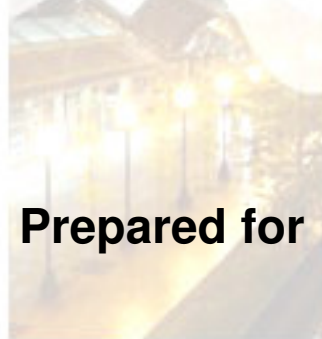




# Public Transit Performance Measurement Study



Prepared for



Compiled by

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### Introduction

*The focus of this study was to perform a literature search to illustrate best management practices for major public sector transit agencies. This information is presented as a reference to Sound Transit on the state of development of performance measurement systems for sister transit agencies. It is instructive, in that it presents good examples as well as “works-in-progress” of performance measurement practices.*

*Our approach for obtaining the material in this study was to collect data from agency websites and to contact some agencies requesting additional documentation. We found that agency website data ranged from a very thorough and complete view of their measures to only presenting a minimal amount.*

*The amount of information available impacted our ability to identify good examples of performance measurement systems. Obviously, a more complete picture of an agency’s performance measures provided a better opportunity for finding good examples. On the other hand, the limitations of data available limited our ability to capture some good practices that may exist.*

*We chose to identify “good examples” of performance measurement systems rather than naming “best practices”. To be a “best practice” a process must be predictable, repeatable and transferable. In addition to identify best practices requires a more in-depth study than was done in this literature search.*

*This report is organized in two major sections; Executive Summary and Detailed Reports by Transit Agency. Our intent is that the Executive Summary provides the analysis and can be utilized as the prime source of information. The detailed reports are available for a more in-depth review of specific transit agencies based upon questions or interest generated.*

### Executive Summary

This document presents data from primarily West Coast transit agencies that are recognized as being leaders in transit service delivery and the use of performance management systems. As would be expected, an organization that is strong in performance management also delivers solid results. Some Transit Agencies provide a great deal of information about their performance management systems. Others are more restrictive on what they are willing to share. This is evident by the differing amounts of data we were able to amass. This variance in available data also impacts our “good example” evaluations.

#### **BACKGROUND**

The presence and use of performance measures in public transit is evidenced by many variations and formats. There is no one all-encompassing best performance measurement system currently in use. The wide variety of performance measurement systems are reflected in the degree to which each agency chooses to integrate day-to-day performance management into the overall fabric of their fundamental mission. We found excellent performance management systems in many of the transit agencies. We also found areas that could be improved in all of them.

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Sound Transit directed our consultant team to conduct a literature search of industry performance measurement programs. The examples we included represent a broad-based collection of performance measurement data. The data that we evaluated is based solely on what was readily available from each agency.

In order to establish a methodology to evaluate this information we reviewed these transit agencies based on the following elements of a robust performance management system:

1. Succinct, well-focused directional statements (Mission, Vision, Values)
2. Presence of achievable, relevant goal statements, that when attained will clearly move the agency towards its Mission, Vision, Values
3. Key Results Areas and Strategies that are focused efforts and have shared commitments from divisions/units
4. Use of performance measurements, including targets and objectives, that are clearly defined, trackable, understandable and relevant to their goals
5. Clear evidence of cascading and integration of these elements throughout the organization
6. Clear evidence of accountability for achieving the results expected in the performance measures and targets

Based on these criteria we analyzed each agency to identify areas of strength. The following table represents a summary of our evaluations where the highlighted blocks indicate an area of strength.

Transit Agencies	Direction Statements	Goals	Key Results Areas	Measurements	Cascading	Accountability
Alameda						
Atlanta						
Dallas						
Denver						
Houston						
Portland						
Orange County						
Salt Lake						
SF BART						
SF MUNI						
Santa Clara						

### OVERALL

Two Transit Agencies seem to stand out from the rest; **Atlanta – MARTA** and **Dallas – DART**. Both have well developed systems that are integrated from directional statements to operations.

### GOOD EXAMPLES

The following describe the “good examples” of strong performance measurement systems that we found in individual agencies. We focused on the overall system where key elements are present and linked to others – enabling a performance measurement system.

The good examples are organized by the above key elements of a robust performance management system:

#### Direction Statements

- **Atlanta - MARTA**

Their directional statements (Mission and Vision) are short, focused and actionable.

Their values are few (five) and include behavioral actions that can be measured.

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- **Dallas Area Rapid Transit - DART**  
Their strategic plan includes a very clear graphic that demonstrates the Leadership System and Strategic Alignment processes. They have very concise and functional Mission and Vision statements, along with Organizational Values.  
  
The statements are simple, powerful, and well structured.
- **Denver – RTD**  
Their directional statements are well written and clearly represent the intent and future for DART.
- **San Francisco - BART**  
Their directional statements are complete. In addition they provide strategies that are focused on their vision.
- **Santa Clara – VTA**  
Their vision and mission statements are clearly linked together. Both are very practical and can be understood by all staff.

### Goal Statements

- **Dallas Area Rapid Transit – DART**  
They have five agency-wide and overreaching goals that have been consolidated into three focus areas. The focus areas deal with customers, stakeholders and internal operations – making up three legs of their balanced scorecard.  
  
These goals are the drivers for the agency’s Management Objectives and associated performance measures.
- **Denver – RTD**  
Goal statements are simple and to the point. They are easily understood.  
  
They have 13 goal statements. Generally this is too many for a well-focused organization but may be workable for Denver.
- **Orange County - OCTA**  
They have five long-range transportation goals that cover mobility, environment, local priorities, safety and land-use.
- **San Francisco – BART**  
They describe their Focus Areas (Goals) as necessary for attaining their mission. The seven goals include; customers, partners, transit demand, quality of life, employees, physical infrastructure and finances.

### Key Results Areas

- **Atlanta, Georgia – MARTA**  
Strategies are structured so they directly support MARTA’s Areas of Focus (Goals).
- **Orange County – OCTA**  
Their strategic initiatives are concise and clear. Their intent is easily understood.

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- **San Francisco - BART**

BART strategies include both policies and programs that focus on attaining the mission and vision;

- Policies; System Expansion, Access Management and Improvement, Welfare to Work to Career, Station Area Planning and Sustainability
- Programs; Renovation, Employee Development and Stewardship, Seismic Retrofit, Business Advancement Plan, System Capacity

### Measurements

- **Atlanta, Georgia – MARTA**

Each strategy has a set of Performance Measures and Targets that are clearly linked back to their Areas of Focus (Goals).

- **Dallas Area Rapid Transit – DART**

They identify overall agency Management Objectives along with leading and lagging indicators (performance measures).

In the Strategic Plan graphic, they identify the outcomes to be achieved (increase effectiveness, increase efficiency, increase stakeholder satisfaction, increase employee satisfaction) and link them to the overall agency goals.

They have identified Key Performance Indicators (KPIs) and annual results for the overall agency.

- **Denver – RTD**

We did not obtain specific measures and targets, but their description of the process leads us to believe they have a very sound measurement system.

RTD has formal performance standards (Service Standards) that are updated every three years. If measures fail to meet and/or exceed the Service Standard, measurement adjustments are made. RTD assesses their operational service if performance measures are 10-25 above or below Service Standard averages.

Measures are reported and reviewed on a quarterly basis. The measures in the report are linked to the operational unit and agency goals.

- **Portland – TRI-MET**

Portland has a very extensive measurement package. They provide summarized reports to the General Manager and Board of Directors. The detail reports are used for operational management.

- **Salt Lake City – UTA**

UTA established overall agency goals. They include a statement describing the goal, a definition (how the measurement is calculated) and a specific target. They also weight each of the goals. This is unique among the agencies reviewed and important when accountable managers and units have progress reviews.

- **San Francisco – MUNI**

MUNI performance measures are tied to overall MTA goals for service standards and performance measures. Each of the service standards are referenced in the performance measurement description. Service standards are: System Reliability,

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System Performance, Staffing Performance, Customer Service and Employee Satisfaction.

Each measure has:

- a definition (how/where data is collected and is calculated)
- a method which describes when data will be collected (am, noon, pm, etc.)
- a specific target
- a comparison of actual to planned

### Cascading and Integration

- **Atlanta, Georgia – MARTA**

For Rail and Bus operations, they identified the agency strategies that this particular operational unit will focus on. Operational unit strategies are linked to each of the agency strategies identified in their performance plan. While the above linkages are good, they did not go far enough, i.e., no objectives or targets were identified.

- **Dallas Area Rapid Transit – DART**

The Operating Units use the same format and reporting structure as is used for the overall agency. This provides a visual and usable linkage between the two levels.

There are clear, structured goals and related measurement objectives – all drilled down to the lowest level in the organization.

### Accountability

- **Atlanta, Georgia – MARTA**

They identified a lead responsibility (operational unit) for each unit strategy.

## CONCLUSION

Our observations indicate that all transit organizations utilize some form of performance measurement systems. We noted that agencies that are recognized for superior performance also utilize well-developed and managed performance measurement systems. Transit authorities that develop, use, and continually refine relevant performance measurement systems are more likely to produce excellent results. The variation of performance measurement systems and transit service programs demonstrates the importance of differentiating “effort” from achieving outstanding results.

As noted earlier, we have identified good examples of agency practices...yet all agencies could benefit from improvement. It is therefore highly instructive to review all the performance measurement examples from the agencies researched. All apparently approached the development of performance measures with the best of intentions...yet there is great disparity in results.

Clearly, the research demonstrated that the most effective performance measurement systems are achieved when the developmental efforts are focused, well structured, integrated and refined.

### Alameda-Contra Costa Counties, California – AC Transit

The Alameda-Contra Costa Transit District is the third-largest public bus system in California, serving 13 cities and adjacent unincorporated areas in Alameda and Contra Costa counties. AC Transit has been serving the East Bay since 1960, taking over from the Key System and its predecessors, which carried passengers via buses, horse-drawn rail, electric streetcars, and ferries over the previous 100 years.

#### **VISION**

AC Transit's vision is to be the mobility manager for East Bay.

#### **MISSION**

The AC Transit's mission is to provide Safe, Convenient, Courteous and Reliable Transit Service.

#### **GOALS AND SUB-GOALS (Key Results Areas)**

1. Provide High Quality, Useful Transit Service for Customers in the East Bay
  - Improve on-time performance
  - Target specific audiences to increase market share
  - Insure proper staffing at all levels to improve schedule adherence
  - Identify and serve emerging new markets
  - Identify and correct bus scheduling issues/problems
  - Modernize AC Transit's fleet and services
  - Maximize the use of technological advancements to improve District operation
  - Improve air quality and other environmental impacts of both AC Transit vehicles and facilities
  - Provide sufficient resources to support District budgeted programs and levels of service
  - Insure that a sufficient number of busses are available to meet all bus schedules
  - Retain and promote a high quality diverse workforce that mirrors the diversity of the communities that the District serves
  - Increase ridership
  - Provide high quality paratransit service in cooperation with the East Bay Paratransit Consortium
  - Plan and implement service enhancement projects, including increased service levels and/or route restoration
  - Implement capital and operating measures that speed up the buses traveling through major corridors
  
2. Make sure that Customers are the First Priority
  - Improve content and availability of information about AC transit to our customers
  - Improve the ability for riders with disabilities to use fixed route accessible service
  - Maintain clean vehicles
  - Treat all customers with respect and dignity
  - Promote rider and community involvement in identifying issues for increased District efforts
  - Promote District and public safety awareness
  - Provide for emergency preparedness, including continuation of service during an emergency

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3. Strengthen Financial Stability
  - Maximize District investments
  - Minimize the District's exposure to financial risk
  - Increase level of funding that AC Transit receives through sales tax reauthorization, grant sources and/or other innovative funding sources
  - Reduce costs associated with vandalism
  - Minimize fare evasion
  - Minimize the District's exposure to risk from passenger and employee accidents
  - Provide timely and complete analysis of financial and statistical data to support District operations
  - Ensure that operation of paratransit is cost efficient
  - Be prepared for downturn in local and national economy
  
4. Plan and Advocate for Funding and Implementation of Future Projects
  - Develop a visible and positive image with public officials and the community at large
  - Complete planning studies for the heaviest bus corridors
  - Promote partnerships between the District and other organizations (unions, government agencies, civic groups, general public and/or private sector) to support common interests
  - Develop public/private partnerships with both businesses and cities to provide enhanced service levels
  - Work with City and Local agencies to make transit usage as safe, secure, reliable and quick as possible and to promote transit usage in the planning process
  - Promote "Transit First" development practices and increased funding for transit through transit mitigation funding for new developments
  - Advocate for new funding sources to enhanced service levels
  - Explore alternatives to conventional fixed-route transit
  - Promote public involvement to assist in District decision-making processes
  
5. Increase Employee Participation and Pride in the Agency
  - Strengthen internal communication at all levels
  - Become a 'can-do' agency
  - Provide employees with all of the necessary tools to continually improve knowledge, skills and abilities
  - Promote organizational development that prepares the District for the future
  - Provide employee support systems that enhance morale and minimizes stress

### **BOARD APPROVED KEY PERFORMANCE MEASURES**

"The measurements offer a snapshot of the 'big picture' and are representative of key performance measurement factors within bus operations that are used to gauge the Department's overall health and the District's ability to provide reliable service on the street."

1. Delays in Service and Missed Trips
2. Transportation Sick and Industrial Injury
3. Maintenance Sick and Industrial Injury
4. Maintenance Miles Between Roadcalls
5. Maintenance Life Roadcalls
6. Accidents per 100,000 Miles
7. Paratransit Roadcalls

### Atlanta, Georgia - MARTA

In the 32 years since the creation of the Metropolitan Atlanta Rapid Transit Authority, the city of Atlanta has sustained tremendous growth. In the last decade alone, the population of the 20-county metropolitan area has grown from 2.9 million to more than four million people. With this growth comes an increasing responsibility for MARTA - to ensure the timely arrival and safety of our traveling public.

This year marks the 25th Anniversary of MARTA's combined rail and bus. In all, MARTA has transported millions of patrons to thousands of destinations.

- MARTA is the ninth largest transit system in the U.S. and North America that provides bus, rail and paratransit service.
- There are more than 4,300 MARTA employees.
- MARTA transports more than 300,000 passengers daily.
- Since the beginning of MARTA rail service in 1979, MARTA has transported approximately 3.5 billion people, or 10 times the entire population of the U.S.
- MARTA operates 575 buses with 125 bus routes.
- MARTA operates 110 Paratransit vans.
- MARTA has 540 bus shelters.
- MARTA operates 338 rail cars in 38 stations on 47.6 miles of rail.

#### **VISION**

MARTA (Metropolitan Atlanta Rapid Transit Authority) is a partner in a multi-modal operation system that offers a seamless ride on an equitable basis through the Greater Atlanta Region.

#### **MISSION**

MARTA is committed to providing comprehensive, quality public transportation services in a safe and cost-effective manner.

#### **CORE VALUES**

##### **Commitment**

Employees striving to provide comprehensive and quality public transportation services by performing their jobs to the best of their ability.

##### **Integrity**

We will treat each other, stakeholders and customers with honesty, trust and respect.

##### **Teamwork**

Working together to achieve a common goal.

##### **Excellence**

The continuous pursuit of results that exceed customer, employee and stakeholder expectation.

##### **Stewardship**

The careful and responsible management of the Authority's assets.

##### **Safety**

Keeping environments free from danger, injury and risk.

#### **STRATEGIC GOALS**

##### **Increased Ridership**

By establishing a targeted approach to retain riders and attract new riders, MARTA will enhance service delivery, improve its infrastructure, increase safety and security and develop and implement methods to improve our image.

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### A Solid Financial Future

Through the assignment of fiscal responsibility and accountability, MARTA will enhance its technological and fixed infrastructure, develop employees and effectively and efficiently manage both human and financial resources.

### AREAS OF FOCUS (Key Results Areas)

- Financial Viability – Cost Efficiency and New Funding Sources
- Image – Service Delivery Improvements
- Infrastructure & Technology – Upgrades and Improvements
- Employee Morale – Organizational Culture Change
- Contract & Assistance Agreement
- Ridership Shifts & Migration
- Regional Changes –Regional Mobility & Role

### STRATEGIES, PERFORMANCE MEASURES, TARGETS

#### Improve Employee Communications & Morale

**Strategy 1** – Implement targeted employee initiatives to address key workforce issues of attendance, morale and communications

Performance Measures	Target
1. Overall Authority-wide increase in attendance	2% increase over FY03 level
2. Reduce employee DEO/HR grievances	10% reduction

#### Upgrade Infrastructure & Technology

**Strategy 2** – Implement state-of-the-art Automated Fare Collection system to enhance customer service and improve fare and data collection, while upgrading technological infrastructure and capabilities to better serve business units and support major projects Authority-wide.

Performance Measures	Target
1. Favorable Customer Satisfaction Index (CSI) scores associated with fare collection	>FY04 CSI
2. Decrease in fare evasion at stations	5% reduction in evasion rate from the average of FY03 and FY04 levels

#### Improve Service Delivery

**Strategy 3** – Provide reliable, clean, safe and on-time bus, rail and paratransit service delivery that is responsive to customer needs and complies with federal mandates.

Performance Measures	Target
1. Meet or exceed performance targets and customer satisfaction attributes for on-time, cleanliness, safety and reliability	Detailed measures outlined in FY05 Strategic and Operational Performance Plan
2. Reduction of customer complaints	10% reduction from FY04 levels

#### Enhance Safety and Security

**Strategy 4** – Provide a safe and secure environment for customers and employees by improving customer perception of safety and reducing the number of incidents and associate cost of maintaining the system.

Performance Measures	Target
1. Favorable improvements in Quality Of Life (QOL) attributes	>FY04 levels

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2. Reduction in Part I Crime Rate	<FY04 Part I Crime rate
3. Shorten average police response time	<FY04 levels
4. Reduction of lost time due to injuries	<FY04 levels

### Improve Financial Viability

**Strategy 5** – Seek new sources of revenue and ways to control costs while maintaining the strategic direction of the Authority

Performance Measures	Target
1. Significant new operating & capital funding sources obtained	FY05 Year End
2. Reciprocal actions taken to achieve successful and equitable outcome regarding Union contract negotiations	FY05 Year End

### Improve Marta's Image

**Strategy 6** – Enhance MARTA's image, increase customer loyalty and develop regional partnerships through transit advocacy and quality improvement initiatives.

Performance Measures	Target
1. Increased customer loyalty	General rider > FY04 general rider loyalty; Paratransit > FY04 paratransit loyalty; Rail > FY04 rail loyalty

## OPERATIONAL PERFORMANCE MEASURES – RAIL AND BUS

**Strategy 3** – Provide reliable, clean, safe and on-time bus, rail and paratransit service delivery that is responsive to customer needs and complies with federal mandates.

1. Increase mean distance between failures; Lead Responsibility: AGM Operations
2. Achieve rail on-time performance; Lead Responsibility: AGM Operations
3. Achieve bus on-time performance; Lead Responsibility: AGM Operations
4. Increase mean distance between failures; Lead Responsibility: AGM Operations
5. Achieve Paratransit on-time performance; Lead Responsibility: AGM Operations

**Strategy 4** – Provide a safe and secure environment for customers and employees by improving customer perception of safety and reducing the number of incidents and associate cost of maintaining the system.

1. Maintain or reduce bus injury rate; Lead Responsibility: AGM Operations
2. Maintain or reduce bus collision rate; Lead Responsibility: AGM Operations
3. Manage the MPACT System to reduce the FY04 Part 1 Crime Rate

**Strategy 6** – Enhance MARTA's image, increase customer loyalty and develop regional partnerships through transit advocacy and quality improvement initiatives.

1. Favorable increase in overall customer satisfaction; Lead Responsibility: CEO Team

### Key Financial and Operational Performance Measures

- Customer Focus – Overall Customer Satisfaction
- Customer Focus - Transit Advocacy; System Linked Trips
- Safety – Bus Collisions per 100,000 Miles
- Safety – Part 1 Crime Rate (Major violent and property crimes)
- Service Delivery – Rail On-Time Performance
- Service Delivery – Bus On –Time Performance
- Finance – Primary Revenue by Source (Fares, Sales Tax)
- Finance – Total Expenses by Function; Trend of Total Expenses

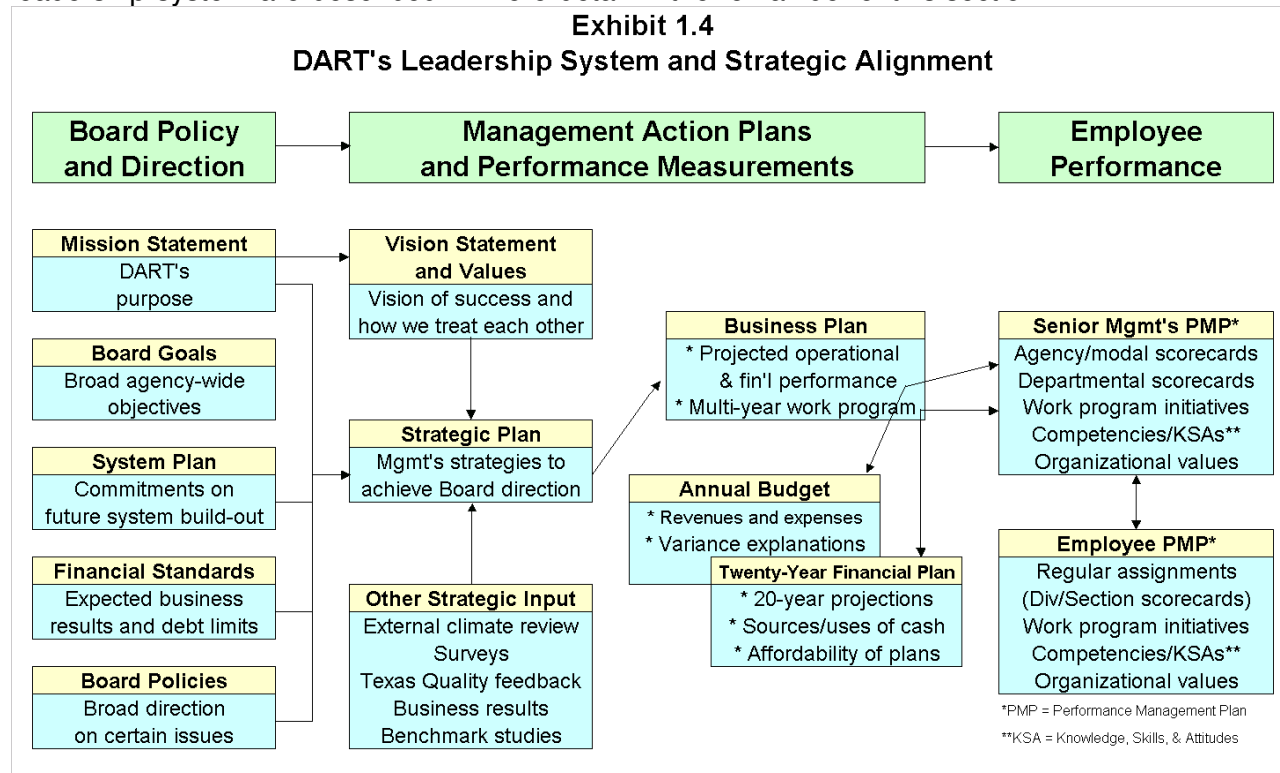
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## Dallas, Texas – DART

Dallas Area Rapid Transit (DART) is a regional transportation authority of the State of Texas. DART was created on August 13, 1983, by a voting majority of the citizens to organize and provide regional public transportation to its member jurisdictions pursuant to Article 1118y of Vernon's Annotated Texas Civil Statutes, as amended, and recodified into Chapter 452 of the Texas Transportation Code effective September 1, 1995. The enabling legislation allows DART to collect one-percent sales and use tax on certain transactions.

### OVERVIEW OF DART'S LEADERSHIP SYSTEM

DART's (Dallas Area Rapid Transit) leadership system is based on the concept of strategic alignment. This is the process used to ensure that DART employees understand how their jobs and performance are linked to the Board's mission, direction, and goals. The leadership process is shown in Exhibit 1.4. Performance measurements are critical and are incorporated into "scorecards" at different levels of the Agency. The major components of the leadership system are described in more detail in the remainder of this section.



### MISSION

To build, establish, and operate a safe, efficient, and effective transportation system that, within the DART Service Area, provides mobility, improves the quality of life, and stimulates economic development.

### VISION

To help achieve the Board's mission and goals, a vision statement was developed in FY 1997 to address the Agency's three focus groups (customers, employees, and stakeholders). The vision describes what the Agency is trying to achieve. The key statements are incorporated into the Agency's Strategic Plan (see Exhibit 1.5). DART's vision follows:

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DART is a welcomed, integral part of our region. We provide quality service. Our innovative accomplishments benchmark DART as a transportation leader which is supported by a thriving internal environment.

### BOARD GOALS

To achieve this mission, the Board has developed five goals which have been consolidated into three focus areas or target groups for purposes of strategic planning.

#### Customer Focus

- Provide DART's customers with services that are ever increasing in quality, effectiveness, and efficiency.
- Establish a common vision for transportation that is regionally accepted, progressively implemented through a comprehensive system plan, and periodically revisited.

#### Internal Focus (Employee)

- Foster an internal environment that promotes teamwork, empowerment, accountability, and positive self-image.

#### External Focus (Stakeholder)

- Sustain a multi-faceted outreach effort to promote dialogue with the public on DART's goals, services, and accomplishments; and
- Develop and enhance coalitions with all organizations that have a vested interest in regional transportation issues.

### ORGANIZATIONAL VALUES

As an adjunct to the vision statement, six core values were developed in FY 1998 for DART's management and employees. These values demonstrate where focus and emphasis need to be placed on a daily basis. At DART, employees value being:

#### Focused on Our Customers

We are dedicated to meeting our customers' needs  
We strive for continuous improvement  
We deliver quality

#### Committed to Safety

We expect safety to be the responsibility of every employee  
We are committed to ensuring the safety of our passengers

#### Professional

We demonstrate a high regard for each other  
We take pride in our accomplishments  
We congratulate each other for our successes  
We honor integrity and honesty

#### Dedicated to Quality Performance

We strive for excellence  
We have high expectations  
We hold ourselves accountable for results  
We coach, reinforce, and recognize our employees

#### Team Players

We are committed and dedicated to DART  
We support each other

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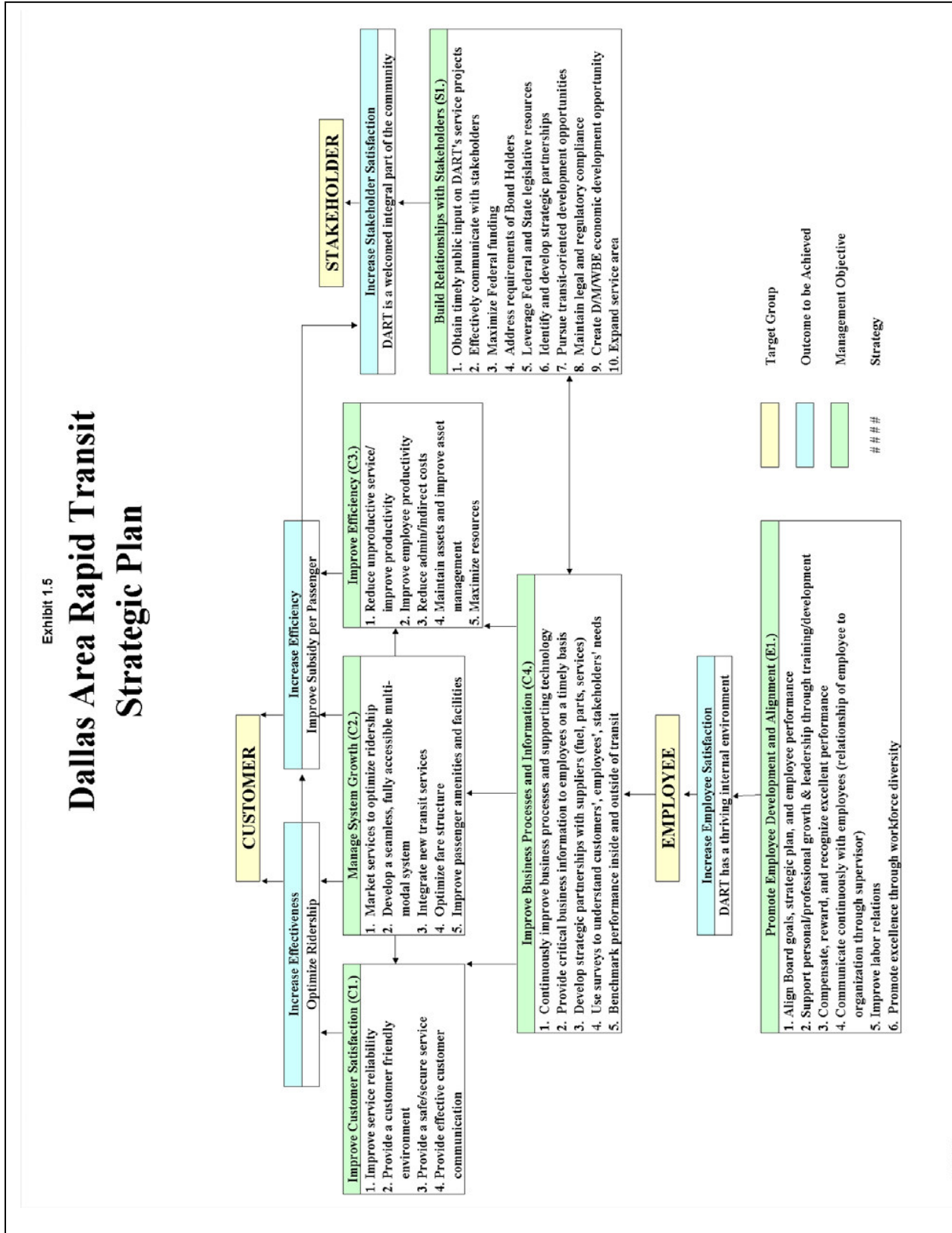
We value our diversity  
**Good Stewards of the Public Funds**  
 We responsibly use public funds and property

### STRATEGIC PERFORMANCE MEASUREMENTS

Management Objectives	Leading Indicators	Key Lagging Indicators
<b>Customer Focus</b>		
C1 – Customer Satisfaction	<ul style="list-style-type: none"> <li>▪ On time performance</li> <li>▪ Accidents per 100k miles</li> <li>▪ Complaints per 100k passengers</li> <li>▪ Call abandonment rates/service levels</li> <li>▪ Response time</li> <li>▪ Miles between road calls</li> <li>▪ Missed trips</li> </ul>	<ul style="list-style-type: none"> <li>▪ Ridership</li> <li>▪ Passenger per mile/hour</li> <li>▪ Customer satisfaction surveys</li> </ul>
C2 – Manage System Growth	<ul style="list-style-type: none"> <li>▪ Revenue miles/hours</li> <li>▪ Actual schedule vs. plan for system expansion</li> </ul>	<ul style="list-style-type: none"> <li>▪ Subsidy per passenger</li> <li>▪ Administrative ratio</li> <li>▪ Sales taxes for operations</li> <li>▪ Unused financing capacity</li> </ul>
C3 – Improve Efficiency	<ul style="list-style-type: none"> <li>▪ Operator lost time claims</li> <li>▪ Unscheduled absences</li> <li>▪ Pay-to-platform ratio</li> <li>▪ Average system speed</li> <li>▪ Deadhead ratio</li> <li>▪ Timely replacement of assets</li> </ul>	
C4 – Improve Business Processes and Information	<ul style="list-style-type: none"> <li>▪ Cycle time/process measurements</li> <li>▪ Project implementation vs. plan</li> <li>▪ Benchmark comparisons</li> </ul>	<ul style="list-style-type: none"> <li>▪ Sales taxes for operations</li> <li>▪ Administrative ratio</li> </ul>
<b>Internal Focus – Employee</b>		
E1 - Promote Employee Development and Alignment	<ul style="list-style-type: none"> <li>▪ Employee verbal feedback</li> <li>▪ Number of grievances</li> <li>▪ Corrective disciplinary actions</li> <li>▪ Retention/absenteeism</li> </ul>	<ul style="list-style-type: none"> <li>▪ Employee Satisfaction Survey</li> </ul>
<b>External Focus – Stakeholder</b>		
S1 – Build relationships with Stakeholders	<ul style="list-style-type: none"> <li>▪ Complaint/commendations</li> <li>▪ Press clippings</li> </ul>	<ul style="list-style-type: none"> <li>▪ Climate Satisfaction Survey</li> <li>▪ Completion of TSP commitments</li> <li>▪ Joint development created</li> </ul>

Exhibit 1.5

## Dallas Area Rapid Transit Strategic Plan



## Public Transit Performance Measurement Study

### DART KEY PERFORMANCE INDICATORS

Exhibit 2.1 is the DART Scorecard of Key Performance Indicators (KPIs). Fiscal Years 2002 and 2003 are the actual values while Fiscal Years 2004 through 2006 are the budget and projected values. FY04 Q2 is a four-quarter rolling average ending March 31, 2004. Each of these indicators is discussed in more detail in this report.

DART Scorecard of Key Performance Indicators					
KPI Measure	FY02A	FY03A	FY04A	FY05B	FY06P
<b>Ridership</b>					
Total Ridership (M)	93.8	94.4	93.0	95.1	95.9
Fixed Route (M)	58.7	59.6	57.1	59.2	59.9
<b>Efficiency</b>					
Subsidy Per Passenger – Total System	\$2.76	\$2.69	\$2.61	\$2.70	\$2.79
Fixed route Subsidy Per Passenger	\$3.93	\$3.77	\$3.72	\$3.79	\$3.92
<b>Administrative Ratio</b>					
Service Quality	92.8%	91.7%	91.8%	92.0%	92.0%
On-Time Performance – Bus	97.0%	97.4%	97.1%	97.0%	97.0%
On-Time Performance - LRT	97.2%	96.7%	98.1%	96.0%	96.0%
On-Time Performance – TRE					
<b>Customer Satisfaction</b>					
Complaints per 100,000 Passengers – Fixed Route	34.8	42.6	40.0	36.8	TBD
Complaints per 100,000 Passengers – Bus	38.8	46.1	53.6	50.1	TBD
Complaints per 100,000 Passengers – Light Rail	4.3	13.6	9.9	9.5	TBD
Complaints per 100,000 Passengers – TRE	6.6	11.4	7.9	8.0	TBD
<b>Managed Growth</b>					
Sales Tax for Operations	77.5%	80.1%	71.3%	73.1%	71.0%

### EMPLOYEE PERFORMANCE

A critical part of DART's leadership system is the link between the Business Plan and employee performance. DART's Senior Management Team (assistant vice-presidents and above) is held accountable for achieving or exceeding the operating, financial, and quality targets established in the Business Plan at the Agency-wide and modal levels.

Scorecards and work programs are developed and cascaded down from the Agency-wide and modal levels to the department and division levels. Scorecards at the department and division levels tend to focus more on internal process measurement since continuous process improvement is one of the Agency's core values and therefore a major theme for management.

The work program elements necessary to improve performance at all levels are then incorporated into individual employee Performance Management Plans (PMPs). Some PMPs may be homogeneous for an entire group and will focus on achieving the expected business results for that section (such as claims processing). Other PMPs will be project specific (or work program specific) and linked directly back to the specific initiatives in the Strategic Plan.

Salaried employees review their performance with their supervisors at least two times per year to ensure that schedules are being maintained and targets are being achieved. Exceptions are noted and adjustments are made to schedules. Management places a significant amount of weight on achieving the performance expectations shown in the scorecard. The Agency uses pay-for-performance merit increases, a lump-sum bonus plan, and other incentive programs to reward employees (or groups of employees) who achieve their objectives.

## Public Transit Performance Measurement Study

### OPERATING UNIT SCORECARDS

Bus – Key Performance Indicators					
KPI Measure	FY02A	FY03A	FY04A	FY05B	FY06P
<b>Customer/Quality Indicators</b>					
Fixed Route Bus Ridership (M)	42.4	40.3	38.4	39.5	39.9
Charter Ridership (M)	0.4	0.4	0.4	0.4	0.4
Revenue Miles (M)	31.2	30.5	28.2	28.0	28.0
Passengers per Mile	1.37	1.32	1.36	1.41	1.42
Complaints per 100k passengers	38.8	46.1	53.6	50.1	TBD
On-Time Performance	92.8%	91.7%	91.8%	92.0%	92.0%
Mean Distance Between Service Calls	3827	4221	4566	4400	4400
Veh. Accidents Per 100k Miles (All Service)	2.40	2.02	1.99	2.15	2.15
Avg # OP Unsched Absence Days	22.5	20.3	14.9	20.0	19.0
<b>Financial/Efficiency Indicators</b>					
Revenues (M)	\$27.2	\$28.3	\$26.6	\$28.6	\$28.6
Expenses – Fully Allocated (M)	\$205.1	\$189.8	\$177.2	\$183.4	\$192.2
Net Subsidy (M)	\$177.9	\$161.6	\$150.6	\$154.8	\$163.6
Cost Per Revenue Mile	\$6.57	\$6.22	\$6.29	\$6.56	\$6.86
Pay-to-Platform Ration - Hours	n/a	1.30	1.25	1.33	1.33

Light Rail – Key Performance Indicators					
KPI Measure	FY02A	FY03A	FY04A	FY05B	FY06P
<b>Customer/Quality Indicators</b>					
Ridership (M)	13.7	17.0	16.5	17.2	17.5
Revenue Car Miles (M)	3.9	5.7	5.1	5.2	5.4
Passengers per Car Mile	3.51	3.00	3.25	3.32	3.24
Complaints per 100k passengers	38.8	46.1	53.6	50.1	TBD
On-Time Performance	97.0%	97.4%	97.1%	97.0%	97.0%
Complaints per 100k Passengers	6.6	13.6	9.9	9.5	TBD
Mean Distance Between Calls	6	37	39	42	42
Veh. Accidents Per 100k Miles (All Service)	0.37	0.32	0.26	0.36	0.36
Avg # OP Unsched Absence Days	22.5	20.3	14.9	20.0	19.0
<b>Financial/Efficiency Indicators</b>					
Revenues (M)	\$9.5	\$12.4	\$12.5	\$13.0	\$12.8
Expenses – Fully Allocated (M)	\$47.7	\$62.4	\$61.6	\$69.8	\$70.4
Net Subsidy (M)	\$38.2	\$50.1	\$49.2	\$56.8	\$57.6
Subsidy Per Passenger	\$2.76	\$2.95	\$2.98	\$3.30	\$3.30
Subsidy Per Passenger Mile	N/A	\$0.48	\$0.38	\$0.40	\$0.40
Cost Per Revenue Car Mile	\$12.20	\$11.02	\$12.17	\$13.45	\$13.04
Pay-to-Platform Ration - Hours	1.55	1.35	1.31	1.39	1.39

Commuter Rail – TRE Key Performance Indicators					
KPI Measure	FY02A	FY03A	FY04A	FY05B	FY06P
<b>Customer/Quality Indicators</b>					
Ridership (M)	2.2	2.3	2.2	2.1	2.2
Revenue Car Miles (M)	1.6	1.6	1.3	1.4	1.4
Passengers per Car Mile	1.4	1.5	1.6	1.5	1.6
Scheduled Train Hours	16.8	22.0	19.3	20.3	20.3
On-Time Performance	97.20%	96.7%	98.1%	96.0%	96.0%
Complaints per 100k Passengers	6.6	7.9	8.0	TBD	TBD
Missed Trips	24	9	9	15	15
Veh. Accidents Per 100k Miles (All Service)	0.11	0.28	0.26	0.31	0.31
<b>Financial/Efficiency Indicators</b>					
Revenues (M)	\$4.2	\$4.9	\$5.7	\$6.0	\$5.5
Expenses – Fully Allocated (M)	\$21.0	\$17.8	\$17.9	\$19.9	\$19.9

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Net Subsidy (M)	\$16.9	\$13.0	\$12.2	\$13.9	\$14.5
DART Net Expenses				\$5.6	\$5.1
Subsidy Per Passenger	\$7.64	\$5.53	\$5.65	\$6.49	\$6.64
Subsidy Per Passenger Mile	N/A	\$0.31	\$0.34	\$0.40	\$0.41
TRE Cost Per Revenue Car Mile	\$13.36	\$11.45	\$13.49	\$14.21	\$14.23
DART Cost Per Revenue Car Mile				\$8.15	\$7.53

Paratransit Services – Key Performance Indicators					
KPI Measure	FYO2A	FY03A	FY04A	FY05B	FY06P
<b>Customer/Quality Indicators</b>					
Ridership (M)	585.7	577.3	5899.1	584.4	584.4
Scheduled Ridership (M)	n/a	691.4	683.7	693.0	678.7
Revenue Hours (M)	417.4	383.7	414.8	416.0	415.1
Paratransit Passengers per Hour - Scheduled	1.71	1.80	1.65	1.67	1.64
Paratransit Passengers per Hour - Actual	1/40	1.50	1.42	1.40	1.41
On-Time Performance	89.6%	88.1%	87.5%	86.0%	86.5%
Accidents per 100k Passengers	n/a	n/a	2.30	2.50	2.50
Percentage of Trips Completed	98.4%	100.0%	100.0%	98.0%	98.0%
Passenger Cancelled Trips Ratio	13.5%	12.7%	10.5%	13.0%	12.0%
Passenger No Show Ratio	4.8%	3.7%	3.3%	4.0%	
3.5% Service Level - Scheduling (3 minutes)	88.7%	95.0%	95.0%	92.0%	93.0%
Service Level – Where’s My Ride (2 minutes)	87.8%	93.0%	92.0%	91.0%	92.0%
Complaints per 1K Riders	3.80		4.52	5.50	5.00
Certified Riders	6560	7170	7680	7600	7828
<b>Financial/Efficiency Indicators</b>					
Revenues (M)	\$0.90	\$1.10	\$1.40	\$1.40	\$1.50
Expenses – Fully Allocated (M)	\$25.1	\$24.6	\$26.3	\$27.9	\$28.9
Net Subsidy (M)	\$24.2	\$23.5	\$24.8	\$26.4	\$27.4
Subsidy per Passenger	\$41.47	\$40.76	\$42.14	\$45.24	\$46.82

HOV – Key Performance Indicators					
KPI Measure	FYO2A	FY03A	FY04A	FY05B	FY06P
<b>Customer/Quality Indicators</b>					
Ridership (M)	34.2	33.8	35.0	35.0	35.0
Avg. Weekday Ridership (M)	104.5	103.9	106.4	105.0	105.0
On-Time Performance				98.0%	99.0%
Operating Speed Ratio	1.86	1.65	1.70	1.70	1.70
<b>Financial/Efficiency Indicators</b>					
Expenses – Fully Allocated (M)	\$4.60	\$5.40	\$5.70	\$5.40	\$5.60
Subsidy per Passenger	\$0.13	\$0.16	\$0.16	\$0.16	\$0.16

Overview and Vanpool – Key Performance Indicators					
KPI Measure	FYO2A	FY03A	FY04A	FY05B	FY06P
<b>Customer/Quality Indicators</b>					
Ridership (M)	360	419	379	380	405
Number of Vanpools	72	73	65	70	70
<b>Financial/Efficiency Indicators</b>					
Revenues (M)	\$0.80	\$0.90	\$0.80	\$0.90	\$0.90
Expenses – Fully Allocated (M)	\$0.90	\$1.30	\$1.10	\$1.10	\$1.30
Subsidy per Passenger	\$0.48	\$1.07	\$0.78	\$0.63	\$0.78

## Public Transit Performance Measurement Study

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### BUSINESS PLANNING PROCESS

Exhibit 1.7 highlights the standard business planning compilation and approval process used at DART.

<b>Exhibit 1.7</b>	
<b>Date</b>	<b>Standard Business Plan Development Schedule</b>
Jan - Feb	Management reviews Strategic Plan
Jan - Apr	Management reviews and develops Financial Standards
Apr-May	Board reviews and approves Financial Standards
May – Jul	Staff develops Business Plan (which includes the Annual Budget and Twenty-Year Financial Plan) for following year
Jul	Staff presents proposed Budget and Twenty-Year Financial Plan to Board
Aug	Board approves issuance of Budget and Twenty-Year Financial Plan to Member Cities
Sep	Member Cities provide input
Sep	Board approves Budget and Twenty-Year Financial Plan

DART takes a top-down approach to business planning. It begins with the Board's Financial Standards which establish parameters within which management must operate. The Business Planning Parameters were initiated as part of the Financial Standards in 1997. Targets are established, maintained, and highlighted throughout the document.

In January, management reviews the Strategic Plan, performs an environmental scan (see Exhibit 1.4), determines projected funding levels, and establishes expected performance levels for the next several years. Next, the Board reviews the Financial Standards to determine that the business objectives are appropriate based on input from management.

Typically, the Board reviews projected business and financial results, including proposed new operating and capital programs beginning in May and June. Departmental targets are set based on projections from the Twenty-Year Financial Plan and other known factors or programs (e.g., increase in health care costs or fuel). Based on the direction of senior management, departments prepare detailed budgets for each of their cost centers within the set targets. If the departments are unable to reach their set targets, a budget hearing is held with the President/Executive Director. The hearing provides an opportunity for the department head, the Executive Vice President, the President/Executive Director, and the Budget Office to discuss the respective budgets as well as any changes. All new proposed programs are evaluated for effectiveness and efficiency.

The Finance Department then compiles the numbers, coordinates work programs to achieve strategies, and publishes the Business Plan for the legislatively-required 30-day comment period by DART's member cities. The Board performs additional reviews in August and September, as necessary, before it approves the Budget and Twenty-Year Financial Plan in late September. DART's legislation does not require public hearings.

### DEFINITIONS

**Issue** - An issue is a statement of problems or concerns. It is usually stated as a question. A common planning approach is to identify the existing and future internal STRENGTHS and WEAKNESSES and the existing and future external OPPORTUNITIES and THREATS. The concerns that you want to do something about, expressed as issues, are unmet goals and objectives.

**Guiding Principle** - A guiding principle is an idea that influences one greatly when making a decision or considering a matter. The most important goals for the Transit System Plan or the transit system planning process are guiding principles.

## Public Transit Performance Measurement Study

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**Goals** - The ends or ideal toward which the planning effort is directed. Goals state what you mean to do something about. Goals are derived from issues. Goals are often used to evaluate alternatives to determine which alternative will best achieve the desired goals.

**Objectives** - The means to accomplish the goals, expressed in a form that is measurable and achievable. The objectives should be based on the issue analysis. Strengths can be matched to opportunities and/or the conversion of weaknesses or threats.

**Plan** - A plan is a decision made in advance for the accomplishment of an objective. A plan document usually contains goals, objectives and policies in the form of a map and text.

**Policies** - Policies are written courses of action intended to direct decisions and action. A planning policy directs decisions made today about the future or decisions made in the future.

**Effective** - Producing the results that were intended.

**Efficient** - Acting or producing with a minimum of waste, expense or unnecessary effort.

**Performance Indicator** - A measure, (usually numerical) of the degree to which an objective is being achieved.

## Public Transit Performance Measurement Study

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### Denver, Colorado - RTD

Regional Transportation District (RTD) operates as a public transportation system in a seven-county service area, which includes all of Boulder, Broomfield, Denver and Jefferson Counties, and parts of Adams, Arapahoe and Douglas Counties. There are approximately 2,400 square miles in the service area. RTD maintains a fleet of over 1,100 buses, 30 light rail vehicles, and 185 Access-a-Ride demand-responsive vehicles. RTD provides several special services in addition to Access-a-Ride, including special events shuttles and van pools. In 2001, RTD provided approximately 82 million trips.

#### **MISSION:**

To meet out constituents' present and future public transit needs by offering safe, clean, reliable, courteous, accessible and cost-effective service throughout the district.

#### **2030 Metro Vision Transportation Vision:**

A balanced multimodal transportation system will include rapid transit, a regional bus system, a regional highway system, local streets, bicycle and pedestrian facilities and associate system and travel demand management services. This system will provide reliable mobility choices to all of its users: residents and visitors of all ages, incomes and physical abilities, as well as businesses that provide services and produce or sell goods. Users will find it easy to access and it will permit efficient state and nation-wide connections for people and freight.

#### **2030 Metro Vision Transportation Goals:**

Provide safe, environmentally sensitive and efficient mobility choices for people and goods; and integrate with and support the social, economic and physical land use development of the region and state.

#### **2030 Metro Vision Transportation Policies: (Key Results Areas)**

##### **Policy #1. System Preservation**

Assure the preservation and maintenance of existing facilities

##### **Policy #2. Transit**

Provide increased transit service and facilities that stimulate travel by means other than the single-occupant motor vehicle (SOV), encourage transit-oriented developments and provide mobility options.

##### **Policy #3. Roadways**

Expand capacity of existing roadways in the most critically congested corridors and at key traffic bottlenecks and encourage access controls to maintain capacity.

##### **Policy #4. Rights-of-way Preservation**

Reserve rights-of-way in newly developing and redeveloping areas for pedestrian, bicycle, transit and roadway facilities.

##### **Policy #5. Denver Central Business District**

Improve and maintain transportation access to downtown Denver.

##### **Policy #6. Safety**

Develop a transportation system that promotes increased safety and security for all of its users.

## Public Transit Performance Measurement Study

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### **Policy #7. Management of Operations**

Make the best use of existing transportation facilities by implementing measures that actively manage and integrate systems, improve traffic operations, and reduce the demand for single-occupant motor vehicle travel.

### **Policy #8. Bicycle and Pedestrian**

Provide bicycle and pedestrian access through and between developments and provide links to transit facilities.

### **Policy #9. Interconnections**

Improve interconnection of the transportation system within modes, between different modes and between the metropolitan area and the rest of the state and nation.

### **Policy #10. Transportation Efficient Housing and Business Developments**

Design new developments within communities to allow the efficient movement of pedestrians, bicyclists, buses and motor vehicles within and through the area.

### **Policy #11. Land Use Integration**

Implement transportation system components that support Metro Vision's urban growth boundary/area, urban centers and associated concepts.

### **Policy #12. Transportation for the Disadvantaged**

Provide a transportation system that considers the needs or impacts on minority, low-income, elderly and disabled persons.

### **Policy #13. Air and Water Quality**

Develop a transportation system that contributes to improved air quality and minimizes impacts on water quality.

## **MEASURES, STANDARDS, AND TARGETS**

RTD has a three-tiered performance measurement system, consisting of Service Standards, a Quarterly Progress Report, and an Annual Report. Service standards have been in place the longest—over 25 years. There are numerous measures in each report category. Key economic performance measures are subsidy per passenger and passengers per mile. The Quarterly Progress Report addresses complaints, schedule adherence, and accident ratio (e.g., vehicle accidents per 100,000 miles traveled).

Service standards and economic performance measures are identified for seven classes of service:

- Local-CBD,
- Local-Urban,
- Local-Suburban,
- Express,
- Regional,
- Demand-Responsive, and
- SkyRide (service to Denver International Airport).

RTD has formal performance standards through its Service Standards. The standards are updated about every three years. If a measure fails to meet its standard, or exceeds its standard, service adjustments are made. RTD reassesses service if economic performance measures are 10 to 25 percent or more below or above average. (The exact percentage varies by measure.)

## **Public Transit Performance Measurement Study**

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### **DATA COLLECTION PROCEDURE**

Data for the measures are collected from the farebox and automatic vehicle location (AVL) system, as well as from the RTD Finance Department. RTD staff views the data collected as being very useful. The data are used to make service planning decisions: restructuring service, eliminating service, and adding new service.

RTD also measures “softer” indicators. RTD conducts an on-board customer survey annually, covering one or two service classes. Several evaluation categories relate to the degree of customer satisfaction. A complete survey of all service classes takes four years. RTD also conducts a random telephone survey by county every year. The survey size is based on each county’s population. RTD is committed to collecting this information every year.

### **MONITORING AND REPORTING**

Economic performance measures are determined annually, while measures used in the Quarterly Progress Report are measured every three months. The measures in the Quarterly Progress Report are related to a set of goals and objectives. Economic performance measures are linked to the RTD budget. The performance measures used are reviewed about every three years.

## Public Transit Performance Measurement Study

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### Houston, Texas - METRO

The Texas State Legislature authorized the creation of local transit authorities in 1973. In 1978, Houston-area voters created METRO and approved a one-cent sales tax to support its operations. METRO opened for business in January, 1979. In two decades, the Authority has transformed a broken bus fleet into a comprehensive transportation system on a regional scale.

#### **VISION**

METRO (Metropolitan Transit Authority of Harris County) is an innovative organization partnering with public and private organizations to deliver effective and efficient transportation system solutions within our expanding region.

#### **MISSION**

METRO is an innovative regional transportation organization of dedicated employees committed to partnering with the public and private sectors to provide the safest, highest quality services and mobility solutions that exceed our customers' expectations while creating economic growth.

#### **VALUES**

We, the employees of METRO, dedicate ourselves to:

- Encouraging teamwork and diversity through communication, cooperation, flexibility and mutual respect.
- Maintaining the highest personal and professional standards through growth and recognition, commitment and integrity.
- Accepting responsibility for our actions.
- Committing to create and maintain a safe and secure environment.
- Achieving excellence through visionary solutions and in service delivery to our customers.

in order to collectively achieve and support the organizational mission and vision.

#### **FISCAL 2001 – FISCAL 2004 State Required Performance Audit of the Metropolitan Transit Authority of Harris County, Texas**

The following are recommendations and the corresponding response for this audit:

*Recommendation 5 – Implement a strategic plan based on a system of integrated goals and objectives.*

- **Response** – For FY06, METRO's plans will be formalized into an integrated strategic plan with coordinated layers of goals and objectives. Already underway is the development of individual salaried employee goals for FY05.

*Recommendation 6 - Enhance performance evaluations by aligning evaluations with system wide success in achieving goals and objectives.*

- **Response** - METRO is implementing the FY05/06 Performance/Development Management Program. The METRO Senior Management team will align their functional goals to the goals published for Metro by our CEO. Senior management then will cascade their functional goals to their managers who will then create department goals linked to functional goals.

All employees will have an individual performance plan (goals and objectives) supporting their department goals. We will use the 05 calendar year to transition all employees to a common review date and link our reward's practice to the

## Public Transit Performance Measurement Study

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Authority's and employee's performance in 2006. Human Resources will create the tools and facilitate the process and all managers will be responsible for the implementation of the process in their areas.

*Recommendation 13 – Develop indicators to provide a yardstick for measuring individual operator performance.*

- **Response** - Management concurs that it is useful to have measurements that compare an individual operator to an “average” operator. Operations currently use two indicators – Operator-related Complaints per Operator and Disciplinary Actions per Operator. METRO agrees that expanding this list would be of value, particularly in assessing overall job performance, and will incorporate accident and attendance indicators into our processes.

*Recommendation 17: Leverage upcoming data management capabilities to improve data collection efficiency and quality.*

*Recommendation 18: Develop and use a centralized database for the preparation of internal and external performance reports.*

- **Response** – METRO concurs with the findings and recommendations #17 & #18. Beginning in FY2000, METRO undertook a major overhaul of its IT systems including software and hardware. The effort was divided into two phases: Phase I – replace, upgrade or add systems designed to collect and store a large array of data necessary for the effective and efficient operation of the multi-model transit system. Phase II – add software capable of allowing flexible analysis of the collected data.

## Public Transit Performance Measurement Study

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### Orange County, California - OCTA

The Orange County Transportation Authority (OCTA) is the county's primary transportation agency. OCTA creates funds and delivers efficient transportation for Orange County. We keep Orange County moving with extensive bus and paratransit service, Metrolink commuter rail service, the planned CenterLine light rail starter system, the 91 Express Lanes toll road, freeway, street and road improvement projects, motorist services and by regulating taxi operations.

#### **MISSION**

To enhance the quality of life in Orange County by delivering safer, faster and more efficient transportation solutions.

#### **VALUES**

##### **Our Commitment to One Another and Our Customers**

The values that shape the way we do business will significantly influence who we are and how we want to be viewed by others. The OCTA Values should guide our behavior and how we treat everyone we have contact with.

Our values of Integrity, Customer Focus, Can-Do Spirit, Communication and Teamwork/Partnership represent the standards we aspire to. If we all place a priority on them, OCTA will truly be the best transportation system now and in the years to come.

##### **Integrity**

- Do what we say we are going to do and deliver as promised
- Be accountable for our actions
- Apply the golden rule as we work with others
- Practice ethical behavior

##### **Customer Focus**

- Know our customers; Be courteous, friendly and responsive to their needs
- Treat others with care, consideration and respect
- Provide safe, timely, reliable, professional service

##### **Can-Do Spirit**

- Be proactive, take the initiative to do and make things better
- Do all we can to always improve what we do; strive to be "outstanding"
- Be creative and innovative in our approach to new challenges
- Take risks and learn from past mistakes
- Practice visionary and forward-thinking

##### **Communication**

- Communicate openly, honestly and in a straightforward manner
- Strive to be responsive to the knowledge and information that others need
- Provide consistent, timely and reliable information to build trust in others

##### **Teamwork/Partnership**

- Build cooperative, supportive relationships across all lines of business
- Build and sustain relationships characterized by shared goals and success, shared knowledge and mutual respect
- Understand and adapt to the diverse background at OCTA

#### **2030 LONG-RANGE TRANSPORTATION PLAN GOALS**

- Improve mobility to enhance the movement of people and goods in and through the County.

## Public Transit Performance Measurement Study

- Focus on the sustainability of the transportation system and minimize the negative environmental impacts of improvements.
- Ensure transportation plans reflect local priorities.
- Provide safe, reliable, and cost-effective transportation projects and services that meet the needs of residents, visitors, workers, and persons with special needs.
- Develop transportation solutions that complement the land-use plans of local communities

### 2030 STRATEGIC INITIATIVES (The Power of Ten)

- Deliver the SR-22 HOV and I-5 Far North
- Fix freeway bottlenecks
- Encourage carpooling on toll roads
- Invest in streets and roads
- Expand Metrolink service
- Expand local bus service
- Add express bus service
- Provide Bus Rapid Transit (BRT) service
- Build Light Rail Transit (LRT)

### 2030 PLAN PERFORMANCE MEASURES

If the proposed plan is fully implemented, mobility conditions in the future will improve over the baseline scenario. Below are some of the results.

Measure	Base Yr 2000	Baseline 2025	Balanced Plan	Preferred Plans & Options
<b>Vehicle Trips</b>				
Daily Trips	9.7 million	11.5 million	11.4 million	11.4 million
Daily Work Trips	2.2 million	2.7 million	2.7 million	2.7 million
<b>Travel Characteristics</b>				
Daily Vehicle Hrs	1.6 million	2.9 million	2.7 million	2.5 million
Vehicle Hrs Delay	184,000	965,000	751,000	489,000
Daily Vehicle Miles	64 million	86 million	86 million	86 million
Work Travel Time	23 minutes	30 minutes	27 minutes	25 minutes
Work Travel Distance	13 miles	12.8 miles	12.8 miles	12.7 miles
<b>Average Speeds</b>				
Ave Daily Speed	38.8 mph	28.8 mph	31.6 mph	34.8 mph
Freeway PM Peak Speed	42.9 mph	21.5 mph	25.9 mph	29.2 mph
Arterial PM Peak Speed	30.7 mph	22.5 mph	24.1 mph	29.0 mph
All Facilities PM Peak Speed	35.5 mph	23.2 mph	26.1 mph	30.1 mph
<b>Work Trip Travel Choice</b>				
Drive Alone	69.2%	67.2%	66.5%	66.1%
Carpool	20.1%	21.0%	20.5%	20.2%
Transit	3.5%	4.6%	5.7%	6.5%
Work at Home	4.8%	4.8%	4.8%	4.8%
Bike/Walk	2.4%	2.5%	2.5%	2.5%
Transit in Central Core	5.3%	7.4%	9.2%	10.3%

### Portland, Oregon - TRI-MET

TriMet is a municipal corporation providing public transportation for much of the three counties in the Portland, Oregon, metro area. TriMet operates a comprehensive transit network including a 44 mile, 64-station MAX light rail system, 93 bus lines, service for seniors and people with disabilities, and enhanced amenities and information.

#### **STRATEGIC DIRECTION**

TriMet is striving to build a safe, comfortable, reliable and innovative transit system that delivers transportation options to our growing region. A total transit system will meet the needs of our current riders and attract new riders. To achieve our goals, we will value the contributions of each employee, engage the public in the decision-making process, expand our service and demonstrate our strong commitment to quality.

#### **GUIDING PRINCIPLES**

- Continue to build the total transit system.
- Maximize use of existing resources and make capital investments that enhance efficiency and prevent future problems.
- Increase ridership.
- Focus on service quality.
- Demonstrate environmental leadership.
- Integrate transportation and land-use goals.
- Increase agency diversity by attracting, training and retaining employees who reflect our community.
- Maintain strong fiscal controls.
- Respond to customer needs.

#### **TRANSIT INVESTMENT PLAN (TIP) PRIORITIES (Key Results Areas)**

1. Build the Total Transit System – Enhance customer information, access to transit, stop amenities, frequency, reliability, passenger comfort, safety and security.
2. Expand High Capacity Transit – Invest in MAX Light Rail, Commuter Rail and Streetcar service along key corridors to connect Regional Centers.
3. Expand Frequent Service – Add routes to TriMet’s network of bus lines that run every 15 minutes or better, every day.
4. Improve Local Service – Work with local jurisdictions to improve transit service in specific local areas.

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### TIP IMPLEMENTATION

Priority	FY2005	FY2006	FY2007-FY2010
<b>Build the Total Transit System</b>	<ul style="list-style-type: none"> <li>▪ Launched Transit Tracker by Phone</li> <li>▪ Added 81 spaces to Tualatin Park &amp; Ride</li> <li>▪ Implemented short term parking management at Gateway &amp; Sunset Transit Centers</li> <li>▪ Installed 35 shelters</li> </ul>	<ul style="list-style-type: none"> <li>▪ Provide Stop IDs at bus stops and on schedules</li> <li>▪ Open Milwaukee Park &amp; Ride</li> <li>▪ Install solar-powered lighting and new shelters with station names</li> <li>▪ Deploy 39 new buses</li> <li>▪ Automate announcements on 94 buses</li> <li>▪ Address low performing lines</li> </ul>	<ul style="list-style-type: none"> <li>▪ Revitalize Portland Mall</li> <li>▪ Provide automated stop announcements, air conditioning and low-floor boarding on over ¾ of buses</li> <li>▪ Add buses and light rail vehicles to address projected passenger crowding</li> </ul>
<b>Expand High Capacity Transit</b>	<ul style="list-style-type: none"> <li>▪ MAX Yellow line served 3.9 million boarding in first year</li> <li>▪ Operated Streetcar to Riverplace</li> <li>▪ Completed Washington County Commuter Rail Final Design</li> <li>▪ Completed South Corridor Preliminary Engineering</li> </ul>	<ul style="list-style-type: none"> <li>▪ Pursue Washington County Commuter Rail federal full funding grant agreement</li> <li>▪ Start South Corridor final design</li> <li>▪ Operate Streetcar to Gibbs street</li> <li>▪ Continue analysis &amp; planning for future corridors</li> </ul>	<ul style="list-style-type: none"> <li>▪ Open Washington County Commuter Rail</li> <li>▪ Open Gresham Civic MAX station</li> <li>▪ Open MAX on I-205 to Portland Mall</li> <li>▪ Redesign downtown bus service.</li> <li>▪ Continue analysis &amp; planning for future corridors</li> </ul>
<b>Expand Frequent Service</b>	<ul style="list-style-type: none"> <li>▪ Added 16 miles of Frequent Service in Washington County</li> <li>▪ Added signal priority to Portland Frequent Service</li> </ul>	<ul style="list-style-type: none"> <li>▪ Fund sidewalk construction along TV Hwy through partnerships</li> </ul>	<ul style="list-style-type: none"> <li>▪ Add Frequent Service to complement Commuter Rail, I-205 investments</li> </ul>
<b>Improve Local Service</b>	<ul style="list-style-type: none"> <li>▪ Launched Blue Lake Park weekend shuttle</li> </ul>	<ul style="list-style-type: none"> <li>▪ Tigard</li> <li>▪ South Waterfront</li> </ul>	<ul style="list-style-type: none"> <li>▪ Revise N. Clackamas service to coordinate</li> </ul>

Data for these reports are not included. The reports shown here are examples to demonstrate the Portland performance measurement system.

### MONTHLY PERFORMANCE (Operating) REPORT

#### SYSTEM RIDERSHIP SUMMARY

Note: This report is provided to the General Manager and the Board of Directors.

Measure	Jul 05	Jul 04	% Δ	FY06 TD	FY05 TD	% Δ
<b>Avg. Weekday Boardings</b>						
<b>Fixed Route</b>						
Bus-Other Service						
Bus-Frequent Service						
Subtotal All Bus						
MAX Service						

## Public Transit Performance Measurement Study

Fixed Route Total						
<b>Paratransit</b>						
LIFT						
Volunteer						
Medical Transportation						
Paratransit Total						
<b>System Total</b>						
<b>Avg. Weekly Boardings</b>						
<b>Fixed Route</b>						
Bus-Other Service						
Bus-Frequent Service						
Subtotal All Bus						
MAX Service						
Fixed Route Total						
<b>Paratransit</b>						
LIFT						
Volunteer						
Medical Transportation						
Paratransit Total						
<b>System Total</b>						
<b>Boarding Rides/Vehicle Hour</b>						
<b>Fixed Route</b>						
Bus-Other Service						
Bus-Frequent Service						
Subtotal All Bus						
MAX Service						
Fixed Route Total						
<b>Paratransit</b>						
LIFT (no cab)						
Volunteer						
Medical Transportation						
Paratransit Total						
<b>System Total</b>						

Data for these reports are not included. The reports shown here are examples to demonstrate the Portland performance measurement system.

### KEY INDICATOR PERFORMANCE REPORT (FIXED ROUTE)

Note: This report is provided to the General Manager and the Board of Directors. It is a summary of the detail reports that follow – a summary of the Key Indicators.

Measure	Jul 05	Jul 04	% Δ	FY06 TD	FY05 TD	% Δ
<b>Ridership</b>						
Avg. Weekday Boarding Rides						
Monthly Boarding Rides per Revenue Hour						
<b>Revenue &amp; Cost Efficiency</b>						
Passenger Revenue/System Cost						
System Cost/Boarding Ride						
System Cost/Vehicle Hour						
<b>Labor Productivity</b>						
Bus & Rail Operator Attendance						
Bus & Rail Maintenance Attendance						
Weekly Boarding Rides Per Full Time Employee						
<b>Service Supplied</b>						
Bus Miles/Chargeable Road Call						
Bus Miles/Vehicle Accident						
Bus % Maintained Pullouts						

## Public Transit Performance Measurement Study

Bus On-Time Performance					
Rail Car Miles/Svce Related Repair					
LRV-Train Miles/Vehicle Accident					
LRV % Maintained Pullouts					
Rail On-Time Performance					

### DETAIL REPORTS THAT ARE SUMMARIZED IN THE KEY INDICATOR REPORT

Note: This report structure is the same for all operations. This material is used for operational management.

I. FIXED ROUTE RIDERSHIP PASS & TICKET				12 Month Average		Objective
Bus and Rail Operation	Jul 05	Jun 05	Jul 04	This Year	Last Year	For FY 06
Average Weekday Ridership						
Originating Rides						
Boarding Rides						
Boarding Rides/Revenue Hour						
<b>Average Saturday Ridership</b>						
Originating Rides						
Boarding Rides						
Boarding Rides/Revenue Hour						
<b>Average Sunday Ridership</b>						
Originating Rides						
Boarding Rides						
Boarding Rides/Revenue Hour						
<b>Average Weekly Ridership</b>						
Originating Rides						
Boarding Rides						
<b>Monthly Ridership</b>						
Originating Rides (000)						
Originating Rides/Revenue Hour						
Originating Rides/Vehicle Mile						
Boarding Rides (000)						
Boarding Rides/Revenue Hour						
Boarding Rides/Vehicle Mile						
<b>Pass &amp; Ticket Information</b>						
<b>Total Pass Sales</b>						
All-Zone Adult						
2-Zone Adult						
1-Zone Adult						
Honored Citizen						
Youth						
School Pass						
<b>Annual Photo ID Program Employees</b>						
<b>Total Ticket Book Sales</b>						
All-Zone Adult						
2-Zone Adult						
1-Zone Adult						
Honored Citizen						
Youth						
One-day Ticket						
Three-day Ticket						
Quik Tik						

Data for these reports are not included. The reports shown here are examples to demonstrate the Portland performance measurement system.

II. FIXED ROUTE RIDERSHIP PASS & TICKET				12 Month Average		Objective
Bus Operation	Jul 05	Jun 05	Jul 04	This Year	Last Year	For FY 06

## Public Transit Performance Measurement Study

<b>Average Weekday Ridership</b>						
Originating Rides						
Boarding Rides						
Boarding Rides/Revenue Hour						
<b>Average Saturday Ridership</b>						
Originating Rides						
Boarding Rides						
Boarding Rides/Revenue Hour						
<b>Average Sunday Ridership</b>						
Originating Rides						
Boarding Rides						
Boarding Rides/Revenue Hour						
<b>Average Weekly Ridership</b>						
Originating Rides						
Boarding Rides						
<b>Monthly Ridership</b>						
Originating Rides (000)						
Boarding Rides						
Boarding Rides/Revenue Hour						
<b>Rail Operation</b>						
<b>Average Weekday Ridership</b>						
Originating Rides						
Boarding Rides						
Boarding Rides/Revenue Hour						
<b>Average Saturday Ridership</b>						
Originating Rides						
Boarding Rides						
Boarding Rides/Revenue Hour						
<b>Average Sunday Ridership</b>						
Originating Rides						
Boarding Rides						
Boarding Rides/Revenue Hour						
<b>Average Weekly Ridership</b>						
Originating Rides						
Boarding Rides						
<b>Monthly Ridership</b>						
Originating Rides (000)						
Boarding Rides						
Boarding Rides/Revenue Hour						

Data for these reports are not included. The reports shown here are examples to demonstrate the Portland performance measurement system.

III. REVENUE & CONST EFFICIENCY (SYSTEM)				12 Month Average		Objective
System Costs	Jul 05	Jun 05	Jul 04	This Year	Last Year	For FY 06
Total System Costs (Millions)						
<b>System Fixed Route &amp; ATP Indicators</b>						
System Cost/Boarding Ride						
System Cost/Originating Ride						
System Cost/Vehicle Mile						
System Cost/Vehicle Hour						
System Cost/Vehicle Hour CPI Adjusted to Previous Year						
Operating Revenue/System Cost						
<b>Passenger Revenue (Millions)</b>						
Passenger Revenue/System Cost						

## Public Transit Performance Measurement Study

Average Originating Fare						
<b>QUARTERLY REPORT</b>						
<b>Employer Payroll Tax</b>						
Payroll Tax (Millions)						
<b>Sustainability</b>						
Bus Boarding Rides/Gallons (diesel)						
Fixed Rout Boarding Rides/Electricity (kW/hr)						
Fixed Route Boarding Rides/Sheet (paper)						

IV. REVENUE & COST EFFICIENCY (FIXED ROUTE)				ve
Bus & Rail System	Jul 05	Jun 05	Jul 04	06
<b>System Costs (Millions)</b>				
System Cost/Boarding Ride				
System Cost/Originating Ride				
System Cost/Vehicle Mile				
System Cost/Vehicle Hour				
System Cost/Vehicle Hour CPI Adjusted to Previous Year				
Operating Revenue/System Cost				
<b>Passenger Revenue (Millions)</b>				
Passenger Revenue/System Cost				
Average Originating Fare				
<b>Operating Cost (Millions)</b>				
<b>Bus and Rail Operations</b>				
Operations Cost/Boarding Ride				
Operations Cost/Originating Ride				
Operations Cost/Vehicle (Train) Mile				
Operations Cost/Vehicle (Train) Hour				
Operations Cost/Vehicle Hour CPI Adjusted Previous Year				
Passenger Rev/Operating Cost				
<b>Bus Operations</b>				
Operations Cost/Boarding Ride				
Operations Cost/Originating Ride				
Operations Cost/Vehicle Mile				
Operations Cost/Vehicle Hour				
<b>Rail Operations</b>				
Operations Cost/Boarding Ride				
Operations Cost/Originating Ride				
Operations Costs/Train Mile				
Operations Costs/Car-Mile				
Operations Costs/Train Hour				

Data for these reports are not included. The reports shown here are examples to demonstrate the Portland performance measurement system.

IV. REVENUE & COST EFFICIENCY (FIXED ROUTE)				12 Month Average		Objective
Bus & Rail System	Jul 05	Jun 05	Jul 04	This Year	Last Year	For FY 06
<b>System Costs (Millions)</b>						
System Cost/Boarding Ride						
System Cost/Originating Ride						
System Cost/Vehicle Ride						

## Public Transit Performance Measurement Study

System Cost/Revenue Hour						
System Cost/Vehicle Hour						
System Cost/Vehicle Hr CPI Adj Previous Year						
<b>Passenger Revenue (Millions)</b>						
Pass Rev/System Cost (FRR)						
Average Originating Fare						
<b>Operating Costs (Millions)</b>						
<b>Bus and Rail Operations</b>						
Operations Cost/Boarding Ride						
Operations Cost/Originating Ride						
Operations Cost/Vehicle (Train) Ride						
Operations Cost/Vehicle (Train) Hour						
Operations Cost/Vehicle Hr CPI Adj Previous Year						
Passenger Rev/Operating Cost						
<b>Bus Operations</b>						
Operations Cost/Boarding Ride						
Operations Cost/Originating Ride						
Operations Cost/Vehicle Mile						
Operations Cost/Vehicle Hour						
<b>Rail Operations</b>						
Operations Cost/Boarding Ride						
Operations Cost/Originating Ride						
Operations Cost/Train Mile						
Operations Cost/Car Hour						
Operations Cost/Train Hour						

Data for these reports are not included. The reports shown here are examples to demonstrate the Portland performance measurement system.

V. LABOR PRODUCTIVITY				12 Month Average		Objective
	Jul 05	Jun 05	Jul 04	This Year	Last Year	For FY 06
<b>Total Employees</b>						
Total Tri-Met Employees						
Total Tri-Met Employees FTE						
<b>Total Operators</b>						
Full-Time Operators – Bus						
Full-Time Operators – Rail						
Part-Time Operators - Bus						
Full-Time Equivalent Operators						
Field Operations						
Bus Maintenance						
Rail Equipment Maintenance						
Rail Maintenance of Way						
Streetcar Tri-Met Employees						
Other Operations Staff						
Total Operation Division FTE						
Light Rail Project Employees						
General Administration						
Weekly Vehicle Hours/FTE						
Weekly Boarding Rides/FTE						
All Operator Pay Hours/Vehicle Hours						
Wkday Sch Veh Hr/Sch Pay Hr-Bus						

## Public Transit Performance Measurement Study

Wkday Sch Veh Hr/Sch Pay Hr-Rail						
Maint OT Hrs/Maint Empl-Bus						
Maint OT Hrs/Maint Empl-Rail						
Maint OT Hrs/Maint Empl-MOW						
<b>Extraboard Efficiency-Bus</b>						
Scheduled Extraboard Operators						
Standby Hours /Avg # Ops Worked						
Unscheduled OT/Avg # Ops Worked						
Avg Work Day/Avg # Ops Worked						
<b>Extraboard Efficiency-Rail</b>						
Scheduled Extraboard Operators						
Standby Hours /Avg # Ops Worked						
Unscheduled OT/Avg # Ops Worked						
Avg Work Day/Avg # Ops Worked						

Data for these reports are not included. The reports shown here are examples to demonstrate the Portland performance measurement system.

VI. ATTENDANCE				12 Month Average		Objective
	Jul 05	Jun 05	Jul 04	This Year	Last Year	For FY 06
<b>Bus Operator Attendance</b>						
Excused Absence						
Family Leave						
Unexcused Absence						
Sick Leave						
Industrial Injury						
Contractual Absence						
<b>Rail Operator Attendance</b>						
Excused Absence						
Family Leave						
Unexcused Absence						
Sick Leave						
Industrial Injury						
Contractual Absence						
<b>Administrative</b>						
Excused Absence						
Family Leave						
Unexcused Absence						
Sick Leave						
Industrial Injury						
Contractual Absence						
<b>Bus Maintenance</b>						
Excused Absence						
Family Leave						
Unexcused Absence						
Sick Leave						
Industrial Injury						
Contractual Absence						
<b>Rail Equipment Maintenance</b>						
Excused Absence						
Family Leave						

## Public Transit Performance Measurement Study

Unexcused Absence						
Sick Leave						
Industrial Injury						
Contractual Absence						
<b>Rail Maintenance of Way</b>						
Excused Absence						
Family Leave						
Unexcused Absence						
Sick Leave						
Industrial Injury						
Contractual Absence						
<b>Field Operations</b>						
Excused Absence						
Family Leave						
Unexcused Absence						
Sick Leave						
Industrial Injury						
Contractual Absence						

Data for these reports are not included. The reports shown here are examples to demonstrate the Portland performance measurement system.

VII. FIXED ROUTE SERVICE SUPPLIED				12 Month Average		Objective
	Jul 05	Jun 05	Jul 04	This Year	Last Year	For FY 06
<b>Vehicle Utilization</b>						
26 ft Buses						
30 ft Buses						
40 ft Buses						
88 ft Rail Cars						
<b>Total Vehicles</b>						
Vehicle in Service: Peak						
Vehicle in Service: Base						
Revenue Hours						
Vehicle Hours						
Vehicle Miles						
Revenue Hours/Vehicle Hours						
Vehicle Miles/Vehicle						
Scheduled Weekly Vehicle Hours						
<b>Service Quality</b>						
Scheduled Monthly Pullouts						
Missed and Late Pullouts						
No Operator						
No Equipment						
Percent Maintained Pullouts						
<b>Customer Service Information</b>						
Total Customer Service Requests						
Total Commends & Suggestions						
Total Commendations						
Total Complaints						
Complaint Service Deliver						
Complaint Public. Re. Skills						
Complaint Fare System						
Complaint Information & Sales						
Complaint Equipment Related						
Complaint Safety						
Complaint Vandalism & Security						
<b>Total Customer Comments</b>						
Boarding Rides/Commendation						

## Public Transit Performance Measurement Study

Boarding Rides/Complaint						
<b>Responsive to Customer Complaints</b>						
% Completed in 5 Days						
% Completed in a Month						
% Not Completed in a Month						

VIII. TRANSPORTATION OPERATIONS				12 Month Average		Objective
	Jul 05	Jun 05	Jul 04	This Year	Last Year	For FY 06
<b>Bus Transportation</b>						
Vehicles in Service: Peak						
Vehicle in Service: Base						
Revenue Hours						
Vehicle Hours						
Vehicle Miles						
Revenue Hours/Vehicle Hours						
Rev Hrs/Veh Hr (Other Bus)						
Rev Hrs/Veh Hr (Frequent Bus)						
FTE Operators/Peak Vehicle						
Scheduled Weekly Vehicle Hours						
<b>Service Quality</b>						
Scheduled Monthly Pullouts						
Missed and Late Pullouts						
No Operator (Missed & Late)						
Percent Maintained Pullouts						
Vehicle Miles/Gallon						
Average Bus Speed (All)						
Avg Bus Speed (Frequent Bus)						
Bus Miles/Vehicle Accident						
Bus Miles/Passenger Accident						
On-Time Performance (All)						
On Time Performance (Frequent Bus)						
Classroom Training Hours						
<b>Rail Transportation</b>						
Vehicles in Service: Peak						
Vehicle in Service: Base						
Train Revenue Hours						
Train Hours						
Train Miles						
Car Miles						
Train Revenue Hours/Vehicle Hours						
FTE Operators/Peak Train						
Scheduled Weekly Train Hours						
<b>Service Quality</b>						
Scheduled Monthly Pullouts						
Missed and Late Pullouts						
No Operator (Missed & Late)						
Percent Maintained Pullouts						
Average Train Speed						
Train Miles/Vehicle Accident						
Train Miles/Passenger Accident						
On-Time Performance						

Data for these reports are not included. The reports shown here are examples to demonstrate the Portland performance measurement system.

## Public Transit Performance Measurement Study

<b>Field Operations</b>						
Monthly Fares Inspected/Fare Inspector						

IX. MAINTENANCE OPERATIONS				12 Month Average		Objective
	Jul 05	Jun 05	Jul 04	This Year	Last Year	For FY 06
<b>Bus Maintenance</b>						
26 ft Buses						
30 ft Buses						
40 ft Buses						
Total Active Fleet						
Reserve and/or Inactive Fleet						
<b>Total Vehicles</b>						
Peak Service Vehicle Requirements						
Spare Ratio						
Missed & Late Pullouts-No Equipment						
Journeyworker Mechanics						
Vehicle Miles/Journeyworker						
Bus Maint Cost/Vehicle Mile						
Vehicle PMs Completed ON-Time						
Chargeable Roadcalls						
Avg Miles/Chargeable Roadcall						
Bus Inventory Turnover Rate						
Days Between Interior Cleanings						
Workplace Safety Rate						
<b>Rail Maintenance</b>						
Type I Light Rail Vehicles						
Type II Light Rail Vehicles						
Type III Light Rail Vehicles						
<b>Total Vehicles</b>						
Peak Service Vehicle Requirement						
Spare Ration						
Missed & Late Pullouts-No Equipment						
LRV Journeyworker Mechanics						
Rail Car Miles/Journeyworker Mechanic						
Rail Inventory Turnover Rate						
Rail Equipment Maintenance Cost/Care Mile						
Rail Vehicle Service Related Repairs						
Rail Car Miles/Service Related Repair						
Rail MOW <u>workplace Safety Rate</u>						
Rail REM Workplace Safety Rate						
Days Between LRV Interior Cleanings						
Vehicle PMs Completed On-Time						
Track PMs Completed On-Time						

Data for these reports are not included. The reports shown here are examples to demonstrate the Portland performance measurement system.

## Public Transit Performance Measurement Study

Substation PMs Completed On-Time						
Overhead Electrical PMs Completed On-Time						
Signals PMs Completed ON-Time						
Ticket VM PMs Completed On-Time						
Schedule Station Pressure Washing						

X. CUSTOMER CONTACTS				12 Month Average		Objective
	Jul 05	Jun 05	Jul 04	This Year	Last Year	For FY 06
<b>Bus Operations</b>						
Total Customer Service Requests						
Total Comments/Suggestions						
Total Commendations						
Total Complaints						
Complaint Service Deliver						
Complaint Public. Re. Skills						
Complaint Fare System						
Complaint Information & Sales						
Complaint Equipment Related						
Complaint Safety						
Complaint Vandalism & Security						
<b>Total Customer Comments</b>						
Boarding Rides/Commendation						
Boarding Rides/Complaint						
<b>Rail Operations</b>						
Total Customer Service Requests						
Total Comments/Suggestions						
Total Commendations						
Total Complaints						
Complaint Service Deliver						
Complaint Public. Re. Skills						
Complaint Fare System						
Complaint Information & Sales						
Complaint Equipment Related						
Complaint Safety						
Complaint Vandalism & Security						
<b>Total Customer Comments</b>						
Boarding Rides/Commendation						
Boarding Rides/Complaint						
<b>Other Customer Contacts (including LIFT)</b>						
Total Customer Service Requests						
Total Comments/Suggestions						
Total Commendations						
Total Complaints						
Complaint Service Deliver						

Data for these reports are not included. The reports shown here are examples to demonstrate the Portland performance measurement system.

## Public Transit Performance Measurement Study

Complaint Public. Re. Skills						
Complaint Fare System						
Complaint Information & Sales						
Complaint Equipment Related						
Complaint Safety						
Complaint Vandalism & Security						
<b>Total Customer Comments</b>						
<b>Responsive to Customer Complaints</b>						
% Completed in 5 Days						
% Completed in a Month						
% Not Completed in a Month						

XI. ACCESSIBLE TRANSPORTATION PROGRAMS				12 Month Average		Objective
	Jul 05	Jun 05	Jul 04	This Year	Last Year	For FY 06
<b>System Ridership</b>						
LIFT and Cab Monthly Rides						
Ride Connection Monthly Rides						
<b>Total Monthly Rides</b>						
<b>LIFT Costs and Revenues</b>						
LIFT System Costs (000)						
System Cost/Ride						
Dedicated Cigarette Tax						
LIFT Passenger Revenues						
Agency Payments						
Fare Recovery Ratio						
<b>LIFT and Cab Performance</b>						
Average Weekday Rides						
Average Saturday Rides						
Average Sunday Rides						
LIFT and Cab Monthly Rides						
Monthly Rides/Vehicle Hour						
Monthly Vehicle Hours (no Cab)						
Monthly Vehicle Miles (no Cab)						
Monthly Vehicle Miles/Ride (no Cab)						
LIFT On-Time Performance						
LIFT Operations Cost (000)						
Ops Cost/Vehicle Hour						
Ops Costs Exclude Vehicle Maint/Veh Hour						
Ops Costs/Monthly Ride						
Ops Cost Monthly ride (no Cab)						
Ops Costs exclude Vehicle Maint/Ride						
<b>Service Quality</b>						
Monthly ADA Turndowns						
Monthly ADA Turndowns/Ride						
LIFT Miles/Chargeable Roadcall						
LIFT Miles/Vehicle Accident						
<b>Customer Service</b>						
Total Commendations						
Total Complaints						
LIFT Complaints/1,000 Rides						

Data for these reports are not included. The reports shown here are examples to demonstrate the Portland performance measurement system.

## Public Transit Performance Measurement Study

### OPERATIONS DIVISION KEY INDICATORS

	Jul 05	Jun 05	Jul 04	12 Month Average		Objective
				This Year	Last Year	For FY 06
<b>Bus Maintenance Operations</b>						
Total Active Fleet						
Reserve or Inactive Fleet						
Total Vehicles						
Peak Service Vehicle Requirement						
Spare Ratio						
Annualized Vehicle Miles/ Journeyworker						
Maintenance Cost/Vehicle Mile						
Vehicle PMs Completed On Time						
Ave miles/Chargeable Roadcall						
Inventory Turnover Rate						
Ave Days per interior Cleaning						
Workplace Safety Rate						
<b>Rail Maintenance Operations</b>						
Total Active Fleet						
Peak Service Vehicle Requirement						
Spare Ratio						
Annualized Car Miles/ Journeyworker						
Inventory Turnover Rate						
Rail Equipment Maintenance Cost/Car Mile						
MOW Workplace Safety Rate						
REM Workplace Safety Rate						
Ave Days per interior Cleaning						
Vehicle PMs Completed On Time						
Track PMs Completed On Time						
Substation PMs Completed On-Time						
Overhead Electrical PMs Completed On-Time						
Signals PMs Completed On-Time						
Ticket VM PMs Completed On-Time						
Scheduled Station Pressure Washing						
<b>Customer Contacts</b>						
Bus Boarding Rides/ Complaint						
Rail Boarding Rides/ Complaint						
<b>Accessible Transportation Programs</b>						
Monthly Rides/Vehicle Hour						
LIFT On-Time Performance						
Ops Cost/Veh Hr, excl. Vehicle Maintenance						
Ops Cost/Ride, excl. Vehicle						

Data for these reports are not included. The reports shown here are examples to demonstrate the Portland performance measurement system.

## Public Transit Performance Measurement Study

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Maintenance						
Monthly ADA Turndowns/Ride						
LIFT Miles/Chargeable Roadcall						
LIFT Miles/Vehicle Accident						
LIFT Complaints/1000 Rides						

## Public Transit Performance Measurement Study

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### Salt Lake City, Utah - UTA

The Utah Transit Authority was incorporated on March 3, 1970, under the authority of the Utah Public Transit District Act of 1969 for the purpose of providing a public mass transportation system to Utah communities. The Authority is governed by a 15 member board of trustees which is the legislative body of the Authority. In 2004 passengers took over 1.9 million rides more than 2003, representing an increase of 6%. UTA's popular light rail system, TRAX, had increases of over 13% in ridership. Bus service had about a 2% growth in ridership and rideshare services.

#### **UTA (UTAH TRANSIT AUTHORITY) CREDO**

Good people creating a good transportation value for a better quality of life.

#### **VISION**

Utah Transit Authority provides quality transportation services through an efficient operation that meets the needs of our community at an optimal value to the people we serve.

#### **STRATEGIES**

##### **Operational Devices – Safety**

1. Properties are free from conditions that contribute to accidents and injuries.
2. Facilities, including vehicles, are free from unduly hazardous conditions and methods of operations.
3. Operations are conducted in environments and in ways that are safe for all who participate in them with minimal disruption of service.
4. Passengers and employees feel safe from hazards and violence.
5. Facilities are safeguarded against vandalism, violence, sabotage and terrorism.
6. Employees are vigilant in correcting observed and/or reported unsafe conditions and practices.

##### **Advertising**

UTA allows for advertising on its public transit vehicles, its electronic media, or facilities consistent with contractual agreements, local ordinances, and State and federal laws as a method of facilitating the Authority's revenue potential and supporting the Authority's public transit operations. Advertisements on any Authority vehicle, electronic media, or facility adhere to the restrictions set forth in the Board's Executive Limitations Policy regarding Advertising.

##### **Service, Quality and Value**

1. Increases transit market share in core markets (work, school and recreation) compared with single passenger vehicles.
2. Measurably improves the safety, reliability, user-friendliness, customer orientation, accessibility and convenience of its present services.
3. Seeks opportunities to add value to the community, in addition to direct transportation service, through creative deployment of its people, equipment, facilities and financial resources.
4. Trustees, management and staff stay connected to the service by using it.
5. Applies new technology to improve the value and usability of service.
6. Makes its services as user-friendly as possible and treats its services with equal emphasis.

## Public Transit Performance Measurement Study

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### Community Contributions and Partnerships

1. Brings communities together and increases feelings of public ownership of the transit system.
2. Actively participates with community leaders in considering the regional implications of public transit decisions.
3. Works to increase the efficiency of public infrastructure including roads, sewer, power, water security, health services and education, through transit-oriented land use and effective transit services.
4. Facilitates planning and development of valuable and effective multi-use, transit-oriented areas including providing support for tax increment financing for transit-oriented development.

### Property; Acquisition

1. Acquisition of real property that is now needed or that may be needed in the future for the provision of transit within the Authority's district is a priority of the Authority. This may include property acquired:
  - a. To meet a defined transit need including property for expansion or alteration of an existing project or for a new project
  - b. To enhance and protect existing transit properties
  - c. To preserve transportation corridors that may be useful for providing transit in the future
  - d. To meet the objectives of a long-range transit plan
  - e. To preserve for an identified transit purpose
  - f. To enhance the value of functionality of the Authority's transit properties, to enhance ridership, or to improve the quality of service provided to the Authority's riders
  - g. To provide for relocation of tenants and owners as may be required by state or federal law or regulation, or by contract with a governmental entity
2. Acquisition of real property that is not currently needed for transit use but that will support transit development with the Authority's district is another priority of the Authority. This may include property acquired:
  - a. To enhance transit use
  - b. To improve the quality of service provided to the Authority's riders
  - c. To generate revenue for the purpose of supporting public transit by selling, trading or leasing the Authority's real property assets.

### Planning and Staffing to Meet Growth

1. Attracts and retains good people, with the skills and capabilities necessary to meet the challenges faced by the Authority.
2. Develops plans, strategies and schedules in cooperation with the communities we serve.

### Funding

1. Works aggressively and creatively at the national, state and local level to secure solid financial support necessary to implement long-range regional transit plans approved by the metropolitan planning organizations.
2. Works with metropolitan planning organizations and local government to identify community needs and priorities, and to document priorities in the MPO long-range regional transportation plans. Frees organizational resources through creative development of efficiencies.
3. Optimizes revenues and operating costs to achieve the greatest possible ridership with the lowest investment per rider.

## Public Transit Performance Measurement Study

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### UTA PERFORMANCE GOALS: 2005

**Ridership (50%):** Ridership is to be increased. Ridership measurements: total system boardings including bus, rail, paratransit and van pool. UTA will follow existing passenger counting procedures for 2005 and will report ridership each month with the financial statement:

**2005 Ridership Goal: 3.4% increase of 2004 actual**

**Investment per Rider (35%):** Net operating expense as reported on the monthly financial statement (which excludes major investment studies) minus passenger revenue as reported on the monthly financial statement (which includes fares, vehicle rental revenue, and van pool lease revenue) divided by ridership (as defined above). Investment per rider will be calculated with the following formula:

$$\text{Investment per Rider} = \frac{\text{Net Operating Expense} - \text{Passenger Revenue}}{\text{Ridership}}$$

**2005 Investment per Rider Goal \$3.00**

**Revenue Development (15%):** Revenues from discretionary grants, CM/AQ funds, state, local and private contributions, and any other sources except revenues from sales tax, passenger fares, advertising, formula funds, joint development, investments, and any other on-going sources.

Qualifying revenues will be reported and applied toward goal achievement upon receipt of an executed, non-reversible instrument of obligation from the contributor. Year-to-date revenue development amounts will be reported monthly on a schedule with the financial statements.

**2005 Revenue Development Goal: \$51,564,026**

### PERFORMANCE MEASURES

#### Service Efficiency

- Operating expense per vehicle revenue mile
- Operating expense per vehicle revenue hour

#### Cost Effectiveness

- Operating expense per passenger mile
- Operating expense per unlinked passenger trip

#### Service Effectiveness

- Unlinked passenger trips per vehicle revenue mile
- Unlinked passenger trips per vehicle revenue hour

The same performance measures are used for Light Rail, Bus Service and Demand Response Service. Each set of measurements are compared to similar measures in other agencies; including Dallas – DART, Denver – RTD, New Orleans – RTA, Sacramento – RTD, Seattle – KC Metro.

**Ten year statistics show trends across a collection of data:**

- **Passengers**
  - Bus Service
  - Rail Service
  - Paratransit Service
  - Vanpool Service
  - Passengers (All Modes)

## Public Transit Performance Measurement Study

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- **Revenue Miles**
  - Bus Revenue Miles Service
  - Rail Revenue Miles Service
  - Paratransit Revenue Miles Service
  - Vanpool Revenue Miles Service
  - Passengers Revenue Miles (All Modes)
- **Total Miles**
  - Total Bus Miles
  - Total Rail Miles
  - Total Paratransit Miles
  - Total Vanpool Miles
  - Total Miles (All Modes)
- **Passengers Per Mile**
  - Bus Passengers Per Mile
  - Rail Passengers Per Mile
  - Paratransit Passengers Per Mile
  - Vanpool Passengers Per Mile
  - Total Passengers Per Mile
- **Revenue Hours**
  - Bus Revenue Hours
  - Rail Revenue Hours
  - Paratransit Revenue Hours
  - Vanpool Revenue Hours
  - Total Revenue Hours
- **Passengers Per Revenue Hours**
  - Bus Passengers Per Revenue Hours
  - Rail Passengers Per Revenue Hours
  - Paratransit Passengers Per Revenue Hours
  - Vanpool Passengers Per Revenue Hours
  - Total Passengers Per Revenue Hours
- **Total System (All Modes)**
  - Cost Per Mile
  - Cost Per Passenger
  - Fare Revenue Per Passenger

## Public Transit Performance Measurement Study

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### San Francisco, California - BART

The BART story began in 1946. It began not by governmental fiat, but as a concept gradually evolving at informal gatherings of business and civic leaders on both sides of the San Francisco Bay. Facing a heavy post-war migration to the area and its consequent automobile boom, these people discussed ways of easing the mounting congestion that was clogging the bridges spanning the Bay. In 1947, a joint Army-Navy review Board concluded that another connecting link between San Francisco and Oakland would be needed in the years ahead to prevent intolerable congestion on the Bay Bridge. The link-- An underwater tube devoted exclusively to high-speed electric trains.

Now, pressure for a traffic solution increased with the population. In 1951, the State Legislature created the 26-member San Francisco Bay Area Rapid Transit Commission, comprised of representatives from each of the nine counties which touch the Bay. The Commission's charge was to study the Bay Area's long range transportation needs in the context of environmental problems and then recommend the best solution.

#### **MISSION**

To provide safe, clean, reliable, and customer-friendly regional public transit service in order to increase mobility and accessibility, strengthen community and economic prosperity, and preserve the environment in the Bay Area.

#### **VISION**

To be respected as a quality regional public transportation resource and leader, with unique competence in a regional rail, indispensable to the livability and vitality of the Bay Area community.

In carrying out this vision, BART (Bay Area Rapid Transit) will:

- Work with our transit partners to provide seamless, safe, and reliable service to people throughout the San Francisco Bay region;
- Work together with other stakeholders to promote effective transit policies, initiatives, and service delivery across the region;
- Maximize ridership using the BART system's capacity to its fullest potential;
- Partner with the communities we serve to make investment choices and policy decisions which encourage, support, and enhance transit-oriented development and the increased use of transit;
- Be a professional, caring organization dedicated to meeting the needs of our customers and employees;
- Maintain our infrastructure and equipment in a condition that enables us to supply safe, reliable, high-quality, clean, and customer-friendly transportation;
- Know where we are, and where we are going financially, with capital and operating revenues and expenses that are balanced, predictable, stable, sustainable, and sufficient to meet our standards and goals.

#### **FOCUS AREAS (Key Results Areas)**

To attain its organizational Mission and Vision, BART is focusing on seven key focus areas with a vision and specific goals for each area. These areas are closely interrelated and our success in addressing them will have a major impact on the system's future success. The focus areas and goals include:

## Public Transit Performance Measurement Study

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### **The BART Customer Experience**

Listening to our customers and responding to their needs for efficient, integrated transit services.

- We will continually improve customer satisfaction by maintaining performance standards and providing quality customer service.
- We will maximize regional transit access, convenience, and ease of use through effective coordination among transit providers.

### **Building Partnerships for Support**

Focusing on partnerships with other transit agencies to support customer focused transit initiatives and increased transit use.

- BART will be viewed by stakeholders as a credible, trustworthy steward of the system we manage and operate, focused on improving our value to the riders and the communities we serve.
- BART will encourage and consider public input as integral to sound, balanced policy development and decision-making, and make deliberate, disciplined decisions in the best interests of the people it serves.
- Residents of the Bay Area will value and take pride in BART as an integral part of their communities.
- Key elected officials, opinion leaders, and decision makers will understand and actively support transit needs and initiatives.

### **Transit Travel Demand**

Maximizing transit use by encouraging off-peak and reverse commute travel and improving station access.

- We will work to understand changing transit demand patterns and be prepared to respond to them, and we will work proactively to influence travel demand trends in the region to support transit ridership.
- We will optimize the use of existing capacity.
- We will encourage and facilitate improved access to, and from, our stations by all modes.
- BART will work to close gaps in regional rail services between cities

### **Land Use and Quality of Life**

Partnering with local communities to integrate transit services with development, improve access, and enhance quality of life in surrounding areas.

- In partnership with the communities it serves, BART properties will be used in ways that first maximize transit ridership and then balance transit-oriented development goals with community desires.
- In partnership with the communities BART serves, we will promote transit ridership and enhance the quality of life by encouraging and supporting transit-oriented development within walking distance of BART stations.

### **People of BART**

Providing appropriate training and development for all employees and breaking down barriers to effective teamwork.

- BART will create a welcoming and supportive working environment for all employees.

## Public Transit Performance Measurement Study

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- BART will have an organizational culture that respects, values, and empowers employees and puts customers first. We will seek to improve working relationships within BART, and between BART, and the people and communities we serve.
- We will attract, train, retain, and provide job enrichment and career growth to a dedicated and competent workforce.

### Physical Infrastructure

Sharpening our focus on the repair, maintenance, and renovation of our system to reduce system failures and improve service and reliability.

- We will make annual investments in maintenance and repair of our physical infrastructure sufficient to support safety, cleanliness, reliability, train performance, and customer usability.
- We will meet the demands of our customers and we will assure the long-term viability of BART by routinely reinvesting in our aging infrastructure to maintain its functional value.
- We will ensure that infrastructure and maintenance capacity support the planned level of service. At the same time, we will provide the infrastructure flexibility to support the planned level of service.

### Financial Health

Protecting the Bay Area's investment in rapid transit through long-term capital planning and strategic partnerships.

- We will remain a transit service that is competitive in terms of value (i.e., quality for price) for the people we serve.
- We will maintain and improve the stability of our financial base.
- We will work with our regional transit partners to advocate for funding needed to sustain existing transit services and infrastructure reinvestment, and to pursue prudent expansion.
- Our financial choices will be guided by prudent fiscal policies and reliable, useful revenue and expense forecasts and plans.

## STRATEGIC INITIATIVES

BART Strategic Initiatives are both policies and programs that outline specific goals and strategies aimed at attaining the District's organization mission and vision.

The strategic initiatives include:

### Policies

- System Expansion
- Access Management and Improvement
- Welfare to Work to Career
- Station Area Planning
- Sustainability

### Programs

- Renovation
- Employee Development and Stewardship
- Seismic Retrofit Program
- Business Advancement Plan
- System Capacity

Each of the Policy and Program areas include Goals and Operating Strategies.

## Public Transit Performance Measurement Study

### San Francisco, California - MUNI

In 1902, a company called the United Railroads of San Francisco took over operation of most of the city's transit services. That company's disregard for the public welfare, corruption of city officials, and callous labor practices angered the voters so much that they approved bond issues for a municipal streetcar line in December, 1909. The Municipal Railway (Muni) started service on Geary Street on December 28, 1912.

Although Muni expanded service, the United Railroads remained much larger. That company was renamed the Market Street Railway in 1921 and was acquired by the city in 1944. Included in the acquisition were the company's two remaining cable car lines. After World War II, most of the combined system's streetcar lines were converted to bus service, with much of the new service provided by electric trolley buses. The last privately owned transit system in the city, the California Street Cable Railroad, which operated three cable car lines, was purchased by the city in 1952. The cable car system was cut back, with the present-day three-line system beginning operations in December, 1957.

#### **MUNI (SAN FRANCISCO MUNICIPAL RAILWAY) VISION**

Muni has envisioned what a truly first-class transit system for San Francisco might look like.

- It would be one that moves our riders quickly and efficiently throughout the city with a minimum of waiting. It would be a high-capacity, easily accessible, rapid transit style service.
- It would enable riders to transfer easily between Muni lines as well as to BART, Caltrain, ferries, and other interregional transit services.

#### **MUNI PRINCIPLES**

- Integrate local and regional transit into a seamless transit network.
- Physically separate transit service from automobile traffic on major corridors by creating exclusive rights-of-way (ROW).
- Provide high capacity, rapid transit-style service in major corridors.
- Upgrade transit service in increments as ridership builds and as funding becomes available.

#### **MUNI PERFORMANCE MEASURES**

##### **System Reliability**

1. *Percent of Vehicles that run on time according to published schedules (no more than 4 minutes late or 1 minute early) measured at terminals and established intermediate points.*

**Goal:** No less than 85% on July 1, 2004

**Purpose:** To measure schedule adherence

**Definition of Measurement:** Each line will be checked at least once in each six-month period. Such checks shall be conducted no less often than 10 weekdays and weekends per check. An annual checking schedule shall be established for the routes. The order in which the routes are checked will be determined monthly through a random selection process. To the extent automated systems can be substituted at less cost for such checks, or the measurement of any performance standard, such systems must be used.

**Method of Measurement:** Periods of time includes morning rush (6 a.m. to 9 a.m.) midday (9 a.m. - 4 p.m.) evening rush (4 p.m. to 7 p.m.) and night (7 p.m. to 1 a.m.). Supervisory personnel shall conduct a one-hour, on time, and load standard check at

## Public Transit Performance Measurement Study

a maximum load point at mid-route during all four time periods stated above.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL 65%	GOAL 70%	GOAL 75%	GOAL 85%
Actual 4 <sup>th</sup> Q 65.5%	Actual 4 <sup>th</sup> Q 71.9%	Actual 4 <sup>th</sup> Q 70.9%	Actual 4 <sup>th</sup> Q 68.3%

2. *Percent of Scheduled service hours that are delivered and percentage of scheduled vehicles that begin service at the scheduled time.*

**Goal:** To less than 98.5% on July 1, 2004.

**Purpose:** To measure service hours through available operators and available equipment, actually deployed in revenue service, along with the percentage of equipment available for service.

**Definition of Measurement:** Monthly measurement of the percent of total available hours for service measuring operators and equipment and percentage of equipment available daily.

**Method of Measurement:** Both operators and equipment are measured as to the total number of hours in service as a percentage of the total scheduled hours. Data come from the online Dispatching System. Measurement of the vehicles that begin service at the scheduled time will be provided from the 8 a.m. and 6 p.m. "Not-Out Report" generated by Central Control and will show the percent of vehicles that went out at the scheduled time for both the a.m. and p.m. pullout.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL 96.5%	GOAL 97%	GOAL 97.5%	GOAL 98.5%
Actual 4 <sup>th</sup> Q 94.5%	Actual 4 <sup>th</sup> Q 97.8%	Actual 4 <sup>th</sup> Q 94.5%	Actual 4 <sup>th</sup> Q 97.3%

3. *Missed service due to either insufficient vehicles or driver unavailability as a percentage of scheduled service hours.*

**Goal:** No greater than 1.5% on July 1, 2004.

**Purpose:** To measure service hours through available operators and available equipment, actually deployed in revenue service, along with the percentage of equipment available for service.

**Definition of Measurement:** Monthly measurement of percent of total available hours missed for service measuring operators and equipment and percentage of equipment available daily.

**Method of Measurement:** Both operators and equipment are measured as to the total number of hours in service missed as a percentage of the total scheduled hours. Data comes from the online Dispatching System.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL 3.5%	GOAL 3%	GOAL 2.5%	GOAL 1.5%
Actual 4 <sup>th</sup> Q 5.5%	Actual 4 <sup>th</sup> Q 2.2%	Actual 4 <sup>th</sup> Q 5.5%	Actual 4 <sup>th</sup> Q 2.7%

4. *Percent of vehicles that pass published time points during measurement periods*

## Public Transit Performance Measurement Study

unable to pick up passengers due to crowding without being followed within 3 minutes or less by another vehicle on the same route with space for all waiting passengers.

**Goal:** Less than 5%.

**Purpose:** To measure crowding in vehicles

**Definition of Measurement:** Pass-ups shall be conducted no less often than 10 weekdays per month. At the beginning of each quarter, supervisory personnel will review all the lines checked in the previous quarter, and identify the five lines with the highest load factors, and the time period these load factors occurred. Supervisory personnel will then check those five lines, during the time period that the high load factor occurred, each month during the coming quarter for pass-ups. Supervisory personnel will check to see if any PSRs for pass-ups were made for any of those five lines, and if the location of the pass-up was recorded. If it was recorded, supervisory personnel will use that point as the point to check for pass-ups. If there are no locations recorded, supervisory personnel will use the stop just before the MLP.

**Method of Measurement:** Periods of time includes morning rush (6 a.m. to 9 a.m.) midday (9 a.m. - 4 p.m.) evening rush (4 p.m. to 7 p.m.) and night (7 p.m. to 1 a.m.).

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL <5%	GOAL <5%	GOAL <5%	GOAL <5%
Actual 4 <sup>th</sup> Q 0.0%	Actual 4 <sup>th</sup> Q .3%	Actual 4 <sup>th</sup> Q 1.6%	Actual 4 <sup>th</sup> Q 2.1%

5. *Peak period passenger load factors*

**Goals:** No greater than 85 % of combined seating & standing capacity.

**Purpose:** To measure load factors at peak periods.

**Definition of Measurement:** Each line will be checked twice a year. Such checks shall be conducted no less often than 10 weekdays and weekends per check. An annual checking schedule shall be established for the routes. The order in which the routes are checked will be determined monthly through a random selection process. To the extent automated systems can be substituted at less cost for such checks, or the measurement of any performance standard, such systems must be used.

**Method of Measurement:** Periods of time includes morning rush (6 a.m. to 9 a.m.) midday (9 a.m. - 4 p.m.) evening rush (4 p.m. to 7 p.m.) and night (7 p.m. to 1 a.m.). Supervisory personnel shall conduct a one-hour, on time, and load standard check at a maximum load point at mid-route during all four time periods stated above.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL <85%	GOAL <85%	GOAL <85%	GOAL <85%
Actual 4 <sup>th</sup> Q 13 Lines Exceeded LF	Actual 4 <sup>th</sup> Q 8 Lines Exceeded LF	Actual 4 <sup>th</sup> Q 2 Lines Exceeded LF	Actual 4 <sup>th</sup> Q 3 Lines Exceeded LF

6. *Actual headways against scheduled headways on all radial express, cross-town, secondary, and feeder lines for peak, base, evening, and late night services.*

**Goal:** Operate no less than 85% of the time within 30% or 10 minutes of scheduled headway (whichever is less).

**Purpose:** Measurement of scheduled headways against actual headways.

## Public Transit Performance Measurement Study

**Definition of Measurement:** Each line will be checked twice a year. Such checks shall be conducted no less often than 10 weekdays and weekends per check. An annual checking schedule shall be established for the routes. The order in which the routes are checked will be determined monthly through a random selection process. To the extent automated systems can be substituted at less cost for such checks, or the measurement of any performance standard, such systems must be used. Actual headways against scheduled headways on all radial express, cross-town, secondary, and feeder lines for peak, base, evening, and late night services. Will also check lines during periods when their headway is greater than 10 minutes.

**Method of Measurement:** Check the headways of designated lines. Periods of time includes morning rush (6 a.m. to 9 a.m.) midday (9 a.m. - 4 p.m.) evening rush (4 p.m. to 7 p.m.) and night (7 p.m. to 1 a.m.). Supervisory personnel shall conduct a one-hour, on time, and load standard check at a maximum load point at mid-route during all four time periods stated above.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL 80%	GOAL 85%	GOAL 85%	GOAL 85%
Actual 4 <sup>th</sup> Q 56.8%	Actual 4 <sup>th</sup> Q 72.1%	Actual 4 <sup>th</sup> Q 74.8%	Actual 4 <sup>th</sup> Q 69.2%

7. *Percent vehicle availability and reliability (mean distance between failure) by mode.*

**Goal:** No less than 98.5% Vehicle Availability.

**Purpose:** To measure the percentage of equipment available for service.

**Definition of Measurement:** Monthly measurement of availability as a percentage of vehicles at each facility available at 7 a.m. and 4 p.m. on non-holiday weekdays against peak demand requirements. An additional measurement is added which shows the number of days when a facility (mode) does not have 100% availability.

**Method of Measurement:** The Vehicle Maintenance System provides the data for all modes with the exception of Cable Car. A vehicle is considered available for service if it is available for assignment to an operator no later than 7 a.m. and 4 p.m.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL 98.5%	GOAL 98.5%	GOAL 98.5%	GOAL 98.5%
Actual 4 <sup>th</sup> Q 99.5%	Actual 4 <sup>th</sup> Q 99.2%	Actual 4 <sup>th</sup> Q 99.6%	Actual 4 <sup>th</sup> Q 99%

8. *Unscheduled absences by operator, mechanical and administrative personnel.*

**Goal:** Annual 5% reduction of YTD average for Maintenance (Mechanical), 10% reduction for Transportation (Operators) and 5% reduction for Administration.

**Purpose:** To measure unscheduled absences.

**Definition of Measurement:** Monthly measurement of unscheduled absences is defined as time that is not scheduled in advance and includes the following payroll categories: Sick pay (with pay), Sick Leave (without pay), AWOL, Worker's Comp, SDI, and Assault Pay.

**Method of Measurement:** The online TESS and the online Attendance Tracking System currently provides the data as a calculation of scheduled hours available against unscheduled hours. Unscheduled absences are tracked for operators,

## Public Transit Performance Measurement Study

mechanical and administrative staff by mode.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL Maintenance 5% Admin 5% Operations 5% Transit 10%	GOAL Maintenance 5% Admin 5% Operations 5% Transit 10%	GOAL Maintenance 5% Admin 5% Operations 5% Transit 10%	GOAL Maintenance 5% Admin 5% Operations 5% Transit 10%
Actual 4 <sup>th</sup> Q Maintenance 8.1% Admin 5.6% Operations 13.7% Transit 13.7%	Actual 4 <sup>th</sup> Q Maintenance 7.6% Admin 6.0% Operations 8.1% Transit 12.8%	Actual 4 <sup>th</sup> Q Maintenance 6.2% Admin 5.0% Operations 7.2% Transit 11.1%	Actual 4 <sup>th</sup> Q Maintenance 6.5% Admin 5.0% Operations 7.4% Transit 10.3%

9. *Miles between roadcalls by mode*

**Goal:** Increase the miles between roadcalls.

**Purpose:** Measure reliability through the miles a vehicle travels between failures.

**Definition of Measurement:** Monthly measurement is currently dictated by the Federal Transit Administration as follows: Failures are classified as either a major or minor failure of an element of the vehicle’s mechanical system. For each incident of a major or minor failure, report whether the vehicle completes the trip or the vehicle does not complete the trip. If the failure occurs during deadhead or layover, include this in revenue vehicle system failures.

**Method of Measurement:** Data is collected and input into the online Vehicle Maintenance System for all revenue vehicles except for Cable Car, which has its own internal tracking system. Reports are generated and the data for roadcalls is analyzed against the Central Control log. All verifiable major and minor mechanical defects are included as part of the Mean Distance between defects number. Areas that do not result in a chargeable roadcall to the maintenance shops include accidents, sick passengers, vandalism, body damage and broken windows.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL Increase Miles	GOAL Increase Miles	GOAL Increase Miles	GOAL Increase Miles
Actual 4 <sup>th</sup> Q 5620	Actual 4 <sup>th</sup> Q 5631	Actual 4 <sup>th</sup> Q 6387	Actual 4 <sup>th</sup> Q 5814

**System Performance**

1. *Passengers carried by mode*

**Goal:** To increase the number of passenger boardings by mode.

**Purpose:** Measurement of the ridership.

**Definition of Measurement:** Annual measurement of the number of passengers who board the Muni’s revenue vehicles. A passenger is counted each time they board a vehicle, even though they may be on the same journey from origin to destination. Data will be reported to the board on a quarterly basis.

**Method of Measurement:** Ride checkers are utilized to count the passenger boardings.

## Public Transit Performance Measurement Study

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL 2% Increase	GOAL 2% Increase	GOAL 224M Boardings	GOAL 224M Boardings
Actual 4 <sup>th</sup> Q 4.1%	Actual 4 <sup>th</sup> Q -7.4%	Actual 4 <sup>th</sup> Q 216M	Actual 4 <sup>th</sup> Q Not Available

2. *Fare revenues generated by mode*

**Goal:** To achieve \$117 M in fare revenue.

**Purpose:** Measure fare revenue by mode, as well as by general Fast Pass sales.

**Definition of Measurement:** Fare revenue collection on board revenue vehicles, sales of Fast Pass, sales of individual tickets at POP stations and special 1, 3 and 7 day pass sales, Weekly Fast Pass, Cable Car Souvenir Tickets, Bart Plus, Tokens, Adult Passes, Youth Passes, Senior Passes, Ballpark and Special Event Passes, Regional Passes, etc.

**Method of Measurement:** Cash fares are collected electronically on board all revenue vehicles (with the exception of Cable Car), utilizing the Cubic Farebox system. In Cable Car, a manual fare collection system along with sale of special passes is utilized. POP stations sell tickets at the platform.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL Increase by \$1.6M	GOAL Increase by \$1.6M	GOAL Achieve \$100M	GOAL Achieve \$117Mes
Actual 4 <sup>th</sup> Q +\$2.1M	Actual 4 <sup>th</sup> Q -\$5.9M<	Actual 4 <sup>th</sup> Q \$97.4M	Actual 4 <sup>th</sup> Q \$115.6M

3. *Hours and Miles operated by mode*

**Goal:** To increase hours and miles operated by mode.

**Purpose:** Measure the distribution of miles and hours traveled by mode.

**Definition of Measurement:** The miles and hours that vehicles travel while in revenue service. Vehicle revenue miles and revenue hours exclude travel to and from storage facilities, training operators prior to revenue service, road tests and deadhead travel, as well as charter service.

**Method of Measurement:** Reported from schedules, excluding any service interruptions or special additional service.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL Increase by 1.2%	GOAL Increase by 1.2%	GOAL Achieve 3.6M Hrs 25M Miles	GOAL Achieve 3.5M Hrs 25M Miles
Actual 4 <sup>th</sup> Q 2.4% Hrs 1.8% Miles	Actual 4 <sup>th</sup> Q 7.8% Hrs 7.6% Miles	Actual 4 <sup>th</sup> Q 3.4M Hrs 28.8M Miles	Actual 4 <sup>th</sup> Q Not Available

4. *Budget versus Actual*

**Goal:** Expenses by mode in Fiscal Year 2004 budget to remain within budgeted amount.

**Purpose:** Measure the cost of producing revenue service by division as well as budget adherence.

## Public Transit Performance Measurement Study

**Definition of Measurement:** Expenses collected by mode.

**Method of Measurement:** Budget expenses are tracked by line item and section, but are rolled up into division annually. Data will be reported to the board on an annual basis.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL Within Budget	GOAL Within Budget	GOAL Within Budget	GOAL Within Budget
Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q

**Staffing Performance**

1. *Net vacancies by position (vacancies remaining once promotions and new hires have been deducted from retirees or resignations) for each division.*

**Goal:** No greater than 5% vacancy rate

**Purpose:** Efficiency level of the department in hiring.

**Definition of Measurement:** Monthly measurement of net vacancies against budgeted positions by division.

**Method of Measurement:** The Vacancy Report will be the basis of the data reported to the board on a quarterly basis.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL No Greater Than 5%	GOAL No Greater Than 5%	GOAL No Greater Than 5%	GOAL No Greater Than 5%
Actual 4 <sup>th</sup> Q 4.5%	Actual 4 <sup>th</sup> Q 3.7%	Actual 4 <sup>th</sup> Q 4.2%	Actual 4 <sup>th</sup> Q 5.3%

2. *Attrition rates for new employees, by division and level.*

**Goal:** No greater than 10%

**Purpose:** Measurement of effectiveness of recruitment and employee satisfaction by the rate of voluntary separations for new employees.

**Definition of Measurement:** Number of employees by division and class who are released during probationary period or who are voluntarily separated during probation. Will break down attrition within probationary period, as well as attrition one year after hire. Data will be reported to the board on a quarterly basis.

**Method of Measurement:** Vacancy Report will provide data for quarterly reporting.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL No Greater Than 10%	GOAL No Greater Than 10%	GOAL No Greater Than 10%	GOAL No Greater Than 10%
Actual 4 <sup>th</sup> Q 25.9%	Actual 4 <sup>th</sup> Q 76.6%	Actual 4 <sup>th</sup> Q 59.4%	Actual 4 <sup>th</sup> Q 23.5%

**Customer Service**

1. *Development of an annual marketing plan identifying specific programs and projects that will promote increased patronage.*

**Goal:** To develop an annual Marketing Plan by January 1, 2004.

**Purpose:** To produce a variety of marketing tools that will provide the Public with an incentive to utilize the services of Muni.

## Public Transit Performance Measurement Study

**Definition of Measurement:** Marketing Plan developed.

**Method of Measurement:** Marketing Plan completed and approved for implementation.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL	GOAL	GOAL	GOAL Jan 1, 2004
Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q

2. *Publication and distribution to the public of schedules for all trips taken by all vehicles which shall consist of specific arrival times at terminals and established intermediate points.*

**Goal:** Publish a complete timetable during FY2004.

**Purpose:** Provide riders with an updated schedule.

**Definition of Measurement:** Publication and distribution schedules for all trips taken by all vehicles which shall consist of specific arrival times at terminals and established intermediate points.

**Method of Measurement:** Distribution of the timetable to the public. Muni is in the process of reviewing the schedules of all the lines. Once the review is complete, we will publish schedules for individual lines, as well as an updated system-wide schedule.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL	GOAL	GOAL	GOAL Publish Timetable
Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q

3. *Operator conduct complaints and their resolution, by complaint, consistent with due process and required confidentiality.*

**Goal:** 75% of all Passenger Service Reports will be resolved in 30 days and 10% reduction of Passenger Service Reports annually.

**Purpose:** Monthly measurement of customer satisfaction with the agency as well as measuring the effectiveness of internal process to address the complaints.

**Definition of Measurement:** Muni will make available a summary of complaints received, resolved and outstanding on a quarterly basis. We have replaced Minor and Major categories with: Three Categories of Operator Complaints:

- Dismissed/No Merit
- No Action/Possible Merit
- Action Taken/Repeated Reports.

Have added a breakdown of Miscellaneous Employees and have added Commendations.

**Method of Measurement:** Data provided from the Passenger Service Report Unit and will be reported to the board on a quarterly basis.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL	GOAL	GOAL	GOAL 75% within 30 days & 10% annual reduction <11,466 PSRs
12,931 PSRs	13,373 PSRs	12,036 PSRs	10,371 PSRs

## Public Transit Performance Measurement Study

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4. *Annual passenger surveys and follow-up by management.*

**Goal:** Conduct a Rider Survey and an Employee Survey.

**Purpose:** Measure the level of satisfaction of both transit riders and employees. Use the results of the survey to implement improvements.

**Definition of Measurement:** Muni will conduct an annual survey of riders and hold focus-group meetings to determine riders' sentiments and concerns. Surveys will include an Employee Survey along with a Rider Survey.

**Method of Measurement:** Successful completion of the surveys prior to the end of FY2004 and present findings of surveys to Board and Citizens Advisory Committee.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL	GOAL	GOAL	GOAL Conduct Rider & Employee Survey
Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q

5. *Improvements in public information regarding vehicle delays during operations as well as general user information regarding system modifications, route changes, and schedules.*

**Goal:** Improve Passenger Information

**Purpose:** Improve passenger information by communication of service problems and other information to each vehicle, the station platforms, the Telephone Information Center, media and the Service Hotline, and assess.

**Definition of Measurement:** Assess current practices, develop and implement improvement plan.

**Method of Measurement:** Plan completed and implemented.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL	GOAL	GOAL	GOAL Plan completed and implemented
Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q

6. *Efforts to improve driver training, technical as well as accident follow-up.*

**Goal:** 50,000 hours of Driver Training per year and 5% reduction in accidents

**Purpose:** Reduce accidents through effective operator training programs as well as effective accident follow-up training.

**Definition of Measurement:** Monthly measurement of the number of training hours by type of class. Track reduction in accidents as a result of more effective operator training and accident retraining.

**Training hours will be tracked for the following areas:**

- New Operator Training
- Immediate Follow-up Rides
- One Day Accident Retraining
- Two Day Accident Retraining
- Verification of Transit Training
- Operator Refresher
- Passenger Relations/Conflict Training

## Public Transit Performance Measurement Study

**Method of Measurement:** Number of reportable accidents and training hours. Data will be reported to the board on a quarterly basis.

**Milestone:**

FY2001	FY2002	FY2003	FY2004
GOAL 100,000 Hrs 5% Accident Reduction	GOAL 100,000 Hrs 5% Accident Reduction	GOAL 50,000 Hrs 5% Accident Reduction	GOAL 50,000 Hrs 5% Accident Reduction
Actual 4 <sup>th</sup> Q 140,692 Hrs 3042 Accidents	Actual 4 <sup>th</sup> Q 129,769 Hrs 2913 Accidents	Actual 4 <sup>th</sup> Q 82,099 Hrs 2966 Accidents	Actual 4 <sup>th</sup> Q 65,771 Hrs 2975 Accidents

7. *Number of crime incidents on Municipal Railway vehicles or in Municipal Railway facilities.*

**Goal:** Reduction of 5% from previous year.

**Purpose:** To measure the crime rate on transit vehicles.

**Definition of Measurement:** Quarterly, we report on all categories of crime incidents with the corresponding quarter for the previous year with a % change.

**Method of Measurement:** Data is collected daily by the Muni Transit Police. Data will be reported to the board on a quarterly basis.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL	GOAL	GOAL	GOAL Reduce 5% 2281 Incidents
Actual 4 <sup>th</sup> Q 2927 Incidents	Actual 4 <sup>th</sup> Q 2655 Incidents	Actual 4 <sup>th</sup> Q 2401 Incidents	Actual 4 <sup>th</sup> Q 2289 Incidents

### Employee Satisfaction

1. *Number of grievances*

**GOAL:** Report quarterly on the number of grievances.

**Purpose:** Record and monitor the status of all grievances.

**Definition of Measurement:** Quarterly reports will include number of new grievances filed, resolved and active, by division.

**Method of Measurement:** Internal tracking system will be used to provide data for the board on a quarterly basis.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL Report Quarterly Resolve 75% in 30 Days	GOAL Report Quarterly Resolve 75% in 30 Days	GOAL Report Quarterly Resolve 75% in 30 Days	GOAL Report Quarterly Resolve 75% in 30 Days
Actual 4 <sup>th</sup> Q 75% Resolved	Actual 4 <sup>th</sup> Q 92% Resolved	Actual 4 <sup>th</sup> Q 87.5% Resolved	Actual 4 <sup>th</sup> Q 75% Resolved

2. *Speed of resolution of grievances*

**Goal:** Resolve 75% of internal grievances within 30 days.

**Purpose:** Measure the effectiveness of the Labor Relations in the resolution of grievances.

**Definition of Measurement:** Monthly measurement of the resolution of grievances.

## Public Transit Performance Measurement Study

**Method of Measurement:** Internal tracking system will be used to provide data for the board on a quarterly basis.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL	GOAL	GOAL	GOAL 75% Within 30 Days
Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q 75% Within 30 Days

### 3. Longevity of employment

**GOAL:** Provide an annual report of the longevity of employment.

**Purpose:** Track and report on the longevity of employment.

**Definition of Measurement:** Monthly tracking of the number of employees that leave through retirements, terminations and promotions.

**Method of Measurement:** Produce an annual report that shows the longevity of employment by classification, including Years of Service.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL	GOAL	GOAL	GOAL Annual Report
Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q

### 4. Employee Recognition

**Goal:** Annual achievement of honorees in the following programs:

- ( 12 ) System wide Operators of the Month Award
- ( 4 ) Transit Supervisors of the Quarter Award
- ( 4 ) Finance & Admin Employees of the Quarter
- ( 12 ) Maintenance Employees of the Month
- ( 4 ) Maintenance Supervisors of the Quarter
- ( 4 ) Safety & Training Employee of the Quarter
- ( 4 ) Accessibility Employee of the Quarter

**Purpose:** To recognize the achievements of employees and encourage excellence in job performance.

**Definition of Measurement:** Monthly tracking of all award programs. Award program criteria vary for the above. A detailed nomination evaluation process exists on file for each program. Criteria for non-operator awards includes, but is not limited to, Employee's Performance Evaluation, attendance, work performance, absence of disciplinary and or EEO measures. For Operator awards, attendance records, accident records, PSR's and safety records are used to evaluate the candidate.

**Method of Measurement:** A detailed nomination evaluation process exists on file for each program and the time frame measured is generally on a rolling 12 month basis. Some of the criteria includes employee's performance evaluation, attendance, work performance, absence of disciplinary and or EEO measures. Data will be reported to the board on a quarterly basis.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL Annual Achievement	GOAL Annual Achievement	GOAL Annual Achievement	GOAL Annual Achievement
Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q	Actual 4 <sup>th</sup> Q

## Public Transit Performance Measurement Study

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5. *Employee education and training opportunities*

**Goal:** Provide approximately 20 hours per FTE.

**Purpose:** Provide continuous opportunities for employee development.

**Definition of Measurement:** Training hours will be tracked monthly for the following areas:

Maintenance Training (including new revenue vehicle training)

- 7 Habits of Highly Effective People
- Ambassador Training
- Supervisory Skills Training
- Management Skills Training
- Violence in the Workplace
- Desktop Computer Training
- Additional training as developed

**Method of Measurement:** Track number of hours by type of training. Data will be reported to the board on a quarterly basis.

**Milestones:**

FY2001	FY2002	FY2003	FY2004
GOAL 50,000 Hrs	GOAL 50,000 Hrs	GOAL 50,000 Hrs	GOAL 40,820 Hrs
Actual 4 <sup>th</sup> Q 52,296 Hrs	Actual 4 <sup>th</sup> Q 50,880 Hrs	Actual 4 <sup>th</sup> Q 31,241 Hrs	Actual 4 <sup>th</sup> Q 36,820 Hrs

## Public Transit Performance Measurement Study

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### Santa Clara County, California - VTA

The Santa Clara Valley Transportation Authority (VTA) is an independent special district responsible for bus and light rail operations, congestion management, specific highway improvement projects, and countywide transportation planning. As such, VTA is both a transit provider and a multi-modal transportation planning organization involved with transit, highways and roadways, bikeways, and pedestrian facilities.

Valley Transportation Authority plays a variety of roles toward its vision and fulfilling its mission and goals. The Authority plans, funds and provides for the transportation system and in conjunction with other agencies, also manages and operates components of the system.

The Authority also plays a leadership role which includes anticipating and projecting regional transportation and economic trends; advocating the County's transportation needs on the regional, State, and national levels; prioritizing funding of State and Federal transportation funds in accordance with the goals of the Authority; educating the community about transportation goals and options; responding to municipal requests for technical assistance; and coordinating joint efforts with local, regional and State government, the private sector, and the community.

#### **VISION**

The vision of the Santa Clara Valley Transportation Authority is to provide a transportation system that allows anyone to go anywhere in the region easily and efficiently.

#### **MISSION**

The mission of the Santa Clara Valley Transportation Authority is to provide the public with a safe and efficient countywide transportation system. The system increases access and mobility, reduces congestion, improves the environment, and supports economic development, thereby enhancing quality of life.

#### **POLICY DIRECTIONS (Key Results Areas)**

##### **Integrate Transportation and Land Use:**

To maximize mobility, land-use planning must anticipate and encourage alternatives to the automobile.

##### **Use all Transportation Options:**

VTA's long-range vision describes a countywide transportation system without gaps in facilities or services. This implies coordination and integration of all the ways people move around.

##### **Create a Safe, Convenient, Reliable and High-Quality Bus/Rail Operation:**

VTA seeks to create a bus and rail system that provides the public with a viable alternative to the automobile.

##### **Build a Regional Perspective:**

The local, countywide and regionwide roles of VTA must be balanced among the interests of individual jurisdictions, the county, and the region as a whole.

## Public Transit Performance Measurement Study

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### GOALS

- Enhance our customer's focus
- Integrate transportation and land use
- Improve mobility and access
- Increase employee ownership
- Maintain financial stability

### RESPONSIBILITIES AND FUNCTIONS

The responsibilities of Valley Transportation Authority include the following:

#### **Transit Service:**

Operate, maintain and improve bus, light rail and paratransit services.

#### **Transit Planning:**

Plan, design and construct new light rail extensions, stations and facilities.

#### **Highway Planning:**

Plan, design and construct specific new highway and roadway improvements, as the successor organization to the Santa Clara County Traffic Authority.

#### **Caltrain Service:**

Administer and fund the Caltrain commuter rail service between San Francisco and Gilroy in partnership with the transit agencies for San Mateo and San Francisco counties.

#### **Congestion Management Program (CMP):**

Prioritizing transportation projects for local, state and federal funding, including transit, highway and roadways, and other transportation projects. The CMP also links transportation and land use.

#### **Regional Transit Partnerships:**

Join with transit operators in other counties to:

- Provide intercity rail service on the Capitol Corridor between San Jose and Sacramento;
- Provide regional bus service over Highway 17 between San Jose and Santa Cruz and across the Dumbarton Bridge between Palo Alto and the Union City BART Station;
- Explore the potential for commuter rail service over the Altamont Pass between Stockton and San Jose.

### Research References and Sources

The following sources and references were utilized in compiling this research study. The data and analysis provided in this report are a direct result of the information derived from the following sources.

#### **ALAMEDA COUNTY, CALIFORNIA – ACTRANSIT**

<http://www.actransit.org/> Alameda County Transit

#### **ATLANTA, GEORGIA – MARTA**

<http://www.itsmarta.com/> Metropolitan Atlanta Rapid Transit Authority

#### **DALLAS, TEXAS – DART**

<http://www.dart.org/> Dallas Area Rapid Transit

#### **DENVER, COLORADO – RTD**

<http://www.drcog.org/index.cfm>  
<http://www.rtd-denver.com/> Denver Regional Council of Governments  
Regional Transportation District

#### **HOUSTON, TEXAS – METRO**

<http://www.ridemetro.org/> Metropolitan Transit Authority of Harris County

#### **ORANGE COUNTY, CALIFORNIA – OCTA**

<http://www.octa.net/> Orange County Transit Authority

#### **PORTLAND, OREGON - TRI-MET**

<http://www.trimet.org/> Tri-Met Public Transportation for Portland, Oregon  
Kiran Limaye – Monthly Operating Report

#### **SALT LAKE CITY, UTAH – UTA**

<http://www.rideuta.com> Utah Transit Authority  
Mick Crandell – Direction Statements; Goals

#### **SAN FRANCISCO, CALIFORNIA – BART**

<http://www.bart.gov> San Francisco Bay Area Rapid Transit District

#### **SAN FRANCISCO, CALIFORNIA – MUNI**

<http://www.sfmuni.com> San Francisco Municipal Railway

#### **SANTA CLARA COUNTY, CALIFORNIA – VTA**

<http://www.vta.org> Santa Clara Valley Transportation Authority

#### **AMERICAN PUBLIC TRANSPORTATION ASSOCIATION**

<http://www.apta.com/>

#### **BUREAU OF TRANSPORTATION STATISTICS**

<http://www.bts.gov/>

#### **FEDERAL TRANSIT ADMINISTRATION**

<http://www.fta.dot.gov/>

## Public Transit Performance Measurement Study

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**NATIONAL HIGHWAY TRANSIT SAFETY ADMINISTRATION**

<http://www.nhtsa.dot.gov/>

**NATIONAL TRANSIT INSTITUTE**

<http://www.ntionline.com/>

**NATIONAL TRANSIT INSTITUTE DATABASE**

<http://www.ntdprogram.com/NTD/ntdhome.nsf/?Open>

Source for the "Transit Cooperative Research Guidebook"

**U.S. DEPARTMENT OF TRANSPORTATION LIBRARY**

<http://dotlibrary.dot.gov/>

**VOLPE NATIONAL TRANSPORTATION SYSTEMS CENTER**

<http://www.volpe.dot.gov/>