City of Waukesha

Waukesha Metro Transit

2018 Transit System Management Performance Review

Prepared for the Wisconsin Department of Transportation

Final Report | May 2019

Consulting Group, Inc.

Consulting LLC

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INTRODUCTION

Section 85.20 of the Wisconsin Statutes requires the Wisconsin Department of Transportation (WisDOT) to conduct a transit system management performance review (MPR) of all urban mass transit systems receiving state aid at least once every five years. This report summarizes the 2018 MPR for the City of Waukesha's public transit service, doing business as Waukesha Metro Transit. The last City of Waukesha MPR was conducted in 2011.

The 2018 MPR process consisted of three main activities: performance analysis, review of completed written MPR questionnaire and provided documentation, and an on-site interview and facility review. The review team conducted a performance analysis in July 2018 to inform the areas of focus for the MPR questionnaire and on-site review. An electronic MPR questionnaire form was sent to the Waukesha Metro Transit Director in August. The on-site review was conducted on September 26, 2018.

This report consists of five sections: System Overview; Analysis of System Performance; Policy- and Decision-Making Processes; Functional Area Review; and Recommendations Summary. The Functional Area Review focuses on transportation operations, vehicle and facility maintenance, finance, planning and scheduling, and marketing aspects of the transit system.

Summary

Below are summary tables that highlight the findings and recommendations of this 2018 MPR Final Report for Waukesha Metro Transit. Detailed descriptions and analysis accompany these throughout this report.

Table i: Summary of Recommendations from Previous Management Performance Review (2011)

Functional Area	Recommendation	Status (Presented as Reported by Waukesha Metro Transit Staff)
Accounting, Finance, and Purchasing	Conduct an analysis to determine the potential ridership and revenue effects of offering a day pass with unlimited transfers for weekday service, in addition to the current weekend day pass.	In March 2013, a Day Pass was introduced when swipe cards replaced paper passes, tickets and transfers.
Personnel and Labor Relations	No recommendations	--
Transportation Operations	No recommendations	--
ADA Paratransit Service	Consider increasing paratransit fare to $4.00, double the fixed route fare.	Paratransit fare was doubled to $4 in June 2012
Safety Management and Training	No recommendations	--
Planning	Prior to selecting a strategy for service reductions, the system should conduct a survey of Sunday mobility to gauge potential impact on mobility and access to jobs.	Comprehensive survey of service completed in 2013 to look at efficiency of every route and every day of operation of route. Sunday service is viable and provides needed mobility to our community.
	Pursue reinstatement of APTA membership.	This is not feasible given APTA's fee structure. Costs far exceed benefit. Considering membership to CTAA which is more in tune with the needs of small operations.

Functional Area	Recommendation	Status (Presented as Reported by Waukesha Metro Transit Staff)
Scheduling	No recommendations	--
Marketing	Pursue social media initiatives.	Social media has been added, however, it is handled on a Citywide basis through the Mayor's office. It has been effective this way.
	Add Google Translate functionality to website to offer multilingual information.	Was added in 2013
Vehicle and Facility Maintenance	Proceed with plans to replace older buses in fleet.	Aggressive replacement of fixed route vehicles began in 2015 and will continue into 2019. By Spring 2019, all fixed route buses will be within their FTA useful.
	Update Maintenance Procedures Manual to account for new paratransit fleet and reorganization in light of Deputy Transit Director's departure.	Maintenance manual was updated and there have been multiple re-organizations since the last review due to personnel changes and needs of the system.
	Pursue a capital program for scheduling building rehabilitation over the next five years.	Numerous components at both facilities have been replaced over the past 5 years through the Capital Improvement program including replacement of generators at both facilities
Information Technology	Initiate a study of peer systems' best practices and cost efficiency in transit IT support to determine the best course of action for managing IT support, and work with the city to implement an improvement plan.	Never completed, however, City IT outsourced HelpDesk function 2+ years ago and support has greatly improved. 3 of the 4 "Transit" applications are hosted by vendor which has been very beneficial.
	As capital funding allows, merge capabilities of Trapeze software and AVL locator system to improve paratransit operations efficiency.	Merging never occurred but new AVL system for fixed route and paratransit were deployed in 2015 and late 2016. The new paratransit system, Ecolane, has improved paratransit efficiency by over 20%.

Table ii: Peer Analysis Performance Summary

Performance Objective	Performance Measure	Single Year: 2016		Trend Analysis 2012-2016	
		WI Peer Comparison	US Peer Comparison	WI Peer Comparison	US Peer Comparison
Cost Effectiveness	Operating Expenses Per Passenger Trip	▼	●	▲	▲
Cost Efficiency	Operating Expenses Per Revenue Hour	▼	▲	▲	▲
Service Effectiveness	Passenger Trips Per Revenue Hour	▼	●	●	●
Market Penetration	Passenger Trips Per Capita	▼	●	▼	●
	Revenue Hours Per Capita	●	●	●	▲
Passenger Revenue Effectiveness	Average Fare Per Passenger Trip	▲	▲	▲	●
	Operating Ratio	▲	▲	▲	▲
	Subsidy Per Passenger Trip	▼	●	▲	▲

Key to Symbols	
▲	Better than peer average
●	Worse than peer average, but within satisfactory range (+/- one standard deviation)
▼	Outside satisfactory range

Table iii: Assessment of Policy- and Decision-Making Processes

Criterion	Rating
The manager has sufficient authority and control to manage in an efficient manner.	▲
The lines of authority, responsibility, and accountability are well defined and appropriate.	▲
The lines of communication provide for sufficient exchange of information to ensure decision makers are knowledgeable on issues.	▲
The current organizational structure is conducive to effective and efficient operation.	▲

Key to Symbols	
▲	Structures and procedures are conducive to effective operations
●	Structures and procedures are adequate with room for improvement
▼	Structures and procedures are insufficient

Table iv: Summary Assessment of Functional Areas

Functional Area	Rating
Transportation Operations	▲
Vehicle and Facility Maintenance	▲
Finance	▲
Planning and Scheduling	▲
Marketing	▲

Key to Symbols	
▲	Structures and procedures are conducive to effective operations
●	Structures and procedures are adequate with room for improvement
▼	Structures and procedures are insufficient

Table v: Summary of Recommendations

Functional Area	Recommendation	Priority
Policy- and Decision-Making Processes	No recommendations	--
Transportation Operations	Update automatic vehicle location (AVL) software, or seek additional training from the vendor, to allow for consistent on-time performance monitoring of fixed-route service.	High
	Station a lift-equipped supervisory vehicle at the Downtown Transit Center (DTC) for missed transfers and to respond to delays or other passenger events.	Medium
	Prior to implementation of upgraded automatic vehicle location (AVL) technology, collect departure times at scheduled timepoints along fixed routes for all trips. Using these data, develop a process for systematically monitoring on-time performance in comparison to the established on-time performance goal.	Medium
	Increase extra board to accommodate expected increase in driver turnover rate.	Low
	The City should consider moving forward with proposed changes to traffic operations on North Street in downtown Waukesha. Reconfiguring the roadway from one-way to two-way operations would improve transit operations and safety.	Low
Vehicle and Facility Maintenance	Conduct an analysis and peer review to determine if electric buses are a desired and feasible investment for Waukesha Metro Transit; stay informed on funding sources available for fleet modernization, including the FTA Section 5339 Low or No Emission Vehicle Program.	Low
Finance	The City should explore possibilities for collecting stable operating local share contributions from the City of Pewaukee; doing so could result in opportunities to expand service and improve relatively poor market penetration performance.	High
	Conduct a ridership and fare analysis that considers the impacts of fares on overall ridership and trip lengths; pair with a survey to better understand the income levels of existing and potential customers.	Low
Planning and Scheduling	Update the Waukesha Metro Transit Development Plan to comprehensively evaluate existing service, conduct market analysis and determine transportation needs, and provide strategic direction for next several years. Seek an FTA Section 5304 Statewide Transportation Planning grant from WisDOT, or assistance from SEWRPC, to help fund this effort.	High
	Work with MCTS to address missed transfers between Route 1 and GoldLine.	High
	Develop an ADA Transition Plan to assess conditions and prioritize bus stop improvements. Establish a yearly budget allocation for continued ADA accessibility improvements until all bus stops are ADA-compliant.	Medium
Marketing	Conduct a customer satisfaction survey at least once every two years, and use the results to guide service improvements and strategic planning efforts.	High
	Increase social media presence to better communicate with existing customers and attract new ones; create Metro Transit-specific accounts or work collaboratively with City staff to host transit content on existing citywide accounts.	Medium

PART I: SYSTEM OVERVIEW

The City of Waukesha provides public transit as Waukesha Metro Transit (Metro Transit), serving nearly 900,000 passengers annually. Metro Transit operates local fixed-route bus service and Americans with Disabilities Act (ADA) complementary paratransit. The Metro Transit fleet includes 26 revenue vehicles, most of which are heavy-duty, 35-foot buses.

Additionally, Metro Transit administers Waukesha County Transit (County Transit) service on behalf of Waukesha County. County Transit offers four commuter bus express routes with service to Milwaukee from Waukesha, Oconomowoc, and Mukwonago. The service is operated by Wisconsin Coach Lines. The 2018 MPR focused on Metro Transit, while considering relevant aspects of County Transit.

Fixed-Route Bus Service

Metro Transit operates 10 regular fixed routes (Table 1, Figure 1). In addition, it operates seven routes on Saturdays and five operate on Sundays.[1] On average, weekday service operates from about 6:00 a.m. to 8:00 p.m.; Saturday service from 8:30 a.m. to 8:00 p.m.; and Sunday service from 9:30 a.m. to 7:00 p.m. This span of service is better than many small urban transit systems in Wisconsin. Operating within a hub-and-spoke, timed-transfer (or pulse) system, all Metro Transit routes serve the Downtown Transit Center (DTC) to facilitate transfers.

Table 1. Fixed-Route Bus Service Summary: Waukesha Metro Transit

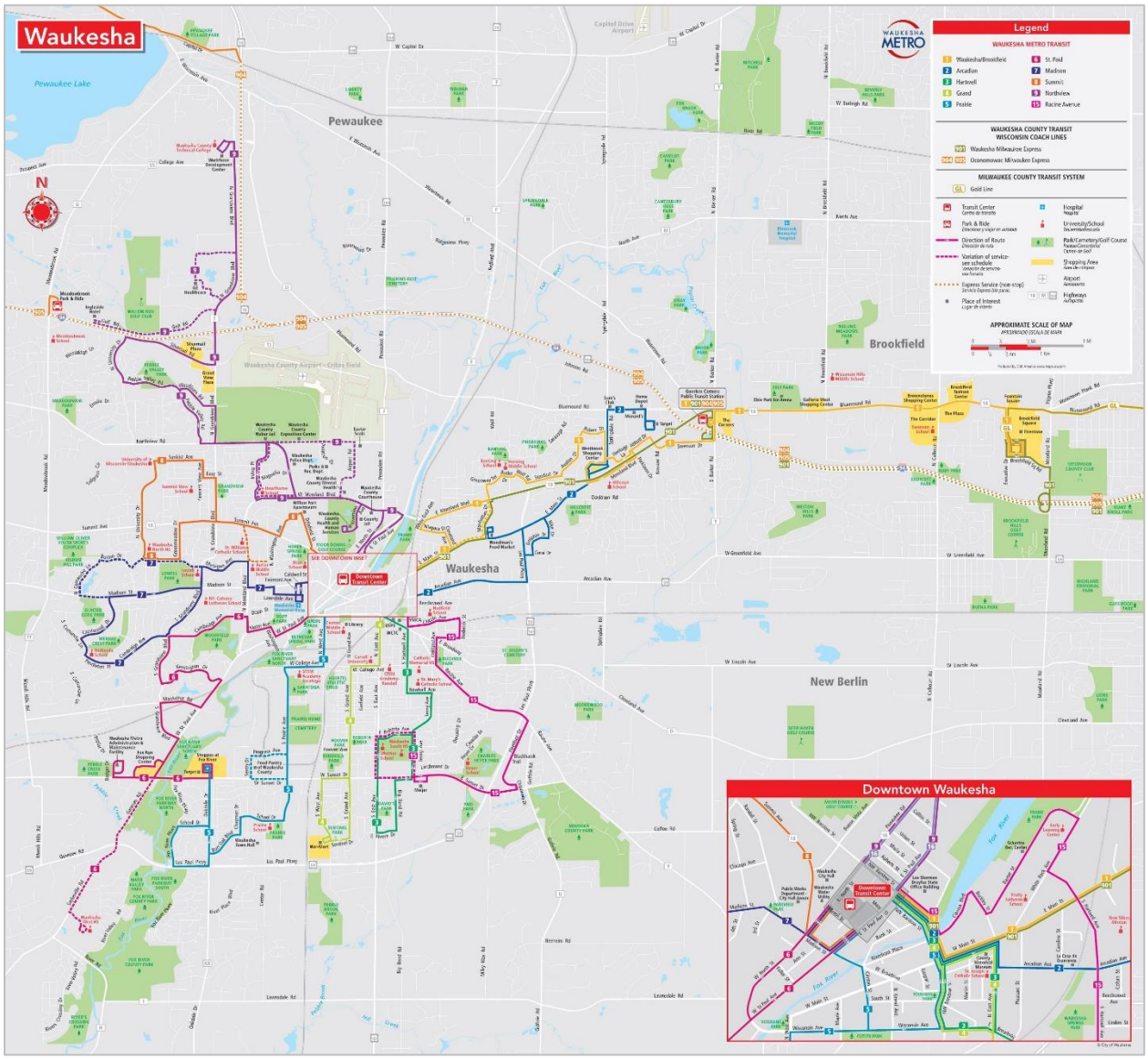
Frequency **(in minutes)** between buses *Frecuencia **(en minutos)** entre los autobuses*		Monday through Friday *Lunes a viernes*			Saturday *Sábado*		Sunday *Domingo*
Number *Número*	**Route** *Ruta*	Peak *Punta*	Midday *Mediodía*	Evening *Noche*	Daytime *Día*	Evening *Noche*	Daytime *Día*
1	Waukesha/Brookfield	30-35	30	30	30	30	30
2	Arcadian	60-70	60	60	60	60	60
3	Hartwell	35-70	60	--	60	--	--
4	Grand	30-35	30-35	60	60	60	60
5	Prairie	60-70	60	--	60	60	60
6	St. Paul	60-70	60	--	60	60	60
7	Madison	60-70	60	60	60	--	60
8	Summit	30-35	30-35	60	60	--	60
9	Northview	35-60	30-60	60	60	--	--
15	Racine Avenue	60-70	60	--	60	--	--

Source: Waukesha Metro Transit

[1] About half of the Saturday and Sunday routes are combined variations of weekday routes (e.g., Route 3/15, Route 5/6, and Route 7/8).

Metro Transit Route 16 was eliminated as part of service changes effective January 2019. Route 16 provided a single morning trip designed to serve an Easter Seals training center program; the program ended in 2018, and Route 16 service hours were subsequently reinvested in Route 3.

Figure 1. Fixed-Route System Map: Waukesha Metro Transit



Source: Waukesha Metro Transit

County Transit also provides four commuter bus express routes connecting Waukesha, Oconomowoc, and Mukwonago with Milwaukee on weekdays (Table 2). These routes are operated by Wisconsin Coach Lines via contract with County Transit. Most of the service is designed to meet the needs of traditional work shifts for jobs in Milwaukee, but Route 901 does include some reverse commute and midday service between Milwaukee and Waukesha via Brookfield. County Transit implemented significant service changes in early January 2019 due to declining ridership, sub-standard performance, and the

presence of service alternatives.[2] The service changes included a net elimination of five daily trips, which is estimated to save County Transit nearly $100,000 annually.[3]

Table 2. Fixed-Route Bus Service Summary: Waukesha County Transit

Frequency **(in minutes)** between buses *Frecuencia **(en minutos)** entre los autobuses*		Monday through Friday *Lunes a viernes*			Saturday *Sábado*		Sunday *Domingo*
Number ***Número***	**Route** ***Ruta***	Peak *Punta*	Midday *Mediodía*	Evening *Noche*	Daytime *Día*	Evening *Noche*	Daytime *Día*
901	Waukesha/ Milwaukee Express	10-60	--	--	--	--	--
904	Oconomowoc/ Milwaukee Express	2 trips	--	--	--	--	--
905	Oconomowoc/ Milwaukee Express	10-95	--	--	--	--	--
906	Mukwonago/ Milwaukee Express	25-35	--	--	--	--	--

Source: Waukesha Metro Transit

In addition to the four commuter bus routes shown in Table 2, Waukesha County pays for the operation of Route 79 and a portion of the GoldLine, which connect Menomonee Falls and Brookfield with downtown Milwaukee, respectively.[4] No City of Waukesha funds are used for either service. Route 79 and the GoldLine are operated by Milwaukee Transport Services (MTS), the operating entity of Milwaukee County Transit System (MCTS). Both Route 79 and the GoldLine are marketed to the public as part of the MCTS bus network.

Paratransit

The ADA complementary paratransit for Metro Transit – known as Metrolift – is provided during the same hours as the fixed-route system. Metrolift is an origin-to-destination, curb-to-curb, shared ride system available only to certified riders. Reservations can be made by phone 24 hours a day, but must be made no later than 4:00 p.m. the day before the requested ride. The Metrolift service area adheres to the ¾-mile minimum distance from fixed bus routes required by the ADA.

Separate from Metrolift is Waukesha County Paratransit. Operated through contract with Transit Express, Waukesha County Paratransit is ADA complementary paratransit available weekdays within one mile of County Transit Route 901. ADA complementary paratransit for GoldLine (portions of which are paid for by Waukesha County) is covered by MCTS Transit Plus paratransit service.

[2] Waukesha County Transit measures route performance against a standard of 10 passengers per revenue hour.
[3] County Transit eliminated four trips on Route 901 and one reverse commute trip on Route 905.
[4] The portion of the GoldLine that Waukesha County pays for operates on Bluemound Road from 124th Street to Brookfield Square Mall. Service operates seven days a week and links up with the Waukesha Metro Transit Route 1 at the Mall.

Fares

Metro Transit offers several fare types to its customers, including a 31-day passes, 10-ride cards, and day passes (Table 3). Discounted fares are available for students, seniors, people with disabilities, and Medicare card holders on fixed-route bus services. The Metrolift fare is $4.00, double the fixed-route base fare.

Metro Transit offers free 90-minute transfers on its routes. Passengers can transfer between Metro Transit Route 1 and the MCTS GoldLine at Brookfield Square in Brookfield for no additional fee. Transfers from County Transit routes (901, 904, 905, and 906) to Metro Transit are free; transfers to County Transit routes require an additional $2.00 fare.

Table 3. Fare Structure: Waukesha Metro Transit

Service	Type	Category	Cost
Waukesha Metro Transit Fixed-Route	Cash	Adult	$2.00
		Youth (Ages 5-18) *	$1.25
		Senior/Disabled^	$1.00
		Day Pass	$5.00
		Children (Age 4 and Under)	Free
	31-Day Pass	Adult	$46.00
		Youth (Ages 5-18) *	$30.00
		Senior/Disabled^	$35.00
		Summer Youth Pass **	$35.00
	10-Ride Card	Adult	10 for $18.00
		Youth*	10 for $12.00
		Senior/Disabled^	10 for $10.00
	Transfers from Metro Transit	--	Free
	Transfers from MCTS	--	Free
Metrolift	Cash	Certified Riders	$4.00
	2-Ride Card	Certified Riders	$8.00

* Ages 5-18 with valid identification of enrollment in an elementary or secondary school
^ Medicare or Metro ID required
** Ages 5-18 with valid school ID; good for June, July & August

County Transit service has a separate fare structure from Metro Transit. Fares depend on where the passenger boards/alights within Waukesha County. The service area is split into two zones, with higher fares for the longer trips made from/to the western zone (Table 4). The western zone includes Route 904 west of Goerkes Corners; Route 905 west of Meadowbrook Transit Station; and Route 906 west of Big Bend Park-and-Ride. The eastern zone includes all of Route 901 and the remaining service areas of Routes 904, 905, and 906.

Table 4. Fare Structure: Waukesha County Transit

Service	Type	Category	Eastern Zone Cost	Western Zone Cost
Waukesha County Transit Express Routes	Cash	Adults	$3.50	$4.25
		Student*	$2.50	$3.25
		Youth (Ages 5-17)	$2.50	$3.25
		Senior/Disabled^	$1.75	$2.00
		Children (Age 4 and Under)	Free	Free
	Commuter Book	--	10% Discount	10% Discount
	Transfers from Metro	--	$2 Discount	--
	Transfers from MCTS	--	$0.50 Discount	$0.50 Discount
Waukesha County Paratransit	Cash (Certified Riders)	Within ¾-mile of Route 901 Stops	$7.00	--
		Extended Service Area	+$3.00	--

* With valid identification of enrollment
^ Medicare or Metro ID required

Waukesha County Paratransit certified riders are charged a base fare of $7.00 for service within ¾-mile of bus stops served by Route 901. For an additional $3.00, passengers can travel within one mile of Route 901 bus stops and throughout the larger Metrolift service area, so long as the trip origin or destination is within the regular Waukesha County Paratransit service area.

Fleet

Summarized in Table 5, Metro Transit's active revenue fleet consists of 20 heavy-duty buses for fixed-route service, and 6 light-duty buses for Metrolift service. Sixteen of the 20 fixed-route buses are operated in peak service – a spare ratio of 25 percent. Five Metrolift buses operate in peak service – a spare ratio of 20 percent.

Per Federal Transit Administration (FTA) rolling stock useful life policy guidelines, medium-size, light-duty buses have a minimum useful life of at least 5 years or 150,000 miles; and large, heavy-duty buses have a minimum useful life of at least 12 years or 500,000 miles.[5] Based on these thresholds, the entire Metrolift fleet is due for replacement or will be soon and the fixed-route fleet is not. Five of Metro Transit's fixed-route buses exceed FTA's minimum useful life age threshold; just one vehicle exceeds FTA's mileage threshold (Table 5).

[5] Federal Transit Administration. Circular 5010.1E: Award Management Requirements. 2017. Page IV-25. https://www.transit.dot.gov/sites/fta.dot.gov/files/docs/Grant%20Management%20Requirements%20Circular_5010-1E_1.pdf

Table 5. Revenue Fleet

Service	Quant.	Make/Model	Vehicle Type	Year	Age	Average Mileage*	Over Age	Over Mileage
Metrolift	3	Bluebird Xcel	Medium-Size, Light-Duty. 25-35 Ft	2007	11	207,079	3	3
Metrolift	3	Arboc	Medium-Size, Light-Duty. 25-35 Ft	2011	7	101,683	3	--
Fixed	5	Gillig Low Floor	Large, Heavy-Duty, 35-40 Ft	2004	14	483,500	5	1
Fixed	3	Gillig Low Floor	Large, Heavy-Duty, 35-40 Ft	2008	10	321,460	--	--
Fixed	3	Gillig Low Floor	Large, Heavy-Duty, 35-40 Ft	2015	3	117,633	--	--
Fixed	5	New Flyer Xcel.	Large, Heavy-Duty, 35-40 Ft	2015	3	85,992	--	--
Fixed	3	New Flyer Xcel.	Large, Heavy-Duty, 35-40 Ft	2016	2	76,651	--	--
Fixed	2	New Flyer Xcel.	Large, Heavy-Duty, 35-40 Ft	2017	1	44,750	--	--
Metrolift	**6**			**Avg.**	**9.0**	**154,381**	**6**	**3**
Fixed	**20**			**Avg.**	**5.9**	**200,035**	**5**	**1**
All	**26**						**11**	**4**

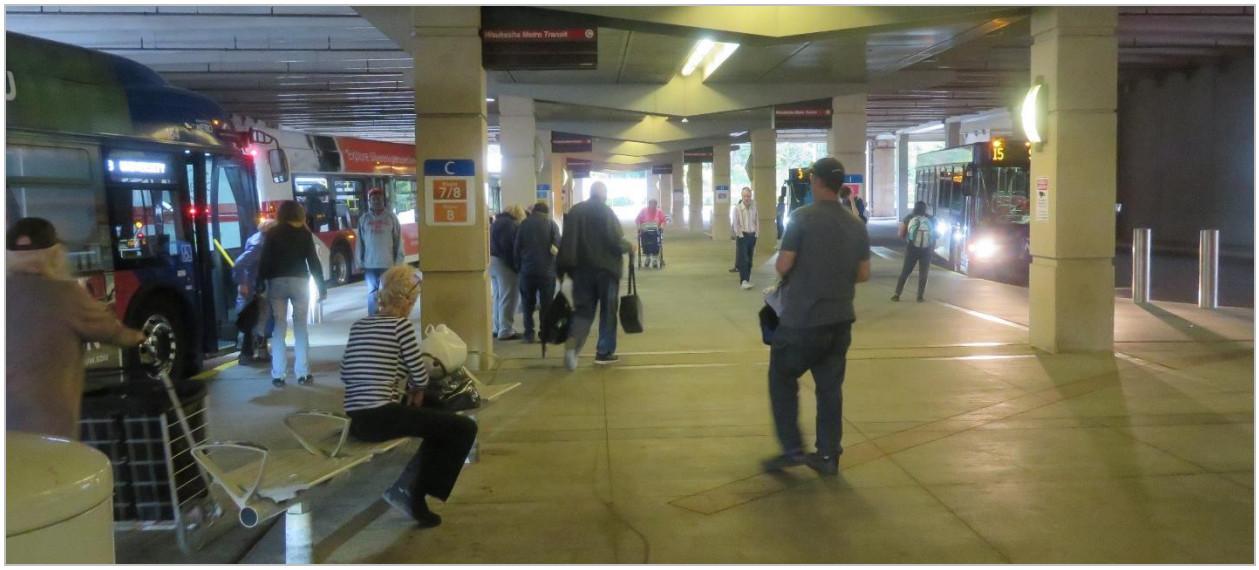
Source: Waukesha Metro Transit
*As of 6/19/2018

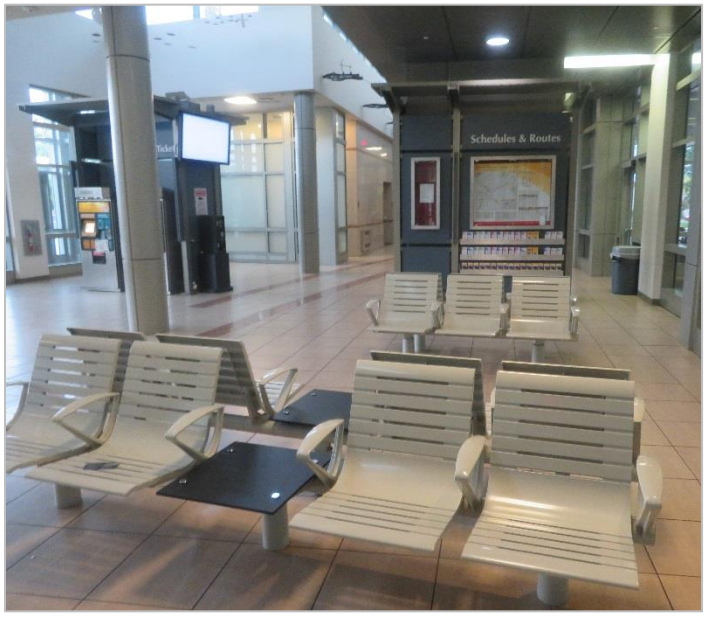
Facilities

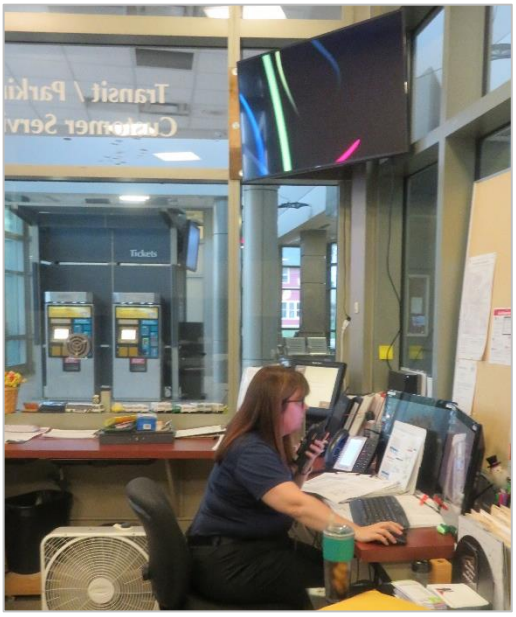
There are two primary Metro Transit facilities: the DTC located in downtown Waukesha and the administration and maintenance facility three miles to its southwest. All Metro Transit routes and County Transit Route 901 serve the DTC. Constructed in 2004, the DTC is a clean, modern facility that acts as the nexus of the Metro Transit fixed-route network. The facility includes 13 bus bays – up to 10 of which are occupied at a time in peak service.

Passenger amenities at the DTC include a climate-controlled indoor public waiting area, public restrooms, a customer service window, ticket machines, and detailed schedule and route information displays. It also contains a drivers' lounge. Supervisors are staffed at the facility to oversee operations, address operational issues, and interact with the public. All in-person customer service business takes place at the DTC. The DTC also includes a two-floor parking ramp with low daily parking rates operated by the City of Waukesha Parking Services.

The administration and maintenance facility, located on Badger Drive, was constructed in 1985 and expanded upon in 1995. It consists of offices and meeting space, a driver break room, maintenance areas, and a bus garage. All revenue vehicles are stored indoors. The facility is clean and well-maintained.







Top: Passengers among the DTC bus bays. Bottom left: DTC passenger waiting area with seating, ticket vending, schedule information, and public restrooms. Bottom right: Supervisor working at the customer service window.

Status of Prior Review Recommendations

An MPR of the City of Waukesha/Waukesha Metro Transit was last completed in 2011. All the recommendations from that review have been adopted or adequately addressed. Table 6 summarizes the status of recommendations included in the 2011 MPR.

Table 6. Summary of Recommendations from Previous Management Performance Review (2011)

Functional Area	Recommendation	Status (Presented as Reported by Waukesha Metro Transit Staff)
Accounting, Finance, and Purchasing	Conduct an analysis to determine the potential ridership and revenue effects of offering a day pass with unlimited transfers for weekday service, in addition to the current weekend day pass.	In March 2013, a Day Pass was introduced when swipe cards replaced paper passes, tickets and transfers.
Personnel and Labor Relations	No recommendations	--
Transportation Operations	No recommendations	--
ADA Paratransit Service	Consider increasing paratransit fare to $4.00, double the fixed route fare.	Paratransit fare was doubled to $4 in June 2012
Safety Management and Training	No recommendations	--
Planning	Prior to selecting a strategy for service reductions, the system should conduct a survey of Sunday mobility to gauge potential impact on mobility and access to jobs.	Comprehensive survey of service completed in 2013 to look at efficiency of every route and every day of operation of route. Sunday service is viable and provides needed mobility to our community.
	Pursue reinstatement of APTA membership.	This is not feasible given APTA's fee structure. Costs far exceed benefit. Considering membership to CTAA which is more in tune with the needs of small operations.
Scheduling	No recommendations	--
Marketing	Pursue social media initiatives.	Social media has been added, however, it is handled on a Citywide basis through the Mayor's office. It has been effective this way.
	Add Google Translate functionality to website to offer multilingual information.	Was added in 2013
Vehicle and Facility Maintenance	Proceed with plans to replace older buses in fleet.	Aggressive replacement of fixed route vehicles began in 2015 and will continue into 2019. By Spring 2019, all fixed route buses will be within their FTA useful.
	Update Maintenance Procedures Manual to account for new paratransit fleet and reorganization in light of Deputy Transit Director's departure.	Maintenance manual was updated and there have been multiple re-organizations since the last review due to personnel changes and needs of the system.
	Pursue a capital program for scheduling building rehabilitation over the next five years.	Numerous components at both facilities have been replaced over the past 5 years through the Capital Improvement program including replacement of generators at both facilities
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	As capital funding allows, merge capabilities of Trapeze software and AVL locator system to improve paratransit operations efficiency.	Merging never occurred but new AVL system for fixed route and paratransit were deployed in 2015 and late 2016. The new paratransit system, Ecolane, has improved paratransit efficiency by over 20%.

PART II: ANALYSIS OF SYSTEM PERFORMANCE

Part II of this report examines, quantitatively, Metro Transit's performance over the last several years. Since there are no recognized industry standards for most measures of transit system performance, widespread practice is to compare the performance of a system to the average values of a peer group of systems.

The following peer analysis compares Metro Transit *fixed-route bus* performance to a Wisconsin peer group and a national peer group in five categories using eight specific measures, summarized in Table 7. As part of its Cost Efficiency Report and MPR initiatives, WisDOT typically measures transit system performance using at least six core measures, shown below, in accordance with section 85.20 of the Wisconsin Statutes.

Table 7. Performance Objectives and Performance Measures

Performance Objective	Performance Measure	WisDOT Core Measure
Cost Effectiveness	Operating Expenses Per Passenger Trip	X
Cost Efficiency	Operating Expenses Per Revenue Hour	X
Service Effectiveness	Passenger Trips Per Revenue Hour	X
Market Penetration	Passenger Trips Per Capita	X
	Revenue Hours Per Capita	X
Passenger Revenue Effectiveness	Average Fare Per Passenger Trip	
	Operating Ratio (Passenger Revenues Per Operating Expenses)	X
	Subsidy Per Passenger Trip	

This peer performance analysis excludes data from demand response and commuter bus modes; analyzing Metro Transit fixed-route bus data *alone* allows for a more direct comparison with peer transit systems in Wisconsin and around the Midwest.

Each measure in Table 7 is used to assess Metro Transit's fixed-route performance in two ways:

- **Single Year: Comparison to peer average for most the current year.** Year 2016 National Transit Database (NTD) data are used. This is the most recent year for which NTD data were available for all peer systems at the time of analysis. Consistent with the WisDOT approach, performance is considered "satisfactory" within one standard deviation of the peer average. The system's performance is considered "outside the satisfactory range" (unsatisfactory) if it falls more than one standard deviation from the peer average.
- **Multi-Year Trend Analysis: Comparison to peer average for annual rate of change.** NTD data from 2012 to 2016 are used. The annual rate of change from 2012 to 2016 is calculated as follows:

$$\text{Annual rate of change} = (\text{Value}_{2016}/\text{Value}_{2012})^{¼} - 1$$

For the trend analysis, the system's annual rate of change is compared to that of the average of the peer group. Again, the system's trend performance is considered "satisfactory" within one standard deviation of the peer group average. Beyond one standard deviation from the peer group average, the system's trend performance is considered "outside the satisfactory range."

Peer Groups

The selection of the peer groups for Metro Transit was based on a review of small urban bus systems in the NTD, an FTA database. NTD was used because its data are readily available and consistently reported. Two peer groups were selected for comparison: a Wisconsin peer group and a national peer group (Table 8, Table 9). Systems' fixed-route bus data (excluding any other modes operated) were used in the selection of peers and the subsequent analyses. County Transit commuter bus data were not included in this analysis.

This review recognizes the limitations of using other Wisconsin medium bus systems for peer comparison. Each system operates in a vastly different environment, serves different markets, and has a unique organizational structure. However, Wisconsin peer systems also provide context for operating conditions within the state. For this reason, it is customary in the MPR to compare medium bus systems to others in Wisconsin.

Table 8 contains 2016 operating statistics for Metro Transit and the selected Wisconsin peer systems. These operating statistics are the basis for the performance measures included in this analysis.

Table 8. 2016 Operating Statistics – Wisconsin Peer Group

System Name	City, State	Revenue Hours	Passenger Trips	Operating Expenses	Passenger Revenues	Service Area Population
Valley Transit	Appleton, WI	67,186	1,036,081	$5,359,564	$847,420	216,154
Eau Claire Transit	Eau Claire, WI	48,255	869,952	$4,075,723	$774,618	74,601
Green Bay Metro	Green Bay, WI	79,406	1,323,000	$5,827,880	$896,921	175,748
Kenosha Area Transit	Kenosha, WI	63,323	1,247,739	$5,531,266	$632,362	99,894
Municipal Transit	La Crosse, WI	58,547	1,032,964	$5,123,647	$645,204	71,201
GO Transit	Oshkosh, WI	37,653	914,364	$3,141,795	$462,812	66,083
RYDE	Racine, WI	77,010	1,172,205	$6,308,745	$1,079,727	112,100
Metro Transit	**Waukesha, WI**	**61,612**	**889,399**	**$5,442,496**	**$887,869**	**141,642**
Average		61,624	1,060,713	$5,101,390	$778,367	119,678
Metro Transit as a Percent of Average		**100%**	**84%**	**107%**	**114%**	**118%**

Source: National Transit Database, 2016.

In the development of the national peer group, an attempt was made to select peer systems in cold-weather states in the Midwest; specifically, those with relatively similar service area population and density, and similar transit service mix provided. The Urban Integrated National Transit Database (Urban iNTD) was used to develop an initial list of national peers.[6] This initial list was filtered to include only the most applicable peers.

The national peer group includes systems in Indiana, Iowa, Kansas, and South Dakota. Table 9 contains 2016 operating statistics for Metro Transit and the selected national peer systems. These operating statistics are the basis for the performance measures included in this analysis.

[6] Urban iNTD is a tool developed by the Florida Department of Transportation (FDOT), based on Transit Cooperative Research Program (TCRP) research; available at: http://www.ftis.org/urban_iNTD.aspx.

Table 9. 2016 Operating Statistics – National Peer Group

System Name	City, State	Revenue Hours	Passenger Trips	Operating Expenses	Passenger Revenues	Service Area Population
Cedar Rapids Transit	Cedar Rapids, IA	70,577	1,317,389	$7,105,877	$848,339	158,890
CITIBUS	Davenport, IA	56,822	1,228,300	$6,025,735	$416,402	99,685
Gary Public Transp. Corp.	Gary, IN	59,106	771,972	$5,228,017	$705,618	102,746
Sioux Area Metro	Sioux Falls, SD	64,389	837,474	$4,462,489	$497,250	130,390
Met. Transit Authority	Topeka, KS	55,616	1,155,180	$5,405,889	$1,024,673	127,473
Wichita Transit	Wichita, KS	116,116	1,233,899	$9,762,142	$1,420,689	382,386
Metro Transit	**Waukesha, WI**	**61,612**	**889,399**	**$5,442,496**	**$887,869**	**141,642**
Average		69,177	1,061,945	6,204,664	828,691	163,316
Metro Transit as a Percent of Average		**89%**	**84%**	**88%**	**107%**	**87%**

Source: National Transit Database, 2016.

Performance Measures: Results

This section summarizes Metro Transit's performance over the five-year period and results of the single-year (2016) and multi-year (2012-2016) analyses for each of the eight performance measures reviewed in this MPR. Metro Transit is compared to its Wisconsin and national peer groups for each of the eight performance measures. Table 20 summarizes Metro Transit's performance relative to peer systems across all measures.

Metro Transit Five-Year Summary

Table 10 and Table 11 show Metro Transit's operating statistics and performance measures, respectively, for 2012 through 2016. The average annual rate of change for the five-year period is calculated for each statistic and measure.

Table 10. Operating Statistics – Waukesha Metro Transit, 2012-2016

Operating Statistic	2012	2013	2014	2015	2016	Annual Rate of Change
Revenue Hours	62,171	62,556	60,485	61,015	61,612	-0.2%
Passenger Trips	1,055,906	1,017,518	963,955	938,423	889,399	-4.2%
Operating Expenses	$6,031,182	$5,906,688	$5,689,004	$5,441,857	$5,442,496	-2.5%
Passenger Revenue	$1,022,954	$991,233	*$344,003	$910,271	$887,869	-3.5%
Service Area Population	141,642	141,642	141,642	141,642	141,642	0.0%

Source: National Transit Database, 2012-2016.
*Passenger revenue reported for 2014 was abnormal and thus excluded from performance measures

Table 11. Performance Measures – Waukesha Metro Transit, 2012-2016

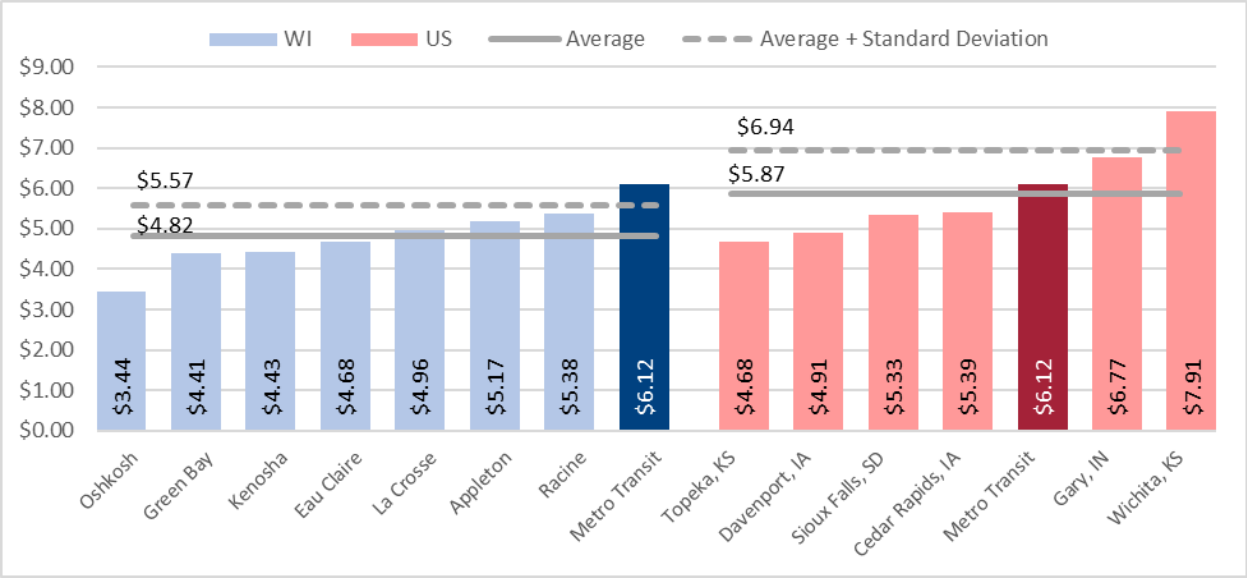
Performance Measure	2012	2013	2014	2015	2016	Annual Rate of Change
Operating Expense Per Passenger Trip	$5.71	$5.80	$5.90	$5.80	$6.12	1.7%
Operating Expense Per Revenue Hour	$97.01	$94.42	$94.06	$89.19	$88.33	-2.3%
Passenger Trips Per Revenue Hour	17.0	16.3	15.9	15.4	14.4	-4.0%
Passenger Trips Per Capita	7.5	7.2	6.8	6.6	6.3	-4.2%
Revenue Hours Per Capita	0.44	0.44	0.43	0.43	0.43	-0.2%
Average Fare Per Passenger Trip	$0.97	$0.97	$0.97	$0.97	$1.00	0.8%
Operating Ratio	17.0%	16.8%	16.8%	16.7%	16.3%	-1.0%
Subsidy Per Passenger Trip	$4.74	$4.83	$4.83	$4.83	$5.12	1.9%

Source: National Transit Database, 2012-2016.

Cost Effectiveness

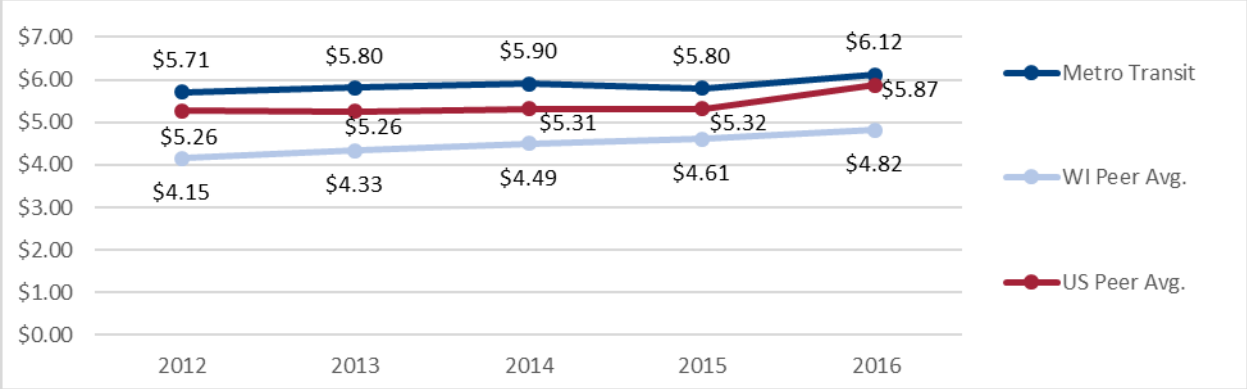
Cost effectiveness addresses transit use in relation to the level of resources expended. The primary measure for comparison under this objective is *operating expenses per passenger trip*. The lower the cost per passenger trip, the more cost effective the service.

Figure 2. Operating Expenses Per Passenger Trip, 2016 Peers



Source: National Transit Database, 2016.

Figure 3. Operating Expenses Per Passenger Trip Compared to Peer Averages, 2012-2016



Source: National Transit Database, 2012-2016.

Table 12. Operating Expenses Per Passenger Trip, 2012-2016 Trend Performance

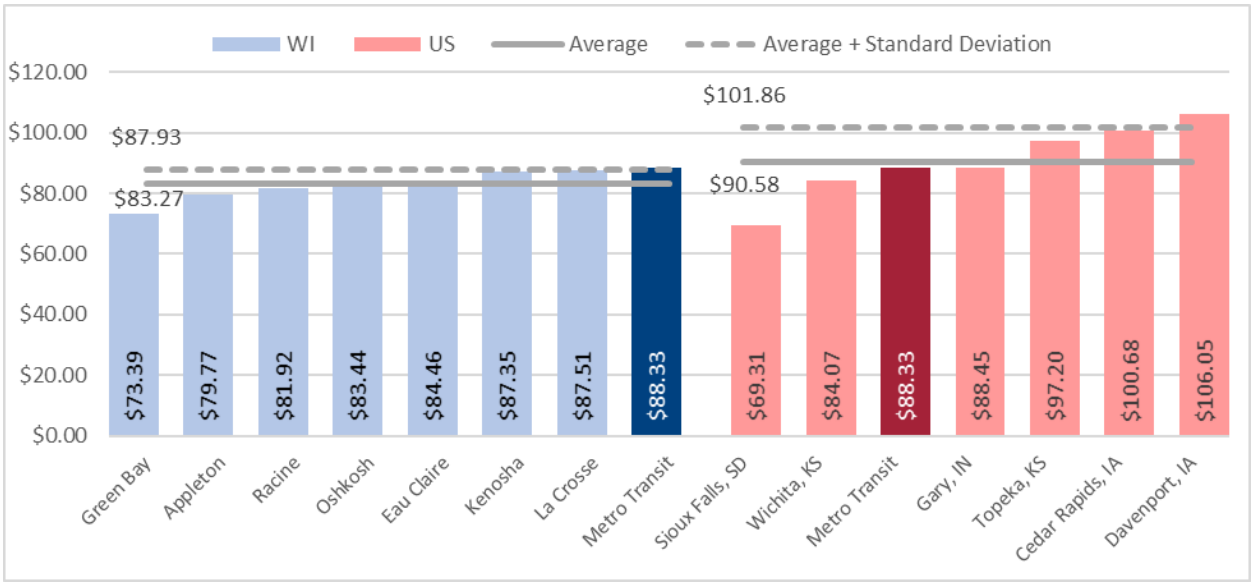
Peer Group	Annual Rate of Change			
	Average	Std. Dev.	Satisfactory Range	Metro Performance Relative to Peer Group
Metro Transit	1.7%	--	--	--
Wisconsin Peer Group	4.0%	1.8%	4.0% to 5.8%	Better than average
National Peer Group	2.2%	4.4%	2.2% to 6.6%	Better than average

Source: National Transit Database, 2012-2016.

Cost Efficiency

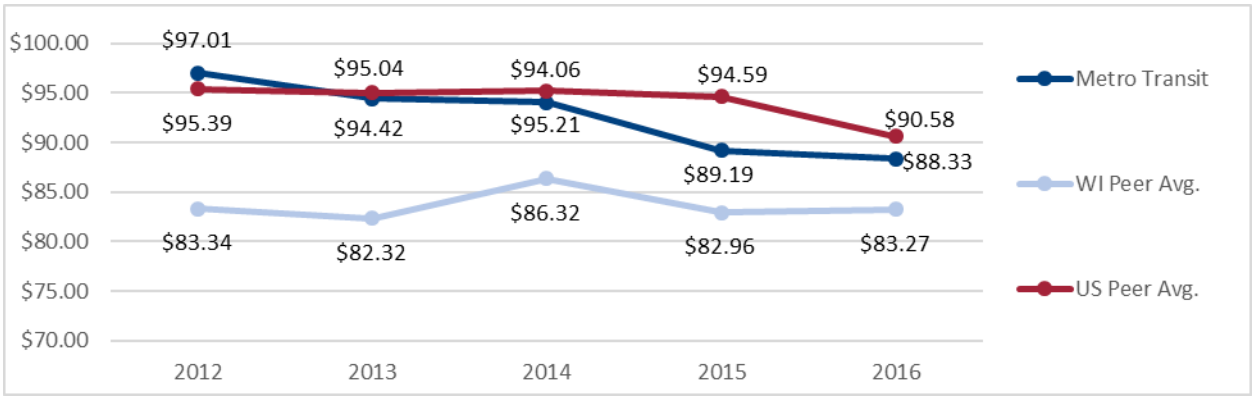
Cost efficiency examines the amount of service produced in relation to the amount of resources expended. *Operating expenses per revenue hour* is the measure used to assess service efficiency.

Figure 4. Operating Expenses Per Revenue Hour, 2016 Peers



Source: National Transit Database, 2016.

Figure 5. Operating Expenses Per Revenue Hour Compared to Peer Averages, 2012-2016



Source: National Transit Database, 2012-2016.

Table 13. Operating Expenses Per Revenue Hour, 2012-2016 Trend Performance

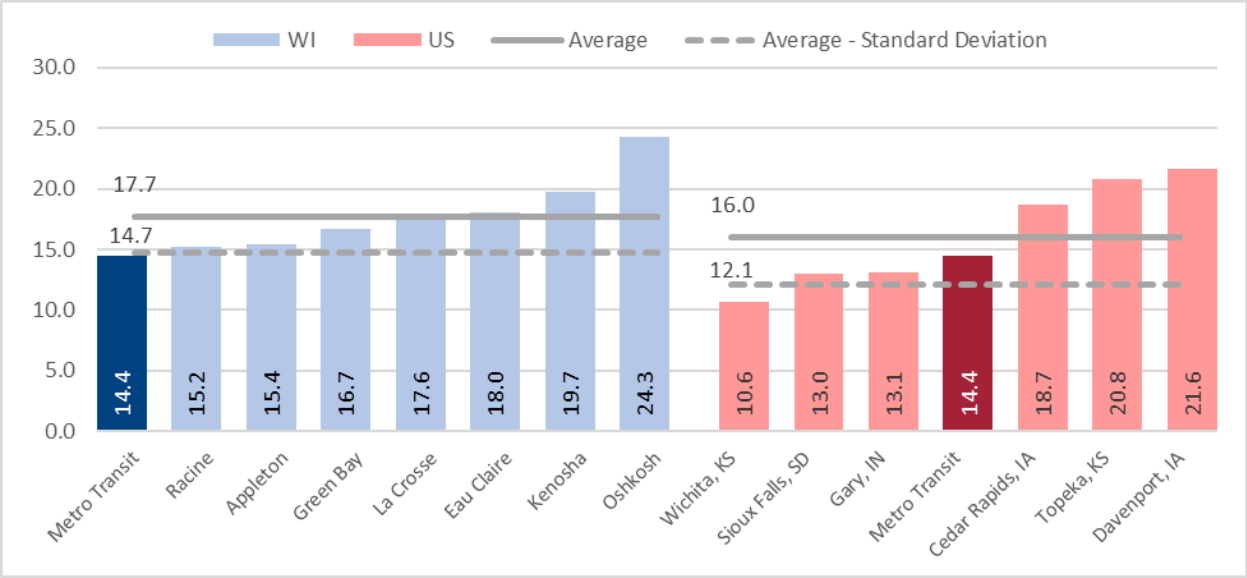
Peer Group	Annual Rate of Change			
	Average	Std. Dev.	Satisfactory Range	Metro Performance Relative to Peer Group
Metro Transit	-2.3%	--	--	--
Wisconsin Peer Group	0.0%	1.4%	0.0% to 1.4%	Better than average
National Peer Group	-1.4%	2.0%	-1.4 to 0.7%	Better than average

Source: National Transit Database, 2012-2016.

Service Effectiveness

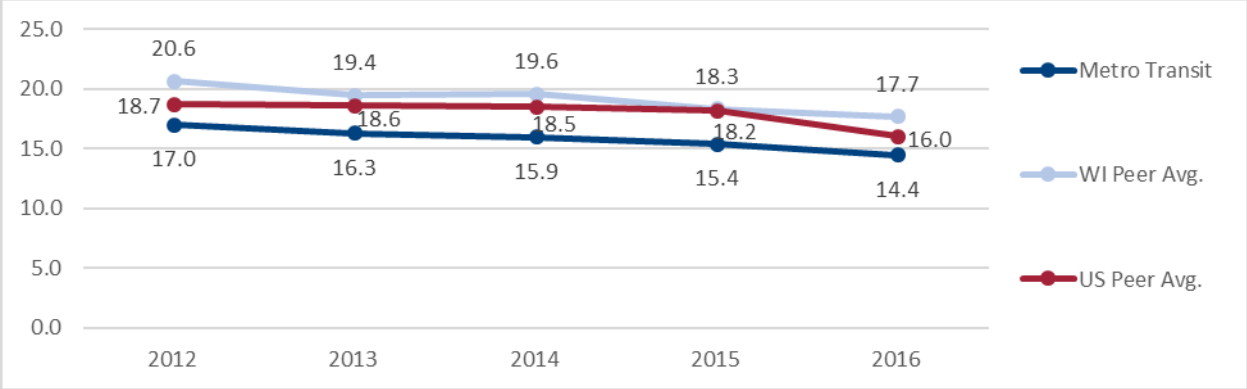
Service effectiveness is a measure of the consumption of public transportation service in relation to the amount of service available. *Passenger trips per revenue hour* is the measure used to assess service effectiveness.

Figure 6. Passenger Trips Per Revenue Hour, 2016 Peers



Source: National Transit Database, 2016.

Figure 7. Passenger Trips Per Revenue Hour Compared to Peer Averages, 2012-2016



Source: National Transit Database, 2012-2016.

Table 14. Passenger Trips Per Revenue Hour, 2012-2016 Trend Performance

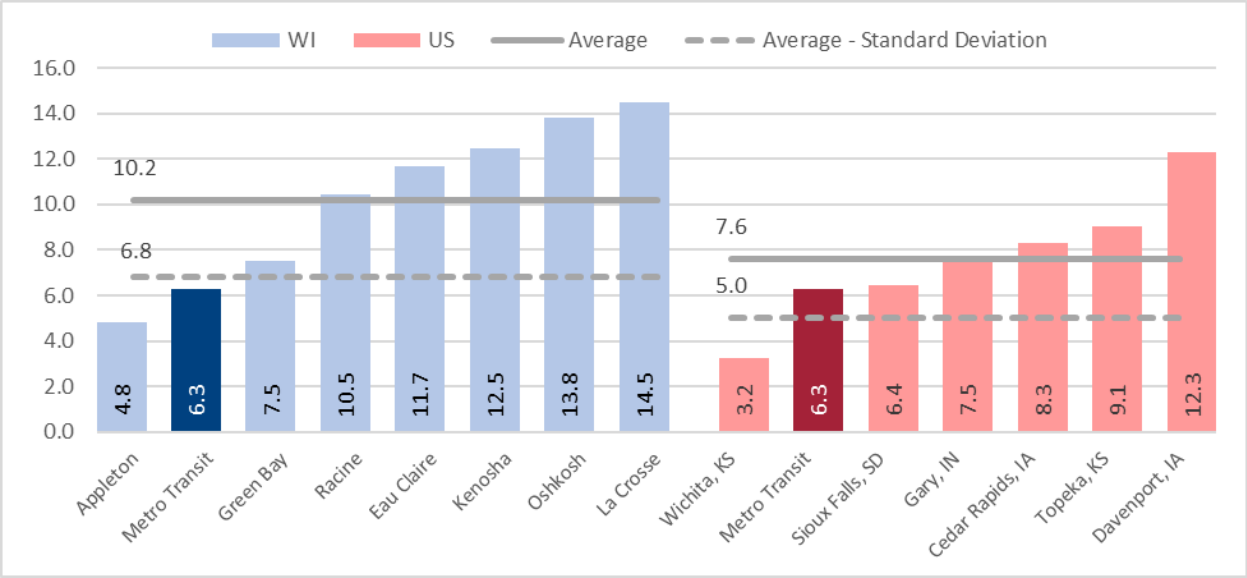
Peer Group	Annual Rate of Change			
	Average	Std. Dev.	Satisfactory Range	Metro Performance Relative to Peer Group
Metro Transit	-4.0%	--	--	--
Wisconsin Peer Group	-3.8%	1.6%	-5.4% to -3.8%	Worse, but within satisfactory range
National Peer Group	-3.3%	5.2%	-8.4% to -3-3%	Worse, but within satisfactory range

Source: National Transit Database, 2012-2016.

Market Penetration

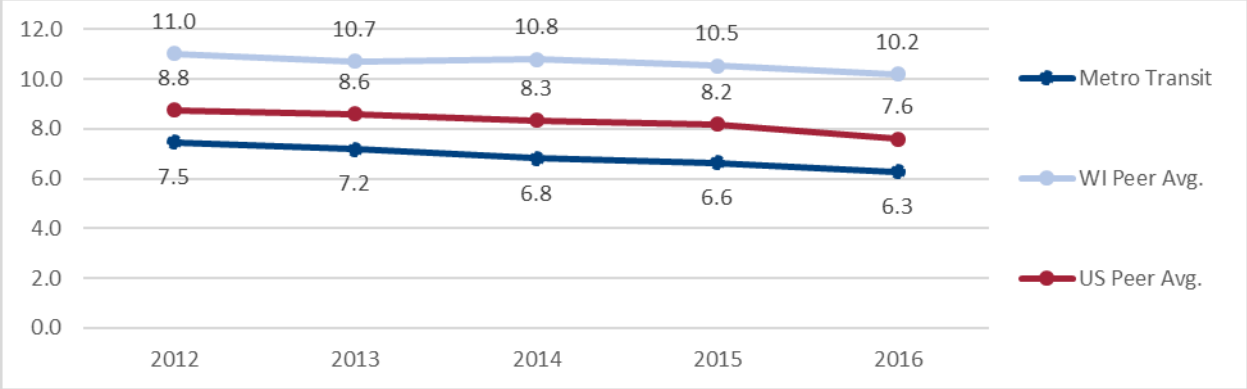
Annual passenger trips per capita is an indicator of overall usage of the transit system in the service area. This measure can be interpreted as the average number of times each service area resident uses the transit service each year.

Figure 8. Annual Passenger Trips Per Capita, 2016 Peers



Source: National Transit Database, 2016.

Figure 9. Annual Passenger Trips Per Capita Compared to Peer Averages, 2012-2016



Source: National Transit Database, 2012-2016.

Table 15. Annual Passenger Trips Per Capita, 2012-2016 Trend Performance

Peer Group	Annual Rate of Change			
	Average	Std. Dev.	Satisfactory Range	Metro Performance Relative to Peer Group
Metro Transit	-4.2%	--	--	--
Wisconsin Peer Group	-1.9%	2.2%	-4.1% to -1.9%	Outside satisfactory range
National Peer Group	-3.9%	4.9%	-8.8% to -3.9%	Worse, but within satisfactory range

Source: National Transit Database, 2012-2016.

Annual revenue hours per capita is the performance measure used to assess service availability, and the second measure of market penetration.

Figure 10. Annual Revenue Hours Per Capita, 2016 Peers

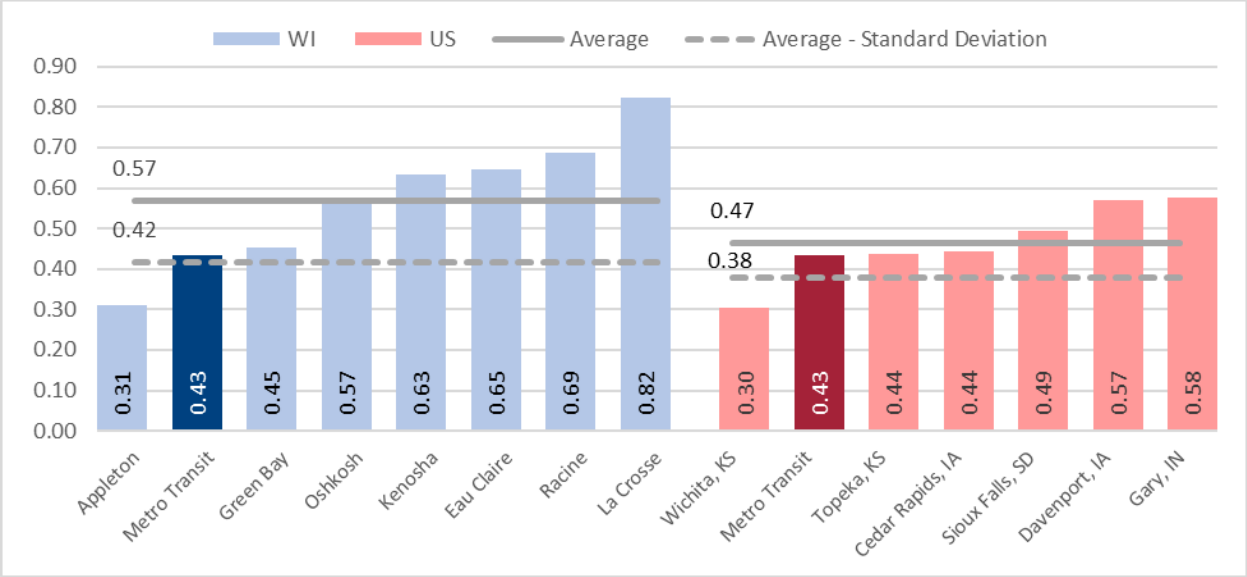
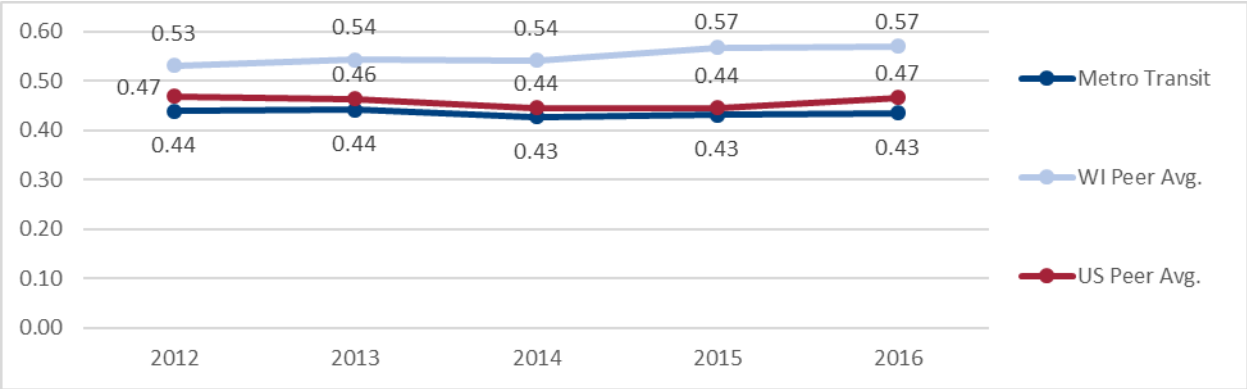


Figure 11. Annual Revenue Hours Per Capita Compared to Peer Averages, 2012-2016



Source: National Transit Database, 2012-2016.

Table 16. Annual Revenue Hours Per Capita, 2012-2016 Trend Performance

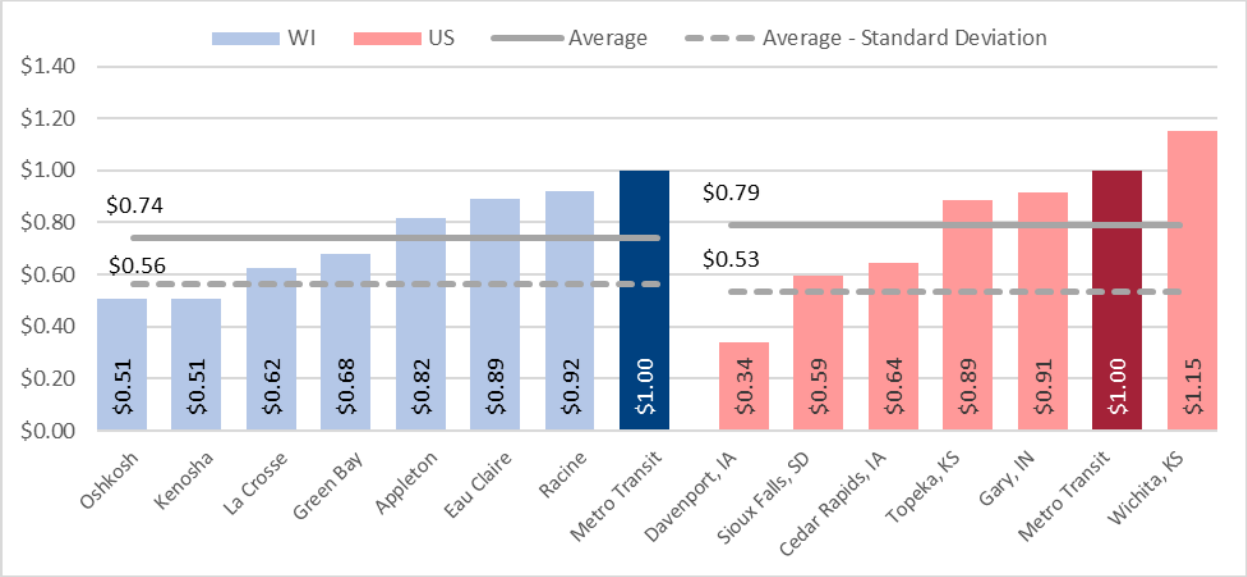
Peer Group	Annual Rate of Change			
	Average	Std. Dev.	Satisfactory Range	Metro Performance Relative to Peer Group
Metro Transit	-0.2%	--	--	--
Wisconsin Peer Group	2.0%	2.9%	-1.0% to 2.0%	Worse, but within satisfactory range
National Peer Group	-0.5%	5.1%	-5.6% to -0.5%	Better than average

Source: National Transit Database, 2012-2016.

Passenger Revenue Effectiveness

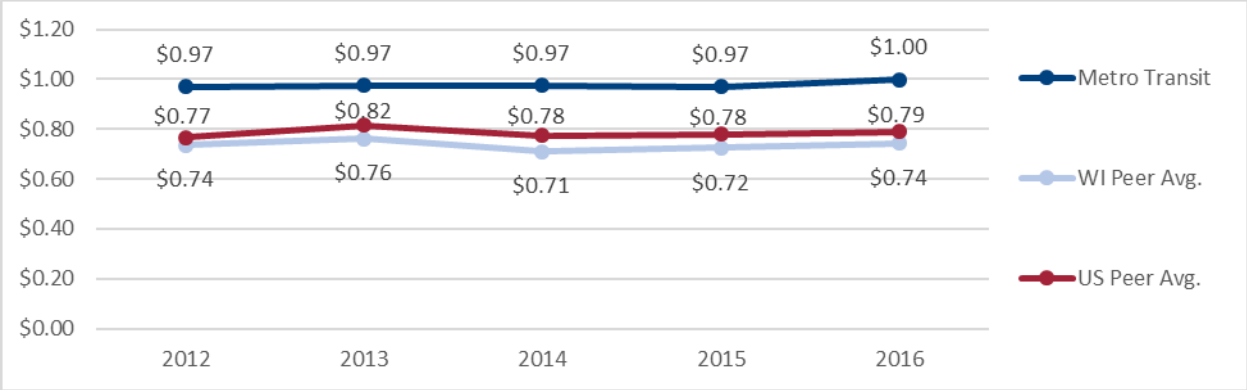
Passenger revenue per passenger trip, or *average fare per passenger trip,* measures the amount each passenger is paying to use the service. The higher the average fare, the more cost is being borne by the passenger. Generally, a higher average fare – within certain limitations – is a positive finding for a public transit system.

Figure 12. Average Fare Per Passenger Trip, 2016 Peers



Source: National Transit Database, 2016.

Figure 13. Average Fare Per Passenger Trip Compared to Peer Averages, 2012-2016*



Source: National Transit Database, 2012-2016. *Passenger revenue reported for 2014 was abnormally low ($334,003); 2013 revenues ($991,233) were used to calculate the 2014 values presented above.

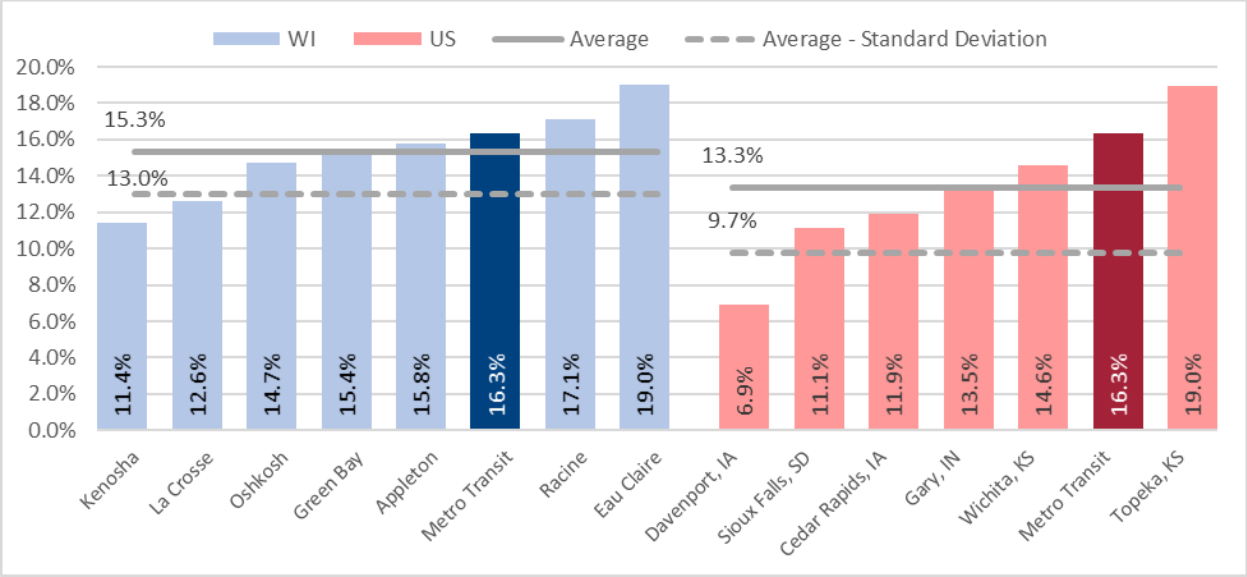
Table 17. Average Fare Per Passenger Trip, 2012-2016 Trend Performance

Peer Group	Annual Rate of Change			
	Average	Std. Dev.	Satisfactory Range	Metro Performance Relative to Peer Group
Metro Transit	0.8%	--	--	--
Wisconsin Peer Group	0.6%	6.6%	-6.0% to 0.6%	Better than average
National Peer Group	0.9%	2.9%	-2.0% to 0.9%	Worse, but within satisfactory range

Source: National Transit Database, 2012-2016.

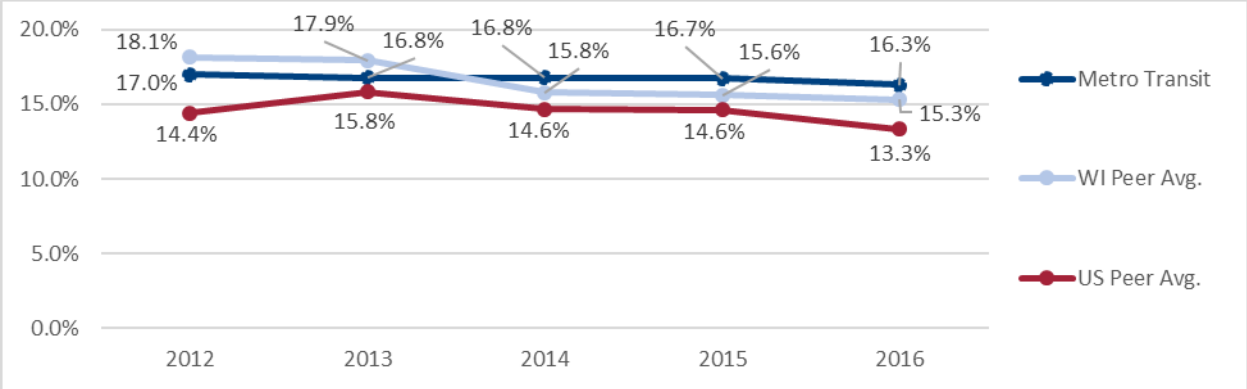
The ratio of revenues to operating expenses measures the level of operating expenses that are recovered through passenger fare payment. This measure is also simply referred to as the *operating ratio or farebox recovery*.

Figure 14. Operating Ratio, 2016 Peers



Source: National Transit Database, 2016.

Figure 15. Operating Ratio Compared to Peer Averages, 2012-2016*



Source: National Transit Database, 2012-2016.
*Passenger revenue reported for 2014 was abnormally low ($334,003); 2013 revenues ($991,233) were used to calculate the 2014 values presented above.

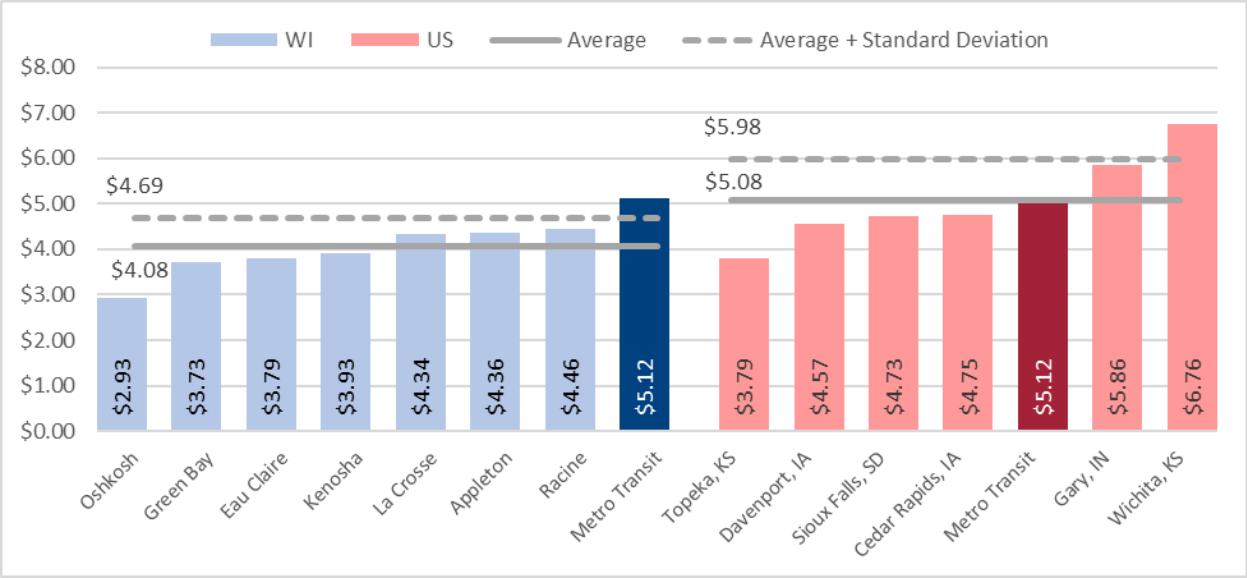
Table 18. Operating Ratio, 2012-2016 Trend Performance

Peer Group	Annual Rate of Change			
	Average	Std. Dev.	Satisfactory Range	Metro Performance Relative to Peer Group
Metro Transit	-1.0%	--	--	--
Wisconsin Peer Group	-3.3%	5.7%	-9.0% to -3.3%	Better than average
National Peer Group	-1.2%	2.0%	-3.2% to -1.2%	Better than average

Source: National Transit Database, 2012-2016.

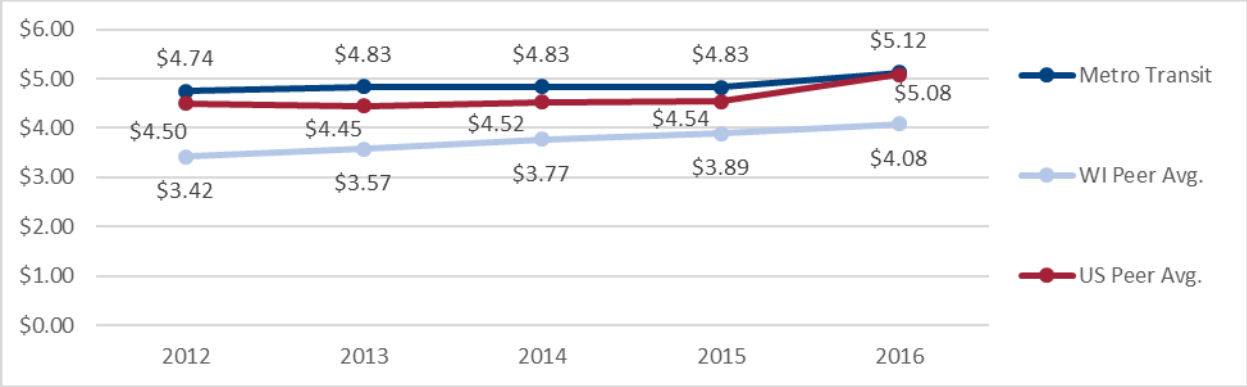
Net expense (subsidy) per passenger trip is used to measure the cost of each passenger trip that is paid for by public operating subsidy. Subsidy per passenger trip is calculated by subtracting passenger revenues from total operating expenses and dividing by total passenger trips. The higher the operating subsidy, the more local, state, and federal resources are required to cover expenses.

Figure 16. Subsidy Per Passenger Trip, 2016 Peers



Source: National Transit Database, 2016.

Figure 17. Subsidy Per Passenger Trip Compared to Peer Averages, 2012-2016*



Source: National Transit Database, 2012-2016.
*Passenger revenue reported for 2014 was abnormally low ($334,003); 2013 revenues ($991,233) were used to calculate the 2014 values presented above.

Table 19. Subsidy Per Passenger Trip, 2012-2016 Trend Performance

Peer Group	Annual Rate of Change			
	Average	Std. Dev.	Satisfactory Range	Metro Performance Relative to Peer Group
Metro Transit	1.9%	--	--	--
Wisconsin Peer Group	4.9%	2.3%	4.9% to 7.2%	Better than average
National Peer Group	2.4%	4.8%	2.4% to 7.2%	Better than average

Source: National Transit Database, 2012-2016.

Performance Summary

The symbols in Table 20 indicate the performance measures for which Metro Transit was better than average, worse than average but satisfactory, or outside satisfactory range. Table 21 and Table 22 display Metro Transit's 2016 performance measure results relative to all Wisconsin and national peers in greater detail.

Table 20. Peer Analysis Summary

Performance Objective	Performance Measure	Single Year: 2016		Trend Analysis 2012-2016	
		WI Peer Comparison	US Peer Comparison	WI Peer Comparison	US Peer Comparison
Cost Effectiveness	Operating Expenses Per Passenger Trip	▼	●	▲	▲
Cost Efficiency	Operating Expenses Per Revenue Hour	▼	▲	▲	▲
Service Effectiveness	Passenger Trips Per Revenue Hour	▼	●	●	●
Market Penetration	Passenger Trips Per Capita	▼	●	▼	●
	Revenue Hours Per Capita	●	●	●	▲
Passenger Revenue Effectiveness	Average Fare Per Passenger Trip	▲	▲	▲	●
	Operating Ratio	▲	▲	▲	▲
	Subsidy Per Passenger Trip	▼	●	▲	▲
Key to Symbols	▲	Better than peer average			
	●	Worse than peer average, but within satisfactory range (+/- one standard deviation)			
	▼	Outside satisfactory range			

In 2016, Metro Transit performed outside the satisfactory range relative to the Wisconsin peer group in five of eight performance measures. However, Metro Transit's scores for several measures – including operating expense per revenue hour, passenger trips per revenue hour, and passenger trips per capita – were close to falling within satisfactory range (Table 20, Table 21). Notably, relative to national peers Metro Transit's performance was within the satisfactory range for all performance measures (Table 20, Table 22). Further, the 2012-2016 trend analysis shows that Metro Transit has been keeping pace with or doing better than the Wisconsin and national peer groups in most performance measures (Table 20).

Table 21. Performance Measures, 2016 – Wisconsin Peer Group

System Name	City, State	Operating Expense Per Passenger Trip	Operating Expense Per Revenue Hour	Passenger Trips Per Revenue Hour	Passenger Trips Per Capita	Revenue Hours Per Capita	Average Fare Per Passenger Trip	Operating Ratio	Subsidy Per Passenger Trip
Valley Transit	Appleton, WI	$5.17	$79.77	15.4	4.8	0.31	$0.82	15.8%	$4.36
Eau Claire Transit	Eau Claire, WI	$4.68	$84.46	18.0	11.7	0.65	$0.89	19.0%	$3.79
Green Bay Metro	Green Bay, WI	$4.41	$73.39	16.7	7.5	0.45	$0.68	15.4%	$3.73
Kenosha Area Transit	Kenosha, WI	$4.43	$87.35	19.7	12.5	0.63	$0.51	11.4%	$3.93
Municipal Transit	La Crosse, WI	$4.96	$87.51	17.6	14.5	0.82	$0.62	12.6%	$4.34
GO Transit	Oshkosh, WI	$3.44	$83.44	24.3	13.8	0.57	$0.51	14.7%	$2.93
RYDE	Racine, WI	$5.38	$81.92	15.2	10.5	0.69	$0.92	17.1%	$4.46
Metro Transit	Waukesha, WI	$6.12	$88.33	14.4	6.3	0.43	$1.00	16.3%	$5.12
Average		$4.82	$83.27	17.7	10.2	0.57	$0.74	15.3%	$4.08
Standard Deviation		$0.74	$4.66	3.0	3.4	0.15	$0.18	2.3%	$0.60
Average +/- Standard Deviation		$5.57	$87.93	14.7	6.8	0.42	$0.56	13.0%	$4.69
Metro Transit Relative to Peer Group		▼	▼	▼	▼	●	▲	▲	▼
Metro Transit as a Percent of Average		127%	106%	82%	62%	76%	134%	107%	125%

Key to Symbols	
▲	*Better than peer average*
●	*Worse than peer average, but within satisfactory range (+/- one standard deviation)*
▼	*Outside satisfactory range*

Source: National Transit Database, 2016.

Table 22. Performance Measures, 2016 – National Peer Group

System Name	City, State	Operating Expense Per Passenger Trip	Operating Expense Per Revenue Hour	Passenger Trips Per Revenue Hour	Passenger Trips Per Capita	Revenue Hours Per Capita	Average Fare Per Passenger Trip	Operating Ratio	Subsidy Per Passenger Trip
Cedar Rapids Tran.	Cedar Rapids, IA	$5.39	$100.68	18.7	8.3	0.44	$0.64	11.9%	$4.75
CITIBUS	Davenport, IA	$4.91	$106.05	21.6	12.3	0.57	$0.34	6.9%	$4.57
Gary Pub. Transp.	Gary, IN	$6.77	$88.45	13.1	7.5	0.58	$0.91	13.5%	$5.86
Sioux Area Metro	Sioux Falls, SD	$5.33	$69.31	13.0	6.4	0.49	$0.59	11.1%	$4.73
Met. Transit Auth.	Topeka, KS	$4.68	$97.20	20.8	9.1	0.44	$0.89	19.0%	$3.79
Wichita Transit	Wichita, KS	$7.91	$84.07	10.6	3.2	0.30	$1.15	14.6%	$6.76
Metro Transit	Waukesha, WI	$6.12	$88.33	14.4	6.3	0.43	$1.00	16.3%	$5.12
Average		$5.87	$90.58	16.0	7.6	0.47	$0.79	13.3%	$5.08
Standard Deviation		$1.06	$11.27	4.0	2.6	0.09	$0.26	3.6%	$0.89
Average +/- Standard Deviation		$6.94	$101.86	12.1	5.0	0.38	$0.53	9.7%	$5.98
Metro Transit Relative to Peer Group		●	▲	●	●	●	▲	▲	●
Metro Transit as a Percent of Average		104%	98%	90%	83%	93%	126%	122%	101%

Key to Symbols	▲	*Better than peer average*
	●	*Worse than peer average, but within satisfactory range (+/- one standard deviation)*
	▼	*Outside satisfactory range*

Source: National Transit Database, 2016.

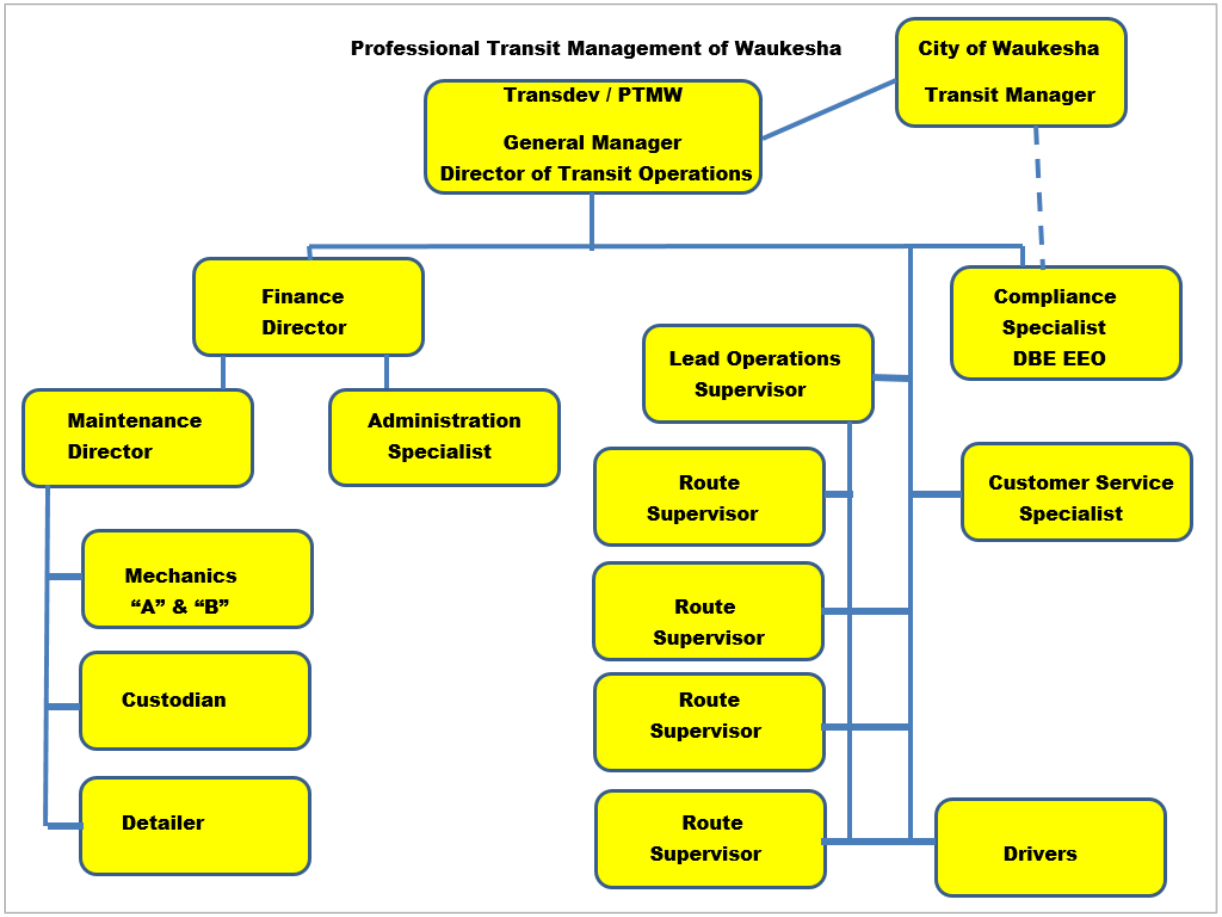
PART III: POLICY- AND DECISION-MAKING PROCESSES

This section contains a description of the policy- and decision-making processes in place at Metro Transit and the City of Waukesha as they relate to transit service.

Organizational Structure

Metro Transit is a division within the Public Works Department of the City of Waukesha, overseen by the City's Transit Commission. The organizational structure of Metro Transit is summarized in Figure 18. The Transit Manager functions as the day-to-day administrator of the transit system and is employed by the City of Waukesha; he reports to the Director of Public Works. The General Manager/Director of Transit Operations manages the day-to-day operations of the system, and is an employee of Transdev working under contract for Professional Transit Management of Waukesha, Inc. (PTMW). Metro Transit selected Transdev as its contracted service provider through an FTA-compliant procurement. PTMW is a Transdev subsidiary formed to provide transit service to the City of Waukesha. All Metro Transit staff are employees of PTMW, except for the Transit Manager, who is a City employee, and the General Manager, a Transdev employee.

Figure 18. Waukesha Metro Transit Organization Chart



Source: Waukesha Metro Transit

The organizational structure is conducive to effective and efficient operations. PTMW – or variants thereof – has been Metro Transit's management company for several decades. This organizational design provides continuity of employment if the contracted operations provider (e.g., Transdev, First Transit, etc.) is replaced through the procurement process. PTMW operating employees have remained employed when such a transition has taken place in the past. The City has thoroughly analyzed staffing levels and options for contracting and organizational structure. The current configuration works quite well.

PTMW employs about 50 people, including 30-35 drivers. About a quarter of its bus drivers are part-time employees. PTMW does not offer a retirement benefit program, but all employees working 25 hours per week or more (including part-time drivers) are eligible for health insurance benefits. Aside from the Transit Manager, the City's role in the ongoing administration of Metro Transit is limited. The City provides legal support, and input on annual Metro Transit budgets, and hosts the Metro Transit website. The lines of authority, responsibility, and accountability among City, PTMW, and Transdev staff are well-defined and appropriate.

Management

Metro Transit embraces a collaborative approach to management. The management team include the Transit Manager, General Manager, Finance Director, Maintenance Director, Compliance Specialist, and Lead Operations Supervisor. The Transit Manager has been in his role since 2013. He knows the community and the relationship between PTMW and the City well, having been a PTMW employee for 14 years prior to joining the City. The Transit Manager oversees day-to-day administration, develops capital and operating budgets, sets and guides strategic initiatives, and serves as Metro Transit's primary liaison with the City Transit Commission and other City departments (e.g., Public Works). The Transit Manager has sufficient authority and control to manage Metro Transit in an efficient manner.

The General Manager reports to the Transit Manager and manages the day-to-day operations of the system, including oversight of front-line staff. There have been several Metro Transit General Managers over the last few years, primarily the result of Transdev staffing decisions. The current General Manager joined the team in early 2018, bringing with him over 15 years of experience working for Wisconsin transit systems, primarily MCTS. The City hopes that the current General Manager will bring greater stability to Metro Transit, following years of frequent personnel changes.

The remaining members of the management team support the Transit Manager and General Manager, contributing to the collaborative effort.

Policy Environment

The Transit Manager and his management team play a critical role in developing policy and strategic direction for Metro Transit. The City of Waukesha Transit Commission and the City Common Council oversee and support their efforts. The Transit Commission can meet up to twice a month, but typically meets monthly, and is comprised of five members, two of whom are City alderpersons; the remainder are appointed. In addition to exercising financial oversight, the Transit Commission approves service changes and policies.

The existing lines of communication between Metro Transit's management team and governing bodies provide for sufficient exchange of information to ensure decision makers are knowledgeable on issues. The Transit Manager and his staff regularly provide information and updates to the Transit Commission.

This information includes extensive monthly summaries of financial information and operating statistics – including performance indicators – by mode, on a monthly and year-to-date basis. Metro Transit provides similar reports is provided to Waukesha County's relevant decision-making bodies. Starting in 2019, the Transit Manager hopes to develop better-defined annual goals for Metro Transit, to be tracked by staff and reported to the Transit Commission.

Conclusions

The policy- and decision-making processes in place at the City of Waukesha and Metro Transit appear to be functioning well. Table 23 contains the review team's assessment of Metro Transit based on the four criteria used to measure the effectiveness of its policy- and decision-making processes.

Table 23. Assessment of Policy- and Decision-Making Processes

Criterion	Rating
The manager has sufficient authority and control to manage in an efficient manner.	▲
The lines of authority, responsibility, and accountability are well defined and appropriate.	▲
The lines of communication provide for sufficient exchange of information to ensure decision makers are knowledgeable on issues.	▲
The current organizational structure is conducive to effective and efficient operation.	▲

Key to Symbols	
▲	Structures and procedures are conducive to effective operations
●	Structures and procedures are adequate with room for improvement
▼	Structures and procedures are insufficient

Overall, the structures and processes in place at Metro Transit and the City of Waukesha support the effective provision of transit services. The organizational structure and management team are important elements that contribute to Metro Transit's success.

PART IV: FUNCTIONAL AREA REVIEW

Part IV of this report contains a review of the following functional areas:

- Transportation Operations
- Vehicle and Facility Maintenance
- Finance
- Planning and Scheduling
- Marketing

These areas were chosen because they have an impact on long-term capital requirements as well as short-term financial resources needed for daily operations and short-term capital planning.

The Transit Manager and his staff completed a detailed MPR questionnaire prior to the on-site review, conducted on September 26, 2018. Metro Transit staff answered all questions and provided extensive supporting material, as requested by the review team. The on-site review process consisted of discussions with the Transit Manager, General Manager, Compliance Specialist, and other Metro Transit staff responsible for specific functional areas.

Transportation Operations

The structures and procedures pertaining to the transportation operations function at Metro Transit are conducive to effective operations. Nevertheless, the review team has developed several recommendations to improve the function. For more details about transportation operations of Metro Transit, see Appendix A for staff's full response to the review team's MPR questionnaire.

Supervision

The management and supervisor teams have proven successful at establishing and communicating operations procedures and expectations with front-line staff that translate into effective service delivery. PTMW and the City have developed extensive policies and procedures for all employees that are well-documented in employee handbooks. Driver supervision is provided by the Lead Operations Supervisor, four Route Supervisors, and the General Manager. At least one supervisor is on duty during all hours of operation.

The supervisor team employs good operating and customer service practices to ensure passenger satisfaction. When customers miss their transfers, a supervisor may provide them a ride from the DTC to their destination using a support vehicle stationed at the DTC. This vehicle is typically not accessible or lift-equipped. To improve upon this practice, an accessible light-duty bus with a ramp or lift could be stationed at the DTC instead of a support vehicle, allowing the supervisor to transport any passenger who has missed a connection.

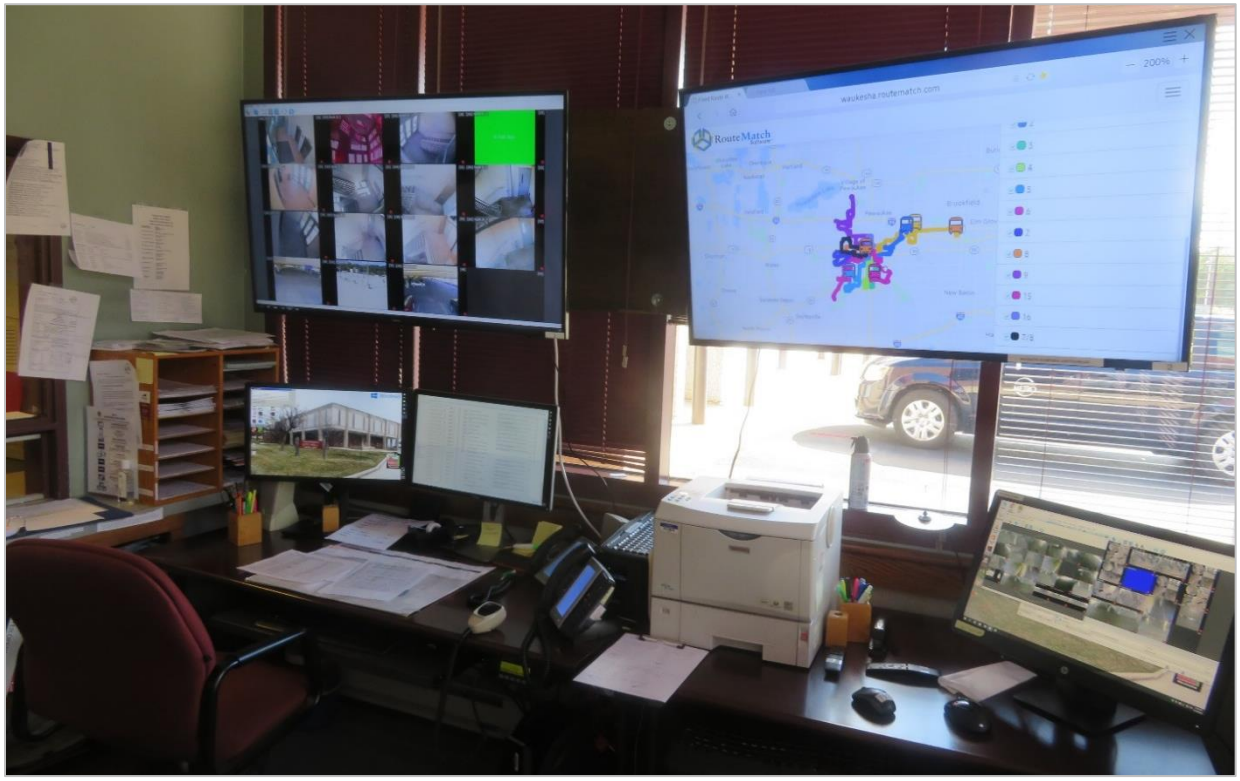
> **Recommendation**: Station a lift-equipped supervisory vehicle at the Downtown Transit Center (DTC) for missed transfers and to respond to delays or other passenger events. Priority: Medium.

In-Service Operations

While in service, Metro Transit drivers are required to count passengers by fare classification using GFI validating, registering fareboxes. Drivers do not collect timepoint arrival/departure data. All Metro Transit buses (fixed-route and paratransit) have Global Positioning System (GPS) technology on board,

allowing supervisors to see the location of buses in service. Ecolane software is used to dispatch and monitor paratransit operations and on-time performance. Fixed-route service is monitored using automatic vehicle location (AVL) software from Routematch. However, Metro Transit does not currently use its Routematch product to systematically track on-time performance relative to published schedules. Metro Transit is committed to customer satisfaction, and regularly monitor on-time performance for both fixed-route and paratransit services is an important means of ensuring high-quality service delivery. Metro Transit should pursue additional training and/or software updates to facilitate fixed-route on-time performance tracking at scheduled timepoints.

Recommendation: Update automatic vehicle location (AVL) software, or seek additional training from the vendor, to allow for consistent on-time performance monitoring of fixed-route service. Priority: High.



Supervisors' station to monitor operations

While awaiting AVL upgrades, Metro Transit should manually record and then analyze time/location data across its fixed routes periodically. Although all Metro Transit fixed routes operate based on published schedules with timepoints, Metro Transit largely relies on anecdotal driver and supervisor information (primarily based on DTC observations) to assess on-time performance relative to published schedules. Absent usable AVL technology, supervisory staff or out-of-service drivers could be used to document departure times at all scheduled timepoints for all fixed routes.[7]

Collection and analysis of timepoint data over time will enable Metro Transit to identify any fixed route (or trip) that consistently runs late – whether at its beginning, end, or any intermediate points– relative

[7] Document both arrival and departure times at the Downtown Transit Center and other timepoints with both scheduled arrival and departure times.

to the published schedule. Monitoring on-time performance will help Metro Transit ensure it consistently provides high-quality service and maintains customer trust, both of which are critical for system sustainability and growth.

> **Recommendation:** Prior to implementation of upgraded automatic vehicle location (AVL) technology, collect departure times at scheduled timepoints along fixed routes for all trips. Using these data, develop a process for systematically monitoring on-time performance in comparison to the established on-time performance goal. Priority: Medium.

Safety and Training

The training program is thorough, consistent, and well-documented. The 4-6-week program consists of an ideal mix of classroom, out-of-service, and in-service training for new drivers. Training protocol for new drivers is based on the standard TAPTCO program, an industry-leading training program. Drivers are trained to operate all of Metro Transit's fixed route and paratransit service vehicles. Check rides are performed several times in a driver's first year, with yearly performance ride and evaluation thereafter. Documentation of training is included in an employee's personnel records.

Metro Transit benefits from the experience and expertise of its Compliance Specialist and supervisory staff. In all, Metro Transit has among the best designed, documented, and administered driver training programs in Wisconsin.

Driver Recruitment and Work Assignments

Management staff expressed concern over the turnover rate of part-time drivers and difficulty in finding qualified applicants. Both are common issues facing many transit systems in Wisconsin and throughout the nation. Additionally, Metro Transit's driver workforce is aging.

All drivers are hired as part-time employees but are eligible to transition to full-time status following retirements. Part-time drivers work 25 hours per week, with opportunities for additional hours and overtime. Further, all part-time drivers are eligible for health insurance benefits. Metro Transit offers a wage progression with increasing wages based on time worked, and the wage level is reasonable. As of August 2018, Metro Transit's average and top driver hourly wages were $22.52 and $23.04, respectively. In comparison, the average hourly wage of transit bus drivers in the Milwaukee-Waukesha-West Allis metropolitan area was $22.60 in May 2016.[8, 9] In summary, Metro Transit's driver pay structure and benefits are sound and should minimizing retention issues.

Metro Transit's average driver age is relatively high. While Metro Transit's experienced workforce contributes to its good safety record and customer satisfaction, employing many drivers who are approaching retirement poses a risk to sustainable operations. Considering the long time required to adequately train a new driver, the review team recommends that Metro Transit consider expanding its extra board to accommodate potential driver shortages in the future.

> **Recommendation**: Increase extra board to accommodate expected increase in driver turnover rate. Priority: Low.

[8] U.S. Bureau of Labor Statistics. Occupational Employment Statistics. May 2016. https://www.bls.gov/oes/tables.htm.

[9] May 2016 were the most recent data available for the Milwaukee-Waukesha-West Allis metropolitan area.

Miscellaneous

The Metro Transit fixed-route bus network is built around the DTC, an excellent facility in downtown Waukesha. Investments in the facility contribute to the quality of transit service provided, and the activity and safety of the area surrounding it. However, the current one-way configuration of North Street – which borders the DTC – is not conducive to safe and efficient transit operations. The one-way street requires Metro Transit buses to make additional left turns, slows average bus speeds, and results in additional revenue miles.

> **Recommendation**: The City should consider moving forward with proposed changes to traffic operations on North Street in downtown Waukesha. Reconfiguring the roadway from one-way to two-way operations would improve transit operations and safety. Priority: Low.

Vehicle and Facility Maintenance

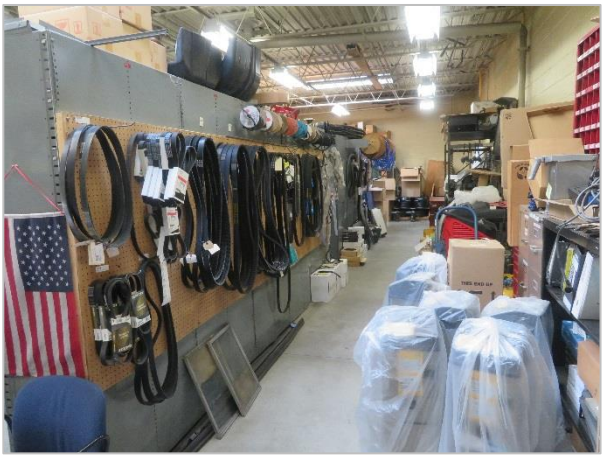
The structures and procedures pertaining to the vehicle and facility maintenance functions at Metro Transit are conducive to effective operations. For more details about vehicle and facility maintenance at Metro Transit, see Appendix A for staff's response to the review team's MPR questionnaire.

Vehicle Maintenance

Metro Transit vehicle and facility maintenance procedures were briefly reviewed, and a tour was provided. The vehicle maintenance function at Metro Transit is overseen by the Maintenance Director, who managers four mechanics and three bus fuelers. All Metro Transit vehicles are owned by the City and are stored and maintained at Metro Transit's combined administration and maintenance facility. Like the operations staff, maintenance staff are guided by well-documented policies and procedures.

Repairs are completed both in-house and with outside vendors. Staff shared and demonstrated maintenance records, standard procedures, and parts inventories upon request. The sample of Metro Transit vehicle maintenance records examined by the review team were completed in a timely manner. Fleet maintenance and parts inventory are tracked using RTA Fleet Management software. The shop is among the best maintained in Wisconsin. Maintenance work and inventory areas are clean and orderly. Buses are in very good condition and well-maintained.

Top left: Metrolift bus in the garage. Top right: Staff in the maintenance area of the facility. Bottom left: Clean, clear maintenance area. Bottom right: Organized parts room.



Vehicle Replacement

Summarized in Table 5, Metro Transit's active revenue fleet consists of 20 heavy-duty buses and 6 smaller accessible buses for Metrolift service. Metro Transit's fleet condition is among the best in Wisconsin – the result of a great deal of time and effort. The average age of Metro Transit's fixed-route fleet is just under six years (Table 5). Replacement efforts in the next two years will focus on the paratransit buses, all of which are past their age-based minimum useful life of five years.

Alternative fuel and advanced vehicle technologies have changed substantially in the last decade. Significant advances in battery storage and charging mechanisms, and to attendant vehicle weight reductions, have make electric buses attractive to more and more transit systems. Transit systems nationwide, including in Wisconsin, are increasingly replacing their diesel buses with battery electric ones, citing environmental benefits and long-term operations and maintenance cost savings.

Metro Transit and the City should determine whether they wish to operate a bus fleet containing electric buses in the future and, if so, how to finance it. Limited FTA funds are available through the competitive Section 5339(c) Low or No Emission Vehicle Program[10], and both Section 5307 and 5339(b) funds can be used to buy any type of bus. Metro Transit and the City would need to thoroughly evaluate alternative fuel bus technologies and how they could fit the Metro Transit service model to determine whether acquiring electric buses makes sense.[11]

> **Recommendation**: Conduct an analysis and peer review to determine if electric buses are a desired and feasible investment for Waukesha Metro Transit; stay informed on funding sources available for fleet modernization, including the FTA Section 5339 Low or No Emission Vehicle Program. Priority: Low.

Facilities Maintenance

The Metro Transit administration and maintenance facility was constructed in 1985 and expanded upon in 1995. The facility looks to be in good condition, given its age. No large, capital-intensive facilities

[10] Federal Transit Administration. Low or No Emission Vehicle Program – 5339(c). https://www.transit.dot.gov/funding/grants/lowno.

[11] Look to WisDOT, the Federal Transit Administration, and Wisconsin peers for technical assistance and guidance.

maintenance items are expected to be needed in the next five years. Recent investments in the facility include lighting improvements and heating, ventilation, and air conditioning system upgrades.

As stated above, Metro Transit should consider whether electric buses may be a part of its future bus fleet. Fleet electrification requires charging infrastructure in addition to the electric buses themselves. As ongoing facility evaluation takes place, it would be wise to consider how charging infrastructure might be integrated, if electrification of Metro Transit's fleet is a realistic possibility. The large roof of the operations and maintenance facility may be able to support a solar array that could charge several battery electric buses. Moreover, the DTC could potentially be the site of a charging station, allowing for the use of smaller in-vehicle batteries.

Finance

The structures and procedures pertaining to the finance function at Metro Transit are conducive to effective operations. The review team has developed two recommendations for the City of Waukesha to consider. See Appendix A for staff's full response to the review team's MPR questionnaire, which includes more details about the finance function.

Local Share

The local match required to receive State and federal operating funds for Metro Transit and County Transit service come from the City of Waukesha and Waukesha County. In addition to Waukesha, portions of Metro Transit Route 9 operates in Pewaukee. Route 9 bringing students, staff, and jobseekers to the Waukesha County Technical College and Workforce Development Center in Pewaukee from Waukesha. Despite the benefit provided to it by Route 9, the City of Pewaukee does not contribute financially to Metro Transit service. Stable local share contributions from the City of Pewaukee could allow Metro Transit to receive more State and federal operating funds and potentially expand service.

As seen in Figure 8 through Figure 11, Metro Transit's market penetration performance is relatively poor compared to its Wisconsin and national peers. Expanding service would improve Metro Transit's passenger trips per capita and revenue hours per capita measures. Waukesha County, SEWRPC, WisDOT, and/or peer systems may have insights on how to best develop sustainable funding agreements that account for the amount of service provided.

Recommendation: The City should explore possibilities for collecting stable operating local share contributions from the City of Pewaukee; doing so could result in opportunities to expand service and improve relatively poor market penetration performance. Priority: High.

Fare Structure

Current Metro Transit fares are summarized in Table 3. The adult fare of $2.00 is higher than the $1.75 Wisconsin peer system average but equals those of Kenosha Area Transit, RYDE (Racine), and Valley Transit (Appleton) [Table 24]. Moreover, at 2.5 times the adult fare, Metro Transit's $5.00 day pass is relatively costlier than its peers' day passes. Of the four Wisconsin peer systems that offer a day pass, each price them at 2.0 to 2.1 times the adult fare.

Table 24. Wisconsin Peer Group Regular Fixed-Route Fares: Adult and Day Pass

System Name	City, State	Adult	Day Pass	Day Pass/Adult
Valley Transit	Appleton, WI	$2.00	$4.00	2.0
Eau Claire Transit	Eau Claire, WI	$1.75	$3.75	2.1
Green Bay Metro	Green Bay, WI	$1.50	$3.00	2.0
Kenosha Area Transit	Kenosha, WI	$2.00	-	-
Municipal Transit	La Crosse, WI	$1.50	-	-
GO Transit	Oshkosh, WI	$1.50	-	-
RYDE	Racine, WI	$2.00	$4.00	2.0
Average		**$1.75**	**$3.69**	**2.0**
Metro Transit	Waukesha, WI	$2.00	$5.00	2.5

Future planning efforts should evaluate the existing fare structure and explore whether changes might spur ridership. Research should be done to better understand the local income levels to ensure that Metro Transit is an attractive, low-barrier transportation option for the community. In particular, a flat fare of $2.00 may inhibit people from taking shorter trips via transit. Public transit systems in Wisconsin and across the country are increasingly offering income-based reduced fares to simultaneously provide relief for customers of least means and combat declining ridership trends. For example, Eau Claire Transit and Madison Metro Transit have implemented income-based reduced fare programs.[12] Zone- or route-based fares are another viable option.

Recommendation: Conduct a ridership and fare analysis that considers the impacts of fares on overall ridership and trip lengths; pair with a survey to better understand the income levels of existing and potential customers. Priority: Low.

Planning and Scheduling

The structures and procedures pertaining to the planning and scheduling functions at Metro Transit are conducive to effective operations. Generally, Metro Transit effectively monitors its service and modifies service to improve effectiveness and efficiency, and to address evolving needs.

Outlined below are two recommendations for Metro Transit and the City of Waukesha to consider. See Appendix A for staff's full response to the review team's MPR questionnaire, which includes more details about the planning and scheduling functions at Metro Transit.

Performance Measures

Relative to the Wisconsin peer group, Metro Transit in 2016 performed worst in operating expense per passenger trip, passenger trips per capita, and subsidy per passenger trip (Table 21). Metro Transit's

[12] Eau Claire Transit's "income-qualifying fare" is available to those with income at or below 185 percent of the federal poverty level, providing an 10-15 percent discount off the regular base fare; more info here: http://www.ci.eau-claire.wi.us/departments/transit/fares-services. Madison Metro Transit offers a "31-day low income pass" for less than half the regular cost, available for those with income at or below 150 percent of the federal poverty level; more info here: http://www.cityofmadison.com/metro/fares/lowincomepass.cfm.

operating expenses and revenues are reasonable. Ridership is the driving factor in all three of the measures that Metro Transit performed worst in.

The Milwaukee-Waukesha-West Allis metropolitan area has the second highest average wage for transit bus drivers in Wisconsin, next to the Madison metropolitan area.[13] Moreover, Metro Transit's operating expense per revenue hour is within less than 10 percent of Kenosha and Racine, its closest peers (geographically and otherwise).[14] Metro Transit's path to improved performance measures in the future will depend in part on planning and marketing initiatives aimed at increasing ridership.

Strategic Planning

The most recent Metro Transit strategic planning effort – the 2013-2017 Waukesha Metro Transit Development Plan (TDP) – was completed in late 2012 by the Southeastern Wisconsin Regional Planning Commission (SEWRPC). Metro Transit is now due for an updated TDP. A new TDP would offer Metro Transit an opportunity to comprehensively assess its current service and develop specific strategies to address current and future needs.

This effort should include an in-depth evaluation of existing services; market analysis to determine community transportation needs; review of service standards and policies; and prioritized strategies to address current and future needs. Further, in its TDP update, Metro Transit should consider including the following elements:

- Customer satisfaction survey, comprehensive boarding and alighting survey, and transfer analysis to better understand existing travel patterns, stop-level ridership, and vehicle loads
- Community travel pattern analysis using origin-destination data analytics products to explore whether there are corridors or trip types underserved by existing transit routes
- Assessment of fleet mix and vehicle needs relative to current and future demand
- Analysis of fare structure and its impact on ridership trends, including trip length
- Identification of Route 1 frequency improvements and connection to MCTS's GoldLine and East-West bus rapid transit (BRT) project (anticipated to begin service in 2022), along with an implementation plan.

TDPs typically are developed by a regional planning commission, city planning office, or outside consultant. Metro Transit could seek an FTA Section 5304 Statewide Transportation Planning grant, applied for through WisDOT, to fund this work.

Recommendation: Update the Waukesha Metro Transit Development Plan to comprehensively evaluate existing service, conduct market analysis and determine transportation needs, and provide strategic direction for next several years. Seek an FTA Section 5304 Statewide Transportation Planning grant from WisDOT, or assistance from SEWRPC, to help fund this effort. Priority: High.

Schedules

Staff regularly communicate with MCTS to maximize coordination between Metro Transit and MCTS routes, including Metro Transit Route 1 and the MCTS GoldLine, which are coterminous at Brookfield Square in order to facilitate transfers. The planned MCTS East-West BRT project will require Metro

[13] U.S. Bureau of Labor Statistics. Occupational Employment Statistics. May 2016. https://www.bls.gov/oes/tables.htm.

[14] For reference, MCTS fixed-route bus service in 2016 cost $101.04 per revenue hour; Metro Transit's was $88.33.

Transit's further coordination and partnership with MCTS, while also having a significant impact on Route 1 and transit service in the surrounding area. Moreover, there are immediate opportunities for both Metro Transit and MCTS to adjust Route 1 and GoldLine schedules to improve service delivery and coordination.

Metro Transit Route 1 and MCTS GoldLine meet at Brookfield Square to facilitate transfers.

A shared bus stop at Brookfield Square is the eastern terminus of Metro Transit Route 1 and the western terminus of MCTS GoldLine. There is significant transfer activity between the two routes at this stop, which is the only location where the two routes meet. On weekdays, Route 1 serves Brookfield square every 30 minutes; GoldLine serves it every 15 minutes, on average. Both routes have a scheduled layover at this location: 10 minutes and 6 minutes, on average, during weekdays for Route 1 and GoldLine, respectively.

In analyzing the Route 1 and GoldLine schedules, it is clear that Metro Transit and MCTS have made efforts to adjust route schedules to allow for transfers between these two routes. Of the 62 scheduled one-way weekday Route 1 trips, about 40 percent have a transfer time to/from GoldLine of 5 minutes or less; about 70 percent are 10 minutes or less. Alternatively, there are also more than 20 instances per weekday when the transfer between Route 1 and GoldLine is missed by 1-5 minutes. The frustration of missed transfers between Route 1 and GoldLine is exacerbated by the 30-minute frequency of Route 1 and the lack of shelter, bench, or other passenger amenities at the Brookfield Square bus stop.

Metro Transit and MCTS consider many factors when developing their route schedules, including variable running time, adequate layover time, and transfers to numerous other routes. Nevertheless, the importance of the connection between Route 1 and GoldLine for residents and employees of both Metro Transit's and MCTS's service areas necessitates ongoing schedule coordination. Both transit systems must be willing to adjust their schedules slightly to achieve this mutual benefit.

Recommendation: Work with MCTS to address missed transfers between Route 1 and GoldLine. Priority: High.

The following are minor Route 1 schedule changes that Metro Transit could implement on its own to enhance transfers to/from GoldLine with no impact on transfers to other routes at the DTC.

- Route 1 eastbound trip departing DTC at 5:35 a.m.: shift 5 minutes earlier (5:30 a.m.) to arrive at Brookfield Square at 6:04 a.m., allowing transfer to 6:07 a.m. eastbound GoldLine; adds 0.08 revenue hours per day
- Route 1 westbound trips departing Brookfield Square at 9:00 p.m., 9:30 p.m., 10:00 p.m.: shift 10 minutes later (9:10 p.m., 9:40 p.m., 10:10 p.m.), allowing transfer from 9:07 p.m., 9:37 p.m., 10:07 p.m. westbound GoldLine; adds 0.5 revenue hours per day

Capital Planning

The fixed-route bus network includes hundreds of marked bus stops. An inventory of existing bus stops should be completed to document needed ADA accessibility improvements, existing amenities, and other attributes. This type of facilities inventory is a key component of an ADA Transition Plan.[15] Neither the City of Waukesha nor Metro Transit has an ADA Transition Plan or other guiding policy to prioritize ADA-compliant bus stop and pedestrian infrastructure improvements. Metro Transit has already identified bus stops requiring improvements (e.g., missing signs, poles, concrete pads) or in need of replacement. A step further, an ADA Transition Plan that includes bus stops and other transit facilities would identify current conditions and the cost to make all bus stops ADA-compliant over time. This effort would benefit accessibility and service quality.

Recommendation: Develop an ADA Transition Plan to assess conditions and prioritize bus stop improvements. Establish a yearly budget allocation for continued accessibility improvements until all bus stops are ADA-compliant. Priority: Medium.

Marketing

The structures and procedures pertaining to the marketing function of Metro Transit are conducive to effective operations. Metro Transit's online and printed materials are more comprehensive and useful than those of most Wisconsin transit systems. Staff conduct regular outreach with area schools, businesses, and transportation advocates to market the transit service; this is accompanied by traditional advertising. Customer contacts and complaints are logged and addressed in a systematic and appropriate manner.

Nonetheless, the review team has developed two recommendations for Metro Transit and the City of Waukesha to consider. See Appendix A for staff's response to the review team's MPR questionnaire, which includes more details about the marketing function.

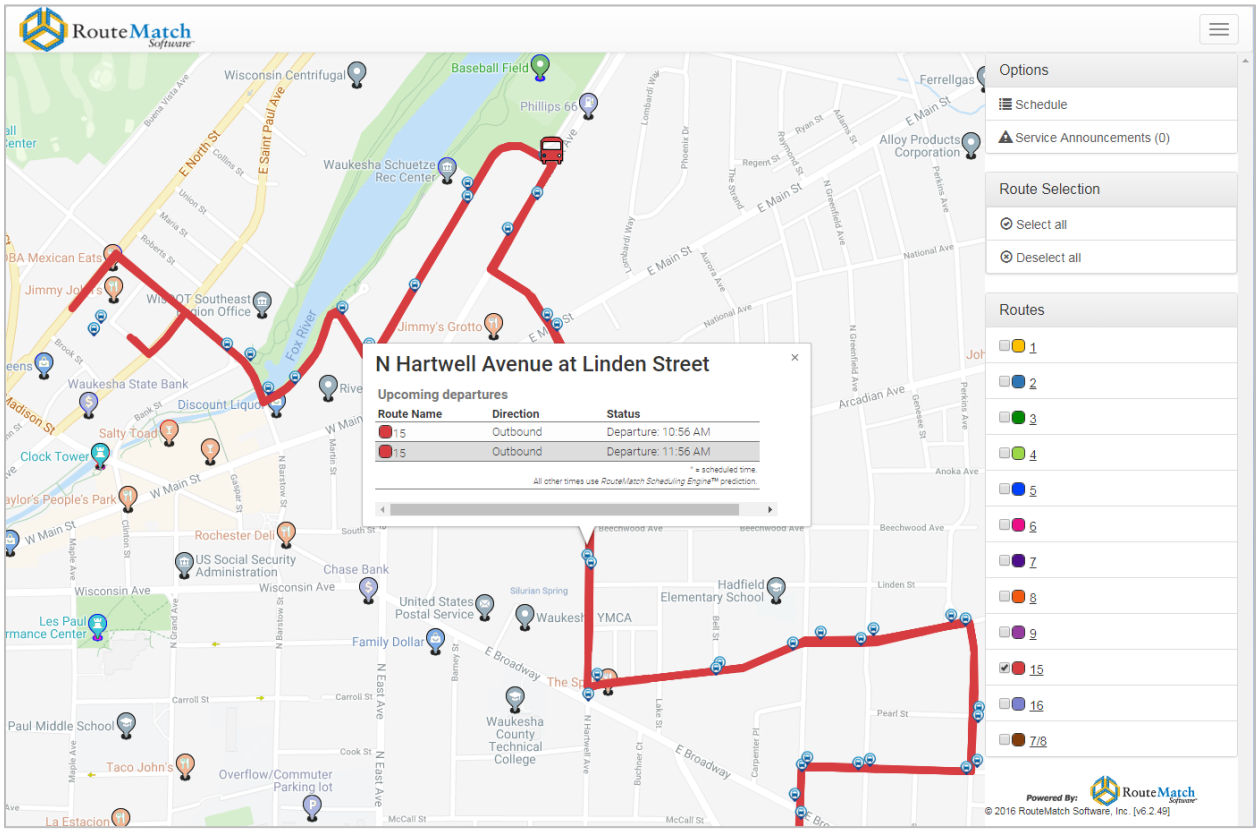
Materials and Website

Metro Transit has a strong brand identity, the result of strict adherence to a branding guide. The Metro Transit system map effectively displays a great deal of information, including County Transit and

[15] Information on the WisDOT's statewide ADA program is available at: https://wisconsindot.gov/Pages/doing-bus/civil-rights/titlevi-ada/ADAcompliance.aspx.

connecting MCTS routes. Individual bus route maps and schedules are very well designed and clearly communicate necessary information. Metro Transit provides new users with "Guide to Ride" information in brochures and on its website. The system website contains all essential information about Metro Transit service, most of which is available in Spanish.

Metro Transit publishes general transit feed specification (GTFS) data, allowing it to host Google Transit Trip Planner on its website, alongside a bus tracker map that provides real-time bus location and stop-level schedule information. Both are examples of smartphone-compatible information tools that are valued by riders and are increasingly important to transit providers. Research suggests that these types of enhanced information applications can result in increased transit use and encourage mode shift away from privately-owned vehicles.[16]



Screenshot of bus tracker map displaying real-time bus location and stop-level next trip information.

Social Media

Metro Transit does not regularly use social media or targeted online advertisements to promote its service or communicate with existing users. Social media platforms are increasingly the means by which people of all ages receive information. These channels are critical, cost-effective elements of a transit system's marketing infrastructure. For example, MCTS uses social media to communicate time-sensitive service alerts and updates, share information about initiatives and events, highlight the good work of its

[16] Federal Highway Administration. Smartphone Applications to Influence Travel Choices: Practices and Policies. April 2016. Pages 40-41. https://ops.fhwa.dot.gov/publications/fhwahop16023/fhwahop16023.pdf.

employees, and promote the benefits of transit service in the community. Social media platforms can attract new riders by offering targeted advertising based on location and/or demographics.

Metro Transit does not have its own social media accounts. Currently, the City's use of social media is centralized in the Mayor's Office, which administers the City's accounts. In 2018, the City's accounts included just two posts that highlighted Metro Transit service; this represents a missed opportunity. Absent the creation of its own social media account, Metro Transit should work with the Mayor's Office to create content that is shared regularly on the City's accounts.

> **Recommendation:** Increase social media presence to better communicate with existing customers and attract new ones; create Metro Transit-specific accounts or work collaboratively with City staff to host transit content on existing citywide accounts. Priority: Medium.

Market Research

Like other forms of data collection, market research is vital to determining transit system performance and identifying areas for growth. Market research can be a crucial element of service planning and prioritizing service improvements. Metro Transit currently does not conduct customer surveys outside of the TDP process, representing another missed opportunity for growth and improvement. It should instead distribute customer satisfaction surveys to both existing rider and to area residents and employers at least once every two years. In addition to identifying riders' level of satisfaction with the service, these surveys effort can provide insight into travel patterns, unmet needs, rider preferences and priorities, and demographics. Further, they can effectively advocate the value of transit services when shared with decision makers.

> **Recommendation**: Conduct a customer satisfaction survey at least once every two years, and use the results to guide service improvements and strategic planning efforts. Priority: High.

Summary

This review's assessment of each functional area is presented in Table 25. Ratings are based on the degree to which the function's structures and procedures are conducive to continued effective operations of the system. Part V summarizes specific recommendations for each functional area.

Table 25. Summary Assessment of Functional Areas

Functional Area	Rating
Transportation Operations	▲
Vehicle and Facility Maintenance	▲
Finance	▲
Planning and Scheduling	▲
Marketing	▲
Key to Symbols: ▲ Structures and procedures are conducive to effective operations	
Key to Symbols: ● Structures and procedures are adequate with room for improvement	
Key to Symbols: ▼ Structures and procedures are insufficient	

PART V: RECOMMENDATIONS SUMMARY

This review's recommendations are summarized in Table 26. Overall, Waukesha Metro Transit's policy- and decision-making structures and functional areas are conducive to effective operations. Metro Transit employs many exemplary practices in operations, maintenance, finance, planning, and marketing; and its fleet's condition and safety and training programs are among the best in Wisconsin. Moreover, Metro Transit had zero findings in its 2017 FTA Triennial Review. Nevertheless, with ridership and productivity declining (Table 10, Table 14), it is imperative that leadership be proactive in identifying new opportunities for incremental growth. The recommendations in Table 26 identify means to improve reliability and quality of existing service, stabilize local funding, and explore ridership growth strategies.

Table 26. Summary of Recommendations

Functional Area	Recommendation	Priority
Policy- and Decision-Making Processes	No recommendations	--
Transportation Operations	Update automatic vehicle location (AVL) software, or seek additional training from the vendor, to allow for consistent on-time performance monitoring of fixed-route service.	High
	Station a lift-equipped supervisory vehicle at the Downtown Transit Center (DTC) for missed transfers and to respond to delays or other passenger events.	Medium
	Prior to implementation of upgraded automatic vehicle location (AVL) technology, collect departure times at scheduled timepoints along fixed routes for all trips. Using these data, develop a process for systematically monitoring on-time performance in comparison to the established on-time performance goal.	Medium
	Increase extra board to accommodate expected increase in driver turnover rate.	Low
	The City should consider moving forward with proposed changes to traffic operations on North Street in downtown Waukesha. Reconfiguring the roadway from one-way to two-way operations would improve transit operations and safety.	Low
Vehicle and Facility Maintenance	Conduct an analysis and peer review to determine if electric buses are a desired and feasible investment for Waukesha Metro Transit; stay informed on funding sources available for fleet modernization, including the FTA Section 5339 Low or No Emission Vehicle Program.	Low
Finance	The City should explore possibilities for collecting stable operating local share contributions from the City of Pewaukee; doing so could result in opportunities to expand service and improve relatively poor market penetration performance.	High
	Conduct a ridership and fare analysis that considers the impacts of fares on overall ridership and trip lengths; pair with a survey to better understand the income levels of existing and potential customers.	Low
Planning and Scheduling	Update the Waukesha Metro Transit Development Plan to comprehensively evaluate existing service, conduct market analysis and determine transportation needs, and provide strategic direction for next several years. Seek an FTA Section 5304 Statewide Transportation Planning grant from WisDOT, or assistance from SEWRPC, to help fund this effort.	High
	Work with MCTS to address missed transfers between Route 1 and GoldLine.	High
	Develop an ADA Transition Plan to assess conditions and prioritize bus stop improvements. Establish a yearly budget allocation for continued ADA accessibility improvements until all bus stops are ADA-compliant.	Medium
Marketing	Conduct a customer satisfaction survey at least once every two years, and use the results to guide service improvements and strategic planning efforts.	High

Functional Area	Recommendation	Priority
	Increase social media presence to better communicate with existing customers and attract new ones; create Metro Transit-specific accounts or work collaboratively with City staff to host transit content on existing citywide accounts.	Medium

APPENDIX A: COMPLETED QUESTIONNAIRE

The following are sheets from the completed MPR questionnaire, as submitted by Metro Transit. These responses were reviewed and used to develop discussion items for the September 26, 2018 on-site review and this MPR final report.

POLICY- AND DECISION-MAKING PROCESS		Waukesha Metro Transit		
#	Question	Yes	No	Response
		X	X	....
GENERAL				
1	How does the transit system interact with WisDOT on this topic?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
2	How does the transit system interact with other public transit systems on this topic?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
STAFFING & ORGANIZATION				
3	How does the transit system fit into the overall local government framework? Is it a stand-alone entity, or is a division of the city / county government?			Division within Public Works of the City of Waukesha. Contracted to support Public Works for Waukesha County for County Transit System.
4	*If the transit system is a city department* , does the city provide the following? Please note if duties are shared between the city and transit system.			
	Human Resources	X		Limited to only Transit Manager related.
	Operations		x	
	Maintenance		x	
	Finance	X		Limited. Can explain onsite.
	Legal	X	X	All legal matters are handled by City Attorney except HR which is done by management company HR/Attorney
	Other (please note)			
5	How many of the following workers does the system employ?			
	Full-time management/administrative employees			4
	Part-time management/administrative employees			0
	Full-time drivers			26
	Part-time drivers			9
	Full-time dispatchers			0
	Part-time dispatchers			0
	Full-time operations/street supervisors			4
	Part-time operations/street supervisors			0
	Full-time mechanics			4
	Part-time mechanics			0
	Full-time maintenance supervisors			1
	Part-time maintenance supervisors			0
	Full-time other maintenance employees			1
	Part-time other maintenance employees			3
	Full-time other employees			1
	Part-time other employees			0
6	How do labor costs (wages and benefits) impact the overall cost of operations? Has this changed significantly in the last few years? If so, how?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
7	Does the transit system offer a retirement benefit program? *If so, describe.*		x	
8	Have transit operations or administration been adversely impacted by high turnover or recent retirements?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
9	What actions does the transit system undertake to improve employee retention?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
10	Are employee retention figures tracked (e.g., average employee tenure)? *If so, describe.*	x		*Senority list and term log by year*
MANAGEMENT				
11	Who does the transit manager report to?			Director of Public Works
12	Who is responsible for the following management activities? Please include names and job titles.			
	Preparing capital / operating budgets			Transit Manager, Finance Director
	Providing input on staffing levels			Transit Manager, Finance Director, Maintenance Director, General Manager, Compliance Specialist
	Administering discipline			General Manager, Lead Supervisor, Supervisors

POLICY- AND DECISION-MAKING PROCESS		Waukesha Metro Transit		
#	Question	Yes	No	Response
	Hearing grievances			General Manager, Lead Supervisor, Supervisors
	Negotiating labor contracts			General Manager, Finance Director, Compliance Specialist
13	How often does management hold regular staff meetings?			Regular meetings infrequent, however, management staff meet several times a week to discuss matters. Very collaborative approach to management.
14	How often do you (transit manager) meet with your supervisor?			Standing meeting weekly, additional meetings as needed.
15	What training has management staff received in the past year?			Reasonable suspicion, ADA training, Sexual harrassment, active shooter, accident investigation, train the trainer, RouteMatch AVL training, IT Security Training
16	What training is planned for management staff in the next year?			TMI training, TransDev training, IT Security Training
17	As transit manager, are you satisfied with the level of management training available to you? *If no, please describe.*	X		
POLICY BOARD / TRANSIT COMMISSION				
18	Is there a governance board / transit commission in place? If yes, complete questions 19-28. If no, skip to question 29.	x		
19	How many members are on the board?			5
20	What is the term of members?			2 year
21	Are any members elected officials?	x	x	
22	Are board members compensated?	x		
23	How frequently does the board meet?			As needed, averages once a month
24	Are board meetings open to the public and publicized?	x		
25	Are board meeting agendas and minutes posted online? *If so, please provide a link.*	x		https://waukesha.legistar.com/Calendar.aspx
26	Are there committees of the board? *If so, please list.*		x	
27	Do management and staff regularly attend board meetings?	x		
28	Do management and staff prepare regular updates for board and committee meetings? *If so, what reports are prepared?*		x	
29	*If there is not a transit commission in place* , what body is responsible for making decisions?			NA
POLICY-MAKING PROCESS				
30	Has the transit system adopted performance goals? *If so, which individuals are responsible for establishing them?*		X	Will be doing so for 2019. Currently in development
31	*If yes* , do you regularly review and evaluate system progress toward established goals? How? How often?			NA
32	Briefly describe the goals set for 2018.			NA
33	Who is involved in setting transit performance goals?			Transit Manager and management staff will be
34	Who is involved with setting local policy on:			
	Operations			Transit Manager and General Manager, Compliance Specialist
	Service planning and changes			Transit Manager, Transit Commission Board, SEWRPC
	Specifying / procuring equipment and rolling stock			Transit Manager, Compliance Specialist, Maintenance Director
	Fare structure			Transit Manager, Finance Director, Transit Commission Board
35	How are policy changes communicated to system users?			Posted on the website, on buses and at the Transit Center. City will also communicate changes through social media.
36	Do you evaluate the effectiveness of policy changes? *If yes, how, and how often?*			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
37	Does the board review the results of policy evaluation?	x		
38	Does the community have access to the results of policy evaluation?	x		
COMPLIANCE				

POLICY- AND DECISION-MAKING PROCESS		Waukesha Metro Transit		
#	**Question**	**Yes**	**No**	**Response**
39	Did the system have any deficiencies, corrective actions, or findings in the most recent FTA Triennial Review/WisDOT Compliance Site Review? *If yes, describe.*		x	0 findings in 2017 Triennial review.

TRANSPORTATION OPERATIONS		Waukesha Metro Transit		
#	Question	Yes	No	Response
		X	X	....
GENERAL				
1	How is the system performing in terms of reliability? What aspects impact reliability of the system? Describe how transit staff interact with system users.			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
2	Currently, what is the most pressing operational issue the system is experiencing?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
3	How does the transit system interact with WisDOT on this topic?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
4	How does the transit system interact with other public transit systems on this topic?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
OPERATIONS MANAGEMENT AND SUPERVISION				
5	Is there an operations manager? *If yes, who (name and title)?*	X		The General Manager is responsible for the operations of the system although with his other duties.
6	Are operations supervisors scheduled and present during all hours service is operated? *Please describe.*	x		A supervisor is present prior to drivers reporting for duty and the night supervisor leaves after all drivers have returned and checked out from their shifts.
7	How many supervisors are on duty for each shift?			1 or 2
8	Are any supervisors on call at home?		X	
9	What are the principal duties of the supervisor?			Route and driver supervision, overseeing the operation of paratransit, covering open shifts, assisting drivers as needed on their route, taking/investigating customer comments
10	Is at least one dispatcher on duty for all hours of service? *Please describe* .		x	NA-No Dispatchers. Only Supervisors
11	What are the functions of dispatchers?			NA-No Dispatchers. Only Supervisors
12	Who are the first employees to report to work on weekdays? What time do they arrive? Do they have specific first-to-report tasks to open up the facility?			The morning supervisor opens up at 4:15 am. Yes, check paratransit schedule, bus assignments, check for driver sick calls and fill open shifts if necessary. Prepare run cards for driver reports, check in drivers for daily shifts
13	Does the system retain the daily bus and run assignment sheets? *If yes, how long are sheets retained?*	x		Yes. Seven Years
DRIVER COMMUNICATIONS				
14	How are route and service changes communicated to drivers?			
	Bulletins	x		
	Memos/Special notices	x		
	Verbal announcement	x		
	Staff meetings	x		
	Other (*please describe*)			
15	Are drivers required to sign for, and acknowledge, memos/special notices and bulletins?	X	X	
16	Is there a specific employee guidebook for operations or a specific driver's manual?	x		
17	Is there a cellular phone / digital device usage policy for drivers?	x		
18	Is there a defined, progressive disciplinary policy for drivers? *If so, plese describe.*	x		Refer to the Performance Code
19	Are job performance evaluations completed regularly for all driver staff? *If so, how often, and what do they entail?*		x	This has not been done over the past several years but the new General Manager is reinstituting this. Previous policy has been annually for each employee. Forms used are provided for reference.
20	Are any monetary or non-monetary incentive programs in place for driver performance? *If so, what are they?*	x		Safety awards. No preventive accidents, drivers are eligible for drawings for prizes at Safety Awards lunch. Also, if system has lowest claims, insurance company will provide funds to recongize the drivers. Management company provides safety incentive prizes as well.
DRIVER: PRE-TRIP / POST-TRIP				
21	How far in advance of pullouts (in minutes) do drivers report?			Eight minutes

TRANSPORTATION OPERATIONS		Waukesha Metro Transit		
#	Question	Yes	No	Response
22	Is there a method for dispatch to communicate with maintenance to ensure that all routes have been assigned vehicles that are in good repair?	x		
23	Are all drivers required to personally check-in or report to a supervisor, dispatcher or some other management person before going on duty? *If not, how is a driver's fitness for duty determined?*	x		Yes
24	Do any drivers begin work at remote start points? *If yes, what is the procedure for checking in and getting to remote locations?*	x		Mid day shifts start and end at the Transit Center. Drivers can report to Badger Drive and use a company vehicle travel to the Transit Center. A supervisor is present at Badger to check them in. Those who report directly to the Transit Center check in with the driver being relieved. The driver being relieved must stay on duty until the relief is present. If problems occur, the supervisor is notified. There are supervisors at the Transit Center as well.
25	When does the first bus on weekdays pull out?			5:26
26	Is a pre-trip inspection required before a bus goes in service?	x		
27	Do drivers have a post-trip checklist?	x		
28	*If no* , what functions do drivers complete at the end of the shift?			
29	Is there a drivers' room? *If so, where?*	x		Next to Transportation office at the Garage and lounge at Transit Center
30	Who locks up the garage at the end of the service day, and at what time? Is a security system used when no one is present?			Security Guards do Monday-Saturday. Cleaning Service Sunday. Transit Center closes at 9:30pm M-F, 9pm Sat, 7 pm Sun
DRIVER: IN-SERVICE				
31	Do drivers record the following information throughout the day?			
	Passengers by classification	x		
	Special fares	x		
	Timepoint arrivals		x	
	Start/end vehicle mileage	x		
	Other (*please specify*)			
32	Do drivers handle cash or tickets in any way?		x	
33	Do you regularly review ridership boarding and alighting patterns on existing routes? *If so, how? How often?*	x		Daily and Monthly
34	Do you track on-time performance? *If yes, how do you define "on time"?*	X	X	Ecolane track on-time performance for paratransit. Goal of 95% Fixed route Looking for AVL to do this again
35	Is there an adopted on-time performance standard (e.g., % of trips on time)? *If yes, what is the standard?*	x		95%
36	What was the actual level of on-time performance for 2017 (% on-time)?			Paratransit On-time performance YTD 2017 = 90%
TRAINING				
37	Are drivers, dispatchers, and supervisors given training in how to respond to accidents and medical emergencies?	x		
38	*If yes* , is the training specifically included in a driver's manual/operations manual?	x		
39	Are drivers given training and direction in how to respond to passenger incidents?	x		
40	Do you have an accidents per mile goal (e.g., fewer than 2.7 accidents/100,000 miles)? *If yes, what is it?*		x	
41	2017 miles between preventable accidents:			
42	Have the drivers been through specialized driver safety courses (e.g., Smith System, WI RTAP, TSI, CTAA)? *If so, please note course.*	X		Veolia/Transdev
43	How long is your driver training program?			
	Number of total hours			160

TRANSPORTATION OPERATIONS		Waukesha Metro Transit		
#	Question	Yes	No	Response
	Number of classroom hours			40
	Number of behind-the-wheel hours			120
44	Who are the instructors?			David Seese, Dan Peterson
45	Does the Maintenance staff have any role in training new drivers?			Yes Maintenance is given an opportunity to meet with new drivers to discuss issues relating to maintenance
46	Do you provide or arrange for initial training of inexperienced drivers? *If yes, describe.*	x		train to obtain CDL
47	Do you provide or arrange for ongoing training for drivers? *If yes, describe.*	x		Training is provided in house, and through vendors: Transit Mutual Insurance, Argent Workers Compensation Carrier, and suppliers such as Q-Straint
48	Is there a retraining program for drivers with poor safety or complaint records? *If yes, describe.*	x		Yes. Drivers involved in preventable accidents receive re-training applicable to the deficiencies noted. Validated Customer Complaints also trigger re-training for the operator.
49	Does your safety program offer incentives and recognition to drivers with good records? *If yes, describe.*	x		Yes, TMI Safety Awards, Safety Certificates, Safety Recognition sponsored by Transdev
50	Do you have regular safety meetings with the following staff? *If yes, how often?*			
	Drivers	x		There is a Safety Committee that meets as needed (typically quarterly)
	Mechanics	x		that consists of drivers, maintenance and the Safety Supervisor
	Administration	x		review issues and solutions with the Compliance Specialist
51	Does the system do driver ride checks ("ride alongs") with management, supervisors, or other drivers? *If yes, how often?*	x		Insurance company performs ride checks multiple times a year. Training Supervisor ride checks every driver at least 2 times a year.
52	What type of training, guidelines, and / or procedures are in place for using communication equipment (e.g., phone, cell phone, radio, tablet, etc.)			Policy procedures - supervisor training, new hire orientation
53	Are drivers permitted to use the radio to communicate with the dispatcher while the bus is in motion?	x		
54	Are drivers given specific training in the use of a passenger lift and how to properly secure a wheelchair?	x		
55	*If yes* , is this procedure specifically covered in the driver's manual or guidebook?	x		
56	Who conducts safety training for maintenance workers?			Maintenance Director and Compliance Specialist, TMI and other resources provide information
WORK AND VEHICLE ASSIGNMENTS				
57	Briefly describe the methods / processes / tools used for run cutting.			Manual runcutting with the use of Excel Spreadsheets
58	Do you use specialized scheduling (*e.g. HASTUS*) or other software to maintain a schedule database? *If so, briefly explain.*		x	
59	Do drivers choose route assignments based on seniority?	x		
60	How often do drivers select work assignments?			3 or more times a year
61	Are there requirements for driver breaks? *If yes, describe.*		x	
62	Does the system employ standby drivers who report to work but are not assigned to a route (extra board)?	x		
63	Does the system employ on-call drivers who are available for work, but do not report to work unless called in (on-call)?		x	

MAINTENANCE		Waukesha Metro Transit		
#	Question	Yes	No	Response
		X	X	....
GENERAL				
1	In your opinion, is the maintenance program operating efficiently? Is your maintenance program able to effectively keep facilities and vehicles in safe and working order? What are the major challenges facing your maintenance program?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
2	How does the transit system interact with WisDOT on this topic?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
3	How does the transit system interact with other public transit systems on this topic?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
4	How many of the following workers does the system employ?			
	Full-time mechanics			4
	Part-time mechanics			0
	Full-time maintenance supervisors			1
	Part-time maintenance supervisors			0
	Full-time other maintenance employees			1
	Part-time other maintenance employees			3
5	Is there a maintenance manager?	x		
6	Is a maintenance lead or supervisor always on duty in the shop?		x	
7	Is there a mechanic on duty during all hours of revenue operation?		x	
8	Are buses stored, maintained, and dispatched from the same facility? *If not, please describe.*	x	x	During weekdays from 8 am -5 pm, Supervisors are at our Transit Center
9	Are the following repairs performed **in house** or are they **contracted**?			
	Routine maintenance			In house
	Body work			Both
	Engines			Both
	Transmissions			Both
	A/C			Both
	Paint			contracted
10	Have mechanics had specific training on vehicles they are maintaining?	x		
11	What type of maintenance training is offered?			Safety Training - In House and Transit Mutual Insurance and Argent Work Comp Carrier, manufacturer and vendor training
12	Who in the organization develops vehicle, equipment, and contracted services specifications?			Maintenance Director and Transit Manager
DAILY VEHICLE SERVICING				
13	Is the fueling system automated?	x		
14	How often are buses fueled and fluid levels (oil, torque fluid, water) checked?			daily
15	How often is mileage recorded for each vehicle?			daily
16	Is there a monthly report (summary) showing by vehicle its total mileage, and consumable consumption, miles per gallon, miles per quart on fluids? *If yes, how is it analyzed?*	x		Maintenance Director reviews the report monthly and updates management staff
17	How often are bus exteriors washed?			Daily
18	How often are vehicle interiors swept and/or wiped down?			Daily
INSPECTIONS AND PREVENTIVE MAINTENANCE				
19	Are reports generated for pre- and post-operation inspections?		x	
20	At what mileage intervals are inspections performed?			In accordance with manufacturer specifications - refer to inspection forms
21	What work is done at each mileage interval? *Explain briefly.*			In accordance with manufacturer specifications - refer to inspection forms
22	Percent inspections performed on time in 2017:			100%

MAINTENANCE		Waukesha Metro Transit		
#	Question	Yes	No	Response
23	What is the typical mileage interval between brake relining / reconditioning?			Depending on bus manufacturer. New Flyer is 36000 and 48000. Brake inspections are done with each inspection. Gillig typically have 200,000 miles before requiring brake service.
24	Is there an internal standard for the amount of time it should take to complete PM inspections? *If yes, what is it?*	X		A inspection is 2.8 hours, B inspection is 5.0 hours, C inspection is 12 hours. Times will vary depending on bus type/manufacturer.
25	How are road calls tracked?			By a manual road call sheet. The report is provided monthly to the Finance Director for reporting purpsoes.
REPAIRS				
26	Is any type of software used to track work? *If so, which?*	x		RTA
27	Is there a system for prioritizing repairs and assigning work to mechanics?		X	
28	Is there a procedure to ensure that unsafe buses aren't used? *If yes, explain briefly.*	x		Marked out of service and use of lock out/tag out.
29	Is there a procedure to ensure that the most critically needed types of vehicles are repaired first? *If yes, explain briefly.*	x		Fleet anlaysis on a continuous basis.
30	Do mechanics complete a work order form showing the nature of the repair, the hours (labor) required, and the parts used?	x		
31	*If yes,* is this information kept on file for each vehicle?	x		
32	Does a maintenance lead or supervisor review driver defect reports?	x		
33	Does the system monitor mechanic productivity?	x		
SHOP				
34	Does the vehicle maintenance and storage area have a sprinkler or other fire suppression system in place?	x		
35	Is there a separate room for the storage of hazardous/explosive materials?	x		
36	Is there a separate room for battery storage?	x		
37	What is the date of the most recent fuel-oil storage tank inspection?			April, 2018
38	Is there an up-to date file on hazardous materials per OSHA requirements?	x		
39	Does the system have a program for disposing of recyclables and hazardous materials?	x		
40	Are the following required in the shop?			
	Eye protection	x		
	Safety shoes	x		
	Hardhats		x	
41	Is there an office area for maintenance staff and recordkeeping?	x		
PARTS				
42	How do you determine from where and how often you purchase *parts* ?			Spot checking of inventory, part requisition reports on RTA, mechanics reports of items needed
43	How do you determine from where and how often you purchase *fuel* ?			Fuel is monitored by Red jacket Monitoring System. Fuel prices are obtained from a minimum of three vendors, up to five vendors before the purchase is authorized.
44	How do you determine from where and how often you purchase (or lease) *tires* ?			An RFP is issued for tire lease and the length of the contract is five years.
45	Is there a computerized parts inventory control process?	x		
46	Is there a method of confirming the inventory? *If yes, describe. How often?*	X		Physical inventory count.
47	Is there a stock keeper in charge of the parts room? *If yes, who?*	x		Maintenance Director
48	*If not* , who supervises parts withdrawals?			
49	Are all parts withdrawals documented? *If yes, how?*	x		RTA work order tracks parts used.

MAINTENANCE		Waukesha Metro Transit		
#	**Question**	**Yes**	**No**	**Response**
50	Have targeted inventory and reorder levels been established for common or high usage items?	X		
51	How many stock outs occurred in 2017 that resulted in a vehicle being held out of service?			None
FACILITIES MAINTENANCE				
52	If the system has bus shelters, or a transit center, is it responsible for maintaining them? *If yes, how frequently are they cleaned?*	x		Transit Center is cleaned daily. Bus shelters are cleaned monthly with spot checks performed weekly. Drivers will also report issues if present on a daily basis.
53	Does the system have a facilities maintenance plan? *If yes, what does it entail?*	x		Refer to plan submitted with documents.
54	Are facility management responsibilities clearly assigned within the system?	x		

FINANCE		Waukesha Metro Transit		
#	Question	Yes	No	Response
		X	X	....
GENERAL				
1	How are things working right now? Are there any problems with the way the accounting/ finance function works for your system?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
2	How does the transit system interact with WisDOT on this topic ?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
3	How does the transit system interact with other public transit systems on this topic?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
4	Do you have complete control over all financial systems or are you part of another agency's financial system?			Complete control with a few exceptions. Can explain.
5	Which staff are involved with the following:			
	Payroll			Finance Director, Compliance Specialist, Administration Specialist
	Purchasing			Transit Manager, Maintenance Director, Finance Director
	Accounts payable			Finance Director, Transit Manager, Administration Specialist
	Accounts receivable			Finance Director, Compliance Specialist, Administration Specialist
	General ledger			Finance Director
	User fare revenues			Finance Director, Compliance Specialist, Administration Specialist
6	Does the system or its parent organization have an internal audit function?	x		
7	*If yes,* does management and/or the governing board provide input to the annual audit work plan?	x		
ACCOUNTING				
8	Do you use a computerized accounting system?	x		
9	*If yes* , are security and backup systems in place?	x		
PAYROLL				
10	Is there a secure database of employee records, pay rate, benefit elections, and other data?	x		
11	Are payroll checks approved/signed by someone other than the person who prepares them?	x		
REVENUE CONTROL				
12	Do you have a written policy for cash handling procedures?	x		
13	Are fares collected in a locked fare box?	x		
14	Are registering fare boxes used?	x		
15	Who is responsible for removing money from the bus?			Fuelers/Cleaners
16	Who counts the money?			Administration Specialist, Maintenance Director, Transit Manager (Requires two personnel)
17	What is the average daily amount of cash collected?			633.44 average YTD to 7/31/2018
18	Who reconciles money with the passenger count?			Compliance Specialist, Finance Director
19	Who is responsible for making the bank deposit?			Administration Specialist, Maintenance Director, Transit Manager (Requires two personnel)
20	How often are deposits made?			3 times a week
21	Are bank deposits reconciled back to driver or fare box revenues?	x		
22	Are banking records reconciled to bank statements?	x		
23	Are cash receipts for pass sales reconciled back to the number of passes issued?	x		
24	Are fare and pass sale cash receipts counted in a secure area?	x		
25	Are paper transfers issued?	X	x	
26	Do you track how transfers are used?	x		

FINANCE		Waukesha Metro Transit		
#	Question	Yes	No	Response
27	When was the last time fares were increased?			Mar-13
BUDGETING AND GRANTS				
28	When does the annual local budgeting process get started?			July
29	Which staff members are involved in the budgeting process and how?			Transit Manager-oversees and reviews budget, forecasts revenue and some expenses. Maintenance Director-maintenance cost forecast. Finance Director does bulk of work of tying everything together.
30	Who prepares annual funding application to WisDOT?			Finance Director and Transit Manager
31	Are annual capital and operating budgets part of local TIP elements?	X		
32	Does the transit system compare actual revenues and expenses against budgeted revenues and expenses throughout the fiscal year? *If so, please describe your process, including frequency.*	X		It is done through Financial report review on a monthly basis
33	What is the policy for excesses?			If revenues exceed expenses for a given year, it off sets against the local share and the balance of local share is returned to the City (or County).
34	Does the transit system routinely convey post-grant application annual budget changes to WisDOT? *If so, how and when?*		x	
35	Is there a fleet replacement fund in place? *If so, describe.*		x	
36	How does the transit system seek out capital grant opportunities?			The system has a good sense of what resources for capital funding is available and will apply for funds that are applicable for the project that needs to be funded. Several funding sources, 5339 allocated and competitive, CMAQ, STP-M and 5337 all have been used for capital funds in the past few years. The City also will request capital funds allocated to Waukesha County and Waukesha County has allowed the use of those since Waukesha County has very little need for the funds at this point.
37	Have you worked with your MPO/RPC to seek grant opportunities for vehicle replacement and capital investment?	x		
38	Have you had to turn back grant funds in the past 5 years? *If yes, what might prevent this in the future?*		x	

PLANNING		Waukesha Metro Transit		
#	Question	Yes	No	Response
		X	X	....
GENERAL				
1	What do you want to accomplish in the next few years?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
2	In the past, has there generally been success in implementing planning recommendations?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
3	How does the transit system interact with WisDOT on this topic?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
4	How does the transit system interact with other public transit systems on this topic?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
PLANNING FUNCTIONS / LONG-RANGE PLANNING				
5	Are any staff dedicated exclusively to service planning? *If so, how many? If not, who is responsible for the service planning function?*		x	
6	When was the last transit development plan (TDP) or other long-range strategic plan completed?			Completed in January 2013. Next TDP is set to kick off in Q4 2018.
7	Who led the last TDP or strategic plan and what was the system's role in the process? Did any other local agencies participate in the TDP? Please list.			SEWRPC (MPO). Transit Director co-chaired.
8	Are findings from the TDP or strategic plan incorporated into local long-range transportation plan for the community?	x		
9	To what extent is the system following the recommendations in the TDP or strategic plan? *(% recommendations implemented)*			Roughly 75%
10	Does the system regularly survey users regarding the following?			
	Frequency of use		x	
	Transportation alternatives/mode choice		x	
	Origin and destination		x	
	Trip purpose		x	
	Level of satisfaction with service		x	
	Demographics		x	
PLANNING DATA / PERFORMANCE EVALUATION				
11	What daily performance data is regularly reviewed?			Ridership for fixed route and paratransit. Operations report including detours, deviations, delays, paratransit on-time performance. Complaints.
12	Who is responsible for monitoring daily performance data?			Transit Manager and Compliance Specialist Complaints are reviewed by the General Manager.
13	Does the system use automatic passenger counters (APCs)?	x		
14	Do you conduct passenger counts by stop location? *If yes, how often?*	x		2-3 times a year
15	Do you monitor maximum loads on fixed routes? *If yes, how often?*		x	
16	Does the system use automatic vehicle locator systems (AVL)?	x		
17	Do you conduct on-time performance checks for scheduled trips? *If yes, how often?*	x	x	Working to update AVL to allow for this again. Have done so in the past. Ecolane (paratransit) monitors on-time performance and other performance indicators.
18	Does the system have GIS capabilities? *If yes, how is GIS used in the planning function?*	x		Look at demographics of the service area vs. demographics of ridership
19	Do you use standards / performance measures to evaluate your service (individual routes, trips, stops, etc.)? *If so, how often? Who is involved?*	x		Monthly evaluation by Transit Manager from ridership routes.

PLANNING	Waukesha Metro Transit			
#	Question	Yes	No	Response
20	Are there established standards or policies for minimum acceptable ridership and performance levels on particular services? *If so, how, and how often, are these used to shape services delivered?*	x		Monthly evaluation and changes are made as needed 2-3 times a year.
21	Does the system have stated annual ridership growth goals? *If yes, please state goal for 2018* .		X	
SERVICE CHANGES				
22	When was the last significant service change? What did it entail?			January 2014. Consolidated 4 lowest performing ridership routes on Saturday to 2. Reduced some weekday evening service and combined 2 evening routes to operate as 1.
23	When was the last time you evaluated your service area?			Currently underway.
24	What is the process used to propose service changes?			Proposed change can come about from suggestion from driver, Superviosr, passenger or management or change to key destinations in service area. Data is collected to detemine if the change is warranted. The data is verified. Discussion between operations and Transit Manager to vet the proposed change. If viable, change is presented to the Transit Commission for consideration and if approved, ratified by City Council.
25	Do you evaluate the effectiveness of service changes? *If so, how?*	x		It part of the monthly evaluation of service.
26	Generally, how often are routes and/or schedules updated?			2-3 times a year. Not all routes change.
27	Have you instituted any new or substantially expanded programs or service (new mode or type of service) within the last 5 years? *If yes, explain briefly.*		x	
28	Is there a policy concerning a start-up period for new routes or services before ridership is considered stable and an evaluation is made? *If yes, explain briefly.*		x	
29	*If yes* , have you set goals and objectives which are specific to the new / changed services?		NA	
30	*If yes* , have you reviewed and evaluated the results of the new / changed services?		NA	
FIXED ROUTE SCHEDULES				
31	Are fixed route schedules arranged to have routes meet at transfer points?	x		
32	Are buses "held" for late arriving buses at transfer points? *If yes, briefly state the policy* .	x		Yes, up to 5 minutes.
33	Are there situations in which a bus is permitted to go off route to make a pick-up or drop-off? *If so, explain briefly* .	X		Only when it would be unsafe to pick up or drop off the passenger (or obstruction to stop) and permitted by the Supervisor.
34	Is layover time or recovery time incorporated into schedules? *If not, how is recovery time accommodated?*	x		
35	How much layover or recovery time is granted for each bus trip (% or number of minutes)?			3-5 minutes at the Transit Center. Most routes have 5 minutes. Some routes also have layover time at the end of the route (Can vary from 2-10 minutes)
36	Is layover time or recovery time taken at *transfer points* ?	x		
37	Is layover time or recovery time taken at *the end of the line* ?	x		
38	Are trippers operated? *If so, explain briefly.*	x		Yes, limited school trips are provided in the afternoon during the school year.
39	Are schedules checked on a regular basis to determine if running time adjustments are warranted?	x		
PUBLIC INPUT				

PLANNING		Waukesha Metro Transit		
#	Question	Yes	No	Response
40	How does the system engage the public in planning decisions? Briefly describe.			We work with various community service organizations and will discuss changes to the system through them. Also listen to the needs through these organizations.
41	When was your last public input meeting?			Dec-17
42	What was the focus of your last public input meeting?			Public hearing for proposed reductions on Freeway Flyer Route 79.
43	Is there a citizens' advisory board or similar body in place to allow input?		x	
44	What guidelines are used to determine when a public meeting / hearing is needed?			Service reduction of 10% or more for a route per service day or fare increase
45	Does the system conduct formal public hearings before adopting route changes or changes to service hours?	X		
46	How are comments received at public hearings incorporated into service changes?			Transit Commission holds public hearing prior to considering changes. Written comments are provided to the Board. Changes to plan are considered by Board due to public comment.
CAPITAL PLANNING				
47	Does the system have a *fleet* replacement/expansion plan?	x		
48	Does the system have a *facilities* replacement/expansion plan?		x	
49	Has the system analyzed whether the current fleet mix is most appropriate relative to existing/future demand?	x		
50	Has the system made changes to improve energy efficiency and become more environmentally friendly? *If so, describe.*	x		Various lighting projects have been conducted as well as HVAC upgrades. More lighting projects will occur in near future. Switched from paper toweling in public restrooms to hand dryers. Many new low emissions vehicles have been purchased.
51	Is facilities planning conducted as part of annual budgeting or separate from other budget process? Please describe.			Facilities planning is part of the annual budgeting, however, both facilities have many years of useful life left. The City Project Engineering, electrician and Transit Maintenance Director oversee the maintenance of the transit facilities. The Transit Manager also gets invovled in the planning.
COORDINATION				
52	How does the system coordinate with service area communities regarding land use, infrastructure, and development decisions?			Through the MPO (SEWRPC) also with City Planning and Engineering. For the County service, also work with MPO, County Engineering and the local communities.
53	How does the system communicate with planning and zoning agencies?			Through established relationship with the various agenices.
54	How frequently does the system contact peer transit agencies to discuss planning initiatives and potential service changes?			Constant. Always working with our peers.
55	Is the system directly involved in updating the transportation element of local planning documents?	x		

MARKETING		Waukesha Metro Transit		
#	Question	Yes	No	Response
		X	X	....
GENERAL				
1	What are the overall goals of marketing, and where do you get information on how to market your service?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
2	What are some successful marketing activities you've completed?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
3	What are some unsuccessful marketing activities you've done?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
4	What is the perception of the system within the communities served?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
5	How does the transit system interact with WisDOT on this topic?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
6	How does the transit system interact with other public transit systems on this topic?			*No written response is needed for this question, but please take time to think about it as we will discuss this during the on-site visit.*
MARKETING FUNCTIONS				
7	What percent of your total annual budget goes to marketing?			1%
8	Does the system have any dedicated marketing staff? *If yes, how many staff work in marketing? If no, who is responsible for the marketing function?*		X	Transit Manager and Customer Service Specialist
9	Does the system have a marketing plan?	X		
10	Do you contract for any marketing / customer information services from an outside vendor? *If yes, briefly describe.*	X		Graphic design is all outsourced
11	What are your three largest marketing expenditures?			Printing, graphic design & advertising
MATERIALS				
12	Which of the following activities is the marketing department / staff responsible for?			
	System map	x		
	Telephone information	x		
	Website updates	x		
	Social media updates	x		
	Route schedules	x		
	Rider guide	x		
	Advertising themes	x		
	Media contacts/press releases	x		
	Customer surveys		x	
	Alternative language materials	x		
	Community outreach	x		
	Business outreach	x		
	School outreach	x		
	Board updates	x		
	Public meetings	x		
13	Does the system provide marketing materials in languages other than English? *If yes, list.*	x		Spanish
14	*If yes* , how did you determine which languages to use?			4 Factor Analysis in LEP plan and also with knowing the community and working with community groups
15	Do you have a printed or online transit system map? *If yes, is the map up to date?*	x		
16	Does your system provide customers with information about other transit options in the community (e.g. human services transportation, specialty services, intercity bus services)? *If yes, briefly describe.*	x		We administer Waukesha County Transit so those services are also listed on our website. We also have resources available to direct inquiries to other services in our County and region.
WEB PRESENCE				
17	Who is responsible for maintaining the system website?			Transit Manager

MARKETING		Waukesha Metro Transit		
#	Question	Yes	No	Response
18	Which of the following are available on the system website?			
	System map	x		
	Route maps and schedules	x		
	Fare information	x		
	Rider guide	x		
	Real-time bus location information	x		
	Trip planner	x		
19	Does the system maintain route / schedule data in General Transit Feed Specifications (GTFS) format?	x		
20	Does the system maintain Facebook, Twitter, and/or other social media pages? *If yes, briefly describe how and how often each is used, and who maintains them.*		x	This is handled by the Mayor's Office for the City
21	Are policies in place to guide the use of social media as a marketing tool?		x	
22	Is social media use being measured or evaluated?		x	
MARKETING AND PROMOTIONS				
23	Does the system have seasonal marketing or fare promotions? *If yes, briefly describe.*	X		Back to School in August, various promotions for Sponosor Free Ride Day and County Fair service
24	Does the system provide special or incentive fare programs, other than monthly passes? *If yes, briefly describe.*	x		Summer Youth Pass
25	Is there a consistent marketing theme or brand in place connecting materials, facilities, and equipment? *If yes, briefly describe.*	x		We have strict branding guide that all public communication materials must adhere to and the design is consistent in print, on the buses and facilities
26	Does your system have local spokespeople that are recognized transit advocates? *If yes, who are they?*	X		Sofia, a advocacy group of faith leaders.
27	In 2017, did the system conduct any advertising or promotional campaigns (other than publishing a schedule)? *If yes, briefly describe.*	x		As described in #23 and also had ads run on cable tv and have articles in City Public Works newsletters
28	Do you communicate regularly with schools and employers to promote transit services? *If yes, how and how often?*	x		Work closely with School district, Chamber of Commerce, For schools, customer service specialist does training to classes, teachers and aids.
CUSTOMER CONTACTS AND COMPLAINTS				
29	How often do you receive questions regarding service (e.g., daily, weekly, monthly, occasionally)?			Daily
30	How often do you receive comments or complaints regarding service (e.g., daily, weekly, monthly, occasionally)?			semi weekly
31	How many customer complaints were received in 2017?			102
32	How are complaints processed? Explain briefly.			Complaints are input into the complaint form and then investigated by a Supervisor, checking for availability video. The Supervisor then determines if it has validity. If not, the investigation is closed. If so, when applicable, the Supervisor will talk to the driver invovled to receive information. He/she will then determine whether the complaint is valid or not. If valid, driver is re-trained and disciplined. Customer is notified.
33	How are complaint trends analyzed?			Monthly complaint log and comparison year to year.
34	Do you maintain a database of customer contacts / complaints?	x		
35	Is there an established procedure for investigating and responding to passenger complaints?	x		
36	Do complaint reports go to the governing board?	x		