agencies stipulate longevity bonuses in their contracts, Metro Transit's is more generous than what is typically seen in the industry.

- Metro Transit should continue its efforts to implement the employee relations database and incorporate the tool into management procedures to the greatest extent possible.

- This review showed that Metro Transit is experiencing a lower rate of FMLA usage among its employees than is being seen at other transit agencies. This may be due to the availability of AWOP. As AWOP use is addressed, FMLA use among Metro Transit employees may begin to increase. Metro Transit, and the City of Madison, should consider addressing FMLA leave in the same manner as Worker's Compensation (IOD) cases. That is, a Metro Transit supervisor should be assigned to each case, along with a case worker from the City of Madison. These cases should then be discussed at the monthly case management meetings. Also, Metro Transit should ensure the collection of data necessary to gauge Metro Transit's experience with FMLA leave in comparison to other transit agencies. This would require the collection and tracking of data items including the percent of employees taking FMLA leave, median length of leave, total days of leave taken, or other appropriate measures. Metro Transit should then periodically compare its performance to industry or national usage rates provided by APTA, the Transit Labor Exchange, or other labor relations trade groups.

- Related to the above, Metro Transit should request data from the Human Resources Department on a regularly occurring frequency that would allow them to track the rate of non-FMLA AWOP used by Metro Transit employees in comparison to that of city employees overall.

Marketing and Customer Service

- It is imperative that Metro Transit develop and implement a more robust advertising and promotion program which includes TV, radio, and print elements. The current practice of relying on trade arrangements is not sustainable over the long term. Metro Transit should pursue additional appropriations for this purpose, as well as investigate new and alternative revenue sources to fund such a program. One potential source of revenue, which has been employed in other communities with significant U-Pass and employer pass programs, would be to dedicate a portion of the revenue from these sources specifically for advertising and promotion. This could possibly be used as a justification for rate increases among these pass programs.

  The Long Range Metro Transit Planning Ad Hoc Committee made a similar observation and suggested increasing the annual marketing budget to $500,000. The committee did note that this should not be done at the expense of service levels.

- Bus stop signs are currently installed and maintained by the City of Madison Traffic Engineering Department. The June 2008 Final Report issued by the Long-Range Metro Transit Planning Ad Hoc Committee noted that bus stop signs are installed at a 45 degree angle facing the street, since they are seen as an instrument to communicate to drivers that parking is prohibited in front of the stop. The ramification of this policy is that bus passengers cannot see the bus stop sign from the sidewalk. Another issue is that the Traffic Engineering Department must install these signs at the beginning of the parking prohibition zone, which is not always the same location as the actual bus stop. The Ad Hoc Committee recommended a program which would place adhesive stickers on the back of all bus stop signs identifying the location as a bus stop, along with instructions to bus passengers (i.e., "Board bus at corner"). It is recommended that Metro Transit advocate for this program and assume responsibility for implementation as part of the marketing and customer service function. It is also advisable that Metro Transit investigate the feasibility of assuming responsibility for signage designed to communicate to bus passengers, while leaving responsibility for signage which communicates to motorists with the Traffic Engineering Department.

- By spring 2009, Metro Transit will have the ability to record all calls received at the Customer Service Center (CSC). With the availability of this equipment, it is recommended that Metro Transit develop a program to review a random sample of calls for the purposes of ongoing training for the CSC staff as a whole. Also, Metro Transit should develop an individual annual review program for CSC Reps. As part of this program, a sample of calls fielded by that representative would be reviewed to assess the representative's customer service skills as well as the accuracy of the information being provided to callers.

- Metro Transit does not currently track call volume by call type on an automated basis. This information is collected manually through reviewing sample days of activity for the CSC. As a part of this data collection, it is also recommended that Metro Transit calculate the average length of calls by call type. This data would allow for more accurate calculations of impacts to CSC staffing as a result of changes to the fixed route system or paratransit program.

- Metro Transit currently relies primarily on customer feedback for market research purposes. One of Metro Transit's market research goals is to conduct a comprehensive on-board rider survey once every five years. The most recent comprehensive survey efforts were conducted at an interval of eight years. It is recommended that Metro Transit adhere to its goal of conducting a comprehensive system-wide survey every five years. This would suggest that the next such survey effort would be conducted in 2013. It would be advisable for Metro Transit to make more extensive use of focus groups to understand the effectiveness of its advertising materials and the utility of new on-line and mobile tools. The Long Range Metro Transit Planning Ad Hoc Committee made a similar recommendation, specifically identifying focus groups or targeted surveys designed to elicit information from:

- current customers through on-board surveys;
- core Madison service area riders and non-riders; and
- new areas for potential growth.

- Metro Transit does not currently have a procedure for following up on customer complaint files that remain open beyond the 90 day period. It is recommended that this become an item which is routinely reviewed by the Customer Service Group.

- Metro Transit has a valuable service planning tool in the Trip Planner utility of the website. Important data is collected in that riders and potential riders enter information regarding desired trips (i.e., origin, destination, as well as time and day of travel). Metro Transit should develop procedures to extract this data and assemble it into a database that can be queried or mapped for service planning purposes.

Information Technology

- It appears the Metro staff is expecting an unnecessary level of accuracy from APC equipment. The level of expected accuracy provided by the manufacturer should be assumed when using the data. Data should be reviewed for anamolies and anomalies should be discarded, however, not at the expense of all data collected by the APC equipment. Metro should utilize its maintenance contract to determine a calibration schedule to ensure that all equipment is properly calibrated. Staff concerns with APC equipment seem overly exacting. APC equipment APC's are being used by several transit properties throughout the country It is recommended that Metro come to consensus on the role that APCs will play in Metro Transit's operations, and if it is not expanded upon, that a suitable alternative be implemented.

- From an asset management standpoint, the fare collection infrastructure is in need of replacement. It is recommended that a program be developed to replace this equipment.

- As Metro Transit continues to expand on its existing systems and the ITEAM continues its role in identifying and implementing significant IT projects, it is recommended that a formal implementation plan be developed for planned and future projects. The need to have documented operating procedures becomes increasingly important as Metro Transit's operations become more systematic.

- It was not indicated during interviews for this review that existing staffing levels and IT background were insufficient to meet the needs of new systems. However, given the ambitious program planned for this function, the large number of existing systems that the IT department supports, as well as the added data management needs resulting from initiatives such as the video cameras, it is recommended that Metro undertake a detailed staffing level review for this function.

FUNCTIONAL AREA REVIEW
MARKETING AND CUSTOMER SERVICE

This section provides a detailed review of the marketing and customer service function at Metro Transit and includes analysis of:

- marketing and customer service administration;
- public information activities;
- advertising and promotion;
- relationship marketing and partnerships;
- public participation and public relations; and
- customer feedback and market research.

The report includes a description of the status of recommendations made in the prior audit, as well as recommendations made as a result of this review.

Marketing and Customer Services Administration

This section will deal with evaluating the fundamental organizational issues and resources related to marketing and customer service; this includes organization and staffing, budgets, and marketing planning.

Organization and Staffing – The Marketing and Customer Services Unit is responsible for managing all marketing and customer service aspects of the transit system. Primary marketing activities are in the advertising and public relations areas. The customer service functions are performed through the Customer Service Center (CSC). This unit also handles reception duties at the Metro Transit administrative office.

The unit is led by the Transit Marketing and Customer Services Manager. The Manager oversees the full range of marketing services for Metro Transit, as well as all unit and staff activities. This position is part of the senior management team, reporting directly to Metro Transit's General Manager. Examples of other duties include:

- develop long and short range marketing plans and associated activities;
- prepare annual budget and monitor expenditures;
- serve as member of Metro Transit's Customer Service Group;
- direct market research activities;
- administer the contract between Metro Transit and the bus advertising concessionaire;
- direct the development of information materials; and
- utilize/develop emerging internet technologies to promote rider access and utilization of services.

The Transit Marketing Specialist, Customer Service Supervisor, and the Transit Graphics Technician report directly to the Transit Marketing and Customer Service Manager.

Organizational Structure – Marketing and Customer Service Function

```
                    ┌─────────────────┐
                    │ Transit General │
                    │    Manager      │
                    └─────────────────┘
                             ▲
                    ┌─────────────────┐
                    │ Transit Marketing and │
                    │ Customer Services │
                    │    Manager      │
                    └─────────────────┘
                             ▲
                        ┌─────────────────┐
                        │ Transit Marketing │
                        │    Specialist     │
                        │       1 FT        │
                        └─────────────────┘
                        ┌─────────────────┐
                        │ Customer Service │
                        │   Supervisor     │
                        │  1 FT (VACANT)   │
                        └─────────────────┘
                                 ▲
                            ┌─────────────────┐
                            │ Transit Customer │
                            │ Service Representative │
                            │     6 FT, 5 PT    │
                            └─────────────────┘
                            ┌─────────────────┐
                            │ Transit Receptionist │
                            │       1 FT        │
                            └─────────────────┘
                        ┌─────────────────┐
                        │ Transit Graphics │
                        │   Technician     │
                        │       1 FT        │
                        └─────────────────┘
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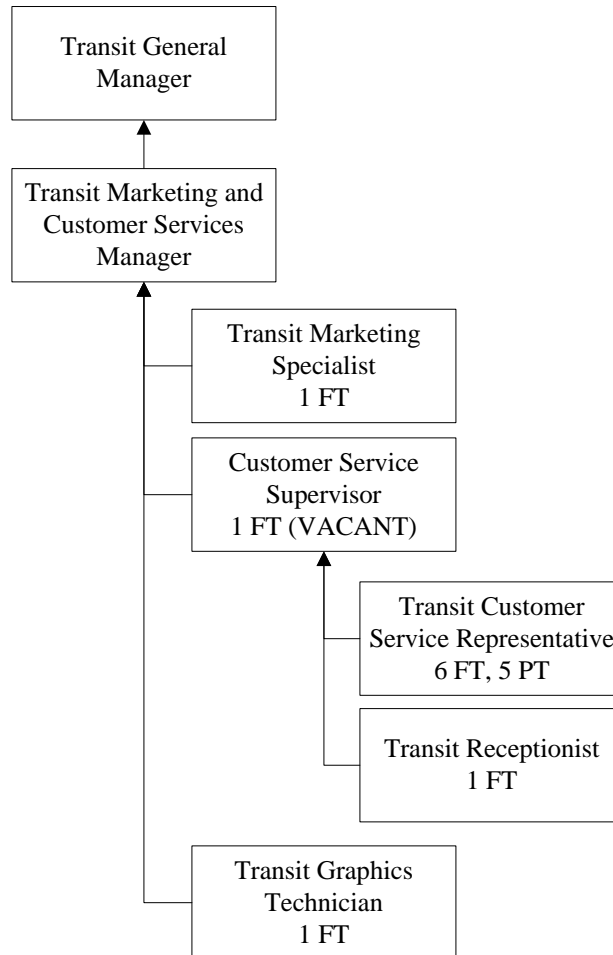
The Transit Marketing Specialist is responsible for performing a variety of marketing, advertising and customer relations activities and projects. Examples of specific duties include producing and maintaining an inventory of customer relations materials, coordinating special events and campaigns, developing transit information outlets, and other activities as needed.

The Customer Service Supervisor is responsible for supervising the Customer Service Center (CSC) staff and the Transit Receptionist. In the role, the Customer Service Supervisor also oversees Metro Transit's customer feedback program. This position has been vacant for over one year, but Metro Transit is currently in the hiring process to fill the position.

The Transit Graphics Technician prepares various visual communications materials and provides a liaison with contractors on transit printing matters.

The remaining unit staff includes the Transit CSC Representatives and the Transit Receptionist. The CSC staff provides transit information to the public by phone or in person, handles paratransit trip reservations and ride confirmations, sell tickets and passes, and administer the Lost and Found. The Transit Receptionist covers reception at the Metro Transit administrative office, and performs clerical duties.

Budget - The 2008 budget for the Marketing and Customer Service Unit, excluding staff salaries and benefits and general office expenses, was $161,018, distributed as follows:

Annual Marketing Activities Budget

Line Item	2008		2003	
	Amount ($)	% of Budget	Amount ($)	% of Budget
Printed Material	99,800	62.0	105,000	43.1
TV/Radio Advertising	25,000	15.5	90,200	37.0
Other Advertising	36,218	22.5	48,643	19.9
Total	161,018	100.0	243,843	100.0

For comparison purposes, the 2003 budget numbers for the same line items is shown in Table 1. It is important to note that Metro Transit spent 33.9 percent less on marketing activities in 2008 than in 2003. In addition, printed materials accounted for 62.0 percent of the marketing activities budget in 2008, compared to 43.1 in 2003. In 2008, Metro Transit's total budget for advertising was $61,218, a decrease of 55.9 percent from the $138,843 spent in 2003.

Marketing Plan – In previous years, the Marketing and Customer Service Unit would prepare an Annual Marketing Plan. This plan would be based on the Strategic Annual Plan, which was a document developed through a coordinated effort of Metro Transit's senior management team. The Annual Marketing Plan would outline a series of new initiatives to support the Strategic Annual Plan as well as the continuation or revision of on-going programs for Strategic Plan elements applicable to the time period. Programs were associated with specific adopted goals and strategies. Progress was then tracked for each goal and strategy.

In the past year, Metro Transit has considered the Metro Transit Long Range Planning Ad Hoc Committee Report the document to guide its marketing program. The Marketing and Customer Service Unit is currently developing the marketing agenda for the coming year. Again, the Ad Hoc Committee report is being used as the guiding document. It is envisioned that the initiatives for the coming year will focus on improving customer communications for detours and other service changes, developing and marketing new mobile and web-based services, as well as promoting and administering a new pass program for small employers. The Metro Transit budget recently adopted by the Common Council includes a fare increase. It is intended that one of the uses of additional revenue would be hiring an additional marketing staff

person dedicated to the new pass program. The fare increase was not approved by the Transit and Parking Commission, a decision which is currently under appeal with the Common Council.

Public Information Activities

This section addresses Metro's efforts in the core public information activities. This includes the following elements: the design and distribution of printed information (System Map and Ride Guide), non-printed information tools (telephone information, web site, real-time information), and signage.

Printed Information – Metro Transit's printed public information includes a system map and a single combined ride guide booklet which includes maps and schedules for each route. The following paragraphs provide a more comprehensive description of these materials as well as the program utilized for their distribution.

- **System Map** – The Metro Transit System Map is a geographically based map which shows the map of the underlying road network to orient the user. The map utilizes the commonly used format of depicting routes in different colors with periodic tabs showing the route number to allow users to follow the alignment. Arrows are also used to designate the direction in which the bus travels along streets that are only served in one direction. There is a map inset which depicts the routing through the Capitol Loop, as well as the bus stop locations in the Loop. The inset also depicts the detour routing around the Capital Loop for when there are events on Capitol Square. Trunk corridors served by numerous routes are depicted in gray with notes showing which routes serve the segment. There are also various map insets of areas that do not appear on the map or require further detail.

  The document includes smaller scale maps that show the details of service in the University of Wisconsin campus area. Other maps on the document depict Metro Transit's evening and weekend services; another shows the supplemental school day services.

  Additional information on the system map document includes the hours and telephone number of the Customer Service Center, as well as Metro Transit's internet web site address. Another feature is a list of popular destinations in the service area and the routes which serve that location. Unlike the system maps for other transit systems, the Metro Transit System Map does not include fare information or "How to Ride" instructions. It should be noted that this information is included in the Ride Guide booklet.

  Overall, the Metro Transit System Map is well laid out and easy to follow, and provides useful information to the user.

- **Ride Guide** – Metro Transit publishes one combined route schedule document for all of its routes. This is a comprehensive document that provides the user with information regarding Metro's administration, the hours and contact information for the Customer Service Center, web site information, instructions on how to read and use the schedule booklet, fare information, "how to ride" instructions, as well as instructions on how to use the bike racks on Metro buses. This information is all laid out in an organized and comprehendible manner.

  The Ride Guide also includes a route description table that shows which routes operate on the weekdays and weekends, which serve Park & Ride lots, and which routes serve similar areas. Similar to the System Map, the Ride Guide also includes a list of popular destinations in the area and identifies which routes serve the location.

  The Ride Guide then includes a schedule and map for each of Metro Transit's bus routes. Only one route is shown on each map. The maps depict the route followed by bolding the streets on which the route operates. Cross streets are shown to orient the user, but they are shown at a much lighter weight. For each route that operates through the Capitol Loop, there is an inset map showing the alignment through the Loop. The schedule for each route shows the scheduled arrival time at various time points along the route, which are typically spaced five to ten minutes apart. Each time point is designated by a number. The time points are also shown on the map for the route and are designated with the corresponding number. Another useful characteristic of the Ride Guide document is the consistent use of icons for transfer points and major landmarks. These icons are used for all routes and are depicted on the schedule and map for the appropriate routes.

  The consolidated schedule document for all routes differs from the practice of many transit agencies of publishing individual schedules for each route. In the past, Metro has published individual route timetables, but found that riders prefer the consolidated document. Also, individual route schedules and maps can be accessed on the Metro Transit web site. As with the System Map, the Ride Guide is designed well and is effective at communicating necessary information to the user.

- **Distribution of Printed Materials** – The Metro Transit System Map and Ride Guide are made available on Metro buses, at the Metro administrative building, and at the transfer points. The System Map and Ride Guide are also available at over 200 locations throughout the service area. Locations can request System Map and Ride Guide documents by signing up on Metro's web site. These locations can then order additional copies when needed also through the web site. As Metro receives requests, Marketing and Customer Services staff will either mail or deliver the materials to the site. Using the information gathered through the web site, the Marketing and Customer Services staff will mail or deliver updated materials to each site every August when service changes are instituted.

Metro Transit prints 80,000 copies of the Ride Guide annually. However, the Ride Guide document is also available on the internet web site. Metro Transit has observed increasing activity of riders accessing the Ride Guide through that medium. It should also be noted that the System Map is also available on the web site.

Non-Printed Information - Metro Transit also has a comprehensive program for providing information to the public through non-printed media. This includes the telephone Customer Service Center and Metro's internet web site.

- **Telephone Information –** Metro Transit Customer Service Center (CSC) Representatives are available by telephone between the hours of 6:15 AM and 6:00 PM on weekdays, 8:00 AM and 4:30 PM on Saturday, and 12:30 PM and 4:30 PM on Sundays and holidays.

    As noted earlier, one of the Customer Service Supervisor administers the Customer Service Center. There are currently six full-time and five part-time customer service representatives. The CSC is staffed with five to six Representatives at any time during its hours of operation on weekdays, and by two Representatives on weekends.

    Customer Service Representatives answer questions regarding routes and schedules. The tools they have available to them include a Trapeze software based trip planner to answer point to point questions for callers. In addition, Representatives will use the Metro Transit website to look up departure information or detour information.

    Customer Service Representatives also take reservations for paratransit trips. Information is entered into the Trapeze paratransit scheduling software.

    Metro Transit implemented a new phone system for the customer service function in 2008. Through the new phone system, Metro Transit has access to a significant amount of data regarding call center activity. Statistics show that the average weekday call volume to the CSC is approximately 1,000. Volume typically increases to approximately 1,300 calls on days with weather situations. Metro is currently working with the Information Systems Unit to finalize the phone system metrics that will be routinely assembled and reported. They are also determining the format in which that data will be reported.

    The previous audit noted that Metro does not track call volume by call type (i.e., paratransit, fixed route service information, complaint, etc.). This is still the case. Metro Transit investigated the option of having callers press a particular number to schedule a paratransit trip after dialing the main number. The ADA Paratransit Oversight Committee objected to this added step, so the option was not pursued. To determine volume by type, the Customer Service Supervisor will periodically take a sample of calls by call type to determine the percentage breakdown. Since all calls come into the same center, and all CSC Representatives can handle any type of call,

the overall volume is the more important statistic to monitor to ensure adequate staffing, as opposed to volume by type.

Metro Transit provides one month of training to its Customer Service Representatives. This time is dedicated to learning the fixed route network, paratransit service, fare structure, and how to ride instructions. During the one month training periods, new Customer Service Representatives are paired with experienced Representatives with the new employee listening to calls. The new Representative then fields call themselves with an experienced Representative listening. After that period, the new Representative begins fielding calls without assistance.

Metro Transit does not currently have a system in place to continuously monitor the quality and accuracy of the information being provided to callers. It has been a goal of Metro Transit to institute a program that would allow management to record and randomly review calls to monitor performance and use for training purposes. This would also provide Metro Transit with a record of occurrences when there are complaints against Customer Service Representatives. Metro Transit has recently purchased the equipment necessary to record calls into the CSC. It is anticipated that this equipment will be operational by spring 2009.

In terms of continuous training, the Marketing and Customer Service Manager, and the Customer Service Supervisor will conduct periodic meetings with the Customer Service Center staff to discuss relevant issues. Metro Transit does not have a specified continuous training program for this staff. However, CSC staff members do attend ongoing training sessions conducted by the City of Madison covering customer service issues such as dealing with the general public.

- **Website** – Metro Transit has a comprehensive internet website through which passengers and potential passengers can find the essential information for using Metro Transit service. This includes route and schedules, the system map, fare information, how to ride instructions, and contact information. The Ride Guide booklet is also available on the website. Interested members of the public can also access information regarding public hearings for Metro Transit issues, as well as the schedules, agendas, and minutes from Transit and Parking Commission or ADA Paratransit Oversight Committee meetings.

  The primary web site address for Metro Transit is cityofmadison.com/metro. This is accessed through the main City of Madison website. However, Metro also utilizes an alternative URL, mymetrobus.com, which automatically redirects the user to the cityofmadison.com/metro site. The alternative address, mymetrobus.com, is what is published on Metro Transit informational materials. This is advisable since this is easier to memorize and is more recognizable.

  Currently, the Metro Marketing and Customer Services Unit designs and provides content for the website. The City of Madison's Information Systems Unit provides

technical back up for the site. The City of Madison is currently redesigning the web sites of all city departments to incorporate consistent templates, formatting, and interfaces. After the redesign is complete, the City of Madison IT Department will be responsible for the design of the site with Metro's Marketing and Customer Services Unit providing content only. With the redesign, the alternative URL address will be retained and will continue to redirect users to the main site.

The website recognizes that most visitors to a transit system website are looking for route and schedule information, and locates the tab for routes and schedules prominently at the top of the home page. The Metro site also includes a trip planner tool through which users can enter origin and destination bus stop numbers, addresses, intersections, or landmarks and be provided step by step instructions on how to use the Metro system to make the trip. Users can also plan their return trip easily using the tool. The output from the Trip Planner provides details regarding the bus stop location at which the passenger should board the bus. This information can be selected for more detailed information regarding the bus stop, including a map. The trip information also provides a summary showing the duration of the bus ride, the number of transfers required, and the required walking distance. Fare information is not indicated. However, since Metro does not have a zone fare structure, the fare information is not as important as it would be at transit systems that employ more complicated fare structures. The trip planner page does include a direct link to the fare information page. The fare information page also provides instructions regarding transfers.

In the past, there have been issues with the trip planner tool. The trip planner has not always been available to users. Also, there have been issues with the accuracy of the information provided. To address these issues, capacity has been added to the trip planner to improve availability. Also, the database used by the trip planner has been updated to improve the accuracy of the information.

An interesting feature of the website is that all information regarding paratransit services includes audio recordings that can be accessed on the site.

The website also includes a video library which allows users to view various videos produced by Metro Transit. Some videos are available in additional languages. The video library currently includes the following:

- Winter Weather Travel Tips and Information (Spanish)
- 31 day Pass – How to Use
- 10 Ride Cards – How to Use
- One Day Pass and Transfers – How to Use
- Program Passes – How to Use
- Supplemental School Services (Spanish, Hmong)
- How to Use Metro's Bike Racks
- Hybrid Buses

Through the website, users can also access information regarding the Commuter Choice pre-tax benefit program. This page also includes a direct link to the State of Wisconsin page that allows state employees to sign up for the benefit. Another page is dedicated to the Metro Transit's Rack & Roll program. This page provides instructions on how to use the bike racks on Metro buses. There is also a link to an instructional video which is part of the video library described above.

Other useful tools included on the Metro Transit website allow members of the public to sign up to order Ride Guides and System Maps for display and distribution purposes. Also included is a list of fare media sales outlets throughout the area. The website also includes a tool that allows users to buy fare media on-line. As with other transit systems that offer this feature on-line, there is no provision for users to apply Commuter Choice Pre-Tax Benefit vouchers (i.e., Transit Check) to their on-line purchase. Passengers using this benefit must purchase their fare media at a sales outlet or through the U.S. mail.

Another new feature allows users to subscribe to email or text message alerts regarding detours and service disruptions. Subscribers also receive a weekly newsletter via email with Metro Transit news. Metro Transit is also planning to institute a new tool on a trial basis entitled WebWatch which will allow users to obtain real time information about their bus route. Marketing and Customer Service staff plan to monitor how this tool is being accessed (i.e., via computers or via mobile phone devices) and design the interface accordingly.

Metro Transit currently tracks the number of hits per page on the system's web site. Also, the amount of time spent on various pages is tracked. In addition the navigation pattern between pages is monitored. Data for 2007 showed an annual total number of hits on the mymetrobus.com of 487,000.

The data gathered regarding the hits per page and the navigation patterns are routinely monitored and are used in the design and maintenance of the site. The Marketing and Customer Services Manager uses the data to identify the most frequently used pages on the site to determine priorities in terms of the upkeep of content. Also, the City of Madison IT Department is using the website activity data in its redesign of the site.

- **Bus Stop Signage** – All Metro bus stops are marked with bus stop signs. Bus stop signs are currently installed and maintained by the City of Madison Traffic Engineering Department. All signs have a stop ID number which can be used with the on-line trip planner. In addition, the bus stop signs list the Metro Transit bus routes which serve the stop. A typical Metro bus stop sign is shown in the figure below.

Metro Transit Bus Stop Sign

The June 2008 Final Report issued by the Long-Range Metro Transit Planning Ad Hoc Committee noted that bus stop signs are installed at a 45 degree angle facing the street, since they are seen as an instrument to communicate to drivers that parking is prohibited in front of the stop. The ramification of this policy is that bus passengers cannot see the bus stop sign from the sidewalk. Another issue is that the Traffic Engineering Department must install these signs at the beginning of the parking prohibition zone, which is not always the same location as the actual bus stop. The Ad Hoc Committee made various recommendations to address this situation.

Advertising and Promotion

In 2007, Metro's budget for advertising and promotion was $180,000. With total operating costs for the fixed route mode of $36.2 million in that same year, the advertising and promotion budget represented 0.5 percent of operating costs. A typical industry target is for the amount expended on advertising and promotion to be equal to approximately 2.5 to 3.0 percent of total operating costs for the fixed route mode. Metro is far below that target rate.

In previous years, Metro has relied heavily on trade arrangements for advertising. This has continued through 2008, with an expended budget for advertising and promotion equaling $161,018, and is expected to continue into 2009. This will continue to pose a challenge to Metro since the parties in the advertising industry are more reluctant to enter into these types of arrangements. Currently, the only advertising being done by Metro is a billboard campaign, which is a result of a trade arrangement. The content of the current billboard campaign focuses on the environmental benefits of using transit, and Metro's efforts in that regard, promoting the new email and text messaging services, as well as promoting the discounted fares and travel training programs for seniors.

Metro does not currently have any TV, radio, or print advertising campaigns, and none are planned for 2009. This is a deficiency in Metro's marketing activities for several reasons. Advertising is important not only to promote and retain ridership but also to create a positive image of transit and raise awareness of the local transit system among non-users. Advertising and promotion is also particularly important in university communities since a significant portion of the system's ridership turns over on an annual basis.

Relationship Marketing and Partnerships

This section addresses strategies to build and retain ridership through relationship marketing and partnership practices.

Metro Transit has an extensive and successful specialty pass program. Metro currently has pass arrangements with the following employers and post secondary educational institutions in the service area:

- University of Wisconsin (ASM students, faculty, and staff)
- Edgewood College (students, faculty, and staff)
- Madison Area Technical College (students)
- University of Wisconsin Hospital (employees)
- St. Mary's Hospital (employees)
- Meriter Hospital (employees)
- City of Madison (employees)

Metro Transit is also preparing to implement a new pass program for small employers in the area. It is anticipated that this program will be implemented in 2009.

Metro Transit has also been innovative in building relationships with riders. As noted earlier, Metro Transit riders can subscribe to email and text message alerts through the Metro Transit web site. Metro Transit sends subscribers a weekly email with general Metro Transit information. Currently, there are approximately 2,200 subscribers to this newsletter. In addition, users can subscribe to six different categories of specific alerts. These include:

- Detours
- Weather
- Supplemental School Service
- Paratransit
- University of Wisconsin Service
- Media

These types of communications help to build loyal riders and promote a support network for Metro Transit in the community.

Public Participation and Public Relations

This section discusses practices related to public participation and public relations activities.

Public Participation – The Marketing and Customer Service Unit is responsible for publishing notifications of public meetings and public hearings. This includes notifications that Metro Transit is required to make, as well as additional efforts. For all meetings of the Transit and Parking Commission and the ADA Paratransit Oversight Committee, Metro Transit publishes the schedule for the meetings in the necessary publications, and posts the schedule, agenda, and subsequently, the minutes of the meetings on the web site. Public hearings are promoted in the same manner.

For the upcoming public hearing regarding the proposed fare increase, the Marketing and Customer Services Unit distributed flyers on buses informing riders of the issue and the schedule for the hearing. In addition, email and text alert messages were sent to subscribers, a notice was posted on the website, a press release was issued, and a notice was posted on the City of Madison's on-line press release site.

Outreach – Metro Transit also conducts an extensive ongoing outreach program. Staff members from the Marketing and Customer Services Unit conduct the following ongoing outreach efforts:

- visit senior centers to make "how to ride" presentations;
- train the trainer sessions for groups working with persons with disabilities;
- school visits to teach students how to use the supplemental school services; and
- display new hybrid buses at environmental events.

Public Relations – The Marketing and Customer Services Unit is also responsible for public relations activities. Metro's activities in this area have gone beyond just what is necessary. Metro Transit routinely issues press releases for issues such as annual ridership numbers, service changes, or to promote new services such as the email and text message subscription service.

Customer Feedback and Market Research

This section reviews the procedures followed by Metro Transit to collect and respond to customer feedback, as well as the market research activities currently conducted by the Marketing and Customer Services Unit. This includes the techniques utilized and the frequency of market research efforts.

Customer Feedback – Calls from passengers with complaints, compliments, or other comments regarding Metro Transit are handled by the Customer Service Center (CSC) Representatives. When calls are received, the information is recorded in a Microsoft Access database developed in-house to address the function. The CSC Representative will enter a code for the appropriate unit (i.e., Operations, Marketing, Maintenance, etc.). Comments received through email are processed in a similar manner. The Manager of the designated unit will then review the applicable records. The Manager must enter the resolution in the record and close out the file within 30 days. If the file remains open after 30 days, the system will automatically send the Manager an alert email notifying them of the open record. The Information Systems Unit monitors the system for files open more than 30 days. However, there are no adopted procedures for any follow up with the applicable Manager.

On a quarterly basis, the Marketing and Customer Service Unit assembles a report of all complaints received. The results are discussed by the Customer Service Group which includes the General Manager and several unit managers. This is a group that meets on a bi-weekly basis to discuss customer service issues. In this forum, strategies are developed to address any identified trends in the complaints data.

Market Research – Metro Transit's market research activities include several types of surveys. Metro Transit periodically performs geographic-specific surveys to identify transit related issues in specific areas. A recent example was a survey of Fitchburg residents. The survey was mailed to all households with the town's newsletter.

Metro also conducts system-wide on-board passenger surveys, which are administered on average every five years with the assistance of private firms. The purpose of these surveys is to obtain data regarding rider characteristics, trip making behavior and satisfaction with Metro Transit service. The most recent such survey was conducted in 2008. The previous such effort was conducted in 2000.

It is also a goal of the Marketing and Customer Service Unit to conduct focus groups on a more regular basis. It is anticipated that the City of Madison will conduct focus groups as part of the effort to redesign the website.

Status of Prior Audit Recommendations

The following recommendation was made for the Marketing and Customer Service function as part of the previous review:

- Metro Transit implemented a new Customer Service phone system in 2000, in response to shortcomings noted in the prior audit. However, call tracking statistics were wholly or partially unavailable for 86 days in 2002 and 25 days in the first eight months of 2003. Gaps in data reporting are experienced frequently due to technical problems with the system. In addition, the system is not configured to distinguish between different types of calls (e.g., general information, paratransit service requests, or fixed-route or paratransit customer complaints). Finally, even though lost calls were reportedly reduced to nearly zero in the last year, the incidence and duration of busy lines increased. Metro Transit should continue to explore strategies for updating its phone system to address all of these issues.

    Metro Transit implemented a new phone system for the CSC in 2008. This new system addresses the issues described above. Metro Transit still does not have the ability to track calls by type. This option was investigated. However, in response to an objection by the ADA Paratransit Oversight Committee, this feature was not incorporated into the new phone system. Volume by type is tracked through sample days collected by the Transit Marketing Specialist who is the supervisor of the CSC.

Conclusions and Recommendations

The overall conclusion of this review is that Metro Transit currently has a comprehensive and effective marketing and customer service function. Metro Transit has well designed and informative System Map and Ride Guide documents, along with an effective distribution program for these materials. Metro Transit has made investments in equipment to keep the telephone information function modern and effective.

In addition, Metro Transit has made several improvements to their internet web site, and has made use of technology to pursue new methods of providing information to their passengers. These additions include a trip planner with information as disaggregated as the bus stop level, a video library, audio capabilities on paratransit pages, and a program through which passengers can subscribe to email and text message alerts and newsletters. Metro Transit has also recognized deficiencies in the trip planner tool and has responded to them. It could be concluded that Metro Transit's web site is state of the art in the transit industry. While all of these elements are significant accomplishments, these new tools provide opportunity for continued innovation and improvement.

The one significant deficiency in Metro Transit's marketing and customer service function is the lack of a sufficient advertising and promotion program. A comprehensive advertising and promotion program is essential to attract and retain riders, and cultivate the image of the transit system with the public at large. Given the fact that Metro Transit operates in

the host community of a large university, a significant portion of Metro Transit's riders will turn over on an annual basis. This underscores the need for continuous exposure to the utility of the local transit system.

Historically, Metro Transit has relied on trade arrangements for access to TV, print, and radio advertising space. Over the past few years, the parties involved in the advertising industry have become more reluctant to enter into these types of relationships. As a result, Metro Transit's current advertising and promotion program includes billboard advertisements only, and no TV, radio, or print advertisement.

Based on these findings, the following recommendations are made for the marketing and customer service function:

- It is imperative that Metro Transit develop and implement a more robust advertising and promotion program which includes TV, radio, and print elements. The current practice of relying on trade arrangements is not sustainable over the long term. Metro Transit should pursue additional appropriations for this purpose, as well as investigate new and alternative revenue sources to fund such a program. One potential source of revenue, which has been employed in other communities with significant U-Pass and employer pass programs, would be to dedicate a portion of the revenue from these sources specifically for advertising and promotion. This could possibly be used as a justification for rate increases among these pass programs.

  The Long Range Metro Transit Planning Ad Hoc Committee made a similar observation and suggested increasing the annual marketing budget to $500,000. The committee did note that this should not be done at the expense of service levels.

The remaining recommendations are suggestions on how Metro Transit can make further improvements and innovations to already sound marketing and customer service practices:

- Bus stop signs are currently installed and maintained by the City of Madison Traffic Engineering Department. The June 2008 Final Report issued by the Long-Range Metro Transit Planning Ad Hoc Committee noted that bus stop signs are installed at a 45 degree angle facing the street, since they are seen as an instrument to communicate to drivers that parking is prohibited in front of the stop. The ramification of this policy is that bus passengers cannot see the bus stop sign from the sidewalk. Another issue is that the Traffic Engineering Department must install these signs at the beginning of the parking prohibition zone, which is not always the same location as the actual bus stop.

  The Ad Hoc Committee recommended a program which would place adhesive stickers on the back of all bus stop signs identifying the location as a bus stop, along with instructions to bus passengers (i.e., "Board bus at corner"). It is recommended that Metro Transit advocate for this program and assume responsibility for

implementation as part of the marketing and customer service function. It is also advisable that Metro Transit investigate the feasibility of assuming responsibility for signage designed to communicate to bus passengers, while leaving responsibility for signage which communicates to motorists with the Traffic Engineering Department.

- By spring 2009, Metro Transit will have the ability to record all calls received at the Customer Service Center (CSC). With the availability of this equipment, it is recommended that Metro Transit develop a program to review a random sample of calls for the purposes of ongoing training for the CSC staff as a whole. Also, Metro Transit should develop an individual annual review program for CSC Reps. As part of this program, a sample of calls fielded by that representative would be reviewed to assess the representative's customer service skills as well as the accuracy of the information being provided to callers.

- Metro Transit does not currently track call volume by call type on an automated basis. This information is collected manually through reviewing sample days of activity for the CSC. As a part of this data collection, it is also recommended that Metro Transit calculate the average length of calls by call type. This data would allow for more accurate calculations of impacts to CSC staffing as a result of changes to the fixed route system or paratransit program.

- Metro Transit currently relies primarily on customer feedback for market research purposes. One of Metro Transit's market research goals is to conduct a comprehensive on-board rider survey once every five years. The most recent comprehensive survey efforts were conducted at an interval of eight years. It is recommended that Metro Transit adhere to its goal of conducting a comprehensive system-wide survey every five years. This would suggest that the next such survey effort would be conducted in 2013. It would be advisable for Metro Transit to make more extensive use of focus groups to understand the effectiveness of its advertising materials and the utility of new on-line and mobile tools. The Long Range Metro Transit Planning Ad Hoc Committee made a similar recommendation, specifically identifying focus groups or targeted surveys designed to elicit information from:

  - current customers through on-board surveys;
  - core Madison service area riders and non-riders; and
  - new areas for potential growth.

- Metro Transit does not currently have a procedure for following up on customer complaint files that remain open beyond the 90 day period. It is recommended that this become an item which is routinely reviewed by the Customer Service Group.

- Metro Transit has a valuable service planning tool in the Trip Planner utility of the website. Important data is collected in that riders and potential riders enter information regarding desired trips (i.e., origin, destination, as well as time and day of

travel). Metro Transit should develop procedures to extract this data and assemble it into a database that can be queried or mapped for service planning purposes.