

Performance Plan and
Analysis
Common
Recommendations/
Commendations

Participant Signatures:

Transit System Representative:	Date: / / 20
ITRE:	Date: / / 20
NCDOT Mobility Development Specialist:	Date: / / 20

By signing this document, participants indicate their agreement with the statements outlined in this plan and declare their commitment to advancing the performance, service and operation of the transit system.

INTRODUCTION

The Performance Planning Analysis is conducted at the system's request as a part of a Technology Plan or after the system is identified as needing assistance. The purpose of this plan is to provide the transit system with a guide to achieve higher performance measures and improve business practices. The system also has the opportunity to independently update the plan to track performance and create a solid foundation for future improvements.

To begin the Performance Planning Analysis process, the Business Practices Questionnaire and Employee Information Worksheet are sent to the transit system and a data set is requested. After the completed questionnaire is received and examined, a site visit is conducted. Once the site visit is complete, further analysis of the information is conducted and recommendations are created.

Methods of Analysis: The Business Practices Questionnaire [Appendix A] and Employee Information Worksheet [Appendix B] cover topics such as human resources, operational policies, organizational culture and the system's planning process. Providing as much detail as needed to fully complete the questionnaire is encouraged because the depth of responses is also analyzed. The way the question is answered, the amount of detail provided and other aspects of the responses illustrate how well the system is prepared for the process and how they view their performance. Vehicle Utilization Data (VUD) Compilation [Appendix C] is used to analyze performance on specific performance measures from a single collection period and over time.

Reports are requested as needed, including reports on cancellations and no shows. Other items, such as daily driver manifests and funding source rates are collected and reviewed to understand application of business practices in day-to-day operations.

This report includes recommendations, which include a target area and a preliminary objective for improvement. Specific steps for achieving the objectives are listed with defined timeframes. These objectives are only the first steps in improving performance. As the system grows and develops, goals will be adjusted and the planning process will be revised.

SYSTEM OVERVIEW

Strongest Area:	The transit system is commended for having made numerous business practice changes to streamline operations.
Area Needing Most Improvement:	Accuracy of reporting/recording manifest data

THE FUTURE FOR TRANSIT SYSTEM

Every transit system must strive to improve and create an image of their future upon which to base goals and measure success. The expectations listed here provide the transit system with a vision of where their system is going and where they want to be in the near future. The section on the future for has been developed by representatives of the transit system, with the assistance of ITRE.

□ TRANSIT SYSTEM TO FILL OUT


PERFORMANCE PLANNING EVALUATION CHECKLIST

Major areas discussed in this Performance Plan are listed in this table with a general rating of the system's policies, progress or achievements in that area.

Rating Key			
■■■■■	Exceptional	■■□□□	Below Average
■■■■□	Above Average	■□□□□	Needs substantial improvement
■■■□□	Average		

Performance Measure	Rating/Category
Other Data Analysis	
♦ Cancellations/No Shows	■■□□□
♦ Percentage of subscription and demand response trips	■■■■□
Comparisons To VUD Peer Group	
♦ Weekday Passengers Per Service Hour	■■□□□
♦ Weekday Passengers Per Revenue Hour	■■■■□
♦ Weekday Passengers Per Service Mile	■■□□□
♦ Weekday Passengers Per Revenue Mile	■■■■□
♦ Weekday Average Daily Passengers	■■■■□

RECOMMENDATIONS

Throughout the analysis, look for the Recommendation Flag  to identify areas that relate to specific recommendations and the Quality Check indicating strong points.



1. Target Area: Improved performance measures

Every community transportation system should aspire to grow their business and increase effectiveness in providing service.

Goals:

Performance Measure	Current Level	Growth %	6 months	12 months	18 months
Weekday Average Daily Passengers	208	5%	218	229	241
Weekday Passengers per Service Mile	0.126	10%	0.132	0.146	0.160
Weekday Passengers per Revenue Mile	0.174	1%	0.183	0.185	0.186
Weekday Passengers per Service Hour	2.68	10%	2.81	3.10	3.40
Weekday Passengers per Revenue Hour	4.14	1%	4.35	4.39	4.43
Weekday Average Cancellations	110	Varies	55	28	28

Steps to Improvement:

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- | | |
|----------|---|
| 6 Months | - Create an outline of the steps that can be taken to achieve these goals working with ITRE and the PTD Mobility Development Specialist
- Implement outlined actions
- Evaluate progress using the next VUD collection period
- Reduce cancellations by 50% by changing internal policies, working with funding agencies, and working with customers |
|----------|---|
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|-----------|---|
| 12 Months | - Reevaluate using VUD
- Continue to reduce cancellations to 75% of the current level by changing internal policies, working with funding agencies, and working with customers |
|-----------|---|
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- | | |
|----------|---|
| On-Going | - Constantly strive to attract new riders
- Constantly strive to improve performance |
|----------|---|



2. Target Area: Information Management

Objective: Increase information control and accuracy

Steps to Improvement:

-
- | | |
|----------|---|
| 6 Months | - |
| On-going | - |

CONTINUED AS NECESSARY

Data and Questionnaire Analysis

1. Comparisons To Vehicle Utilization Data (VUD) Peer Group:

Vehicle Utilization Data was used to understand the system's performance in comparison to peer systems in the state. See the last page for a map of the VUD Peer Groups.

Weekday Statistics	Peer Group		Transit System		% Difference
	#	%	#	%	
Average Daily Passengers	233		208		-11%
Average Daily No Shows	7	3%	4	2%	-43%
Average Daily Wheelchair Passengers	18	8%	27	13%	50%
Total Vehicles	18		21		17%
Lift Vehicles	9	50%	11	52%	22%
Average Daily Service Hours	96		78		-19%
Average Daily Revenue Hours	77	81%	50	65%	-35%
Average Daily Deadhead Hours	19	19%	28	35%	49%
Average Daily Service Miles	1,852		1,645		-11%
Average Daily Revenue Miles	1,453	78%	1,196	73%	-18%
Average Daily Deadhead Miles	399	22%	450	27%	13%
Passengers Per Service Hour	2.63		2.68		2%
Passengers Per Revenue Hour	3.45		4.14		20%
Passengers Per Service Mile	0.132		0.126		-4%
Passengers Per Revenue Mile	0.170		0.174		2%

1.A. Current Summary Statistics: The table below compares descriptive statistics from **VUD DATE** VUD for **TRANSIT SYSTEM NAME** with other counties in their peer group.


1.A.1. Weekday Average Daily Passengers:

- The transit system has become one of the largest community transportation systems in the state in terms of passengers per day.
- The transit system has shown continual growth over the past 2 years
- The transit system has almost doubled its Average Daily Passengers over the past 3 years
- Average Daily Passengers have increased since the Spring of 2006.
- The transit system has increased its average daily passengers by 6% over the past 3 years.
- The transit system is steadily increasing its passenger counts. It was noted at the site visit that the Vocational Rehabilitation workshop in the service area has received its own vehicles and is no longer using the transit system.
- It is recommended that the transit system explore how to attract more riders
- The transit system has achieved significant growth in passenger trips from 2006 to 2008


1.A.2. Weekday Average Daily No Shows:


Almost eliminating no shows by calling the passengers the day before is an excellent practice if staff has time to perform this task.

1.A.3. Weekday Average Daily Wheelchair Passengers:

 At the site visit, it was suggested that the transit system schedule wheelchair trips first because they are the most limiting.

1.A.4. Total Vehicles:


 The transit system must increase its vehicle licenses in the software so that all vehicles can be entered into the system at the same time.

 The transit system needs to develop a unified system for tracking vehicles and all other data.

1.A.5. Lift Vehicles:

It is noted that the transit system carries a higher number of wheel-chair passengers than its peer group.


 The transit system should report VUD vehicles from the PTMS to ensure accuracy


 If the transit system is experiencing periods of high demand for lift vehicles that it is having trouble meeting, it is suggested that the transit system increase the number of lift vehicles in its fleet by replacing non-lift vehicles with lift vehicles.

1.A.6. Weekday Service Hours:

The low hours could be partly due to shorter out of county trips for the transit system than for other peer group members, but it does show that the transit system is creating efficient schedules.

The transit system has significantly less service hours per day than its peer group; however they carry about the same number of passengers


 The transit system must begin tracking breaks and/or must discontinue using the scheduling software to track payroll.


 If the transit system is not accurately recording service times, it is recommended that they begin doing so immediately. Service time should only include time that the driver is operating the vehicle en route to picking up/dropping off a passenger. Wait time and breaks should be removed from service time.

1.A.7. Weekday Revenue Hours:

The transit system has 23% less revenue hours than its peer group but carries the same number of passengers

1.A.8. Weekday Deadhead Hours:

 The scheduling and data collection/reporting process must be evaluated to determine what is causing this increase in deadhead hours.







 The transit system should reevaluate the practice of outstationing vehicles at each drivers home. If schedules can be created so runs begin and end near the drivers home this practice may become more effective. If not, the transit system should reduce the number of vehicles that are outstationed at driver's homes

1.A.9. Weekday Service Miles:


The transit system drives the same number of service miles as the peer group, but carries

more passengers

1.A.10. Weekday Deadhead Miles:

- Although the transit system operates more miles and hours than their peer group, the deadhead proportions are similar to their peers.
-  The transit system must require that drivers accurately record all necessary information
-  The transit system should look at its routes to be certain that the high number of deadhead miles and hours are related to quality scheduling decisions
-  The transit system should review contract rates to be certain that they account for the high deadhead hours.
-  The transit system should immediately begin to consolidate routes, taking care that the costs for agencies will not be adversely affected by the consolidation
-  Data irregularity skews performance statistics, employee time reporting and many other important aspects of service. If drivers are not correctly indicating their mileages or times on manifests, new policies concerning the regularity of reporting must be created. This problem also may stem from data entry. If so, new policies concerning the accuracy of entering run data should be formed. Employees must understand that this continued inaccuracy and other decisions they make on a daily basis affects expenses and costs of service
-  The transit system should only record actual driving service hours and miles on the manifests and in their scheduling software. The transit system must not report fueling, maintenance, and administrative runs as service miles/hours. A separate payroll system, such as a timekeeping punch clock, should be used to track driver pay time.



1.A.11. Weekday Passengers per Service Hour:

-  The transit system must strive to lower their average daily revenue and service miles and hours. The transit system serves a similar number of passengers as their peer group, but have 20-30% more miles and hours which lowers their efficiency.

1.A.12. Weekday Passengers per Revenue Hour:

- The transit system is much more efficient than its peer group in this and all other performances measurements
- The transit system's Passengers per Revenue Hour are 25% above its peer group.
- The transit system's Passengers Per Revenue Hour is 30% higher than its peer group
- The transit system is 20% more efficient in terms of passengers per hour than its peers. Because of the discrepancy in calculating service hours, passengers per revenue hour is a more accurate snapshot of how the transit system compares to its peers


1.A.13. Weekday Passengers per Service Mile:


- Weekday Passengers per Service Mile have increased 25% since the Spring of 2006.
-  The transit system needs to make it clear to the drivers that the manifest information must be correct and that the service and revenue time and miles must only include time spent in the vehicle.
-  One effective way to schedule that will increase efficiency is to take a few drivers and make certain that their daily schedules are as tightly packed as possible


1.A.14. Weekday Passengers per Revenue Mile:


- The transit system's Passengers Per Revenue Mile is 12% higher than its peer group.
- Gateway is 28% more efficient in terms of passengers per hour than its peers. Because of the discrepancy in calculating service hours, passengers per revenue hour is a more accurate

snapshot of how the transit system compares to its peers

 The transit system should reevaluate routes to make sure revenue miles are kept at a minimum by combining trips/routes where possible.

 The transit system should work closely with remote clients to negotiate trips times

 Another possible way to increase performance is to establish times when distant areas of the county will be served. For instance, vans will be in one area of the county beginning at 8 am on Monday, Tuesday, and Thursday, serving urban destinations beginning at 10 am. Scheduling using this method will increase efficiency by grouping origins and destinations better.

 The transit system needs to clearly identify why the new regional system appears to be less efficient than the four individual systems before consolidation

The transit system has shown steady growth in efficiency from 2006 to 2008.

2. Vehicle Utilization Data Compilation Analysis

2.A. Capital Assessment Form:


This also indicates that the transit system is accurately recording data and only providing service where there is a demand – they are not dispatching vehicles for unneeded routes or having vehicles in service for longer than necessary.


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The analysis of the Capital Assessment Form and discussion from the site visit indicate that drivers are correctly recording break information


The varied start and end times for vehicle use indicate that the transit system adapts the service on the street to meet the demands of the customers.


The general Monday-Friday operating hours are 5:30 am to 6:30 pm, making the transit system available for work transportation. It should be noted that the transit system provides complementary ADA Paratransit service for the urban fixed route, requiring the complementary ADA Paratransit service to operate extended hours for the eligible urban clients


 The transit system should evaluate their scheduling and reservation process to determine what makes the vehicles go into service for such short periods of time instead of adding the trip(s) to vehicles that are already in service


 The transit system should determine if these trips could have been added to a route that was already in service, brokered to a taxi, or negotiated with the client to enable better coordination.


 The transit system should strive to effectively utilize its vehicle fleet and reduce the number of vehicles if possible


 The transit system needs to ensure that accurate data is being collected by going over the definition of service time with each driver


 Service time should only indicate when the vehicle is actively providing transportation

 The person responsible for manifest verification should ensure that information is accurately recorded


 Reports for each verified run should be checked for accuracy by supervisors.

 The transit system should make every effort to increase vehicle utilization by using as few vehicles possible. Rearranging schedules to match the demand for every day of the week will help in this area. Also, because of the transit system's lower vehicle usage, they have a good opportunity to expand their services during the times vehicles are not being used. the transit system should seek out new funding sources and clients that need transportation during these times. They may also be able to coordinate with neighboring counties during these times.


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 The transit system should assess its vehicle usage to see if there are runs currently performed by multiple vehicles can be combined and performed by a single vehicle

The Capital Assessment forms show that the transit system is accurately tracking breaks and that service on the street matches the trip demand (vehicles go in and out of service sporadically).

 Drivers must accurately report any and all break times and these breaks must be entered into the scheduling software.

The transit system's CAP form shows that they provide service from around 4:30 am to around 6 pm. However, some vehicles are only used for a short period of time such as an hour to an hour and ½ on a given day. Also, there are no driver break times apparent on the CAP form. If the drivers took breaks during this time, they are not being recorded accurately. After discussing this with the Transit Director, it was discovered that when serving out-of-county destinations, the driver will wait at the location for the passengers to return, often for many hours. During this time, the driver is being paid, but the vehicle is not in service and this should be recorded as break or wait time

 The transit system must correct inaccuracy in data by recording having break times in their scheduling software. Correcting this problem will improve performance statistics because incorrectly recording data skews performance statistics


 The transit system is not earning revenue by having drivers wait at out of county destinations. If possible, the driver should be given other routes and once passengers need to be picked up out of county, a driver should be dispatched for the return trip. Negotiating with clients to arrive at an estimated appointment length will help with this scheduling change. If the driver must wait, the funding source should be charged for the wait time


2.B. Performance Indicators:

Monday and Thursday have the least number of passengers. Monday and Thursday are also the most efficient days in terms of passengers per revenue hour and passengers per service/revenue mile, indicating that the transit system is adjusting service to meet the demand


The transit system's efficiency per day, as indicated by the Passengers per Service and Revenue Hour graph, is fairly stable for each weekday.


Stable amounts billed are another indicator that the the transit system's efficiency per day is roughly the same.

 Monday and Thursday have the least number of passengers. Monday and Thursday are also the most efficient days in terms of passengers per revenue hour and passengers per service/revenue mile, indicating that the transit system is adjusting service to meet the demand


 The transit system should explore all aspects of its billing to ensure that the rates for each

funding agency are reasonable and accurate


 Schedules should be reevaluated as close to the beginning of the run as possible to make sure all changes for cancellations and other factors are reflected in the manifest


 The transit system should explore the characteristics of Tuesday to determine why the no show rate is so high on this day

The Amount Billed per Passenger trip shows that, even though the transit system bills by mile, the average cost of a trip Monday-Friday is remarkably stable at roughly \$15. On Saturday's, the cost per trip increases due to less passenger trips, which is common due to decreased passengers


 The transit system should explore the characteristics of Monday and Wednesday and see if any of the efficient service designs can be applied to the more inefficient days.


2.C. Driver Analysis:


 It should be explained to drivers that their time sheet and their manifest record different information. A manifest records information about the vehicle's service, while their time sheet records their work hours and do not have to have an equal number of hours. The transit system should set a goal of having no more than 10% difference between service hours and pay hours for each driver.


 The transit system needs to track driver pay hours on a daily basis to effectively manage and reduce overtime pay


The transit system has recently implemented an overtime tracking process that ensures drivers are not scheduled when they are nearing overtime. The transit system reports a 47% savings in overtime pay since implementing this new process.


 The transit system should run driver productivity reports on a regular basis to manage and compare driver performance and ensure data accuracy

 The transit system should carefully manage driver hours to prevent unnecessary overtime.

 Verifying manifests quickly and running reports on daily basis will help address the overtime issue.

 The transit system must require that drivers accurately record service and revenue information

 The person responsible for manifest verification should ensure that information is accurately recorded


 Reports for each verified run should be checked for accuracy by supervisors.

2.D. Route Analysis:











The transit system has multiple routes during the day, indicating that they are using route-based scheduling instead of scheduling to the driver or vehicle. However, the transit system may be scheduling too many routes during the day as many have only 1 or 2 passengers on a route

The transit system has more routes than vehicles or drivers showing that they schedule to the route/run rather than assigning reservations to drivers or vehicles.



The transit system has more routes than drivers indicating that they schedule based on routes and not based on a driver or vehicle

 The transit system should reevaluate the way it schedules. Scheduling to a driver, instead of to a route can cause many problems in service delivery. The flexibility of having a driver perform many different routes, though out the week can shed light on inconsistencies in driver behavior. Also, breaking work up into different routes throughout the day provides the

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system with more flexibility in scheduling and greater data collection accuracy
-  The transit system should view daily run-level performance reports to improve the efficiency of individual runs.
- With 62 routes on Monday, 33 drivers, and 38 vehicles, the transit system does a good job of scheduling to routes and not to drivers or vehicles.
-  All verified data needs to be checked for errors on the run level (do not look for errors using daily summaries since these calculations can hide small errors).
-  The transit system should explore the characteristics of efficient routes and try to find ways to combine them with other routes to increase efficiency.
-  The transit system should perform a route analysis on a regular basis to track efficiency
-  The transit system should to reduce the number or routes, which will decrease the deadhead, increase revenue, and create a more efficient transportation system
-  The transit system should either consolidate these passenger trips into other routes or broker these trips to a vendor.
-  The transit system should restructure their scheduling process to schedule to routes instead of vehicles. Scheduling to routes instead of vehicles helps ensure more efficient service delivery and adaptability.
-  The transit system needs to assess the characteristics of the routes with few passengers and either 1) combine these routes with other routes or 2) negotiate times with passengers to increase efficiency.
-  Drivers, the person entering manifest data into the software, and managers need to watch this data closely to ensure accuracy because bills are created from the manifest information.
-  The transit system should closely inspect the characteristics of routes with similar characteristics and 1) use the RouteMatch scheduling engine or other tool to increase efficiency, 2) negotiate pickups/drop off times with clients, and/or 3) combine these routes with other routes.

3. Scheduling Software

- The transit system is commended for developing its own easy to use database for scheduling, which helps with record keeping and creating manifests.
-  The transit system should also consider building a billing feature into the current database or selecting software that has a billing function. As it currently stands, growth is limited by its inability to bill new funding agencies.
-  The transit system should consider adapting the database to include all necessary information that must be reported annually to NCDOT/PTD and ITRE or transitioning to another scheduling software that captures this information.


4. Historic Vehicle Utilization Data Statistics

The table below gives the system’s VUD performance information over the past **three** years as well as the system’s current performance in each area and the percent change from the first collection period.

	2006		2007		2008	Current	% Difference
	Spring	Fall	Spring	Fall	Spring	Fall 2008	
Average Daily Passengers	209	169	333	200	244	208	0%

Passengers per Service Hour	2.76	2.35	3.82	2.80	2.94	2.68	-3%
Passengers per Revenue Hour	3.62	3.36	5.98	4.20	4.45	4.14	14%
Passengers per Service Mile	0.124	0.114	0.177	0.118	0.126	0.126	2%
Passengers per Revenue Mile	0.175	0.157	0.250	0.174	0.183	0.174	-1%


4.A. Weekday Average Daily Passengers:


 There are other funding sources that could be pursued at no cost to the county. It is recommended that the transit system expand their transportation system by seeking out new funding sources. If billed accurately, the expanded service can pay for itself and increase the mobility offered to citizens in the county. The transit system should consult its peers and the state to determine what other funding sources may be added in the future.

5. **Other Data Analysis:**

Cancellation and no show reports and other data received from **August 2008** were analyzed to determine if the system needs improvement. The table below gives current average weekday statistics.

Current Monthly Statistics (Average Weekday)	#	%
Total Scheduled Passengers	327	
Total Passengers Carried	214	65%
Subscription Passengers	156	73%
Demand Response Passengers	57	27%
Cancellations	110	34%
Subscription Cancellations	90	82%
Demand Cancellations	20	18%
No Shows	3	1%
Subscription No Shows	2	67%
Demand No Shows	1	33%




 It is recommended that the transit system run daily reports on the run level to identify data entry mistakes

 Manifests should be verified within 36 hours of the work being completed






5.A. Percentage of Subscriptions and Demand Response Passengers:

- The transit system meets this requirement
- The transit system has a good distribution of subscription and demand response trips with 65% subscription and 35% demand response
- The transit system has a good distribution between subscription and demand response trips.
- With 61% subscription passengers, the transit system does a good job of serving demand response clients.
- With 31% demand response passengers, the transit system does a good job of serving not just agency subscription passengers





5.B. Cancellations:

- The transit system overall cancellation percentage is low
- A 12% cancellation rate is better than most community transportation systems. Most of the cancellations come from subscription trips, which is expected due to their recurring nature
-  The transit system should strive to reduce these cancellations
-  The transit system managers should monitor cancellations on a daily and weekly basis and develop policies to reduce the cancellations to a more reasonable 10% or fewer
-  The transit system should clearly define what a late cancellation is and then develop a system to track late cancellations


5.B.1. Cancellations by Reservation Type:

-  The transit system utilizes a system of canceling trips that need modification (time change, run number, etc) instead of updating the existing trip. In the future, to reduce staff workload and cancellations, reservations that need to be edited should not be added as a new trip
-  Subscription trips should be used only for trips that will actually repeat on selected days for an extended period of time. If a client sets up a subscription trip, and then cancels numerous times, the subscription should be canceled and the client informed that they must call in their trips on a day-by-day basis
-  The transit system should examine the trip characteristics of these funding agencies and determine if there are ways to decrease these cancellation rates.
-  The transit system should evaluate the cancellation rate for each subscription to determine if it should be reclassified as a demand response trip.
-  The transit system should try to decrease the cancellation rate by identifying specific trip characteristics that lead to frequent cancellations


5.B.2. Cancellations and No Shows by Funding Source:


-  The transit system should focus on funding sources with high cancellation rates and work with the funding sources, passengers, and the Board to reduce the cancellations.
-  The transit system needs to examine the scheduling process to determine if these cancellations are due to how the transit system schedules the trips (i.e. cancelling trips instead of editing times/destinations)
-  The transit system also needs to work closely with the funding agencies listed below to reduce the cancellation rates because cancellations require staff effort and can result in inefficient schedules, but generate no revenue
-  The transit system should monitor cancellation and no show rates by funding source on a weekly basis to determine if further policies should be developed to specifically address issues with individual funding sources

5.C. No Shows:

- The transit system reports very few no shows in general
- The transit system overall no show percentage is very low.
-  It is recommended that all no shows be called in immediately by the driver and that the dispatcher immediately flag the trip as a no show in the software and cancel the return trip.
- The transit system has significantly less no shows per day than its peer group.
- The transit system has 57% less daily no shows than its peer group. This may be a

product of the transit system's no show policy that may increase cancellations and decrease no shows.


 Drivers and office staff must begin to accurately track all no shows.


 The transit system should re-examine its reservation-taking policy to ensure that trips are not scheduled so far in advance that the passenger makes new plans or forgets about the scheduled trip. Reservations should only be taken at a maximum of 2 weeks in advance to decrease the number of no shows

The transit system does a commendable job keeping no shows to a minimum.

The transit system has no Weekday Average Daily No Shows.

5.C.1. No Shows by Funding Source:


 The transit system needs to work closely with the funding sources listed below to reduce the no show percentages

 The transit system should explore the trip characteristics of these funding agencies and determine if there are ways to decrease their no show rates

6. Manifest Review

The transit system manifests are ordered, easy to read, contain only the clients that ride for the day, and the listed times are relatively accurate

A general note concerning manifests: The manifest review portion was added to the review process after the initial visit with the transit system to review the performance plan. It is noted that the transit system has begun collecting passenger-level data as suggested at the meeting


 The transit system should go through the complete Performance Planning process in 6 months after making the most important changes outlined in the target area section.


6.A. Data

6.A.1. Space for All Necessary Information:

Manifests have space for all necessary information. However, it is odd that the run beginning and end times are automatically filled out with no room for driver corrections.

6.A.2. Manifests Filled Out Completely:

 The transit system must require all drivers to accurately complete all required information on the manifest.


 The transit system's administrative and office staff must review manifests for completeness when drivers hand them in. Giving a manifest a quick once over before the driver leaves the office will allow time to check that all fields are filled in. If there are blank fields, the manifest should be given back to the driver so they can fill in the missing information

The transit system is commended for tracking passenger pickup and drop off times and odometer readings.


6.A.3. Data Looks Accurate:


It is evident from the manifests that the person responsible for verifying the data compares the statistics and makes corrections where necessary

Drivers record all times and odometer readings for passenger pickups and drop offs

 When manifests are returned, office staff should review manifests for these obvious errors and return them to drivers for correction before they are verified. Incorrect run information

can lead to inaccurate operating statistics and affect billing


 The transit system should emphasize accuracy to drivers concerning recording run information. If the office staff receives a manifest where data is incorrect, it should be returned to the driver to be corrected. Drivers also must record break times on their manifests


 Out of the four sample manifest received, none had complete and accurate data. This becomes more alarming when it is noted that there were already billing calculations written on the manifests based on this incorrect data. It is the responsibility of both the driver and the office staff to correct accurate data. Drivers should be held accountable for accurately recording data, and office staff must check every manifest for errors.

6.B. Legibility

6.B.1. Data Entered Consistently:


The transit system is commended for having drivers use military time instead of am/pm.

 All times should be in the same format, preferably military time.

 It is suggested that all times be entered in military time to make it easier for the person entering the data and to reduce data entry errors

6.B.2. Easy to Read Numbers:


The transit system's drivers have good handwriting which makes verifying and reviewing manifests easier on office staff.


 Drivers need to spend time filling out manifests that can be read by everyone

6.B.3. Easy to Determine Who Rode or Why Not:

From the sample manifests, it is noted that drivers utilize the No Show and Cancellation fields on the manifest and mark trips accordingly. Also, drivers have made dispatching notes such as "other driver picked up" which can be helpful


6.C. Number of Manifests:


 It is recommended that the transit system begin to consolidate runs


 A large number of manifests creates a large amount of data entry work. The transit system should consider combining short runs (those with only one or two passengers) to decrease the amount of data entry work required. Combining runs will also assist in the scheduling and billing issues addressed in the recommendations in sections 7.B and 8.A.


6.D. Ordered


6.D.1. Format Allows for Ordering of Manifests:

 The transit system needs to contact the software vendor and request a new manifest layout that allows them to display pickups and drop offs on separate lines to enable ordered manifests


 Ordered manifests are a necessity for any good transit system. Having a driver that conducts the work according to an ordered manifest lets the scheduler and dispatcher have a better idea of where a driver is at a given time, which eases dispatching and rescheduling. Ordered manifests also show how many and which passengers are on a vehicle at a given time. Additions and changes to these routes should be done by office staff and performed by drivers in the order on the manifest


 The transit system should immediately begin using the manifest format that lists passenger pickups and drop offs on separate rows.


 The transit system should also immediately begin ordering driver pickups and drop offs during the scheduling process so the drivers can follow the manifests from top to bottom without having to flip around to determine what their next pickup/drop off is


 The transit system needs to contact the software vendor and request a new manifest layout that allows them to schedule pickups and drop offs separately.

6.D.2. Pickup and Drop-off Times are Correct:

 It is recommended that the transit system immediately begin to order the manifests with driver input and require the drivers to perform the work in that order.

 Scheduling staff should be in total control of the way runs are performed with very little deviation by the driver. If staff cannot create an efficient run based on pick up and drop off time/location, more training is recommended. However, if the scheduling staff has created the most efficient run possible, drivers should be held accountable for performing the runs in the order dictated by the manifest


 The transit system should extend the practice of having individual pick up times listed on manifests to scheduling drop off times. Office control, with some driver input, is essential to efficient operations


 The transit system should also immediately begin ordering driver pickups and drop offs during the scheduling process so the drivers can follow the manifests from top to bottom without having to flip around to determine what their next pickup/drop off is


The transit system is commended for having ordered manifests with accurate pickup and drop off times.

6.D.3. Appears that the Office Controls the Information, Not the Driver:


Notes such as “other driver picked up” show that the driver has been told by dispatch that a passenger was moved to a different run. Also, the use of the Cancellation field on the manifest show that the office is informing drivers of changes made to their schedule.


 The transit system office staff needs to exert more control over the drivers and the work. It is also recommended that the transit system begin mapping subscription routes using Google Maps to help determine the most efficient route order.


 Manifests and schedules must be controlled by the office/administrative staff. When entering reservation information, it is very important that an actual estimated pick up or drop off time is entered so an efficient schedule can be created


 Ordered manifests are a necessity for any good transit system. Having a driver that conducts the work according to an ordered manifest lets the scheduler and dispatcher have a better idea of where a driver is at a given time, which eases dispatching and rescheduling. Ordered manifests also show how many and which passengers are on a vehicle at a given time. The transit system should re-order manifests for subscription routes to match how the driver actually conducts the work as most drivers have made their routes very efficient. In the future, additions and changes to these routes should be done by office staff and performed by drivers in the order on the manifest.

6.E. Clients on Manifest Ride:

 The transit system needs to have better control of the scheduling information and the manifests should only contain clients known to be riding on the run

 The transit system needs to reevaluate the way no shows and cancellations are differentiated. Having the office staff inform the driver to remove someone for their manifest is a good dispatching policy, however, once the driver has the manifest the trip should be counted as a no show.


 The transit system should work with clients and funding to reduce the late cancellations that occur between the printing of the manifest and a no show

 The transit system's no show policy allows a rider to cancel a trip as much as an hour before the scheduled pick up time. This policy allows too many cancellations that should be counted as no shows and should be revised. Late cancellations (such as when the client calls to cancel an hour before their pick up time) can decrease efficiency in the same way as no shows but there are no repercussions to the client for late cancellations

7. Employment, Training and Staff:


The following analysis is based on the corresponding sections of the Business Practices Questionnaire, Employee Worksheet and site visit. If needed, a comparison was made to the day-to-day documents (manifests, etc) received from the system.


7.A. Job Advertisement [Questionnaire Sections 1a – 1c]:

 In the future, the transit system should advertise for open positions utilizing local media, the internet or other sources. A large applicant pool will insure that the transit system fills the position with the best possible person.


The transit system is commended for mentioning efficiency and required legibility in the driver job description

Job descriptions and advertisements have good specifications for schedulers and the description of the scheduler position mentions aim of efficiency. Both driver and scheduler advertisements also mention the importance of customer service skills


 For the driver job description, consider removing the limitation that all trips will be performed only within the transit system.


 Neither job advertisement mentions required drug testing or contain statements about EOE.

Job advertisements/descriptions for both drivers and “scheduler/dispatcher/computer operator” emphasize customer service and efficiency. The job description for “scheduler/dispatcher/computer operator” however, only lists that “basic computer knowledge” is needed and this may not be adequate for the true needs of the position.

 During the site visit and subsequent discussions for the performance planning process the Transportation Director noted that finding candidates with the correct level of computer proficiency is difficult given budget constraints. However, the job description for “scheduler/dispatcher/computer operator” should be revised to include a more accurate and detailed description of the preferred skills needed to successfully fill the position. If the transit system moves to advanced scheduling software, these skills will become much more important. It may not be possible at this time to find candidates that have all these abilities, but the job advertisement should reflect the most ideal candidate possible.


The job advertisement provided does a good job at conveying the excitement of the job and the desirability of working for the transit system


 It is suggested the transit system advertise for driver positions on their own website.


 It is suggested that the word “check” be added after criminal history in the job description.

The transit system is commended for requiring computer literacy in office positions.

7.B. Designation of Staff Duties and Driver Work Assignment [Questionnaire Section 1c, 1d, 3k – 3m]:


 To gather more information about this issue, the pay system should be utilized to see if drivers are being paid for time they are not driving and what activities they are engaged in at these times. Drivers should understand that a manifest is a record of the vehicles activities and not their activities – time sheets and manifests do not have to match perfectly. Full time drivers should be utilized before part time drivers, and over time should be kept to a minimum


 The transit system should make time to attend user group meetings because these meetings increase the knowledge and skills of the employees while the employees are simultaneously increasing the knowledge of employees at other transit systems.


 The transit system should begin sending staff to the ITRE training series to increase knowledge about community transportation and to share experiences with other providers.

The transit system is commended for promoting dependable drivers with technical skills into office positions and/or providing technical training those employees.

Drivers are assigned multiple runs

 Too many runs can create a large amount of paperwork for drivers and the number of runs created by the transit system is similar to the way a taxi service would dispatch drivers. Combining runs with one or two passengers into longer runs reduces paperwork for drivers and office staff


 It is important that the schedules be looked at from a holistic viewpoint before they are finalized to make certain that the schedule is efficient.


 It is suggested that the scheduler have a designated time during the day when he/she is solely focused on creating quality schedules and does not have to worry about other distractions


Office employees are cross-trained and share most tasks.


7.C. Staff Software Utilization and Computer Proficiency [Questionnaire Sections 1b and 1d]:

The transit system meets and exceeds the definition of fully implemented. At the site visit, it was learned that the transit system is one of the most advanced users of the software in the state. The leadership at the transit system shows complete commitment to the software, the staff has a firm understanding of the software, and the software is an integral part of the business. In addition, the transit system has adapted to the needs of the software instead of trying to find work arounds.

 The transit system does need to upgrade their version of the software to obtain the newest features.

 The person backing up the dispatcher should attend computer and software training courses so she can log all dispatch changes in the software as soon as they occur

 Administrative staff needs to attend general computer training and training for the scheduling software to address inconsistencies and inadequacies in utilization. The transit system also needs to insure that the information staff is given in this training is implemented correctly and completely throughout day-to-day operations.


 The transit system should check to make sure that the billing method settings in the scheduling software for revenue mile match the definition of revenue mile stated in their contracts with funding sources. If these definitions are not the same, the software may be calculating bills differently than the transit system's contracts dictate.

All employees are reported to have above average technical skills.

 During the site visit, the Transportation Manager stated that the staff had been instructed


to use the scheduling software mapping feature, but was not certain if they were utilizing it. The Transportation Manager should look in to this situation and if staff is not using the feature, they should be instructed to do so and given training on the feature if necessary

7.D. Organizational Structure [Questionnaire Section 2c, 2e, 2f]:

 The transit system should consolidate all operations to become a seamless regional transportation provider. The schedulers should accept all reservations, the scheduling software should not be segregated by county, and the routes should serve the most efficient areas instead of being limited to county boundaries

7.E. Working Environment [Questionnaire Section 2a and 2b]:

The overall working environment at the transit system is enthusiastic and dedicated.


 The transit system may want to consider holding staff meetings at least on a quarterly basis to facilitate communication


The transit system is commended for having regular meetings with office staff and drivers to discuss safety and performance.

8. Operations and Administrative Policies:


8.A. Repairs and Routine Maintenance Policy [Questionnaire Section 4a – 4d]:


The transit system uses Fleet Max software to track maintenance.


 It is recommended that the transit system implement their own maintenance tracking system to closely manage the contractors


 To effectively utilize the maintenance software, it is essential that all information is entered as it is occurring, not after the fact (begin work orders then the problem arises and close it when the problem is resolved instead of entering and closing after the work has been performed).


8.B. Scheduling Policy and Procedure, Use of Real-time Dispatching [Questionnaire Section 3a – 3c, 3e, 3f and 3m]:


 It is recommended that the transit system begin tracking trips that meet the strict definition of ADA Complimentary Paratransit eligibility, as Federal law requires that these trips must not be negatively impacted by providing service to the other customers and other areas of Asheville


 The transit system should immediately dissolve the services in the scheduling software to remove the historic practice of scheduling by county


 The transit system must immediately begin to use the scheduling engine and all other features in the scheduling software


 The transit system managers must take responsibility for making certain that the scheduling engine works and that the transit system staff use the software to its full capabilities.


 The transit system's scheduling procedure should be changed to better correspond with the transit system functioning as a Community Transportation system where a client's funding source is not a factor in scheduling a trip.


 Because the transit system charges passengers who ride the van alone a higher rate than passengers who share a van, decisions made by the scheduler impact the rate a passenger is charged and the bill a funding source receives. The transit system needs to define the method schedulers use in deciding which passengers ride alone to insure that all billing rules are applied to each funding sources in a similar manner


 The transit system should create a policy allowing reservations to be placed a maximum of 1 month in advance of the trip. It is believed that a 2 week cut off period is optimal.


 The transit system should fully dedicate itself to using the automated scheduling feature. Resources are available, including 2 online training courses from RouteMatch that are paid for in the annual maintenance fee for the software


 The transit system should dedicate an employee to be the primary contact with RouteMatch. This employee should take it upon him/herself to understand all issues with the software, communicate the issue to RouteMatch, and maintain communication with RouteMatch until the issue is resolved.

 Once the transit system is able to successfully use the scheduling engine in RouteMatch, The transit system should be able to reduce the reservation cut off window from 48 hours in advance to a maximum of 24 hours. At the site visit, it was learned that some agencies provide a batch list of client trips. It is acceptable if these agencies are still required to provide trips to the transit system 48 hours in advance. General public and other demand response riders should enjoy a 24 hour cut off

 The transit system should immediately ensure that it is meeting all Federal requirements for ADA transportation. ITRE is providing information handed out at the ADA refresher course held in March 2009.

 The transit system should also begin tracking ADA eligible trips using the strict Federal language of what constitutes an ADA eligible trip. In addition, the transit system should track trips that originate or end in non-urban areas. Both of these trip types are essential for the accurate tracking of grant allocations

 At the site visit, it was learned that the transit system has room for improvement in real-time dispatching. It is recommended that the transit system immediately begin tracking all changes in real time.


 Building on this first step to true real-time dispatching, the transit system should strive to have dispatchers adjust and up schedules if possible, where no shows have occurred to maximize efficiency on that run.


When a no show occurs, the drivers have been instructed to let the dispatcher know immediately, which is a great first step in real-time dispatching.


A reservation cut off of 3 pm for community transportation is commendable


The transit system appears to be using real time dispatching.


The transit system's scheduling policy states that a passenger must call 24 hours in advance of a trip to schedule a pick up and in the questionnaire it was stated that the transit system tries to accommodate all trips if possible.

 It is recommended that the transit system reduce the 48 hour reservation cut-off to provide next-day service.


 It is recommended that the transit system expand hours so county employees and others that may need or desire work transportation can use this service.


 The office should determine if changes are necessary to the schedule and the office should contact the appropriate driver to handle the change. It is essential that the office control the flow of information and makes the decisions.


 Customers should contact the office directly to schedule/cancel trips.

 It is recommended that the transit system removes the trip limitation from the Policies and Procedures.


8.C. Vehicle Outstationing [Questionnaire Section 5c]:

 The transit system should consider using fax machines or email to transfer manifests to remote sites instead of having staff deliver manifests. Completed manifests should be transmitted back to the main office immediately.

 The transit system could establish a remote desktop so the outstationed sites can access the scheduling software, print manifests directly, and enter completed manifests as soon as they are returned

 The transit system should reevaluate the practice of outstationing vehicles at each drivers home to see if this practice is effective in reducing deadhead.


Vehicles are outstationed, which reduces deadhead

 It is recommended that the transit system revisit the outstationed driver's full time status. The full time driver should be centrally located to ensure that there is 40 hours of work for this driver.


8.D. Policies and Procedure for Emergencies, Sick Drivers or Vehicle Breakdown [Questionnaire Section 3m]:


The transit system is commended for having on call drivers fill in for sick drivers


The transit system is commended for having an on call employee who covers routes if necessary.


 It is recommended that the office call the customer and that driver to customer contact be limited to the times when both are on the vehicle.


8.E. Charges and Procedures for No Shows or Cancellations, Administrative Fees and Fuel Charges [Questionnaire Sections 3e – 3j, 5.b.2, 7f, 7g, 8b and 8c]:


 The transit system needs to begin accurately tracking no shows.


 Brokered trips should include administrative fees.


 It is recommended that the transit system develop a fuel surcharge that protects them from fuel prices above what is assumed in the budgeting process


 More information on the no show policy is needed. Depending on whether the charge for a no show is billed to the client or the funding source, changes to the amount of the charge or the person who is charged need to be made. If the funding source is charged for a no show, the client may have no incentive to reduce no shows.

 The transit system must address its high cancellation rate. No shows are only a significant issue for a few funding agencies




 The transit system's no show policy allows for too many cancellations that should be no shows. It appears that many time, two hours before a scheduled pick up time a driver is already on-route to the location so the transit system has already committed the time and resources to the trip which are not recouped if the trip is marked as canceled instead of no showed. The transit system should begin tracking late cancellations and modify this policy if late cancellations continue.

 The transit system's no show policy needs to be clarified. If the statement on the door hanger is correct, office staff should adhere to the one-hour window and consistently apply this policy. If the no show policy is as stated in the questionnaire is correct, the information given to the client should be updated.




 Both of these policies may be too lenient. After the policy is clarified it should be reevaluated to ensure that efficiency is not being lost because of no shows. This should reduce or eliminate cancellations on printed manifests which negatively affect efficiency.

- The transit system is commended for charging for no shows
- The transit system is commended for including a fuel surcharge in their rates
- The transit system does charge the funding source for all client no shows and this policy seems to be effective as their no show rate is very low. Also, though there is no fuel surcharges currently in place, all the transit system contracts with funding sources include provisions for adding them at any time if needed.
- Agencies are charged for no shows and the policy also states that if a client has three consecutive no shows or 5 no shows in 30 days the transit system can suspend service.
- The transit system is commended for recently revising its no show policy to make it more stringent. Coding late cancellations (less than 2 hours from the pickup time) as no shows will help create a more efficient transportation system
- Having the driver leave door hangers is a good policy as it fosters communication with clients and helps ensure driver accountability
- The transit system is commended for identifying late cancellations and having a late cancellation policy.
-  The transit system should revisit the late cancellation policy to ensure that customers are not penalized exactly the same as a no show. The same penalty for a late cancellation as a no show means that the customer has no incentive to cancel. No shows hurt the transit agency more than late cancellations and should be penalized accordingly.

8.F. Reports and Self-evaluation (data availability and accessibility) [Questionnaire Sections 5d, 6h and 6i]:

-  The transit system should utilize this readily available information to manage its service by viewing performance reports on a daily basis. Keeping a close eye on the performance of vehicles, drivers, and runs will enable the transit system to identify and quickly address issues that are harming efficiency.
-  In addition to the one report viewed on a daily basis, the transit system should view daily reports to determine efficiency (i.e. passengers per service mile), driver reports to track service time, and run-level reports showing miles, hours, and passengers to ensure accurate data. The transit system should also run all daily reports on a weekly basis, along with reports showing essential data by funding agency, day of week, driver, vehicle, and route. On a monthly basis, the transit system should run the daily and weekly reports, along with the operating statistics report.
- As part of the new validation and accuracy checking process, it is recommended that the transit system have a standard set of reports that it runs daily to ensure that all data entry errors are caught.
- The transit system is commended for running a series of reports on a regular basis.
-  It is recommended that performance indicators be added to the spreadsheets and database or that the transit system pursue another software that assists in report creation.

8.G. Interagency Coordination and Trip Brokering [Questionnaire Sections 5a and 5b]:


-  The transit system should explore coordination options with other transit systems including out of county trips
-  The transit system should reach out to other transportation systems known to visit Asheville on a regular basis to determine if assistance can be provided.
-  Other transit systems may be able to pickup the transit system clients on their way into/out of the service area, reducing the need for the transit system to dispatch vehicles to distant edges of the community.
- The transit system is commended for pursuing New Freedom money to certify and train potential brokers. Brokering trips can increase the efficiency of a transit system and reduce


costs.

The transit system brokers after-hours and weekend trips to a local taxi company.


The transit system is commended for coordinating with other transit systems.


The transit system is also commended for brokering some medical trips to private providers

 It is recommended that the transit system work with the nearby transit systems to coordinate trips into/out of that region.

 It is recommended that the transit system work with the nearby transit systems to provide transportation services to the parts of their service area that are easier for you to access than for them to access.

8.H. Out of County Services [Questionnaire Section 3n]:

 It is recommended that the transit system establish set days to serve out of county destination instead of serving these destinations as needed.

 The transit system should consider limiting the number of days it serves out of county destinations to ensure that these trips are as efficient as possible. Even though most out of county trips have more than one passenger, it may be possible to combine more trips so service days can be limited and efficiency can be improved

The transit system is commended for having an out of county billing structure that encourages efficiency.


It appears that single-passenger trips to out of county destinations are rare.

The transit system serves out of town destinations on certain days of the week.

The transit system is commended for maintaining its volunteer system and providing out of county mobility at lower costs as a result.


8.I. Service Types [Questionnaire Section 3o]:


The transit system is commended for providing service for all trip types listed in the Questionnaire


 The transit agency should seek out other funding sources/contracts to expand the total mobility of the community.


8.J. Community Visibility [Questionnaire Section 9a-9c]:


 The website listed on the brochure does not seem to be active.


 Some information on the brochure appears to be out of date or inaccurate. The service hours are listed as Monday – Friday 6:00am – 6:00pm. However, the questionnaire states service begins at 4:30am and the VUD Capital Assessment form shows vehicles in service before 6:00am.

 The transit system should continue to pursue this marketing strategy as a good community understanding of the services they provide is essential. If possible, the transit system may want to explore creating a separate facility for their operations outside the Senior Center.


 All vehicles, brochures, websites, and other advertising tools need have a unified look as soon as possible.

 The transit system has brochures available that explain the nature of the service, billing rates and scheduling procedures

 The coordinated urban/rural nature of the transit system helps to increase its community visibility by presenting one transit agency to the public


 In addition, it appears from the Business Practices Questionnaire that the transit system is ensuring maximum exposure by reaching out to the community through multiple outlets.


 The transit system also produces a “Riders Guide” that gives information on the service and describes how to use its services


 The transit system is commended for having the “Anyone can ride” slogan on the side of the van and for advertising using multiple media outlets.


9. Billing, Funding Sources and Budgeting:


9.A. Billing Methods and Rates [Questionnaire Section 5.a.2, 7a, 7b]:

 It is recommended that the transit system strive toward setting trip cost (flat rate) billing methods instead of mileage/hour based billing methods because trip cost encourages efficiency.

 When the transit system upgrades to automated scheduling, the client’s reservation type will not be taken into account by the software when trips are scheduled.


 Even though the policy of discounting rates for shared trips may encourage the transit system’s funding sources to share trips, this incentive is only achievable if the funding sources has control over part of the scheduling process. The transit system has full control over the scheduling process for most funding sources and can decide how many passengers are on a vehicle (and thus the rate those passengers are billed at). It appears that the billing structure drives the scheduling process and the transit system should reevaluate the billing and scheduling methods. It is safer to bill by a flat rate or zone based method because the decisions of the scheduler have no impact of the bill to the agency or passenger. Billing by a flat rate or zone based billing method will also eliminate the need to have a large number of manifests or runs. In addition, flat rate and zone based billing encourage efficiency because the transit system is rewarded for filling vehicles and reducing miles and hours.


 The transit system staff should attend the “Understanding Billing” class and all other classes from ITRE’s Paratransit Foundations series.

 Billing rates should be re-evaluated to ensure that they are covering the cost of the service provided. If the current rate-setting process is not providing the correct information, a new process should be used to attain accurate costs.


The billing policy of charging more for the first trip and less for all other trips is designed to give an incentive to funding sources, especially DSS, to coordinate trips and share vehicles

The transit system is commended for using a flat rate billing method. Flat rate billing creates a clear and understandable billing paradigm for all users. In addition, flat rate billing encourages the efficient delivery of transportation because the more passengers on a vehicle and the less miles/hours the vehicle travels, the higher the profit for the transit system. As previously mentioned, the transit system’s out of county billing structure is also designed to increase efficiency


 It is understood that the transit system has had no reason in the past to bill, but it should develop a billing rate and preferred billing method that can be used to attract new business

 It is suggested that the transit system develop a rate for drawing down its own funds. By drawing down funds using a billing rate, the transit system will not need to limit trips a particular number of round trips during the calendar year.


9.B. Costs of Service [Questionnaire Section 8a]:


 When the transit system reworks the schedules to reduce the deadhead miles and hours, it is very important that the agency bills are revised to account for the higher number of revenue


miles and hours.

 It is important that the transit system determine the true cost of service and include the driver and office staff salaries and benefits into the cost so that all new services are billed at a rate that does not include much or any county subsidy. It appears that the transit system is unwilling/ unable to expand service because the county is footing much of the bill. If the cost of service were known, the transit system would be able to expand service as long as the new service paid the true cost.

9.C. Rate Setting [Questionnaire Sections 8e]:

 The transit system needs to completely fill out the model to obtain accurate billing rates instead of stopping at the unit cost worksheet.


 The transit system needs to use a rate setting model to establish accurate and fair rates.


 The transit system also needs to establish new rates based on the regional nature of the operation instead of maintaining the rate structure inherited from the individual county operations


The transit system is commended for using the fully allocated cost model.


9.D. Funding Sources [Questionnaire Sections 6f, 6j, 7c – 7e, and 8f]:

The transit system is commended for pursuing new funding sources.

 This section will be further explored when the transit system goes through the Performance Planning process again in 6 months

 Community Transportation is defined by NCDOT as “the efficient and effective utilization of all available resources in the provision of safe and reliable public transportation services for all citizens.” The transit system’s philosophy of placing human service trips at a higher priority than general public trips is understandable considering the history of their organization; however, this should change to reflect the goals of a Community Transportation system. the transit system needs to change practices and policies so funding source is not taken into account and all trips are scheduled the same regardless of funding source.


 This practice of scheduling RGP trips around other subscription service has effectively created two transportation systems at the transit system – one for the general public and another for human services. This does not meet the definition of Coordinated Transportation. the transit system needs to fully integrate human service trips and general public trips by disregarding funding source when scheduling trips.

 The transit system should look into other available funding opportunities. See sections 2.A and 7.A where vehicle usage could be expanded to other areas or hours.


The transit system does a very good job of serving general public riders

9.E. Budgeting [Questionnaire Sections 2e, 8d and 8g]:

As a stand alone entity, the transit system has a solid budgeting process that includes line items for all transportation expenses

 It is recommended that the transit system track pay to service hours for drivers, which means that the transit system compares the total number of driver pay hours for a day to the number of service hours

The transit system’s administration has very good methods for budgeting and financial management.

 The transit system should be certain to track salaries, benefits, maintenance, and all other transportation-related expenses separately so that a true cost of service can be determined.

10. Planning:


10.A. Procedure for Policy Change and Review Process [Questionnaire Sections 2d, 3d, 6b – 6e, 6g]:

The transit system is commended for having a binder that contains all Board approved operational policies.

The transit system recently expanded their operating hours accommodate a new dialysis clinic shift. This illustrates the transit system's the flexibility to serve the needs of their clients.


The transit system is commended for having a future goal of operating multi-modal transportation and coordinating with surrounding counties (Questionnaire Section 6.d.).

The transit system is commended for accurately answering and explaining Questionnaire Section 6.g. Having an efficiency goal of 7.5 is admirable, as the most efficient transportation service will sacrifice elements essential to customer satisfaction.


 This section will be further explored when the transit system goes through the Performance Planning process again in 6 months. All legacy policies must be consolidated.

10.B. Service Planning, Expansion and Review Process [Questionnaire Section 6a, 6b and 6g]:

The transit system reports a very detailed planning process that has recently resulted in increased service

 This section will be further explored when the transit system goes through the Performance Planning process again in 6 months.

Because the scope of the transit system's service is wider than that of senior adults program, the impact of having the senior adults program approval required for service planning and expansion may become difficult if the transit system grows and expands. This relationship should be evaluated regularly to ensure that it continues to be beneficial to the transit system.

 The transit system is encouraged to develop a billing process and then to seek out grants and other funding sources to expand community mobility.

Other Areas of Analysis

During the performance planning process, many aspects of a system's performance are analyzed; all of the areas of analysis are listed below. Only those that need comment are included in the body of the Plan.

Total passenger trips
 Deadhead Miles and Hours
 Cancellations and no shows for subscription trips and demand response trips
 Number of wheelchair passengers
 Number of lift-equipped vehicles
 Weekday Average Daily Passengers
 Weekday Average No Shows
 Weekday Average Wheelchair Passengers
 Total Vehicles
 Lift Vehicles
 Weekday Service Hours
 Weekday Revenue Hours
 Weekday Service Miles
 Weekday Revenue Miles
 Deadhead Miles and Hours
 Hiring practices
 Designation of staff duties and driver work assignment
 Software utilization and computer proficiency

Organizational structure
 Work environment
 Repairs/routine maintenance policy
 Use of real-time dispatching
 Vehicle out stationing
 Policy and procedure for emergencies, sick drivers or vehicle breakdown
 Charges for no shows and cancellations
 Administrative Fees and Fuel Surcharge
 Reports and self-evaluation, availability and ability to access data
 Interagency Coordination
 Billing methods and Rates
 Cost of Service
 Rate Setting
 Funding Sources
 Budget Process
 Policy change procedure and review process
 Service planning, expansion and review process
 Community awareness and relationship

