The following is an annual report to the TPC and Common Council from Catherine Debo, Metro Transit General Manager.

Report: Metro Progress Report on 2004-2009 State Performance Audit [1] Recommendations (9/07/05)

In March 2004, the State of Wisconsin completed its Transit System Management Performance Audit of Metro Transit (Metro), a task performed every five years. The report, prepared by Abrams-Cherwony & Associates, as lead consultant to the State, noted that:

1. Metro is a very efficient and effective organization.
2. Metro provides a much higher level of service on a per capita basis compared to transit systems with similar service area populations.
3. In much larger communities with similar levels of transit service, Metro continues to out-perform those "peer" transit systems in passenger trips/capita and passenger trips/hour.
4. Among its peer transit systems, Metro is tied for the lowest General and Administrative cost and number of General and Administrative employees.
5. Metro's cost per rider is less than the peer system average.
6. Metro's farebox recovery and average fare is trending downward as fares are not keeping up with costs.
7. Metro performs better than the peer group average in all measures related to transportation effectiveness.

Every five years, the Performance Audit provides recommendations for continued improvement of service. Metro reports annually to TPC and Common Council on the status of the recommendations.

A. Policy and Decision-Making Process

- **A separate Transit Commission should be established in order to give transit issues their proper review. Parking and taxi ordinances should be assigned to other oversight committees.**
  No action has been taken by the City to accommodate this recommendation. The Transit General Manager and Traffic Engineering Manager (who oversees Parking Management) have both noted the difficulty in accommodating detailed areas of discussion necessary to accomplish, in timely manner, needed oversight and action on topics addressed within the framework of TPC meetings. Transit Commissions, specific to the purpose, have been established in all areas of the State where transit is provided, pursuant to State Statute, with the exception of Madison which remains anomalous in its approach. Creating a Transit Commission would allow more effective oversight and discussion of transit-related issues. It may also provide an opportunity to acknowledge the regional nature of the services provide by Metro by incorporating Metro partnering communities in the composition of the Commission.

- **Options should be presented for TPC to improve the decision-making process.**
  Examples of extensive discussion and detailed options provided include materials used in considering service changes, auxiliary income, and fare structure changes.

B. General Administration

- **Conduct a Facility Needs Assessment Study and follow-through with facility expansion and renovation**
  This study has been completed and has two sections: the Master Plan and Schematic Design. Elements for facility expansion and renovation have been included for the past *five years* by Metro in its capital budget recommendations to the City, and most recently in the Madison 2007- 2012 capital budget plan. Metro has incorporated facility improvement plans in a longer phasing plan than originally proposed in order to accommodate this critical purpose.

- **Evaluate the positive and negative impacts from a service, financial, and organizational standpoint of remaining a division of the City of Madison.**
  Of course, this is not something that Metro, as a Division of the City can accomplish on its own. We need the full support of the City and suggest the possibility of transitioning to a Regional Transit Authority by first creating a Transit Commission integrating our municipal partners. As Metro continues to reach out to additional communities, the regional nature of Metro services becomes more and more apparent.

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[1] The State's Performance Audit for Metro was completed in March, 2004.

- **Continue Metro initiatives to overcome shortfalls of the City IS system through development of in-house data bases and acquisition of new in-house software.**
  Metro has pretty much overcome problems with the City's limited financial software by developing its own computer software programs to be able to eliminate duplication of effort and organize information in ways required for federal, state, contractual, and other purposes. However there remain some continuing issues and duplicated efforts. Metro uses many database programs and has obtained extensive transit-specific software to accommodate its many data management/analysis needs – which are managed by in-house IS staff.
  Metro and City IS work well and cooperatively together in a number of arenas including,
    - hardware selection and acquisition,
    - sales of fare media via the Internet,
    - support services offered by City IS in city-wide software programs,
    - technical support provided by City IS for development of the web portal that our paratransit contractors will use to report on contracted out service,
    - participation by Metro IS and City IS in selecting an Enterprise-level reporting tool for use city-wide which we anticipate will give Metro access to Metro data contained in other City databases, and
    - potential future collaboration with a new GIS info specialist to be hired by City IS.

- **Involve all units at Metro in budget development process.**
  All members of the Senior Management Team (SMT), who meet weekly, are involved in budget development discussions and other budget-related discussions throughout the year. Each Unit Manager receives a monthly Unit-specific financial report comparing budget with year-to-date actuals in a much-improved format. Additionally, members of the SMT are routinely involved in detailed one-on-one discussions with the Finance Manager for various elements of the budget.

- **Metro Transit should continue to make the City aware of the importance of establishing conservative wage and benefit objectives in the context of future city-wide labor negotiations.**
  Metro management took a lead role in promoting establishment of conservative wage and benefit objectives with the Mayor and BOE for labor negotiations in the past several years. This has been a matter of absolute necessity to Metro in being able to maintain service levels and has been of benefit to the City as a whole from a budget perspective. Metro's last three labor agreements (for which the last one extends through 2007) have set or supported important city precedents in:
    o offsetting benefit improvements with lower wage agreements;
    o expanding opportunities to contract out services;
    o expanding use of part-time employees;
    o eliminating workers compensation supplementary insurance (used elsewhere in the City);
    o eliminating duplication in family health insurance coverage; and
    o tying wage increases to health insurance premiums cost (2006/7),
  among other labor agreement improvements.

- **Pursue the goal of developing an annual evaluation process within Metro Transit.**
  It is an anomaly in Madison that there is no direct connection between wage increases and performance. In many municipalities and organizations there is a direct connection between wages/benefits and performance. An evaluation process has not been developed at Metro and in many other departments/divisions as a result. We continue to carefully monitor the performance of new employees during the six-month probationary period. In Operations and Maintenance units within Metro, one-on-one discussions with bargaining unit members concerning performance are commonplace and are well-documented. In General Administration, Planning, Marketing, Finance, and IT units, staff meetings within the units are routine and generally happen on a weekly basis. Senior Management Team members meet weekly to communicate objectives, etc. Training and re-training programs offer opportunities for advancement and improvement. Advancement in re-classification is based on merit (i.e. performance). But there is no annual or semi-annual evaluation process per se. It is a recommendation that Metro staff should pursue in the future.

C. **Finance**

- **Variable cost modeling should be used to predict costs for adding and deleting services.**
    o Revenue return per route: Metro uses exact revenue return from each route (based on the level of receipts of each individual type of fare payment) in billings to municipalities/entities for service and develops estimates for future services based on revenue return experience from similar services. Our new fare collection equipment, introduced on July 1, 2005, makes this data substantially easier to obtain.
    o Variable costs are used in budget development on a per hour and per mile basis according to transit industry standards and are used for developing estimates for expansion and reduction of service.

D. **Marketing and Customer Service**

- **Explore strategies to update the phone system to track calls, gaps in data reporting, distinguishing between different types of calls, and the duration of busy lines.**
  Phone reports are produced monthly. The Metro Customer Service Center continues to receive more requests for information in this high-fuel-cost period. The number of abandoned calls (i.e. people tired of waiting) continues to decline. The average wait time is about 1.25 minutes, a reduction from the past..

  Even though use of Metro's website to obtain information increased by 75% from 2003 to 2004, and continues to increase, our phone volume increases as well. Since paratransit trips grew by 7-8% in 2005, so too have the number of paratransit customer calls for reservations.

  Our CSC phone system (as is true of all of Metro) was a used system, purchased approximately 8 years ago. Unlike newer systems, its software is proprietary and therefore not easy to manage. Although our individual telephones are relatively new equipment, the underlying software is not. We anticipate addressing the issue of a new system in the context of upgraded "smart" facilities we hope to build within the next few years. New technologies are available and should be considered in that context.

E. **Safety Management and Training**

- **Designate specific staff members to facilitate accomplishment of the safety management and training tasks.**

  The Transit Service Manager oversees Safety and Security issues at Metro. The TSM actively participates in Health and Safety meetings composed of representatives from the various units within Metro. A designated Operations and Maintenance Supervisor has been assigned greater responsibility for safety management within those units. Each attends monthly Workers' Compensation meetings with reps from HR and the WC administrator, as do Metro's Transit Service Manager and Personnel Coordinator. The designated Operations and Maintenance Supervisors meet one-on-one each pay period with employees in their unit who are off work on WC and see that any applicable safety training for the employee is conducted upon return-to-work. The City Safety Coordinator conducted two training sessions in 2004 for Metro Supervisors to instruct them in providing "on the spot" safety training to employees, and in documenting all training provided.

- **Ensure that all desired elements have been integrated into Metro's training and re-training programs.**

  An Operations Supervisor has been designated full-time Training Supervisor for operations employees. That Supervisor, with specialized assistance from other employees, has redesigned Metro's on-going training program for new employees and is in the process of updating materials used for Metro's re-training program for current bus operators. Improvements in evaluation of employees during probation have been made to perform mid-probation review and end of probation meetings with new employees to ensure a better prepared Operator.

  Maintenance has an extensive on-going training and re-training program for its employees. Other units within Metro – General Administration, IT, Finance, Planning, and Marketing - all have in-house training for new employees, regular staff meetings, and provision for continued professional training through City, County, FTA, and transit industry programs.

- **Prioritize the completion and adoption of a Safety & Security Program Plan that is consistent with the advisory guidelines issued by FTA.**
 The Transit Service Manager oversees Security issues at Metro. A security program has been developed for different levels of alerts per FTA guidelines. Assignments for Operations Supervisors have been shifted among employees, such that Security has become a major responsibility for a designed Operations Supervisor within the Operations Unit, consistent with FTA recommendations for hand-on involvement by operational staff. This designated Safety and Security Supervisor attends the meetings of the City of Madison Emergency Planning Team which is currently "Madisonizing" established FTA response programs for emergencies and terrorism events. Metro staff is also involved in the Greater Madison Public Information Officers Organization as well as in research and planning with the Wisconsin Urban and Rural Transit Association (WURTA) on system security issues. Eventually, Metro would like to expand its Operations staff to hire a full-time professional with Security background to oversee this responsibility.

- **Incorporate passenger and service related issues into Metro Transit's Security program, including development of public info materials that delineate appropriate safety and emergency preparedness measures while using transit services.**

Car-cards have been installed on all buses instructing passengers in security issues. Security messages have been included in Rider Reader newsletters, distributed on buses and via Rider-Alert e-mails.

- **Monitor the trend of workers' compensation costs and determine if there are additional measures that can be taken to reduce these costs.**
  Metro's WC experience has improved substantially in recent years as can be seen in the graph shown below. In 2003, Metro was the first (and only) city department/division to negotiate elimination of Workers Compensation Supplemental Disability Insurance in its labor agreement with operations, maintenance, and clerical staff. In 2004, Metro management developed a very extensive plan adding eight additional internal requirements for Metro staff to further reduce WC costs. Each of these requirements has been instituted.

Workers Compensation Wages

Year	
40,000	
20,000	
-	
	2001 2002 2003 2004 2005 2006
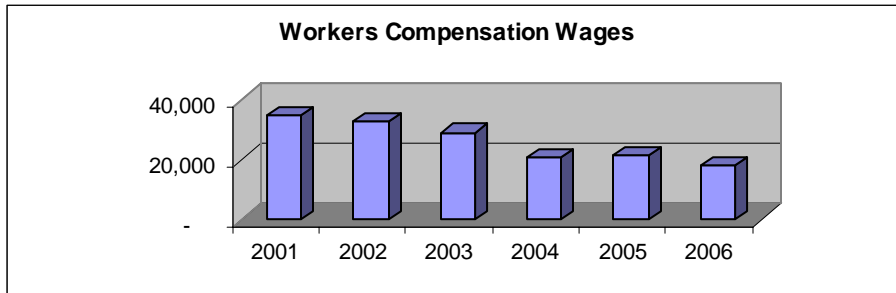
F. Maintenance

- **Development of a program to remove mud from floor of buses.**
  The cleaning process has been updated to address the problem of mud on bus floors in muddy weather.

- **Upgrade Maintenance software programs to incorporate the following functions:**
  A new software program has been acquired to replace our outdated Fleetmate program.

  - **Compare fleet types through software program to compare down-time.** Our new software program has this capability.

  - **Implement parts ordering software to close parts work orders in a more timely fashion, so the cycle count program can be formalized and bar coding and other features can be incorporated.** Software implementation for parts is in progress.

- **Buildings and Grounds should develop a formal preventative maintenance inspection (PMI) program for all major building systems (HVAC, Boiler, etc.), incorporating these systems into new software monitoring programs.** This had been done. The B&G Foreman manually tracks and schedules a PM program for building systems and support equipment including boilers, pumps, air compressors, HVAC units, fuel dispensers, bus washers, bus vacuums, hoists, bus stop shelters, transfer points, forklifts, sweepers, mowers, trailers, and trucks. This info will be incorporated in the new maintenance software to reduce time in manual tracking.

- **Complete the plan to remodel the entire parts facility and in so doing address better security and access control to the parts room.**
  Our new facility expansion and renovation plans address the many shortfalls of current maintenance space, including better security and access control to the parts room.

G. Operations

- **Further develop performance indicator program to incorporate internal indicators for staff review.**
  Operations staff continually monitors employee on-time performance (for reporting to work, schedule adherence, etc.), the amount of Guaranteed time paid (purpose is to minimize), any Unscheduled Overtime, Sick Leave Usage, Attendance, Complaints & Commendations, Accident History, Training and Retraining History, Workers' Comp usage and status. This information is used to determine what, if any, intervention is needed to improve employee and system performance. Various software programs and some manual accounting is used to monitor these elements. The new Bid Dispatch software system has become the repository of all of these elements for tracking purposes.

- **Train operating supervisors/dispatchers in maximum use of the AVL equipment for tracking of buses, drivers, communications, accuracy of info received.**

Operations Supervisors/dispatchers have all been trained with the new radio voice/data) and AVL system. Supervisors monitor a wide variety of real-time reports generated by the new system, such as On-time Alerts, Off-Route Alerts, Excessive layover Alerts, vehicle location of each bus and service vehicle, schedule adherence, driver sign-ins, voice and data communications from drivers, etc. Supervisors use playback capabilities of the system extensively to research complaints concerning vehicle location/on-time performance.

- **Expand staffing time for fixed-route dispatch radio system in the evening and use that person to handle incoming calls for paratransit to evaluate service change requests and provide confirmation if the change is feasible.**
  Staff schedule adjustments have been made in Operations to provide Radio, AVL and telephone coverage from 4am to later in the evening to 12:30am in order to monitor and handle fixed route and paratransit needs.

H. **Planning and Scheduling.** Note: many tasks were identified by the Consultant to address the new radio (data and voice) system, AVL system, and fare collection equipment. Since the report was issued, all of these systems have been installed,
I. are operational, and are used extensively.

- **Development of a data collection and management plan to accommodate new Automatic Passenger Counters (APCs), Automatic Vehicle Locator (AVL) technology, and higher tech registering fareboxes.**
  Operations and Planning personnel have continuous access to the AVL database for use in monitoring drivers and route performance, scheduling, passengers boardings, etc. They are using the data extensively. An Access database has been created to facilitate analysis of data. Data from new fare collection equipment is automatically downloaded when buses enter the garage and is routed to a computer for planning to use in reviewing, collating, and summarizing fare collection and schedule data. Information from the AVL system is used continually to update the accuracy of route schedules with each new issue of the Ride Guide.

  APC-equipped buses (40 of Metro's 199 fixed route buses) are assigned on a rotating basis (4-day cycle) – which results in 100% recording of ridership (boarding, alighting,passenger loads) for all mainline routes to the bus-stop level. The cumulative data, collected in this fashion starting in January 2005, is frequently used in helping staff develop plans concerning location of bus shelters, route productivity analysis, etc. Hardware and software modifications have been made to give very high level of accuracy in this information.

- **Increase staffing to accommodate analysis of a large data base.** Metro's Five Year Staffing Plan calls for an IS/IT position to provide support in programming and data management associated with the AVL/APC system. This would be possible to accomplish with approval of a supplemental 2007 budget item.

- **Continue to explore modifications to existing services in a planned, incremental approach and follow a formal deliberative process in planning modifications to existing services.**
  The overall service planning approach has shifted from network re-structure to refinement of the system on a sub-area basis - an approach that lends itself to in-depth analysis and minimizes passenger disruption. Areas for study are established in the TPC-adopted Annual Strategic Plan and incorporate customer feedback, service requests, known deficiencies, city expansion, and other external data. The planning process is modified as necessary to incorporate other demands for service changes related to budget, lack of adequate funding to retain service levels, specific requests for survey data/focus, or new conditions that require immediate response.

  In 2003, major improvements were made to the Eastside/south quadrant section of the service area where there has been significant growth and long-standing service improvement requests. In 2006, per the Annual Strategic Plan, staff completed the West-side/South-side Route Study, and following a very comprehensive input process from Neighborhood Association and many other meetings and Public Hearing, implemented those changes on August 27, 2006. Those changes include expansion of service in partnering communities Middleton and Fitchburg. In the fall of 2005, service was expanded to Verona after several years of planning.

  Metro's Service Development Committee (SDC) meets weekly to review data, discuss service issues, and guide the progress of service planning by the Planning staff. The Committee is chaired by the General Manager, and consists of planning, marketing, and operations staff.

- **Develop a work program to indicate planning activities to be accomplished.** The Planning Unit work program is reflected in the Annual Strategic Plan Update.

- **Utilize the data from the AVL system to develop on-time performance standards.** On-time performance is monitored in <u>real-time</u> by Operations personnel in order to take immediate corrective action as necessary to maintain on-time route performance. The system generates automatic "Alerts" notifying Operations Supervisors of off-route, early and late buses. Planning Unit personnel review on-time performance through a play-back feature of our new AVL system, in order to develop improved passenger schedules and to obtain further information for route planning purposes. On-time performance <u>standards</u> will evolve from these efforts for inclusion in future monthly performance indicator reports.

- **Consider adding farebox recovery and subsidy per passenger to the route level monitoring process.** Our new fare collection system facilitates such an analysis on a routine basis for use in route planning and marketing purposes.

  Maximize use of AVL system to obtain boarding, alighting, and passenger load data in lieu of "ride checks". APC and AVL systems have been calibrated to assure a very high level of accuracy of the data. Boarding and alighting numbers are currently used quite extensively for route planning/analysis purposes. The next area of concentration should be "Passenger load information" (i.e. how many people are on the bus at any one time for each segment of a route) which has recently become available.

- **Efforts should continue to utilize the windows-based version of Trapeeze.** The Scheduler continues to use the DOS version of Trapeze for route planning only - which is the most efficient use of this program. The Windows version is now used for all other aspects of scheduling by the Scheduler and his assistant – also the most efficient use of this program.

- **Once all modules of the scheduling software are installed, increased use of Trapeze as an analytical tool should be explored.** Our new Bid-Dispatch software is in parallel mode (computer and manual) at present – for purposes of assuring 100% accuracy, and is expected to go full computer mode this fall. Information from this program is a tremendous advantage for Operations in scheduling and keeping and tracking data. Efficiencies from the program will free up personnel for other supervisory tasks.

- **Pay/platform ratios should be monitored.** Pay/platform ratios are currently run as driver "picks" are developed. Information from the new Bid Dispatch software will make it possible to monitor Pay/platform ratios on bi-weekly (payroll) and daily basis.

- **Continued active involvement of the Scheduler in the service development process and in manpower planning.** The Scheduler is a key member of the standing Service Development Committee which meets weekly. The Scheduler has long had a key role in service development planning and to that end the position was re-classified some years ago and re-named Schedule Planner. The Scheduler takes a lead role in route design because of the schedule complexities of the route network.

- **Use of a time line associated with a schedule service change and a new run-cut.** The tasks involved in scheduling service changes have been identified and compiled for lead-up and follow-through activity with each service change. The Service Development Committee reviews the tasks regularly during the planning process to ensure coordination of activities among units and timely completion of all tasks.

J. **Paratransit Service**

- **Formalize monitoring of on-time performance beyond the practice of relying on customer reports.**
  Metro currently uses its AVL system to closely monitor paratransit service directly provided by Metro. An Internet data portal has been developed and implemented for contractors to report their trip performance back to Metro. The information is now transferred to Metro's Trapeze database to create on-time performance reports for contracted service which are identical to the reports generated for Metro directly-provided paratransit service.

- **Tighten up the scheduling process, continuing Trapeze software optimization that has already been accomplished.**
  Metro's AVL system is helping staff tighten scheduling for Metro directly-provided paratransit service. The AVL system provides global vehicle positioning and real-time performance data for dispatchers to monitor. As drivers and dispatchers become more familiar with the capabilities of the system, additional efficiency and service benefits are anticipated.

The "Long-Term Assignment Program" implemented last year, and extended this year, provides plenty of incentive, as well as opportunity, for the contractor to increase efficiency in scheduling trips for that program. The "Long-Term Assignment" program has also provided the means for "templating" a substantial number of ADA paratransit client trips.

- **Focus more time on educating ADA eligible riders on how to use fixed-route bus service.**
  Metro's Marketing and Customer Service Unit and Paratransit Staff work with senior centers, retirement communities, nursing homes and community service agencies to promote fixed route services. Metro staff has also worked with Easter Seals to "Train-the-Trainers" who work with specific paratransit riders to learn to use the fixed route system. The ADA Transit Subcommittee is actively soliciting input from community agencies.

- **Expand staffing time for fixed-route dispatch radio system in the evening and use that person to handle incoming calls for paratransit to evaluate service change requests and provide confirmation if the change is feasible.**
  Supervisor schedule adjustments have been made in Operations to provide Radio, AVL and telephone coverage from 4am later in the evening until 12:30am in order to monitor and address fixed route and paratransit needs.

- **Establish standards that apply to the paratransit program as a whole, including performance thresholds for schedule adherence and road call rate.**
  The implementation of the AVL system with Mobile Data Terminals on-board Metro-operated paratransit vehicles has made close supervision and monitoring of schedule adherence easier. The data portals for contracted service will allow Metro to create baseline stats for on-time performance by contractors as well. Once the quality of the data has been ascertained, standards can be established by ADATS, and performance tracked.

- **Explore options for reducing paratransit costs.**
  Last year, Staff introduced innovative changes in RFPs for contracting, including a pilot "Long Term Assignment Program" which has since been continued. Both RFPs (for the pilot and regular program) have made bids far more competitive. Staff has been successful in attracting additional bidders to the competition - which is making a difference in overall costs.