |
| Chemung County Transit System* | 14.29% | 1 |
| Muskegon Area Transit System* | 9.95% | 2 |
| Blue Water Area Transportation Commission* | 5.88% | 3 |
| Ulster County Area Transit* | 4.52% | 4 |
| County of Lebanon Transit Authority* | 2.00% | 5 |
| Middletown Transit District* | 0.55% | 6 |
| Monroe County Transportation Authority | -0.11% | 7 |
| South Metro Area Regional Transit* | -2.80% | 8 |
| Indiana County Transit Authority | -3.25% | 9 |
| Schuykill Transportation System | -3.49% | 10 |
| Fayette Area Coordinated Transportation* | -8.16% | 11 |
| <i>Average</i> | <i>1.76%</i> | |
| <i>Standard Deviation</i> | <i>6.52%</i> | |
| <i>Average - 1 Standard Deviation</i> | <i>-4.76%</i> | |
| <i>Average + 1 Standard Deviation</i> | <i>8.29%</i> | |
| Within Standard Deviation | Yes | |
| Better or Worse Than Peer Group Average | Worse | |

*urban transit system

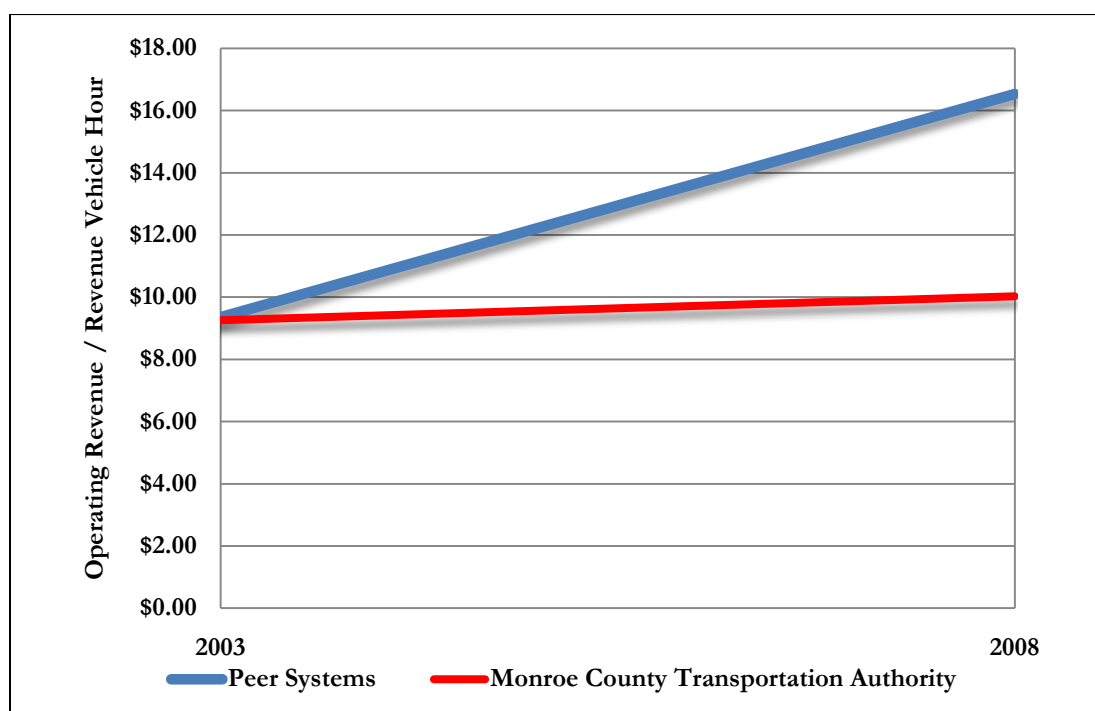
Exhibit 7: Five-Year (2003-2008) Operating Cost per Revenue Vehicle Hour Trend



| Operating Cost / Revenue Vehicle Hour | | |
|--|---------------|----------|
| System | Value | Rank |
| Fayette Area Coordinated Transportation* | -2.65% | 1 |
| South Metro Area Regional Transit* | -1.91% | 2 |
| Middletown Transit District* | 2.78% | 3 |
| Muskegon Area Transit System* | 3.31% | 4 |
| Schuylkill Transportation System | 5.24% | 5 |
| Blue Water Area Transportation Commission* | 6.02% | 6 |
| Monroe County Transportation Authority | 8.37% | 7 |
| Chemung County Transit System* | 9.45% | 8 |
| Indiana County Transit Authority | 9.53% | 9 |
| County of Lebanon Transit Authority* | 10.31% | 10 |
| Ulster County Area Transit* | 11.46% | 11 |
| <i>Average</i> | <i>5.63%</i> | |
| <i>Standard Deviation</i> | <i>4.82%</i> | |
| <i>Average - 1 Standard Deviation</i> | <i>0.81%</i> | |
| <i>Average + 1 Standard Deviation</i> | <i>10.45%</i> | |
| Within Standard Deviation | Yes | |
| Better or Worse Than Peer Group Average | Worse | |

*urban transit system

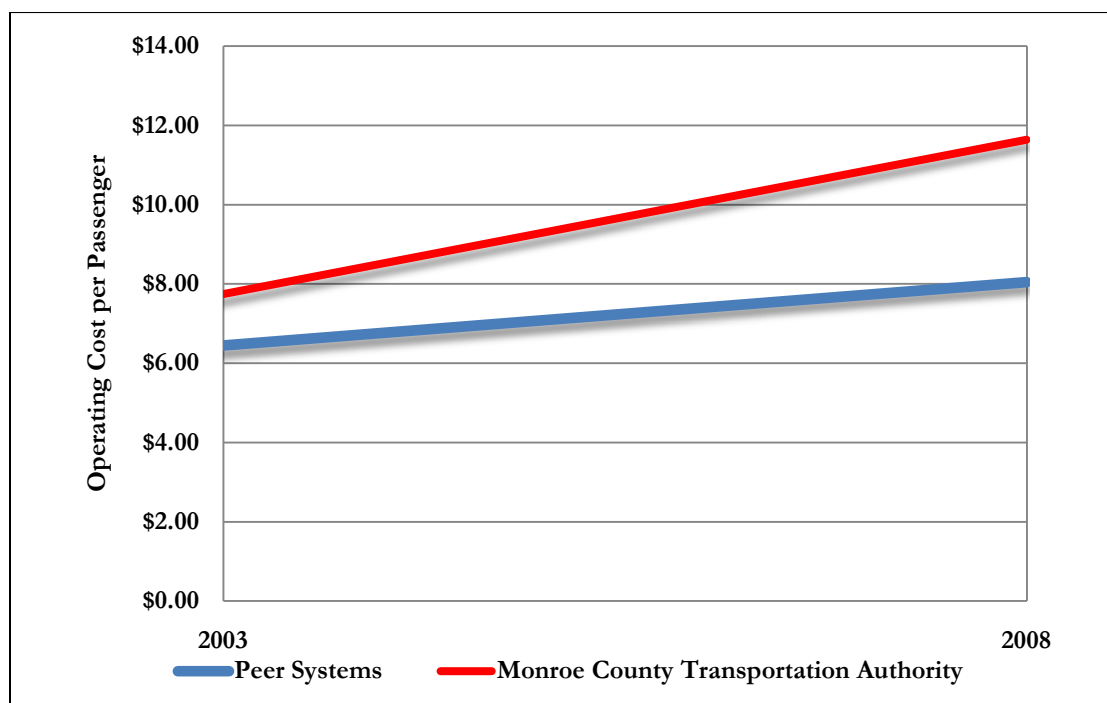
Exhibit 8: Five-Year (2003-2008) Operating Revenue per Revenue Vehicle Hour Trend



| Operating Revenue / Revenue Vehicle Hour | | |
|--|---------------|----------|
| System | Value | Rank |
| South Metro Area Regional Transit* | 43.11% | 1 |
| Blue Water Area Transportation Commission* | 36.25% | 2 |
| Fayette Area Coordinated Transportation* | 20.94% | 3 |
| County of Lebanon Transit Authority* | 16.21% | 4 |
| Muskegon Area Transit System* | 14.27% | 5 |
| Chemung County Transit System* | 13.50% | 6 |
| Middletown Transit District* | 6.63% | 7 |
| Ulster County Area Transit* | 2.09% | 8 |
| Monroe County Transportation Authority | 1.62% | 9 |
| Indiana County Transit Authority | -0.79% | 10 |
| Schuylkill Transportation System | -20.65% | 11 |
| <i>Average</i> | <i>12.11%</i> | |
| <i>Standard Deviation</i> | <i>17.68%</i> | |
| <i>Average - 1 Standard Deviation</i> | <i>-5.57%</i> | |
| <i>Average + 1 Standard Deviation</i> | <i>29.79%</i> | |
| Within Standard Deviation | Yes | |
| Better or Worse Than Peer Group Average | Worse | |

*urban transit system

Exhibit 9: Five-Year (2003-2008) Operating Costs per Passenger Trend



| Operating Cost / Passenger | | |
|--|---------------|----------|
| System | Value | Rank |
| Muskegon Area Transit System* | -6.05% | 1 |
| Chemung County Transit System* | -4.24% | 2 |
| Blue Water Area Transportation Commission* | 0.14% | 3 |
| South Metro Area Regional Transit* | 0.92% | 4 |
| Middletown Transit District* | 2.22% | 5 |
| Fayette Area Coordinated Transportation* | 6.00% | 6 |
| Ulster County Area Transit* | 6.64% | 7 |
| County of Lebanon Transit Authority* | 8.14% | 8 |
| Monroe County Transportation Authority | 8.49% | 9 |
| Schuylkill Transportation System | 9.05% | 10 |
| Indiana County Transit Authority | 13.21% | 11 |
| <i>Average</i> | <i>4.05%</i> | |
| <i>Standard Deviation</i> | <i>5.96%</i> | |
| <i>Average – 1 Standard Deviation</i> | <i>-1.91%</i> | |
| <i>Average + 1 Standard Deviation</i> | <i>10.01%</i> | |
| Within Standard Deviation | Yes | |
| Better or Worse Than Peer Group Average | Worse | |

*urban transit system

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FIVE-YEAR FIXED-ROUTE PERFORMANCE STANDARDS

This transit agency performance report outlines critical areas where improvements may be made to increase the overall quality, effectiveness, and efficiency of the transit system. As a result of the performance review, a set of “performance standards” have been established. These performance standards represent the minimum performance level that MCTA should achieve for each Act 44 criteria during the next performance review cycle, five years from the date of this report.

Performance targets were created using historical data analyzed during the five-year trend analysis as well as the most current DotGrants information available (FY 2010) for MCTA and the peer group. Standards were extrapolated to FY 2015 and are designed to be aggressive, yet achievable. Performance Standards have been mutually agreed upon by PennDOT and MCTA. Five-year performance standards are located in Exhibit 10, Exhibit 11, Exhibit 12, and Exhibit 13.

Exhibit 10: Fixed-Route Passengers per Revenue Hour Performance Targets

Year 2015 Target..... 7.61
Interim Year Targets Annual increase of at least 2.86%

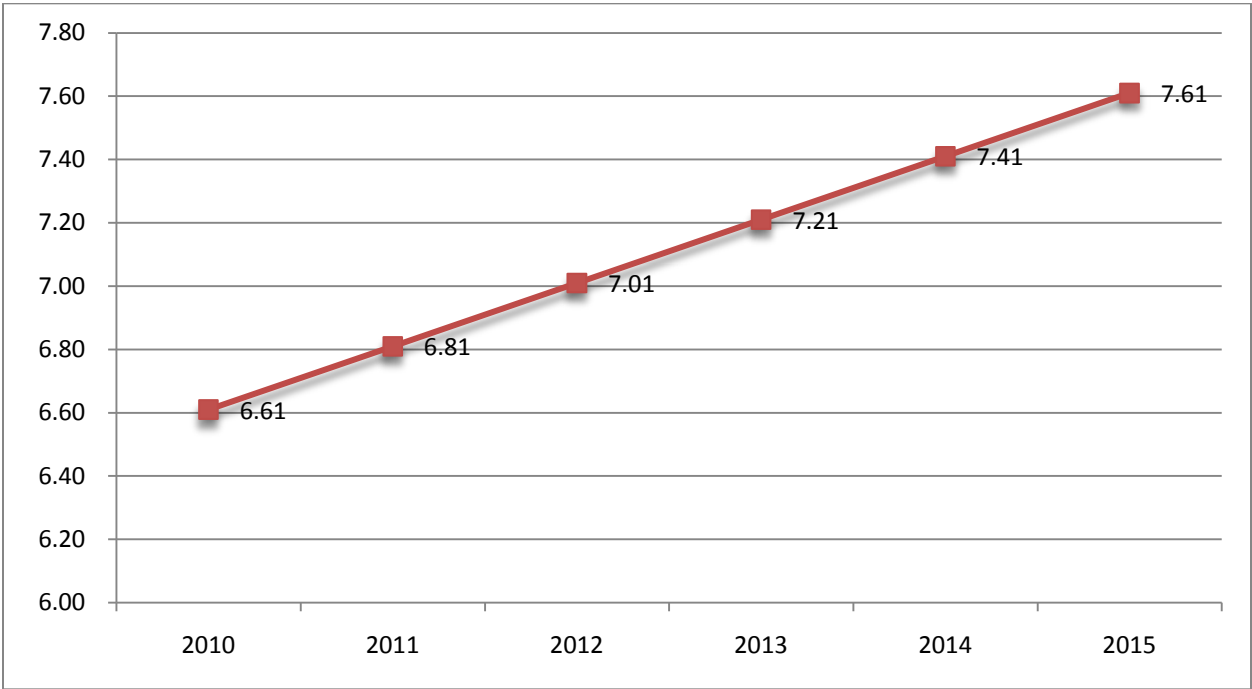


Exhibit 11: Fixed-Route Operating Cost per Revenue Vehicle Hour Performance Targets

Year 2015 Target..... \$111.67
Interim Year Targets Annual increase of no more than 5.0%

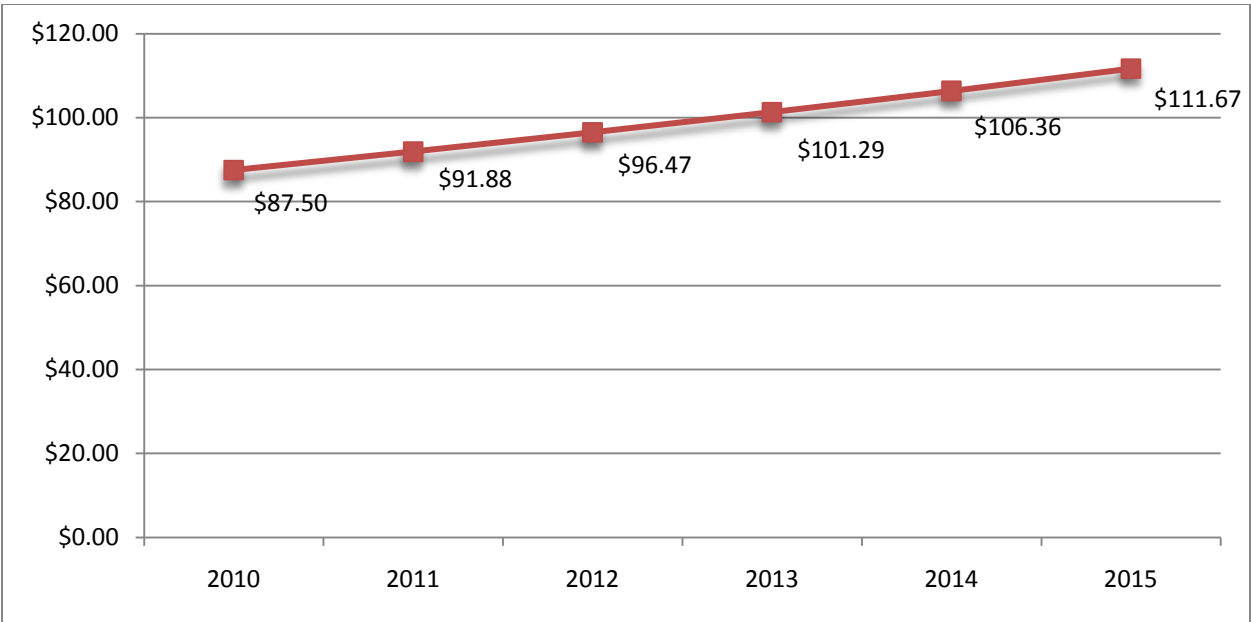


Exhibit 12: Fixed-Route Operating Revenue per Revenue Vehicle Hour Performance Targets

Year 2015 Target..... **\$9.00**
Interim Year Targets **Annual increase of at least 2.86%**

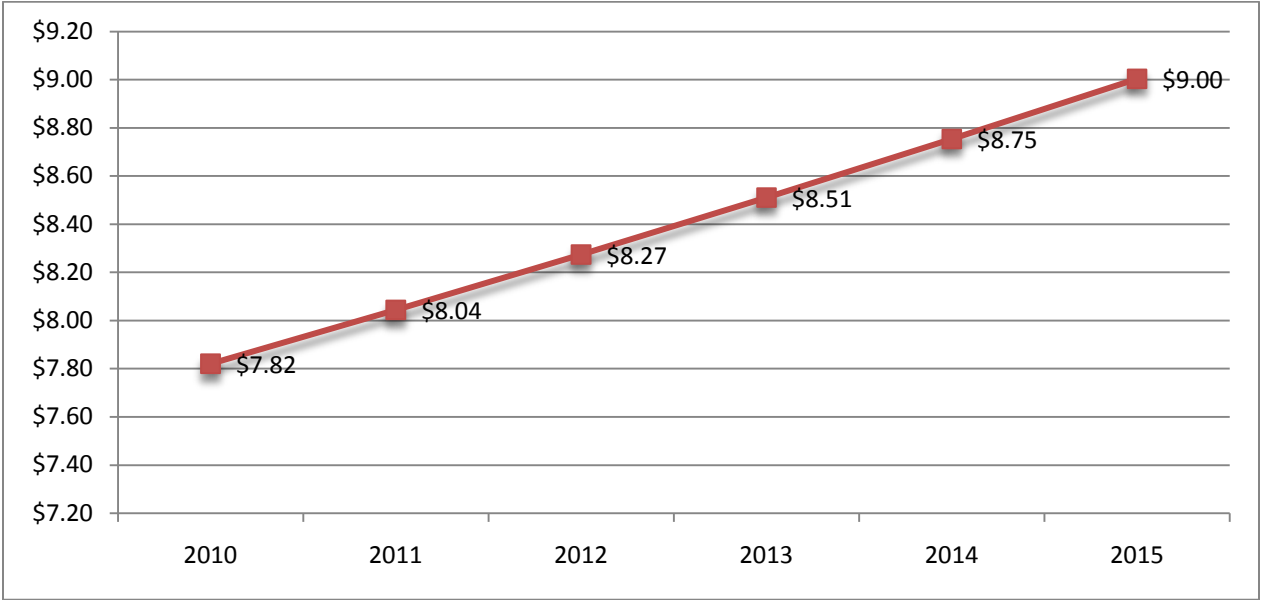
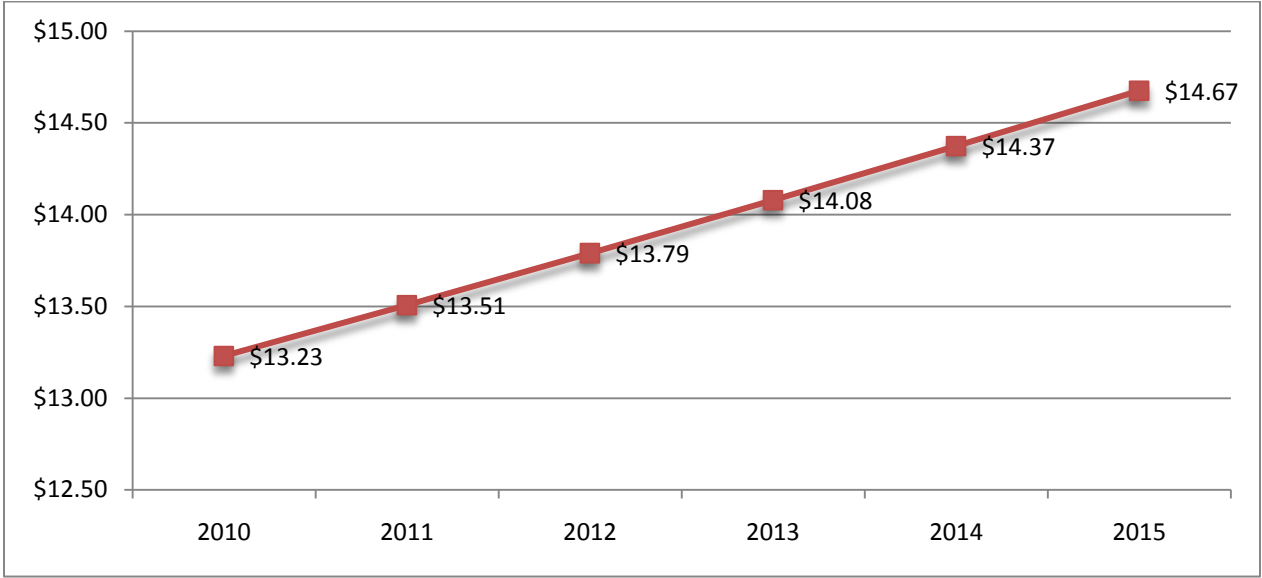


Exhibit 13: Fixed-Route Operating Cost per Passenger Performance Targets

Year 2015 Target..... **\$14.67**
Interim Year Targets **Annual increase of no more than 2.09%**



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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. A total of 15 functional areas were reviewed through documents received from the agency (see **Appendix A: Documentation Request to Executive Director**) and interviews conducted on-site. The functional areas are:

- **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.
- **Advisory Committees** – Typically provide review and input to the Governing Body and agency staff in specific topic areas ranging from a public perspective to technical reviews.
- **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.
- **Human Resources** – Responsible for employee retention, recruitment, training, performance reviews, grievance procedures, employee benefits, and labor relations.
- **Finance** – Functional area includes budgeting, accounting, cash flow management, revenue handling, and insurance.
- **Procurement** – Includes acquisition of rolling stock, vehicle parts, non-revenue capital items (i.e., office equipment) and other operations-related items.
- **Operations** – Includes management of daily service operations, on-street supervision and control, dispatching, and general route management.
- **Maintenance** – Includes vehicle and non-vehicle maintenance management, procedures, and performance.
- **Scheduling** – Includes route and driver scheduling and decision-making, pay premium considerations, general management, procedures, and performance.
- **Safety and Security** – Functional area includes vehicle and passenger safety, facility security, and emergency preparedness.
- **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.
- **Information Technology** – Functional area includes automated mechanisms for in-house and customer service communication including future plans for new technology.
- **Capital Programming** – Includes assessing and programming current and future capital needs reflecting both funded and unfunded projects. Includes the Transit Improvement Plan (TIP), 12-Year Plan, and Long-Range Transit Plan.
- **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.
- **Planning** – Includes analysis of information to effectively plan for changes to the system in the short-, medium-, and long-term horizons, to help assure the continued viability and success of the agency.

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. A complete list of specific items reviewed organized by functional area, topic reviewed, an assessment of its current state, observed trends or planned changes and suggested actions if any is summarized in **Appendix B: Summary of Functional Findings, Trends, and Suggested Actions**. Together 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 the resources that will adapt to changing needs and values.

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 that 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.

OPPORTUNITIES TO INCREASE FIXED-ROUTE RIDERSHIP

"Passengers", as defined by Act 44, are 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

- **MCTA utilizes cutting-edge public information programs:** Google Transit and Route Shout. Google Transit allows passengers to plan their trip online via a web application, and Route Shout facilitates real-time route information via text message. It should be noted that due to overwhelming demand, Google Transit is no longer accepting "partner" agencies and MCTA was one of the first agencies in the country to implement the technology.
- **MCTA has done an excellent job of branding** the system (Pocono Pony), and participates extensively in community outreach.

OPPORTUNITIES FOR IMPROVEMENT (ITEMS TO ADDRESS IN THE ACTION PLAN)

- MCTA currently lacks formal, routine and proactive ways to incorporate customer feedback into the fixed-route service delivery decision-making process. Such feedback can better inform both the community and MCTA so that passenger needs and service are optimized with respect to one another. A citizens' advisory committee exists, but is focused only on paratransit service. **MCTA Management and the Board should work to focus the existing citizens' advisory committee to provide regular feedback on fixed-route topics in addition to paratransit issues, or develop a separate citizens' committee focused solely of fixed-route.**

The committee can advise MCTA from a passenger's perspective on a variety of topics including service changes, fare changes, community outreach, outreach to employers and customer satisfaction. The committee should also serve as a means to **outreach to the**

disability community. In addition, routinely scheduled customer satisfaction and non-rider surveys should be used to monitor and augment these efforts.

- MCTA currently tracks customer complaints through a module in their paratransit scheduling software. **MCTA should investigate ways for the complaint module to generate regular reports to track and assess customer satisfaction.**
- The Executive Director **monitors many performance measures** through the Executive Director's report. This is a positive practice that provides decision-makers with indicators of how effectively service is being delivered as directly measured through ridership and other metrics. It also gives decision-makers the ability to know the effects of various policies, outside phenomena as well as data to determine when and how service should be altered to meet the community's needs in the most efficient manner. **This approach should be expanded to include monthly reporting of performance metrics to the Board, and should also be used extensively in the planning process.**

While MCTA has documented targets in the Executive Director's report, there is no documented service standards policy that outlines the rationale of specific service standards and establishes thresholds for corrective action. **MCTA should also develop a formal service standards policy to guide future planning efforts.**

- MCTA demonstrates regular monitoring of empirically measurable strategic goals and objectives relating to customer satisfaction. Setting targets and measuring performance enhances the chances of improving it. Targets and goals and objectives should be consistently updated. **The Board and Management should work together to develop strategic goals and objectives and continue to set targets for key performance measures, such as on-time performance. Then they should also develop and monitor performance metrics for all key agency functions and operations².**

Metrics should include (but not limited to):

- Number of complaints per passenger
- Percent of complaints responded to within 24 hours
- Improved customer satisfaction survey scores
- X number of marketing campaigns per year

Developing a realistic set of measurable objectives that are reported to and reflect the priorities of the Board will be an important step to improve the quality and efficiency of MCTA's operations.

- MCTA currently **monitors route-level ridership and revenue.** This is a positive practice that provides decision-makers with indicators of how effectively service is being delivered as directly measured in ridership. It also gives decision-makers the ability to know the effects of various policies, outside phenomena as well as data to determine when and how service should be altered to meet the community's needs in the most efficient manner. **This approach**

² Refer to http://onlinepubs.trb.org/onlinepubs/tcrp/tcrp_report_88/Guidebook.pdf Chapter 6 for examples of performance metrics typically used to assess and monitor transit agency functions and outcomes.

should be expanded to include monitoring of all route-level financial measures (i.e. cost and farebox recovery) as well as ridership and revenue.

- While MCTA coordinates with neighboring transit providers, its website lacks a system map that could show passengers where transfer opportunities exist both within the MCTA service area and to other systems in the region where coordination points exist. **MCTA should develop an easy-to-read system map and place it on their website to highlight where transfer opportunities exist.**

OPPORTUNITIES TO INCREASE FIXED-ROUTE REVENUES

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

BEST PRACTICES

- **MCTA actively pursues outside revenue sources from private/institutional organizations.** These contracts (such as the National Park Service) encourage active revenue growth and help to ensure long-term viability of the system.

OPPORTUNITIES FOR IMPROVEMENT (ITEMS TO ADDRESS IN THE ACTION PLAN)

- While MCTA already actively pursues outside revenue sources, **MCTA should continue to identify and capture additional revenues from traditional and non-traditional sources.**
- **MCTA should evaluate current and future service contracts to ensure they are billed at the actual cost of service.** Currently, it appears that the National Park Service Contract is billed below the actual cost of the service. This may be due, in part, to insufficient mechanisms in the contract to regularly increase contract price to be consistent with actual cost. **MCTA should work to ensure future contracts have cost escalation clauses that allow for full allocation of costs to contracted service, and should adjust the National Park Service contract as soon as possible.**

OPPORTUNITIES TO CONTROL OPERATING COSTS

“Operating costs” capture the non-capital costs incurred in the day-to-day operations of a transit system. Labor, maintenance and operating costs such as fuel and tires and lube 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 a key to maintaining current service levels.

BEST PRACTICES

- **MCTA has a well-tailored Information Technology (IT) program.** The IT program places an emphasis on communications with customers, rather than procuring technologies

such as Automatic Vehicle Locator (AVL) and Automatic Passenger Counters (APC). This approach is considered to be appropriate given the size of the agency, and a **best practice**.

OPPORTUNITIES FOR IMPROVEMENT (ITEMS TO ADDRESS IN THE ACTION PLAN)

- The current Collective Bargaining Agreement (CBA) between MCTA and Division 819 / Amalgamated Transit Union (ATU) provided for overtime pay after 8 hours in one day. This could conceivably lead to overtime payments to an employee who did not work a full (40 hour) work week. **MCTA should pursue overtime after 40-hours per week overtime provision in a future CBA.**
- MCTA uses MAS 90® accounting software and RTA Fleet Management ® software for maintenance. The systems are not integrated, resulting in duplicate tasks and manual entry and reconciliation between the two systems. **MCTA should explore better integration between the two software systems** to reduce duplication of effort and redundancy and yield potential cost savings.
- Despite the use of recordkeeping software, the parts inventory function relies heavily on manual analysis and the knowledge of specific employees. Should the employees skilled in parts inventory leave the agency, there may be no means to ensure that inventory is properly recorded and maintained. **MCTA should investigate the report generation capabilities of current software** to determine if more automated analysis could be performed.

Warranty information is currently not entered into MCTA's RTA Fleet Management Software® and is instead determined by management. **MCTA should investigate incorporating warranty information into fleet management software** to ensure that warranty work is not being completed at a cost to the agency.

In addition, MCTA has no formally documented methods or approaches to managing parts inventory levels. **MCTA should establish performance metrics for the parts inventory function and develop procedures for collecting and reporting the data needed to determine performance.** Applicable metrics and methodologies for determining performance can be found in the Transit Cooperative Research Program's publication, *Inventory Management in a Maintenance Environment*, and may include:

- % of total units filled on schedule
- % of maintenance hours lost while waiting for parts
- Average number of vehicles held out-of-service for parts per day
- MCTA has an unusually high level of “for-parts” vehicles. **Surplus vehicles should be removed from the property as soon as possible.** Surplus vehicles add a burden to maintenance staff.
- MCTA lacks targets and goals for key cost drivers, such as unscheduled overtime pay. **MCTA should establish targets and goals for key cost drivers to monitor actual performance in**

relationship to established goals and develop response strategies for performance outside of acceptable parameters.

- MCTA’s maintenance facility does not have sufficient space to store vehicles indoors or under cover. Vehicles are left outside without adequate protection from inclement weather. Inclement weather may damage the exterior of busses, result in shorter vehicle life, increase maintenance needs, and increase operating cost (i.e. winter block heaters). **MCTA should develop a facility master plan to meet the current and future needs of the system, particularly in meeting the need for indoor/covered storage.**
- **MCTA lacks a prioritized technology or IT plan** that can help prioritize expenditures and assure that IT investments yield a return on investment and work seamlessly with other IT systems already in place. This may result in ineffective expenditures, additional staff time and unexpected expenses to make IT systems work together. **Any subsequent investments in technology should be driven by the findings and recommendations of a prioritized technology investment program** that includes plans for the use of the technology and documented benefits to the system.

OTHER FINDINGS THAT IMPACT OVERALL AGENCY PERFORMANCE

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

BEST PRACTICES

- **MCTA has a very knowledgeable and active board.** Board members come from diverse experience and actively participate in governance and advocacy, and clearly understand customer service and their role in the agency. Board members work directly with staff to answer questions and resolve issues.
- **MCTA has a strong emphasis on safety.** Best practices, including a “safety jackpot” to incentivize driver safety and accident kits that include a defibrillator, should be shared with other Pennsylvania transit systems.
- **MCTA has an organized approach for conducting annual performance reviews for both represented and non-represented employees.** This approach enables management to establish goals with individual employees and forms an opportunity to note exemplary or substandard performance.

OPPORTUNITIES FOR IMPROVEMENT (ITEMS TO ADDRESS IN THE ACTION PLAN)

- Constant training and re-training is the best way for Board members, who may not be in the transportation industry, to stay abreast of agency needs and industry norms. **The MCTA**

Board should work with the Executive Director to develop and implement education programs to stay up to date and provide tools for effective governance.

- One main duty of the governing Board is to set strategic goals and objectives for MCTA and monitor progress on these strategic plans. MCTA currently has a strategic plan, but it was last updated in 2006 and is effectively out-of-date. The MCTA Board provides annual goals to the Executive Director, which is good industry practice. **Board members should work with senior staff to update the strategic plan and expand measureable goals and objectives to accomplish the established mission and vision statements.**
- Management lacks formally documented succession planning. **Management should document robust short-term succession plans for key agency positions that include cross-training** to assure continuously smooth service in the event of staffing changes.
- When a citizens' advisory committee focused on fixed-route service is organized, **management should have senior staff monitor and report on service effectiveness with respect to the specific goals set by the board and involve the citizen committee in the discussions about how to fine-tune service delivery to meet the goals.**
- MCTA chooses to purchase bulk fuel via contract and resells fuel to other transportation companies (i.e. Waste Management). While this practice results in increased revenues, it also poses a financial record issue. **MCTA should disaggregate fuel costs for sales to outside entities and not record costs until the transaction occurs.** The current practice of recording all fuel costs when they are incurred shows a higher-than-actual cost in MCTA's records, providing overstated costs that artificially inflate the cost of service.
- **MCTA lacks a prioritized capital needs assessment.** It is good practice to first identify all capital needs to achieve a state-of-good-repair and justified service expansion identified through a service planning document. Once those needs are identified, they should be prioritized and matched against expected or available funding. Capital programming implements the prioritized needs based on available funding either via 12 year and 5 year capital budgets. MCTA lacks a prioritized capital needs plan and is focused only on fiscally constrained 5-year and 12-year capital budgets. **The Executive Director should involve the Board and all senior staff in the development of a formally documented capital needs assessment.**
- MCTA has a DBE goal of 0.66% that proves difficult to meet. It is acknowledged that local DBE companies are scarce. **Management should engage PennDOT's DBE outreach program with the goal of identifying and expanding DBE participation in the local area.**
- Local training opportunities for maintenance and operations staff are limited. **MCTA management should continuously monitor staff training needs and work with PPTA and local technical colleges to develop necessary courses and curricula.**

- While MCTA is commended for their attention to safety, the agency lacks a **System Security and Emergency Preparedness Plan (SSEPP)**. SSEPP's provide an opportunity for the agency to establish procedures and protocols in a single document that will be used in the event of a security breach or emergency. **MCTA should develop and implement a SSEPP.**
- MCTA is currently developing a crisis and disaster plan. **This plan should be completed,** and may be incorporated into a future SSEPP.

APPENDIX A: DOCUMENTATION REQUEST TO EXECUTIVE DIRECTOR

**2010 Transit Performance Review
Data Request
Pennsylvania Department of Transportation
Bureau of Public Transportation**



DOCUMENT REQUEST

Please provide the following documents and label as shown for **fixed route service only**. Information is strongly preferred in electronic format. Please indicate on the below checklist as to the status and availability of the information.

**Denotes information requested from contractors in addition to Agency.

| Requested Item | Mark Form in which Data to Be Provided | | | |
|--|--|------------|---------------|----------------|
| | Electronic | Paper Mail | Not Available | Not Applicable |
| BACKGROUND | | | | |
| 1. Enabling legislation, ordinances, compacts or charter. | X | | | |
| 2. Brief history of the agency, including its current and any prior official names, any present nicknames or monikers, and identify any predecessor entities, service days/hours and any other general agency information. | X | | | |
| 3. Business or Strategic Plans, including adopted Mission and Vision statements. | X | | | |
| 4. Describe any unique circumstances that have adversely or positively affected the agency (ridership, finances, other). | X | | | |
| GOVERNANCE/GENERAL MANAGEMENT | | | | |
| 5. List of current governing body members, with terms and tenure of each member and contact information for each. | - | | | |
| 6. Governing body minutes and agenda from the last 12 months. | X | | | |
| 7. Biography, contract terms, and tenure of General Manager / Executive Director. | X | | | |
| 8. Organization chart delineating decision authority by roles. | X | | | |
| 9. Succession plan or equivalent. | | | X | |
| 10. Any documentation not provided above which delineates the respective roles and responsibilities of management and governing body members. | X | | | |
| OVERSIGHT AND REVIEWS | | | | |
| 11. Two most recent annual reports from chief executive officer to governing board. | X | | | |
| 12. Financial Management Oversight (FMO) reviews, Triennial Reviews, PennDOT 5311 Compliance Reviews and any other recent outside audits or evaluations in any administrative areas such as: Executive Management, Human Resources, Finance, Legal, Information Management, Resource Management, Internal Audit, Marketing, etc. Include all correspondence between the agency, PennDOT, FTA, auditors, etc. | X | | | |
| HUMAN RESOURCES | | | | |
| 13. All collective bargaining agreements as well as any related documents (e.g., letters or memoranda of understanding, letter | X | | | |

**2010 Transit Performance Review
Data Request
Pennsylvania Department of Transportation
Bureau of Public Transportation**

| Requested Item | Mark Form in which Data to Be Provided | | | |
|---|--|------------|---------------|----------------|
| | Electronic | Paper Mail | Not Available | Not Applicable |
| agreements, side letters that clarify or modify the collective bargaining agreements, etc.) | | | | |
| 14. Any strikes or work stoppages over the past 6 years. | X | | | |
| 15. Any reports filed with the state or federal government regarding union operations, funds management, etc. | X | | | |
| 16. Cost of benefits (health care, pension/retirement, etc.) broken down by major category for the last year and projected for the next 5 years. | X | | | |
| 17. Turnover rate by position for each of the last 5 years. | X | | | |
| 18. Operator hiring and performance review procedures. | X | | | |
| FINANCE | | | | |
| 19. Operating and Capital Budgets for the current fiscal year (provide separately if not in the Annual Report). | X | | | |
| 20. Official Bond Statements for the most recent issuances. | X | | | |
| 21. Audited Financial Statement for the most recent fiscal year and Single Audit Statement. | X | | | |
| 22. Profit/Loss/Cash Flow statements for each of the past 12 months. | X | | | |
| 23. Year-end cash position for each of the last 2 fiscal years. | X | | | |
| 24. Operating revenues and expense detail by account for each of the last 2 years. Please provide in as frequent intervals as possible (i.e. monthly, quarterly) | | | X | |
| PROCUREMENT | | | | |
| 25. Procurement policy and procedures. | X | | | |
| CONTRACTING | | | | |
| 26. Contracts involving purchased transportation. | | | | X |
| 27. Contracts for the provision of services or special operations agreements to specific agencies, localities, colleges, universities, or other entities. | | | | |
| 28. Contracts for tire services, management services, and professional services over \$25,000 in value. | | | X | |
| 29. Contract management plan. | | | X | |
| OPERATIONS | | | | |
| 30. Operations Manual. | X | | | |
| 31. Operators Manual. | X | | | |
| 32. Emergency and inclement weather (snow, flood, etc.) operational plans and procedures. | X | | | |
| 33. Dispatch procedures | | | X | |
| 34. On-street supervision procedures (incl. AVL, if equipped). | X | | | |
| 35. Service standards for existing and new or newly restructured services. Provide description or example of how used in periodic service evaluations and service planning. | X | | | |
| 36. Significant seasonal variations in service supplied (including school alterations, special routes, etc.). | X | | | |

**2010 Transit Performance Review
Data Request
Pennsylvania Department of Transportation
Bureau of Public Transportation**

| Requested Item | Mark Form in which Data to Be Provided | | | |
|---|--|------------|---------------|----------------|
| | Electronic | Paper Mail | Not Available | Not Applicable |
| 37. Identify and provide relevant documents regarding any present & future operational challenges. | X | | | |
| FARES AND FARE SECURITY | | | | |
| 38. Listing of fares by type and media (pass, token, cash, etc.) | X | | | |
| 39. Plans for changes in fare media (e.g. electronic). | X | | | |
| 40. Monthly fare revenue by category, and by patron type. | X | | | |
| 41. Fare handling policy & procedures (from on-board vehicle to deposit at bank). | X | | | |
| 42. Commuter choice program description, synopsis of participants, marketing activities, and total revenues derived from program (if applicable). | X | | | |
| MAINTENANCE | | | | |
| 43. **Maintenance plan, programs and procedures manual. | | | X | |
| 44. End of year parts inventory value (\$) for each of past 5 years. | | | X | |
| 45. Building condition appraisals. | | | X | |
| 46. Ongoing asset maintenance programs. | | | X | |
| OPERATIONAL SCHEDULING/PLANNING | | | | |
| 47. Scheduling Manual. | X | | | |
| 48. Maps and schedules (system wide and route specific). | X | | | |
| 49. Revenue miles, revenue hours & fares from any charter services provided in each of the last 6 years. | X | | | |
| 50. Short range transit operational plan (i.e., TDP - transit development plan). | X | | | |
| 51. Long range transit plan. | | | X | |
| SAFETY AND SECURITY | | | | |
| 52. Summary of Worker Compensation Claims, by year, for each of last 5 years. | X | | | |
| 53. Description of accident/incident policy and definitions, including how they are recorded and monitored (separated by employee and patron). | | | X | |
| 54. Property collisions and other reportable incidents for each of the past 6 years. | X | | | |
| 55. Personal injuries and fatalities for each of the past 6 years. | | | | |
| 56. On-board criminal activities for each of the past 6 years | X | | | |
| 57. Property criminal activities for each of the past 6 years | X | | | |
| 58. Safety training and Collision reduction plan(s). | X | | | |
| 59. Emergency Preparedness / Operations Continuity Plan. | X | | | |
| 60. List of any safety or security issues and/or concerns. | X | | | |
| 61. Number of vehicles and sites with security monitoring (i.e., camera, patrols). | X | | | |
| 62. Records of safety meetings for past 2 years. | | | X | |

**2010 Transit Performance Review
Data Request
Pennsylvania Department of Transportation
Bureau of Public Transportation**

| Requested Item | Mark Form in which Data to Be Provided | | | |
|--|--|------------|---------------|----------------|
| | Electronic | Paper Mail | Not Available | Not Applicable |
| CUSTOMER SERVICE | | | | |
| 63. Two most recent customer service surveys reports and any actions taken to address known issues. | X | | | |
| 64. Complaint procedures manual/policy and 2 most recent reports. | X | | | |
| 65. Other customer service metrics maintained by the agency. | X | | | |
| INFORMATION TECHNOLOGY | | | | |
| 66. Computer disaster recovery plan. | X | | | |
| 67. Computer security procedures now in use. | X | | | |
| 68. Data collection technology/programs (i.e., APCs, AVL, scheduling software, financial management software, maintenance software). | X | | | |
| CAPITAL PROGRAMMING | | | | |
| 69. Short and Long-term capital programs or plans including: <ul style="list-style-type: none"> • Transit TIP • Agency Specific Plans (additional to TIP): <ul style="list-style-type: none"> ○ Fleet expansion needs/plans for revenue and non-revenue vehicles (if in addition to TIP) ○ State-of-good-repair facility projects for next 5 years (new roof, vehicle overhaul, etc.) ○ New/Expanded facilities projects for next 5 years ○ Replacement/expansion needs/plans for all other capital assets for next 5 years | X | | X | |
| 70. Contact information for any assets owned, operated, or maintained by others. | | | | X |
| 71. Listing of real estate fixed assets (i.e., facilities, transfer locations, etc.) identifying any asset currently not directly used in transit operations and plans for same. | X | | | |
| 72. Listing of Real estate plans (purchases, sales, or lease changes) including current or planned construction projects, documenting cost to complete and projected completion date planned for next 5 years | X | | | |
| MARKETING AND PUBLIC RELATIONS | | | | |
| 73. Service area demographics, customer profiles, and market research documents (as available). | | | X | |
| 74. Local news clippings from past 5 years. | X | | | |
| 75. Copy of current year marketing program and policies. | X | | | |
| 76. Public involvement plan, and notices and attendance rosters from events from most recent 2 years. | X | | | |
| 77. Reports, input, recommendations, etc. from ridership committees and/or advocacy groups for the past 2 years. | X | | | |

APPENDIX B: SUMMARY OF FUNCTIONAL FINDINGS, TRENDS, AND SUGGESTED ACTIONS

The following notations are used to summarize findings on areas evaluated during the performance review.

| | | |
|----------|---------------|---|
| + | Above Average | Actions/conditions are notably more/better than those observed in similar agencies. |
| ✓ | Average | Actions/conditions are comparable to those observed in similar agencies. |
| - | Below Average | Actions/conditions are notably less/worse than those observed in similar agencies. |

In an effort to recognize where commitments or actions are already under way to change the current state of a particular metric, a column labeled *Trend* has been added to the *Summary* sections. *Trends* are categorized as follows:

| | | |
|---|-------------------|--|
| ↗ | Improving | A commitment or actionable plan is under way to improve upon the current practice/conditions. |
| ⇒ | Little net change | No commitment or actionable plan has been noted that improves upon the current practice/conditions. |
| ↘ | Worsening | No commitment or plan has been made to improve upon the current practice/conditions <i>and</i> conditions are expected to degrade unless the topic is addressed. |

Taken together, the *Finding* and *Trend* are intended to identify best practices and help prioritize the areas where addressing a finding can help improve the efficiency, effectiveness and/or quality of service provided:

| Finding | Trend | Action/Interpretation |
|---------|-------|---|
| + | ↗ | Continue current actions and policies – Potential Best Practice |
| + | ⇒ | Continue current actions and policies |
| + | ↘ | Corrective action may be desirable |
| ✓ | ↗ | Continue current actions and policies |
| ✓ | ⇒ | Continue current actions and policies |
| ✓ | ↘ | Corrective action desirable |
| - | ↗ | Continue current actions but closely monitor progress |
| - | ⇒ | Corrective action desirable |
| - | ↘ | Corrective action necessary |

| Metric | Finding | Trend | Suggested Action |
|---|---------|-------|--|
| Governing Body | | | |
| Full Governing Body membership | ✓ | ➡ | No suggested action. |
| Governance and structure meet changing needs and equitably represent agency's customers | ✓ | ➡ | Board should work with Executive Director to develop and implement education programs. |
| Sets and achieves strategic goals | - | ➡ | Board should work with senior staff to update the strategic plan (last updated in 2006) to establish measurable goals and objectives to accomplish the mission and vision statements. |
| Meets community public transit needs | ✓ | ➡ | No suggested action. |
| Public opinion of Board and transit system | ✓ | ➡ | No suggested action. |
| Working relationship among Board members | ✓ | ➡ | No suggested action. |
| Working relationship with Executive Director and other agency staff | ✓ | ➡ | Board should work with staff to develop succession plans to ensure continuity of operations. |
| Advisory Committees | | | |
| Advisory committees provide opportunity for citizen input | ✓ | ➡ | Have senior staff monitor and report on service effectiveness with respect to specific goals set by the Board and involve citizen advisory committee in the discussions about how to fine-tune service delivery to meet the goals. |
| Advisory committees provide opportunity for technical input | ✓ | ➡ | No suggested action. |
| The number and types of advisory boards are appropriate for an agency of this size | - | ➡ | Modify existing advisory committee structure to increase consideration of fixed-route services. |

| General Management | | | |
|--|---|---|---|
| Relationship with Governing Body | + | → | No suggested action. |
| Organizational structure appropriate for size of agency | ✓ | → | No suggested action. |
| Provides regular performance reporting to oversight Board | ✓ | → | No suggested action. |
| All key management positions currently filled | ✓ | → | No suggested action. |
| Employs strategic policies, goals, and objectives | - | ↗ | Draft a strategic plan for Board review and adoption, with commensurate goals and objectives; implement plan with appropriate performance metrics, reviewed by management and the Board on a monthly or quarterly basis as appropriate. |
| Employs, monitors, and uses written performance standards for all major agency functions | - | ↗ | Create and actively use performance metrics for all major management functions. Monitor and report periodically to staff and Board. |
| Actively promotes and achieves interagency coordination | ✓ | → | No suggested action. |
| Timely satisfaction of all federal and state reporting requirements | ✓ | → | No suggested action. |
| Has and follows a written quality control plan for key functions | ✓ | → | No suggested action. |
| Has a succession plan in place for all key positions | - | → | Develop a management succession plan. Provide ongoing training and cross-training among management personnel to help ensure continuity for short- or long-term absences, and personnel departures. |
| Has cross-training and responsibility practices to ensure functions can operate smoothly in the event of absenteeism, retirement, etc. | + | → | No suggested action. |

| Human Resources | | | |
|--|---|---|---|
| Retain stable work force | ✓ | ➡ | No suggested action. |
| Recruit qualified employees promptly as vacancies occur | ✓ | ➡ | No suggested action. |
| Provide training focused on job performance | ✓ | ➡ | No suggested action. |
| Manage the cost of employee benefits | ✓ | ➡ | Implement aggressive program to contain claims and costs associated with Worker's Compensation insurance. |
| Manage labor relations effectively | ✓ | ➡ | Try to negotiate a 40 hour per week overtime provision vs. the 8 hour per day overtime provision present in the current union contract. |
| Has an updated agency specific operator's manual | - | ➡ | Develop and disseminate an operator's manual for MCTA drivers. |
| Finance | | | |
| Provides realistic annual budgets | ✓ | ➡ | Better integration between the MAS 90® accounting systems and the RTA Fleet Management® software system. |
| Accurately records and reports financial transactions | - | ➡ | Reevaluate National Park Service provided and adjust contract cost to be consistent with true operating costs. Disaggregate fuel costs for sales to outside entities and do not record costs until transactions occur. |
| Manages state/federal grants efficiently to meet government requirements | ✓ | ➡ | No suggested action. |
| Analyzes and manages cash flow | ✓ | ➡ | No suggested action. |

| | | | |
|--|---|---|--|
| Uses reasonable approach for handling passenger revenues | ✓ | ⇒ | No suggested action. |
| Procurement | | | |
| Use of computerized parts management system | ✓ | ⇒ | Pursue automated procedures for determining if mechanics have taken parts out of inventory. |
| Automated analysis and identification of procurement needs | - | ⇒ | MCTA should investigate the report generation capabilities of MAS 90 [®] and RTA Fleet Management [®] to determine if more automated analyses could be performed. |
| Established procedures for verifying inventory figures | ✓ | ⇒ | No suggested action. |
| Record and measure inventory function performance | - | ⇒ | Establish performance metrics for the parts inventory function and develop procedures for collecting and reporting the data needed to determine performance. Refer to the Transportation Research Board's publication <i>Inventory Management in a Maintenance Environment</i> for guidance on applicable metrics and methodologies for determining performance. |
| Has and achieves DBE/MBE/WBE goals | - | ⇒ | Evaluate current use of DBE/MBE/WBE procurement and identify areas where additional efforts should be made, especially in operational purchases. |
| Appropriate use of technology in parts inventory control | ✓ | ⇒ | No suggested action. |
| Operations | | | |
| Service is operated in accordance with published schedules | ✓ | ⇒ | No suggested action. |
| Track key cost drivers such as unscheduled overtime pay and other premium pay categories | - | ⇒ | Establish targets for key cost drivers such as unscheduled overtime pay and develop response strategies for when performance is outside of acceptable parameters. |

| | | | |
|--|---|---|---|
| Track and report on-time performance | - | ➡ | Develop and implement a reliable tracking methodology for on-time performance. |
| Track and analyze service-related customer feedback by category | ✓ | ↻ | No suggested action. |
| Maintenance | | | |
| Use of computerized fleet maintenance recordkeeping | ✓ | ➡ | <p>Pursue procedures for direct use of RTA Fleet Management® or a successor software system by all mechanics and service line employees.</p> <p>Pursue greater use of technology in the maintenance function to automate such tasks as the recording of fuel and fluids consumption data.</p> |
| Automated analysis and identification of trends, performance, and maintenance issues | ✓ | ➡ | <p>Investigate the report generation capabilities of RTA Fleet Management® to determine if more automated analyses could be performed. Despite the use of maintenance recordkeeping software, the maintenance function still relies heavily on manual analysis and the knowledge of long-term employees.</p> <p>Enter warranty information into RTA Fleet Management® and pursue automated notifications. MCTA currently relies on management to identify warranty eligible maintenance work.</p> |
| Adopted vehicle maintenance plan and preventive maintenance schedules/checklists | ✓ | ➡ | No suggested action. |
| Maintenance performance in terms of miles per major road call | - | ➡ | Adopt target rates for miles per major road call and make more extensive use of trend analyses to identify strategies to improve performance. |
| Preventive maintenance on-time performance | ✓ | ➡ | No suggested action. |
| Adequacy of maintenance facilities | - | ➡ | Develop a Master Plan for the maintenance facility to meet the current and future needs of the system. |

| | | | |
|--|---|---|---|
| Adequacy of revenue vehicle fleet | - | ➡ | Remove surplus vehicles from the property. |
| Scheduling | | | |
| Understanding of scheduling process | ✓ | ➡ | No suggested action. |
| Production of vehicle and driver assignments in a timely manner | ✓ | ➡ | No suggested action. |
| Input from operating personnel | ✓ | ➡ | No suggested action. |
| Appropriate use of computers | ✓ | ➡ | No suggested action. |
| Scheduling as an analytical tool | ✓ | ➡ | No suggested action. |
| Existing service standard policy | - | ➡ | Develop and implement service standards, such as on-time performance, to assist in the scheduling function. |
| Performance measures to gauge output of schedule process | - | ➡ | Specify and monitor metrics, such as Pay/Platform Ratio, to gauge the adequacy and success of the scheduling process. |
| Safety and Security | | | |
| Provide comprehensive new operator and refresher training | ✓ | ➡ | No suggested action. |
| Require operators to use consistent and comprehensive procedures for reporting accidents/incidents | ✓ | ➡ | No suggested action. |
| Track and report accidents by type | ✓ | ➡ | No suggested action. |
| Develop and maintain System Security and Emergency Preparedness Plan (SSEPP) | - | ➡ | Develop and implement SSEPP. Finalize the Crisis and Disaster Plan currently in development. |

| Customer Service | | | |
|---|---|---|---|
| Number of staff responsible for customer service | ✓ | ⇒ | No suggested action. |
| Understanding of staff roles in customer service | ✓ | ⇒ | No suggested action. |
| Clear customer service protocols (tracking, response, timeliness, satisfaction) | ✓ | ⇒ | No suggested action. |
| Customer Service Quality Improvement Plan | ✓ | ⇒ | No suggested action. |
| Regular monitoring of customer service satisfaction | ✓ | ⇒ | Implement regular customer satisfaction surveys and integrate findings into decision-making process. |
| Personal follow-up protocols for complaints and compliments | ✓ | ⇒ | No suggested action. |
| Automated follow-up protocols for complaints and compliments | - | ⇒ | Establish a follow-through process to ensure customer's issues have been resolved in a timely manner. |
| Information Technology | | | |
| Number of staff responsible for Information Technology | ✓ | ⇒ | No suggested action. |
| Appropriate use of outsourcing for IT needs | ✓ | ⇒ | No suggested action. |
| Adequacy of in-house network and computer technology | ✓ | ⇒ | No suggested action. |
| Adequacy of radio and communications systems | ✓ | ⇒ | No suggested action. |
| Full use of registering fareboxes | ✓ | ⇒ | No suggested action. |
| Disaster Recovery Plan | ✓ | ⇒ | No suggested action. |
| Strategic IT Plan | - | ⇒ | Begin development of a master IT plan that considers changes in technology, Web-based customer service data, and systems integration amongst the various management |

| | | | |
|--|---|---|---|
| | | | software systems in use at MCTA. Investigate and perform a cost-benefit analysis of installing AVL technology on fixed-route vehicles. |
| Capital Programming | | | |
| Relationships with other agencies in the region | ✓ | ⇒ | No suggested action. |
| Adequate staff to lead capital programming | ✓ | ⇒ | No suggested action. |
| TIP as initial list of all capital needs (fiscally constrained) | ✓ | ⇒ | No suggested action. |
| Relationship and coordination with external agencies | ✓ | ⇒ | No suggested action. |
| Prioritized capital needs plan | - | ⇒ | Assemble a master list of projects (i.e., needs) ranked by priority. Distinguish projects on the basis of available funding and identify those projects that could move forward with additional funding. |
| Marketing | | | |
| Thorough understanding of current customer base | ✓ | ⇒ | Regularly conduct analysis of ridership patterns and market segments in a cost-effective manner. |
| Effective use of targeted marketing and educational materials for special populations such as disabled populations, non-English-speaking populations, etc. | ✓ | ⇒ | No suggested action. |

| | | | |
|---|---|--|--|
| Effective use of marketing approaches to expand market share with current clientele | + | | Develop, implement, and monitor the effectiveness of plans to increase share of the current customer base. Continue to identify innovative ways to increase market share in areas where MCTA competes well against other transportation modes. |
| Clear procedures to identify and assess potential (new) markets | ✓ | | No suggested action. |
| Public Relations | | | |
| Visibility in the community | ✓ | | Develop a system-level route map. |
| Positive image with local community and elected officials | ✓ | | No suggested action. |
| Positive image with state and federal review agencies | ✓ | | No suggested action. |
| Awards and accolades | ✓ | | No suggested action. |
| Planning | | | |
| Proactive approach to short-range planning | - | | Develop formal service standards to guide planning functions. |
| Proactive approach to mid-range planning | ✓ | | No suggested action. |
| Proactive approach to long-range planning | ✓ | | Continue participation in long-range planning activities and assure testing of different levels of transit service and investment. Present findings to the Board and public for their consideration and direction. |
| Possesses adequate staff capabilities in planning | ✓ | | No suggested action. |
| Uses empirical data used to support planning functions | - | | In conjunction with planning, develop a data management plan that leverages existing technologies to obtain ridership and running time information. |
| Demonstrates strong staff leadership in planning functions | ✓ | | No suggested action. |

| | | | |
|--|---|---|---|
| Provides opportunities for planning input from operating personnel | ✓ | ⇒ | No suggested action. |
| Relationships and coordination with other local planning agencies | ✓ | ⇒ | No suggested action. |
| Uses performance measures to assess route performance | ✓ | ⇒ | Expand on current route-level evaluation to include financial measures. |