

Public Works – Waukesha Metro Transit

2311 Badger Drive
Waukesha, Wisconsin 53188

Alex Damien, P.E.,

Director

adamien@waukesha-wi.gov

1-262-524-3636

Waukesha Metro Transit

2023 WisDOT Management Review Summary

Every 5 years per State Statute, the Wisconsin Department of Transportation is required to do a review of each Transit System in Wisconsin.

Recommendations from 2018 Review

Most recommendations from the 2018 Review were implemented. The ones that were not implemented were not feasible or no longer relevant.

Management Functions

All management functions except for Operations were deemed to be effective. Operations was deemed adequate with some suggestions for improvement.

Peer Review Performance Objectives

Single Year Review

Waukesha Metro performed within the acceptable range for most Objectives with its Wisconsin peer systems but was out of range for Operating Expense per trip and Subsidy Per Trip. This is due in large part to the In State Peers having four year UW campuses and/or contracts with their local school districts that generate a lot of trips. Waukesha Metro performed better than its US Peers in Operating Expense per trip and Subsidy Per Trip, Operating Ratio & Operating Expense. All other objectives were in acceptable range.

5 Year Trend

Waukesha Metro performed better than its Wisconsin peer systems for Operating Expense per hour and was within acceptable range for all other objectives. Waukesha Metro performed better than its US peers in all objectives except Passenger Trips per Revenue Hour which was in the acceptable range.

Recommendations from 2023 Review

Half of the 14 recommendations have or are in the process of being implemented. Over the next few years, work on the others will occur.

City of Waukesha Waukesha Metro Transit



Source: Waukesha Metro Transit

Wisconsin Department of Transportation 2023 Transit System Management Performance Review

Final Report | January 2024

Prepared for the Wisconsin Department of Transportation by SRF Consulting Group



Contents

- Introduction1**
 - Status of Previous Recommendations1
 - Summary Tables3
- Part I: System Overview 5**
 - Fixed-Route Service5
 - Paratransit7
 - Fares8
 - Fleet9
 - Facilities9
- Part II: Analysis of System Performance 12**
 - Peer Groups13
 - Performance Measures: Results14
 - Performance Summary18
- Part III: Policy- and Decision-Making Processes 19**
 - Organizational Structure19
 - Policy Environment20
 - Conclusions21
- Part IV: Functional Area Review22**
 - Transportation Operations22
 - Vehicle and Facility Maintenance24
 - Finance25
 - Planning and Scheduling26
 - Marketing28
 - Response to COVID-1929
 - Summary29
- Part V: Conclusions30**
- Appendix A: Peer Performance Analysis32**
- Appendix B: Completed Questionnaire48**

List of Figures

Figure 1.	Waukesha Metro Transit System Map	7
Figure 2.	Photos of the Downtown Transit Center and the Administration and Maintenance Facility	10
Figure 3.	Waukesha Metro Transit Organizational Chart	20

List of Tables

Table i: Summary of Recommendations from Previous Management Performance Review (2018)	1
Table ii: Summary of Waukesha Metro Transit Performance Relative to Peers	3
Table iii: Summary Assessment of Policy- and Decision-Making Processes.....	3
Table iv: Summary Assessment of Functional Areas.....	4
Table v: Summary of Recommendations – 2023 Management Performance Review	4
Table 1.Fixed-Route Service Summary (Local Routes), December 2023	5
Table 2.Commuter Fixed-Route Service Summary, December 2023	6
Table 3.Fixed-Route Fares (Local Routes)	8
Table 4.Commuter Express Fixed-Route Fares	8
Table 5.Revenue Fleet as of November 2023.....	9
Table 6.Performance Objectives and Performance Measures	12
Table 7.2021 Operating Statistics – Wisconsin Peer Group.....	13
Table 8.2021 Operating Statistics – National Peer Group.....	13
Table 9.Operating Statistics – Waukesha Metro Transit, 2017-2021	14
Table 10.Performance Measures – Waukesha Metro Transit, 2017-2021	15
Table 11.Wisconsin Peer Performance Measures Summary, 2021.....	16
Table 12.National Peer Performance Measures Summary, 2021	17
Table 13.Summary of Waukesha Metro Transit Performance Relative to Peers.....	18
Table 14.Summary Assessment of Policy- and Decision-Making Processes.....	21
Table 15.Summary Assessment of Functional Areas	29
Table 16.Summary of Recommendations	30

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 2023 MPR for the Waukesha public transit system, doing business as Waukesha Metro Transit. Waukesha Metro Transit’s previous MPR was conducted in 2018.

The 2023 MPR process consisted of three main activities: performance analysis, review of the completed written MPR questionnaire and provided documentation, and a virtual interview and facility review. In November, an electronic MPR questionnaire was sent to the agency’s Transit Manager. The review team then conducted quantitative and qualitative performance analyses.

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

Status of Previous Recommendations

Most recommendations from the previous MPR – conducted in 2018 – have been addressed, although some of the recommendations from 2018 were no longer practicable during and/or after the COVID-19 pandemic. The status of reach previous recommendation is included below, as reported by the Transit Manager.

Table i: Summary of Recommendations from Previous Management Performance Review (2018)

Functional Area	Recommendation	Status (As Reported by Metro Staff)
Policy- and Decision-Making Processes	No recommendations.	N/A
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.	New AVL system (GMV Syncromatics) was installed in Fall 2021.
	Station a lift-equipped supervisory vehicle at the Downtown Transit Center (DTC) for missed transfers and to respond to delays or other passenger events.	Two Ford Transits with wheelchair lifts are now part of the fleet and are primarily used as Supervisor vehicles
	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.	This was not feasible nor practical at the time nor did it seem to be a benefit in doing so.
	Increase extra board to accommodate expected increase in driver turnover rate.	Given the labor shortage, this is a very inefficient use of operators.
	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.	The City converted North St. to two way traffic in Nov. 2022 and routing in the downtown was revised that improved operations and safety.

Functional Area	Recommendation	Status (As Reported by Metro Staff)
Vehicle and Facility Maintenance Finance	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.	A formal review has not been done, however, we studied other systems experience with electric buses and currently is not feasible to move to but we currently monitor and are learning as this evolves.
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.	This was not feasible nor realistic as we only operate in a very small portion of Pewaukee to Waukesha County Technical College (WCTC). WCTC did inquire about additional service, and we made it known they would need to contribute and that was the end of the request.
	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.	This was neither feasible nor practical at the time nor did it seem to be a benefit in doing so.
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.	SEWRPC completed the Waukesha area 2023-2027 TDP at the end of 2022 and was approved by both the City and County of Waukesha
	Work with MCTS to address missed transfers between Route 1 and GoldLine.	This was worked on; however, Route 1 replaced the Gold Line so service on the entire east-west service from Downtown Waukesha to the Milwaukee Regional Medical Center is on the same schedule.
	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.	This was part of the TDP, and some work was done this year. We have roughly 90% accessible bus stops and can move to a higher % but getting to 100% will be extremely difficult nor feasible without significant investments of a greater sidewalk network in all the communities we serve.
Marketing	Conduct a customer satisfaction survey at least once every two years, and use the results to guide service improvements and strategic planning efforts.	This was not done in part due to COVID, however, SEWRPC did a lot of outreach and surveys in relation to the TDP.
	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.	We have worked a lot with the City Communications Team to have a strong social media presence and they have done a great job of incorporating our messaging into the overall City social media.

Summary Tables

Below are summary tables that highlight the findings and recommendations of Waukesha Metro Transit's 2023 MPR Final Report. Detailed descriptions and analysis accompany these throughout this report.

Table ii: Summary of Waukesha Metro Transit Performance Relative to Peers

Performance Objective	Performance Measure	Single Year: 2021		Trend Analysis: 2017-2021	
		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: Summary 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 – 2023 Management Performance Review

Functional Area	Recommendation	Priority
Policy- and Decision-Making Processes	1 Conduct an assessment to determine if Waukesha Metro Transit would benefit from in-house transit operations.	High
	2 Increase employee wages and benefits to compete with other companies.	High
Transportation Operations	3 Track missed trips to document trends over time.	Medium
	4 Conduct a run time analysis on all routes since the implementation of the service restructure.	Medium
	5 Consider creating a program for regularly occurring continuing education on safety topics for all operators.	Low
	6 Consider conducting independent ride checks for performance review on an annual basis.	Low
Vehicle and Facility Maintenance	7 Create a budget specific to fleet replacement to ensure a smooth procurement process in the future.	Medium
Finance	8 Conduct a study to determine the feasibility of increasing 80.20 and 80.25 funding or to discover additional funding mechanisms.	High
	9 Explore potential operating structures that would allow for the agency to qualify for municipal insurance rate caps.	High
	10 Investigate new ways to fund a one-call, one-click reservation system for countywide transportation service providers.	Medium
Planning and Scheduling	11 Conduct a formal rider survey every one to three years to better understand the community's transit needs and adapt service accordingly.	Medium
	12 Establish targets for key performance indicators, including ridership, productivity, and on-time performance.	High
	13 Complete a Zero-Emission Bus Transition Plan to outline strategies, infrastructure, and staffing needs required to meet Metro's sustainability goals.	Medium
Marketing	14 Create a marketing plan to ensure that the public is aware of transit service, which can increase ridership.	Medium

Part I: System Overview

A service of the City of Waukesha, Waukesha Metro Transit (Metro) provided nearly 464,000 unlinked passenger trips in 2022. Metro provides fixed-route bus service on 10 routes and administers express commuter service on three Waukesha County Transit routes. Metro also provides Americans with Disabilities Act (ADA) paratransit service. The Waukesha Metro Transit revenue fleet includes 29 vehicles.

Fixed-Route Service

Waukesha Metro Transit implemented a fixed-route service redesign in June of 2023. The primary focus of the redesign was to eliminate low performing segments and to create more linear and faster routes. The system maintained its hub-and-spoke design, though not all routes have timed transfers at the Downtown Transit Center due to updated cycle times and frequencies. One major routing change was straightening Route 1 and extending it east to the Milwaukee Regional Medical Center. The Route 1 schedule also includes more frequent service than before.

Waukesha Metro Transit offers 10 local fixed-routes on weekdays, eight on Saturdays, and six on Sundays. On the weekends, Route 2/3 is a combination of weekday Routes 2 & 3, while Route 7/8 is a combination of weekday Routes 7 & 8. Route 7/8 also operates weekday evenings as shown in a note below Table 1.

Table 1 includes the service period and frequency of local routes. Route 1 has the widest service span and the most frequent service on each day type. The other routes vary in span and frequency by day type. On weekdays, scheduled headways are between 30 and 70 minutes on most routes. On weekends, most service operates every 60 minutes. The current Waukesha Metro Transit system map is shown in Figure 1.

Table 1. Fixed-Route Service Summary (Local Routes), December 2023

Service Days	Routes	Service Period (First and Last Trip Departure Times)	Frequency
Monday-Friday	1	5:15 a.m. – 10:15 p.m.	20 minutes (30 minutes after 7:00 p.m.)
	2	6:30 a.m. – 6:15 p.m.	60 to 70 minutes
	3	6:35 a.m. – 7:30 p.m.	45 minutes
	4	5:55 a.m. – 9:15 p.m.	30 to 35 minutes (60 minutes after 6:00 p.m.)
	5	6:30 a.m. – 7:15 p.m.	60 to 70 minutes
	6	6:30 a.m. – 6:45 p.m.*	60 to 70 minutes
	7	5:55 a.m. – 5:45 p.m.**	60 to 70 minutes
	8	5:25 a.m. – 6:15 p.m.**	30 to 35 minutes
	9	5:55 a.m. – 8:15 p.m.	30 to 60 minutes
	15	6:30 a.m. – 5:45 p.m.	55 to 70 minutes
Saturday	1	6:10 a.m. – 10:35 p.m.	20 to 30 minutes
	2/3	8:50 a.m. – 7:50 p.m.	60 minutes
	4	7:50 a.m. – 8:50 p.m.	60 minutes (30 minutes after 7:00 p.m.)
	5	8:50 a.m. – 7:50 p.m.	60 minutes
	6	9:20 a.m. – 7:20 p.m.	60 minutes
	7/8	8:20 a.m. – 6:20 p.m.	60 minutes
	9	8:50 a.m. – 5:50 p.m.	60 minutes
	15	8:50 a.m. – 6:50 p.m.	60 minutes
Sunday	1	7:05 a.m. – 9:11 p.m.	35 minutes

2/3	8:50 a.m. – 5:50 p.m.	60 minutes
4	8:50 a.m. – 6:50 p.m.	60 minutes
5	8:50 a.m. – 4:50 p.m.	60 minutes
6	9:20 a.m. – 5:20 p.m.	60 minutes
7/8	9:20 a.m. – 6:20 p.m.	60 minutes

* One additional evening trip departs the Downton Transit Center at 9:15 p.m.

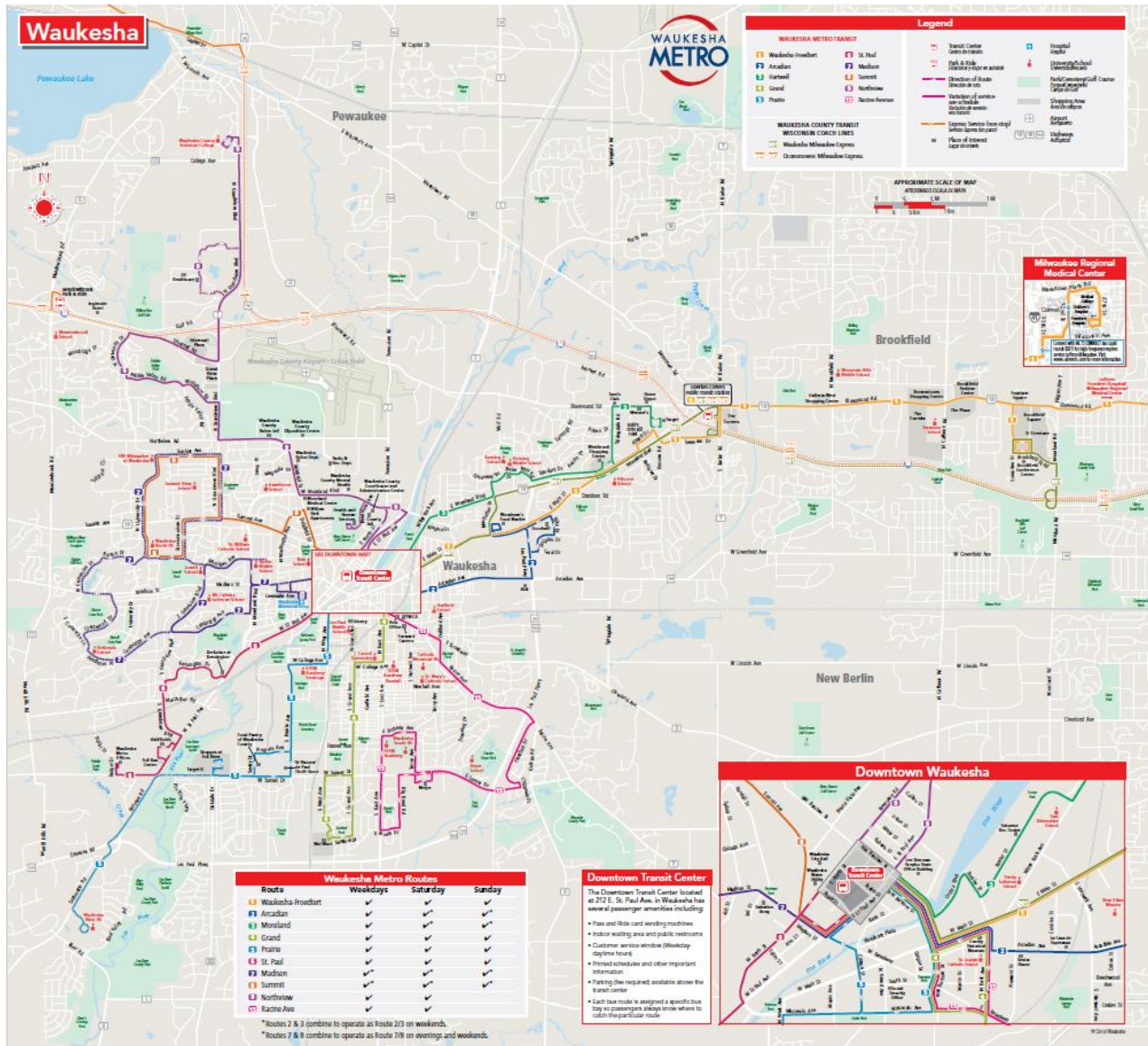
** On weekdays, Route 7/8 operates three additional trips at 6:45 p.m., 7:45 p.m., and 8:45 p.m.

In addition to the 10 local routes described above, Waukesha Metro Transit also administers three commuter routes. These routes are operated by Wisconsin Coach Lines via a contract with County Transit. Service on these routes has been reduced since the pandemic, with the service shown in Table 2 as of December 2023. As part of the recent restructuring, commuter route 906 was eliminated and the western end of Route 905 was truncated at the Nagawaukee Park and Ride. Additionally, the number of trips was reduced on each of the commuter routes due to lower demand after the pandemic.

Table 2. Commuter Fixed-Route Service Summary, December 2023

Service Days	Routes	Service Period (First and Last Trip Departure Times)	Number of Trips
Monday-Friday AM	901	5:10 a.m. – 8:55 a.m.	4 eastbound, 1 westbound
	904	6:05 a.m.	1 eastbound
	905	6:00 a.m. – 7:40 a.m.	4 eastbound
Monday-Friday PM	901	2:45 p.m. – 6:15 p.m.	2 eastbound, 3 westbound
	904	4:40 p.m.	1 westbound
	905	3:50 p.m. – 5:15 p.m.	4 westbound

Figure 1. Waukesha Metro Transit System Map



Source: Waukesha Metro Transit

Paratransit

Waukesha Metro Transit also operates Metrolift, a demand-responsive transportation service, provided in accordance with the Americans with Disabilities Act, for persons unable to use Waukesha Metro Transit fixed-route bus service. During the system redesign process, Metro expanded the Metrolift coverage area to include everywhere within the city limits of Waukesha and within 3/4 miles of Waukesha Metro Transit fixed-routes outside the City of Waukesha. Riders must be certified to ride Metrolift and can apply for certification via a form provided by the City of Waukesha.

Reservations for Metrolift can be made 24-hours a day by calling the reservation line. Reservations can be made between one day and 14 days in advance, but same day reservations are not accepted. Metrolift service is provided seven days a week from 5:15 a.m. to 11:55 p.m. Monday through Friday, Saturdays from 6:10 a.m. to 11:45 p.m., and Sundays from 7:00 a.m. to 10:15 p.m.

Fares

In 2023, Waukesha Metro Transit launched WisGo farecards and the WisGo powered by Umo App. Now, customers can pay their fare with either the Wisgo card or their phone at the validator near the front door of the bus. Each time a customer rides the local fixed-route service, the applicable fare is deducted from their account, as shown in Table 3. The agency also introduced fare capping, which means that a customer rides for free after reaching their applicable fare cap as shown in Table 3. One free transfer may be used within 90 minutes of paying a fare on the first trip. Cash fare payments are still acceptable and exact change is required.

Senior citizens (ages 65+) and disabled passengers who wish to ride for half fare must show either a Medicare Card, a Waukesha METRO Transit Reduced Fare Identification Card, or a WisGo Reduced Fare Card every time they board the bus. All riders who wish to receive a Senior/Disabled Reduced Fare Identification Card must apply for the card online or at the Transit Center Customer Service Window.

Additionally, as part of the fare restructuring, 31-day passes, 10-Ride Cards, and Day Passes are no longer available for purchase. Customers had until April 30, 2024, to use any of these passes.

Table 3. Fixed-Route Fares (Local Routes)

Group	Fare	Fare Caps per:		
		Day	Week	Month
Adult (18-64)	\$2.00	\$4.00	\$18.00	\$50.00
Youth (5-18 with valid ID of enrollment in an elementary or secondary school)	\$1.25	\$2.50	\$12.00	\$32.00
Senior (65+) or Disabled (Medicare or Metro Reduced Fare ID Required)	\$1.00	\$2.00	\$10.00	\$37.00
Children Age 4 and Under*	Free	Free	Free	Free

*Limit of 3 free children with paid fare.

Routes 901, 904 and 905 are express commuter routes administered by Waukesha Metro Transit, operated by Wisconsin Coach Lines through a contract, and funded locally by Waukesha County. These commuter routes have a separate fare structure from the rest of the Waukesha Metro Transit system. Fares for these routes are shown in Table 4. The Eastern Fare Zone includes all of Route 901, Route 904 east of and including Goerkes Corners, and Route 905 east of and including Meadowbrook Transit Station. The Western Fare Zone includes Route 904 west of Goerkes Corners and Route 905 west of Meadowbrook Transit Station. Finally, digital ticket purchasing for these routes was also recently launched via the Coach USA App.

Table 4. Commuter Express Fixed-Route Fares

Group	Eastern Fare Zone	Western Fare Zone
Adult	\$3.75	\$4.50
Student	\$2.75	\$3.50
Elderly / Disabled	\$1.75	\$2.25
Children Ages 5-17	\$2.75	\$3.50
Children Ages 4 and under	Free	Free
Discounts		
10 Ride Digital Tickets	10% discount	10% discount
Transfers from Metro	\$2.00 discount	N/A

Regarding Paratransit fares, the Metrolift cash fare is \$4 for a one-way trip. Ride Cards can also be purchased for two rides for \$8 at Metro Fare Outlets, which include the Downtown Transit Center, two Pick 'n Save stores in Waukesha, and the Metro Market in Pewaukee.

Fleet

Summarized in Table 5, Waukesha Metro Transit's revenue fleet consists of 29 vehicles. Twenty-three are large, heavy-duty buses used for fixed-route service. The Metrolift Paratransit service fleet includes two Ford Transit vans and four Arboc medium-size, light-duty buses.

Below are the Federal Transit Administration (FTA) rolling stock minimum useful life policy guidelines by vehicle type¹:

- Large, heavy-duty buses: at least 12 years or 500,000 miles
- Medium-size, light-duty buses: at least five years or 150,000 miles
- Light duty vehicles: at least four years or 100,000 miles

All of the large, heavy-duty buses and medium-size, light duty buses are below the age and mileage guidelines. Of the two Ford Transit vans, one is now four years old, just meeting the age guideline for light duty vehicles.

Table 5. Revenue Fleet as of November 2023

Service	Vehicle Numbers	Quantity	Year	Make/Model	Length	Average Life Miles	Age (years)
Fixed-route	159, 160, 161	3	2015	Gillig Low Floor	35 ft.	290,260	8
	162, 163, 164, 165, 166	5	2015	New Flyer Xcelsior	35 ft.	278,521	8
	167, 168, 169	3	2016	New Flyer Xcelsior	35 ft.	267,619	7
	170, 171	2	2017	New Flyer Xcelsior	35 ft.	240,911	6
	172, 173	2	2018	Gillig Low Floor	35 ft.	172,240	5
	174, 175	2	2019	Gillig Low Floor	35 ft.	174,624	4
	176, 177	2	2021	Gillig Low Floor	35 ft.	95,039	2
	178	1	2022	Gillig Low Floor	35 ft.	56,744	1
	179, 180, 181	3	2023	Gillig Low Floor	35 ft.	25,151	0
Metrolift Paratransit	700	1	2019	Ford Transit	N/A	22,075	4
	701	1	2020	Ford Transit	N/A	18,988	3
	702, 703, 704, 705	4	2020	Arboc	25 ft.	40,890	3

Source: Waukesha Metro Transit

Facilities

Waukesha Metro Transit maintains two primary facilities (shown in Figure 2): the Downtown Transit Center (DTC) and the Administration and Maintenance Facility. The agency also owns and maintains bus stop shelters throughout the system.

¹ Federal Transit Administration. Circular 5010.1E: Award Management Requirements. 2018. Page IV-25.

<https://www.transit.dot.gov/sites/fta.dot.gov/files/docs/regulations-and-guidance/fta-circulars/58051/5010-1e-circular-award-management-requirements-7-16-18.pdf>.

The DTC is located at 212 E. St. Paul Avenue in Waukesha. All 10 of the Waukesha Metro Transit routes, as well as Waukesha County Transit route 901, serve the DTC. The facility includes an indoor passenger lobby, public bathrooms, a customer service window, Ticket Vending Machines, a transit operations office, and a concourse with 13 bus bays (with each route assigned to a specific bus bay). The DTC was constructed in 2004 and has an FTA TERM Scale Condition of 5 (where 5 is the best) as reported in the agency's TAM Plan. The DTC is not in need of major work, as reported by the Transit Manager during the interview.

The Administration and Maintenance Facility is located at 2311 Badger Drive in Waukesha. This facility includes an administrative office, a training room, the bus garage, fuel/wash lanes, and the operations office. All buses are stored inside the heated (to 50°F) garage. The facility has undergone recent improvements, including:

- Updated mobile lifting system
- New LED lighting
- Updated heaters and ventilation in the maintenance area
- New fuel island equipment
- New security cameras

Within the next one to two years, the agency also plans to redesign the layout of the administrative offices, modernize the operator lounge, improve the bathrooms, add a drug testing site, and replace the bus washing system. Although the building was constructed in 1985, and the last major renovation was done in 1995, Metro staff do not anticipate any structural needs for the next 20 years. The agency's TAM Plan reports an FTA TERM Scale Condition of 4.

In addition to the two main facilities, the system also has approximately 44 bus stop shelters. About half of them are owned and maintained by the city, while the other half are currently maintained by Clear Channel. Metro expects to end its contract with Clear Channel soon and will take over maintaining all the bus shelters. Through the process, the agency will take inventory of all bus shelters, create a standard to identify which stops should have shelters, and will ultimately relocate shelters, as needed. The maintenance cycle of the shelters is to clean them after every snow event, with additional cleaning done as needed.

Figure 2. Photos of the Downtown Transit Center and the Administration and Maintenance Facility





Top left: Downtown Transit Center exterior.
Second row left: maintenance shop.
Third row left: new mobile lifts.
Bottom left: garage exterior.

Top right: Downtown Transit Center interior.
Second row right: Metrolift vehicle.
Third row right: bus garage interior.
Bottom right: headquarters exterior.

Source: Waukesha Metro Transit

Part II: Analysis of System Performance

Part II of this report examines, quantitatively, Waukesha 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’s *local fixed-route bus* performance to a Wisconsin peer group and a national peer group in five categories using eight specific measures (Table 6). As part of its Cost Efficiency Report and MPR initiatives, WisDOT measures transit system performance using at least six core measures, in accordance with section 85.20 of the Wisconsin Statutes.

Table 6. 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, commuter routes, or other modes; analyzing Waukesha Metro Transit’s regular 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 6 is used to assess the Waukesha Metro Transit fixed-route performance in two ways:

- Single Year: Comparison to peer average for the most current year.** Year 2021 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 2017 to 2021 are used. The annual rate of change from 2017-2021 is calculated as follows:

$$\text{Annual rate of change} = (\text{Value}_{2021}/\text{Value}_{2017})^{1/4} - 1$$

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 Waukesha Metro Transit was based on a review of small urban bus systems in NTD. 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 7, Table 8). Each system's fixed-route bus data (excluding any other modes operated) were used in the selection of peers and the subsequent analyses.

Table 7 contains 2021 operating statistics for Waukesha Metro Transit and the selected Wisconsin peer systems. Note that these measures predate Waukesha's recent service updates. This review recognizes the limitations of using other Wisconsin bus systems for peer comparison. Each system operates in a different environment, serves different markets, and has a unique management structure. However, Wisconsin peer systems also provide context for operating conditions within the state.

Table 7. 2021 Operating Statistics – Wisconsin Peer Group

System Name	City	Revenue Hours	Passenger Trips	Operating Expenses	Passenger Revenues	Service Area Population
Valley Transit	Appleton	58,247	544,030	\$5,525,950	\$530,064	216,154
Eau Claire Transit	Eau Claire	47,998	432,019	\$4,460,345	\$708,731	77,027
Green Bay Metro Transit	Green Bay	50,285	495,371	\$5,328,903	\$558,115	176,664
Kenosha Area Transit	Kenosha	59,963	1,080,782	\$6,431,594	\$1,448,403	99,894
Municipal Transit	La Crosse	62,356	510,235	\$5,408,836	\$251,832	79,727
GO Transit	Oshkosh	37,294	472,607	\$3,758,957	\$356,697	66,816
Ryde Racine	Racine	73,734	463,652	\$7,005,130	\$583,832	112,100
Waukesha Metro Transit	Waukesha	57,410	412,525	\$5,690,123	\$444,195	141,642
Average		55,911	551,403	\$5,451,230	\$610,234	121,253
Waukesha Metro Transit as % of Average		103%	75%	104%	73%	117%

Source: National Transit Database, 2021.

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 and transit service mix provided. The Urban Integrated National Transit Database (Urban iNTD) was used to develop an initial list of national peers.² This initial list was filtered to include only the most applicable peers, based on the criteria listed above and previous MPR peer analyses.

The national peer group includes systems in Iowa, Indiana, Ohio, South Dakota, and Kansas. Table 8 contains 2021 operating statistics for Waukesha Metro Transit and the selected national peer systems.

Table 8. 2021 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	58,756	556,654	\$7,776,257	\$62,285	158,890
CitiBus	Davenport, IA	46,535	396,848	\$6,779,953	\$232,407	101,590
Gary Public Transit Corp	Gary, IN	67,652	424,632	\$7,692,734	\$355,651	102,746

² Urban iNTD is a tool developed by the Florida Department of Transportation (FDOT), based on Transit Cooperative Research Program (TCRP) research. http://www.ftis.org/urban_iNTD.aspx.

Portage Area Regional Transportation Authority	Portage County, OH	49,368	344,367	\$5,881,875	\$1,580,837	162,466
Sioux Area Metro	Sioux Falls, SD	51,756	389,816	\$6,039,335	\$270,421	141,400
Topeka Metro	Topeka, KS	54,410	767,435	\$6,494,277	\$386,341	127,473
Wichita Transit	Wichita, KS	115,887	768,859	\$10,274,298	\$777,182	395,745
Waukesha Metro Transit	Waukesha	57,410	412,525	\$5,690,123	\$444,195	141,642
Average		62,722	507,642	\$7,078,607	\$513,665	166,494
Waukesha Metro Transit as % of Average		92%	81%	80%	86%	85%

Source: National Transit Database, 2021.

Performance Measures: Results

This section summarizes Waukesha Metro Transit service relative to peer groups over the five-year period, as well as the results of the single-year (2021) and multi-year (2017-2021) analyses for each of the eight performance measures reviewed in this MPR. Table 13 summarizes Waukesha Metro Transit's performance relative to peer systems across all measures.

It is recognized that during the NTD reporting period available for this report, transit systems across the United States experienced significant operational impacts related to the COVID-19 pandemic. Variations in system performance may in some cases reflect differences in policies related to social distancing, capacity limits, fare collection, and service availability, in addition to broader travel disruptions. However, available data may still yield insights into performance relative to peer groups, and additional data may be available for context at a later date.

Waukesha Metro Transit Five-Year Summary

Table 9 and Table 10 show Waukesha Metro Transit operating statistics and performance measures, respectively, for 2017 through 2021. The average annual rate of change for the five-year period is calculated for each statistic and measure.

Table 9. Operating Statistics – Waukesha Metro Transit, 2017-2021

Operating Statistic	2017	2018	2019	2020	2021	Annual Rate of Change
Revenue Hours	60,848	60,680	60,508	55,675	57,410	-1.4%
Passenger Trips	871,698	870,203	809,707	448,117	412,525	-17.1%
Operating Expenses	\$5,447,594	\$5,529,415	\$5,577,942	\$5,445,467	\$5,690,123	1.1%
Passenger Revenue	\$800,811	\$878,027	\$820,673	\$303,776	\$444,195	-13.7%
Service Area Population	-	-	-	-	141,642	N/A

Source: National Transit Database, 2017-2021

Table 10. Performance Measures – Waukesha Metro Transit, 2017-2021

Performance Measure	2017	2018	2019	2020	2021	Annual Rate of Change
Operating Expense Per Passenger Trip	\$6.25	\$6.35	\$6.89	\$12.15	\$13.79	21.9%
Operating Expense Per Revenue Hour	\$89.53	\$91.12	\$92.19	\$97.81	\$99.11	2.6%
Passenger Trips Per Revenue Hour	14.33	14.34	13.38	8.05	7.19	-15.8%
Passenger Trips Per Capita	-	-	-	-	2.91	N/A
Revenue Hours Per Capita	-	-	-	-	0.41	N/A
Average Fare Per Passenger Trip	\$0.92	\$1.01	\$1.01	\$0.68	\$1.08	4.1%
Operating Ratio	14.70%	15.88%	14.71%	5.58%	7.81%	-14.6%
Subsidy Per Passenger Trip	\$5.33	\$5.35	\$5.88	\$11.47	\$12.72	24.3%

Source: National Transit Database, 2017-2021

Wisconsin Peers

Table 11 shows Waukesha Metro Transit performance measures for 2021 compared with those of the selected Wisconsin peers. Metro was within satisfactory range for six categories and outside satisfactory range for two categories.

Table 11. Wisconsin Peer Performance Measures Summary, 2021

Agency	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
Waukesha	\$13.79	\$99.11	7.19	2.91	0.41	\$1.08	7.81%	\$12.72
Racine	\$15.11	\$95.01	6.29	4.14	0.66	\$1.26	8.33%	\$13.85
Oshkosh	\$7.95	\$100.79	12.67	7.07	0.56	\$0.75	9.49%	\$7.20
La Crosse	\$10.60	\$86.74	8.18	6.40	0.78	\$0.49	4.66%	\$10.11
Kenosha	\$5.95	\$107.26	18.02	10.82	0.60	\$1.34	22.52%	\$4.61
Green Bay	\$10.76	\$105.97	9.85	2.80	0.28	\$1.13	10.47%	\$9.63
Eau Claire	\$10.32	\$92.93	9.00	5.61	0.62	\$1.64	15.89%	\$8.68
Appleton	\$10.16	\$94.87	9.34	2.52	0.27	\$0.97	9.59%	\$9.18
Average	\$10.58	\$97.84	10.07	5.28	0.52	\$1.08	11.10%	\$9.50
Standard Deviation	\$2.73	\$6.42	3.50	2.64	0.17	\$0.33	5.23%	\$2.73
Acceptable Range	\$13.31	\$104.25	6.57	2.64	0.35	\$0.75	5.87%	\$12.23
	Outside satisfactory range	Within satisfactory range	Within satisfactory range	Within satisfactory range	Within satisfactory range	Within satisfactory range	Within satisfactory range	Outside satisfactory range

Source: National Transit Database, 2021.

National Peers

Table 12 shows Waukesha Metro Transit performance measures for 2021 compared with those of the selected national peers. Metro performed better than average in four categories and within satisfactory range in four categories.

Table 12. National Peer Performance Measures Summary, 2021

Agency	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
Wichita, KS	\$13.36	\$88.66	6.63	1.94	0.29	\$1.01	7.56%	\$12.35
Waukesha	\$13.79	\$99.11	7.19	2.91	0.41	\$1.08	7.81%	\$12.72
Topeka, KS	\$8.46	\$119.36	14.10	6.02	0.43	\$0.50	5.95%	\$7.96
Sioux Falls, SD	\$15.49	\$116.69	7.53	2.76	0.37	\$0.69	4.48%	\$14.80
Portage County, OH	\$17.08	\$119.14	6.98	2.12	0.30	\$4.59	26.88%	\$12.49
Gary, IN	\$18.12	\$113.71	6.28	4.13	0.66	\$0.84	4.62%	\$17.28
Davenport, IA	\$17.08	\$145.70	8.53	3.91	0.46	\$0.59	3.43%	\$16.50
Cedar Rapids, IA	\$13.97	\$132.35	9.47	3.50	0.37	\$0.11	0.80%	\$13.86
Average	\$14.67	\$116.84	8.34	3.41	0.41	\$1.18	7.69%	\$13.49
Standard Deviation	\$2.87	\$16.59	2.39	1.23	0.11	\$1.32	7.55%	\$2.71
Acceptable Range	\$17.54	\$133.43	5.95	2.18	0.30	(\$0.15)	0.14%	\$16.20
	Better than average	Better than average	Within satisfactory range	Within satisfactory range	Within satisfactory range	Within satisfactory range	Better than average	Better than average

Source: National Transit Database, 2021.

Performance Summary

Table 13 indicates the measures for which Waukesha Metro Transit was better than average, worse than average but satisfactory, or outside the satisfactory range. For more detail, see Appendix A: Peer Performance Analysis.

Table 13. Summary of Waukesha Metro Transit Performance Relative to Peers

Performance Objective	Performance Measure	Single Year: 2021		Trend Analysis: 2017-2021	
		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 2021, Waukesha Metro Transit was within the satisfactory range in six measures, while it performed outside the satisfactory range in two measures, compared to its Wisconsin peer group. Metro performed better among the national peer group, with four measures better than average and four measures within the satisfactory range (Table 13). Relative to all peers, Metro's strongest measures were operating expenses per revenue hour and operating ratio.

Looking at the five-year trend of Wisconsin peers from 2017 to 2021, Metro performed better than the peer average in operating expenses per revenue hour, but Metro was worse than average, but within satisfactory range, in all other measures.

Relative to the national peer five-year trends, Waukesha Metro Transit performed very well. Metro was better than average in five out of six measures; however, it was worse than average, though within satisfactory range, in passenger trips per revenue hour.

Part III: Policy- and Decision-Making Processes

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

Organizational Structure

Figure 3 shows the Waukesha Metro Transit Organizational Chart from the Transit Manager down. Waukesha Metro's Transit Manager functions as the day-to-day administrator of the transit system and is employed by the City of Waukesha, reporting to the city's Director of Public Works.

The City of Waukesha owns Waukesha Metro Transit and operates it using a private management firm, Transdev. The General Manager manages the daily operations of the system, and is an employee of Transdev, working under contract for Professional Transit Management of Waukesha, Inc. (PTMW), which is a subsidiary of Transdev formed to provide transit service to the City of Waukesha. All Metro employees below the General Manager are employees of PTMW. Waukesha Metro Transit also administers Waukesha County Transit service through a contract with the Milwaukee County Transit System and Wisconsin Coach Lines, Inc.

Most functions related to running Metro are completed in-house. Human resources, operations, maintenance, finance, and marketing are all completed by the Transit Manager or PTMW employees. For legal functions, the agency utilizes City of Waukesha attorneys.

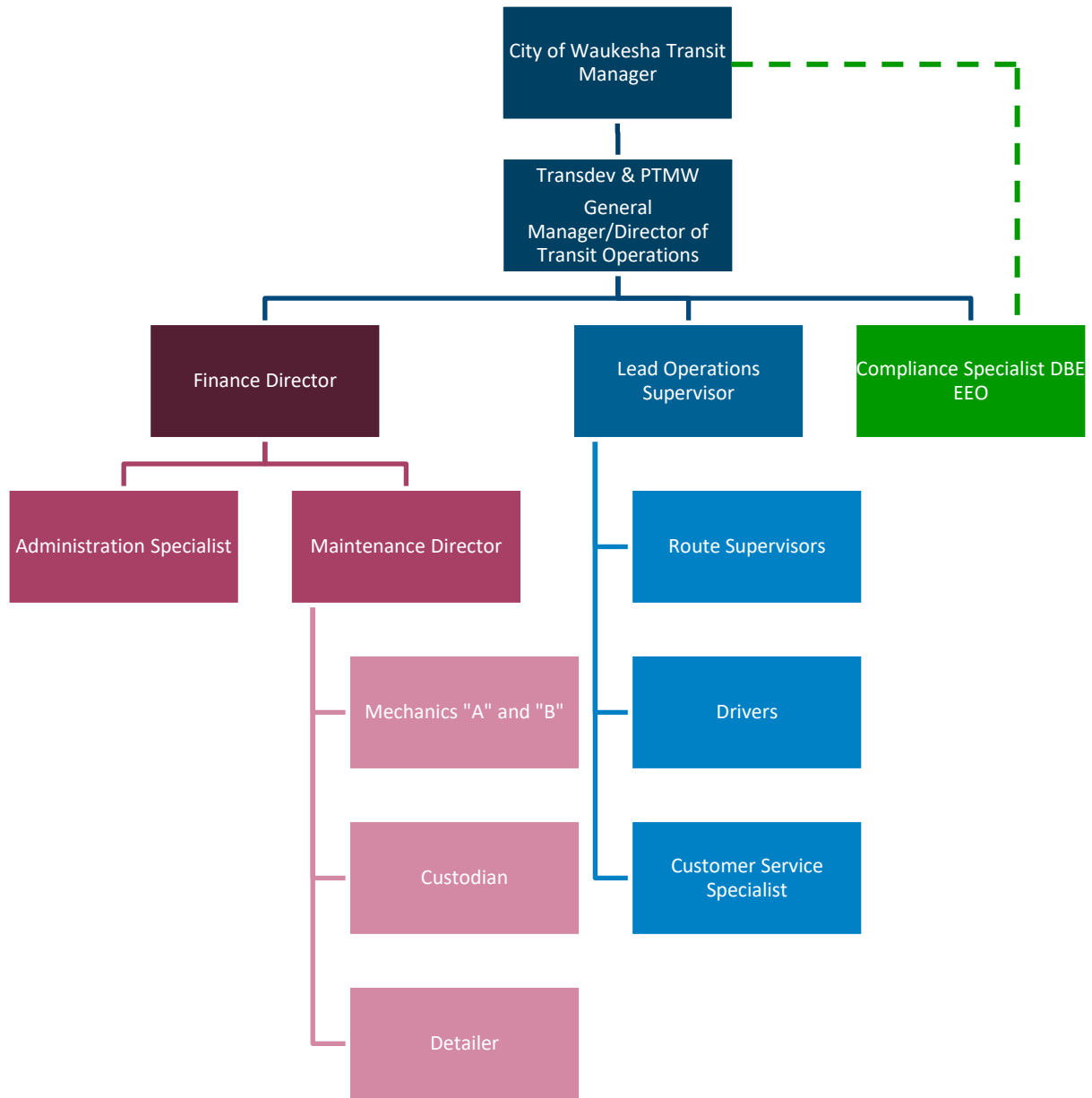
During the MPR interview, the Transit Manager expressed some concern related to using a private firm to manage transit operations. First, during the previous two procurement periods, Transdev and First Transit were the only two companies to submit proposals. Since Transdev acquired First Transit in 2023, there may not be another competitor for future procurements. Additionally, there has been a high rate of turnover of the General Manager role, which has created challenges for continuity in effectively managing the system.

Recommendation 1: Conduct an assessment to determine if Waukesha Metro Transit would benefit from in-house transit operations. Priority: high.

Additionally, the Transit Manager noted that there has been high turnover of operations staff due to growing wages in other segments of the transportation industry. As such, Metro has had a challenge retaining operators after they've received their Commercial Driver's License.

Recommendation 2: Increase employee wages and benefits to compete with other companies. Priority: high.

Figure 3. Waukesha Metro Transit Organizational Chart



Source: Waukesha Metro Transit

Policy Environment

The City of Waukesha Transit Commission acts as the oversight board for Waukesha Metro Transit, while the Common Council has final approval on all matters, including the annual budget of the transit program. The Transit Commission is comprised of five members (three citizen members and two Alderpersons) who are appointed by the Mayor and confirmed by the Waukesha Common Council. The Transit Commission sets the policy for the transit system and has power to make acquisitions, operate, and manage the transit system.

The policy-making body of the county's transit system is the Waukesha County Public Works Committee, consisting of seven members of the Waukesha County Board of Supervisors. The approval of the Public Works Committee is required for legislative matters relating to county facilities, public works, and transportation, including mass transit systems. The Waukesha County Board of Supervisors approves the annual budget for the Waukesha County Transit system, as well as all budget related matters. Given the collaborative management of the City and County transit systems, the City of Waukesha Transit Commission also oversees awarding contracts for Waukesha County Transit Service.

The City of Waukesha Transit Commission meets as needed, averaging about one meeting per month. The County Board discusses transit matters as needed as well. The Transit Manager provides regular updates to each governing body, including financial summaries and operating statistics. The Transit Manager also provides bi-weekly updates on larger projects.

Conclusions

Metro's current policy- and decision-making processes are conducive to effective operations. Job functions are well defined, and lines of communication appear to be open between the governing bodies, the Transit Manager, the Transdev General Manager, and all other PTMW employees. Although the Transit Manager expressed some concern about using a private company to manage operations, the agency has been able to deliver service relatively reliably throughout the pandemic and should be able to continue doing so in the near-term. Nonetheless, the agency should conduct a study to see if operations or other functions would be more efficient and effective if delivered in-house.

Table 14. Summary 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

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
- System Response to COVID-19

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 completed a detailed MPR questionnaire prior to the virtual review, conducted on December 6, 2023. Waukesha Metro Transit staff answered all questions and provided extensive supporting material, as requested by the review team. The virtual review process consisted of discussions with the Transit Manager, Brian Engelking, and the Compliance Specialist, Don Jans.

Transportation Operations

The structures and procedures pertaining to the transportation operations function at Waukesha Metro Transit are adequate with room for improvement. While the agency is able to carry out its operational functions, the Transit Manager expressed concern about the long-term effectiveness of utilizing a contract operator as described in Part III above. For more details about this function, see Appendix B for staff's full response to the review team's MPR questionnaire.

Operator Supervision and Communications

Waukesha Metro Transit has a General Manager (a Transdev employee) that oversees all transit operations. PTMW employs six full-time supervisors, one full-time employee responsible for dispatch and customer service, as well as 33 full-time operators and nine part-time operators.

Operations supervisors are present during all hours of revenue service, though Metro does not have additional supervisors on-call. Metro also has a dispatcher on duty during all hours of revenue service who covers dispatching and customer service responsibilities.

Mechanics and supervisors are the first to report to duty at 4:00am on weekdays. The mechanics ensure that vehicles are ready for service and the supervisor is prepared to make any adjustments to service, as needed, due to any unexpected impediments to providing regularly scheduled service. If there are any changes to service, supervisors verbally communicate the changes to drivers, as well as posts them on the marker board.

Metro has a handbook with policies applicable to both represented and non-represented employees. Of note, Metro has a strict policy prohibiting the use of cell phones while in the driver's compartment of any vehicle.

Service Procedures and Tools

For the most part, operators report for work at the maintenance facility, though some operators report to the Transit Center for midday reliefs. Operators that report to duty at the maintenance facility check-in face-to-

face with supervisors. When operators check-in at the Transit Center, they radio in to dispatch and/or a supervisor, or they check-in face-to-face with the Transit Center staff. Supervisors evaluate the operators' fitness for duty by reviewing their appearance and speech. Metro has a digital pre-trip and post-trip vehicle inspection process in place to ensure that vehicles are clean and safe for operation.

The agency uses an AVL system to track vehicle locations and record on-time performance (OTP) data on fixed-route and paratransit vehicles. Metro has an established OTP standard of departing each time point within 0 to 5 minutes after the scheduled departure time. As of November 2023, year-to-date OTP was 72% for fixed-route service and 87% for paratransit. In their 2022 Title VI Submittal, Metro reported a goal of 90% or better OTP, though the Transit Manager indicated that they were in the process of reviewing the OTP goal at the time of writing. The OTP data is summarized and reported monthly.

At the end of the day, maintenance staff are responsible for closing the maintenance facility at 12:30 a.m. Metro recently installed security cameras at the maintenance facility and was approved to install a fence around the facility in 2024.

Metro utilizes Optibus scheduling software to create pieces of work. Operators typically select their work assignments three times per year. The agency does utilize an extra board, though they do not have additional operators on-call. When creating pieces of work, the agency does not have separate rules for part-time operators or requirements for operator breaks.

Recommendation 3: Track missed trips to document trends over time. Priority: medium.

Recommendation 4: Conduct a runtime analysis on all routes since the implementation of the service restructure. Priority: medium.

Safety and Training

Waukesha Metro Transit updated their Public Transportation Agency Safety Plan (PTASP) in September of 2022. The plan includes annual safety performance targets that track the number of fatalities, injuries, and safety events per 100,000 vehicle revenue miles. At time of writing, the Transit Manager reported to be in compliance with their goals.

The agency has a well-documented training program, which is administered by the Training Supervisor and General Manager. The initial operator training program includes 40 classroom hours and 120 hours of behind-the-wheel training (40 of which are with a senior driver). The training program includes instruction from the Maintenance Director on various parts of the vehicles. Additionally, drivers, dispatchers, and supervisors receive training on how to respond to accidents, medical emergencies, and passenger incidents. Metro also provides or arranges for CDL training, if needed.

In addition to the in-house training, operators go through specialized driver safety courses provided by Transit Mutual Insurance (TMI) and Transdev. TMI also recognizes drivers with good records with a Safe Driver Award and System Award. TMI also plays a role in doing ride checks with operators 2-3 times per year, while supervisory staff perform ride checks as time permits.

In terms of continuing education, the Transit Manager reported that wheelchair securement training is done annually, while any other training is done as needed. Notably, operators with preventable accidents or who receive valid complaints are required to go through three hours of re-training. The agency does not have a regular schedule for overall performance evaluations.

Metro has a Safety Committee consisting of operators, mechanics, and administration that meets regularly to continue discussing ways to improve safety throughout the agency.

Recommendation 5: Consider creating a program for regularly occurring continuing education on safety topics for all operators. Priority: low.

Recommendation 6: Consider conducting independent ride checks for performance review on an annual basis. Priority: low.

Vehicle and Facility Maintenance

The structures and procedures pertaining to the vehicle and facility maintenance functions at Waukesha Metro Transit are conducive to effective operations. See Appendix B for staff's responses to the review team's MPR questionnaire.

Vehicle Maintenance

Metro currently employs three full-time mechanics, one full-time maintenance supervisor, as well as one other full-time and two other part-time maintenance employees. There is at least one mechanic on duty during all weekday revenue hours, as well as Saturday and Sunday evening, though Metro does not have a maintenance lead on duty during all revenue hours.

Metro has one facility where vehicles are stored, maintained and dispatched. Routine maintenance is done in house. Body work, engines, transmissions, and HVAC work are sometimes done in house and sometimes contracted out, if needed, while paint work is contracted out.

Mechanics receive training from the bus manufacturers and vendors of various systems on the buses. The Maintenance Director and Transit Manager develop service specifications for vehicles, equipment, and contracted service. The agency uses RTA Fleet Management Software to track maintenance activity.

The Waukesha Maintenance Procedure was revised in June 2023. It includes the policies and procedures for each role in the maintenance department. It also includes a detailed list of preventive maintenance procedures to be done on each vehicle during A, B, C, and D inspections, as well as procedures for non-scheduled repairs. Additionally, each night, service includes the following: refuel; oil, transmission, and antifreeze level checks; hub odometer reading; tire inspection; bus interior cleaning; driver cabin cleaning; and exterior washing.

The Transit Manager reported that 100% of preventive maintenance procedures have been performed on time. He also reported that road calls are tracked and that the number of road calls has declined recently because the fleet age is lower than in past years.

Vehicle Replacement

Waukesha Metro Transit is included in the *Group Transit Asset Management Plan for Tier II Operators in Southeastern Wisconsin*, covering a four-year period from 2022 to 2025. The Southeastern Wisconsin Regional Planning Commission (SEWRPC) sponsored the group TAM to assist these agencies through the planning process and reduce duplicative efforts. The plan includes a prioritization process and replacement schedule for all revenue and non-revenue vehicles.

For Metro's 35' revenue fleet, the age-based useful life benchmark is 14 years, and the mileage-based useful life benchmark is 600,000 miles. For the cutaway fleet, the age-based useful life benchmark is 10 years and the mileage based useful life benchmark is 200,000 miles. All of the vehicles in Metro's revenue fleet are below these benchmarks.

For the non-revenue fleet, the useful life benchmark is eight years; the agency does not have a mileage-based benchmark. One of the four service vehicles is beyond its useful life with a current age of nine years.

The Transit Manager indicated that the agency does not have a fund specifically for fleet replacement. Nonetheless, the agency has not had challenges securing funding for fleet procurement. The agency typically applies for grant funding on its own and uses operating funds from the city for the local match.

Recommendation 7: Create a budget specific to fleet replacement to ensure a smooth procurement process in the future. Priority: medium.

Facilities Maintenance

Waukesha Metro Transit maintains the Downtown Transit Center (DTC), the Administration and Maintenance Facility, and bus stop shelters. The agency's *Maintenance Procedure Manual* includes a detailed list of maintenance activities and schedules for each of these facilities. The agency employs a Building and Grounds Facilitator, who works under the Maintenance Director.

The Facilitator is responsible for cleaning the Administration and Maintenance Facility daily, and cleaning bus stop shelters, as needed. For the DTC, the Facilitator performs daily, weekly, and monthly inspections as indicated on his monthly checklist, though the agency hires outside contractors for several maintenance activities, including: cleaning the building and the concourse area, landscaping, snow removal, HVAC, security, elevator maintenance, irrigation maintenance, fire alarm and fire sprinkler maintenance, and electrical and plumbing services. The *Maintenance Procedure Manual* also includes a list of all the shop equipment and systems, which are serviced or maintained as recommended by the manufacturer.

Overall, Metro has an exemplary standard for facility and equipment maintenance, both for customer-facing and behind-the-scenes facilities.

Finance

The structures and procedures pertaining to the finance function at Waukesha Metro Transit are currently conducive to effective operations. However, future agency funding is a concern of the Transit Manager. Combined, 80.20 and 80.25 funding sources account for about 60% of the agency's funding and have been at similar levels since 2011. The agency estimates that COVID relief funds will last for about four more years, but costs are likely to go up during this period due to increases in service and most other costs also increasing.

Staff noted further concern about auto liability insurance costs. Because the system is privately managed, the municipal insurance rate caps do not apply. The Transit Manager noted that Racine recently moved their transit operations in-house, which lowered their insurance costs substantially.

See Appendix B for staff's full response to the review team's MPR questionnaire, which includes more details about the finance function.

Recommendation 8: Conduct a study to determine the feasibility of increasing 80.20 and 80.25 funding or to discover additional funding mechanisms. Priority: High.

Recommendation 9: Explore potential operating structures that would allow for the agency to qualify for municipal insurance rate caps. Priority: High.

Partner Contracts

Waukesha Metro Transit maintains a partnership contract with Waukesha County and Milwaukee County to fund service on Route 1. Additionally, Waukesha Metro Transit administers three commuter express routes, operated by Wisconsin Coach Lines, via a contract with Waukesha County Transit.

Metro Transit recently explored an additional opportunity to partner with the Waukesha County Technical College (WCTC) on increased service on Route 9 to WCTC. Unfortunately, WCTC was unable to provide funding, so this option is not being pursued further at this time.

In addition to the fixed-route and Paratransit service described throughout this report, the city and county partner with the Waukesha Aging and Disability Resource Center (ADRC) to provide a number of additional transportation services for individuals, including non- or limited-driving adults 65 years of age and older, and for people with disabilities who are under the age of 65. The Transit Manager expressed that it was a priority of the region to create a one-call, one-click reservation system for these services. Unfortunately, a funding source has not been identified, so this service has not yet been implemented.

Recommendation 10: Investigate new ways to fund a one-call, one-click reservation system for countywide transportation service providers. Priority: medium.

Fare Collection and Revenue Control

The Transit Manager provided the *Waukesha Metro Transit Cash Handling Policy* to the MPR review team. Passengers deposit fares directly into the farebox and operators are not authorized to handle the fares at any time. Fareboxes are collected from the vehicles by the mechanics (and other maintenance staff) and sent to the vault room, which has an activated security camera.

Cash fare revenue amounts to approximately \$400 per day. Fares are counted in the vault room once per week by at least two people at a time (the Administrative Specialist, Transit Manager, or the Maintenance Director). Cash is then deposited to the bank by the Administrative Specialist once per week, or more if a large payment is received. Cash is also accepted at the Transit Center Customer Service Window. These sales, as well as cash collected on the buses, are reconciled to the number of passes issued.

Planning and Scheduling

The structures and procedures pertaining to the planning and scheduling functions at Waukesha Metro Transit are conducive to effective operations. See Appendix B for staff's full response to the review team's MPR questionnaire, which includes more details about the planning and scheduling functions at Waukesha Metro Transit.

Strategic Planning

In December of 2022, the City of Waukesha adopted the *Waukesha Area Transit Development Plan: 2023-2027* (TDP). The plan was prepared by the Southeastern Wisconsin Regional Planning Commission (SEWRPC)

and includes both Waukesha Metro Transit and Waukesha County Transit services. The planning process included an Advisory Committee representing business, educational, social service, and government interests.

The TDP includes a review of existing services, sets service objectives and standards, evaluates the existing systems, and includes a set of recommendations for each agency. Since adoption of the plan, Metro implemented the fixed-route service redesign recommendations in June of 2023, which has been viewed as a success by the Transit Manager. Major elements of the redesign included extending Route 1 to the Milwaukee Regional Medical Center and eliminating low performing segments throughout the system, allowing routes to be more linear and operate more efficiently.

Two other major recommendations of the plan were to adopt the WisGo fare system and institute fare capping, both of which were also completed in 2023 (described in further detail in Part I). Metro is in the process of further investigating the other recommendations from the TDP, some of which include:

- Implementing employment-related on-demand transportation solutions
- Replacing poorly performing Waukesha Metro segments or times of day with on-demand transportation services
- Developing supplemental on-demand Paratransit and non-emergency medical transportation options
- Developing mobility hubs
- Continuing collaboration between the Aging and Disability Resource Center of Waukesha County, Waukesha Metro, and Waukesha County Transit on Paratransit services

Outside of the TDP process, Metro typically makes changes to routing and schedules twice per year. Metro does not have a position dedicated to service planning, but Metro management monitors route performance, feedback from operators, and feedback from customers to determine if schedule changes are needed. Additionally, the agency deploys a formal survey every 10 years through SEWRPC. When the agency recommends changes to service, a public meeting is held if there is a reduction of 10% or more of revenue hours per route.

Recommendation 11: Conduct a formal rider survey every one to three years to better understand the community's transit needs and adapt service accordingly. Priority: Medium.

Performance Measurement

Metro has made major improvements to the technology and software that monitor performance of the system since the 2018 MPR. The agency implemented AVL on fixed-route and paratransit vehicles in 2021. In 2023, the agency finished installing APCs on its entire fleet. With the improved systems, the Compliance Specialist, Transit Manager, and Operation Supervisors are able to track on-time performance, passenger loads, ridership per hour, and other metrics. By tracking vehicle locations more closely, supervisors are able to take immediate corrective action if vehicles are off schedule.

After implementing the service redesign, the agency is now in the process of establishing new service standards and setting targets for each performance measure to empirically assess if changes to service are warranted.

Recommendation 12: Establish targets for key performance indicators, including ridership, productivity, and on-time performance. Priority: High.

Fleet Transition Planning

Since the 2018 MPR, Waukesha Metro Transit has not begun formal planning for zero-emission bus (ZEB) transition. The Transit Manager indicated that staff have reviewed transition plans of peer agencies and they will continue to review how other agencies are planning for ZEB transition as technology advances.

Metro Transit management is aware of state and federal funding opportunities to create a ZEB transition plan, and that having a ZEB transition plan would make Metro eligible for the FTA Section 5339 Low or No Emission Vehicle Program.

Recommendation 13: Complete a Zero-Emission Bus Transition Plan to outline strategies, infrastructure, and staffing needs required to meet Metro’s sustainability goals. Priority: Medium.

Marketing

The structures and procedures pertaining to the marketing function of Waukesha Metro Transit are conducive to effective operations. See Appendix B for staff’s full response to the review team’s MPR questionnaire, which includes more details about the marketing function at Waukesha Metro Transit.

Marketing Plan

Metro does not have staff dedicated to marketing, so the responsibilities are primarily split between the Transit Manager and Operations Specialist. The agency does not have a marketing plan, but staff does do outreach when needed for Back-to-School information, changes to service, and any other major updates. The agency also provides materials in Spanish in response to customer requests and the LEP analysis done for Title VI reporting.

The recent service restructuring and changes to fare policy led the agency to update all online and printed materials throughout the system. While the agency performs most marketing and outreach functions in-house, they outsource graphics work to SEWRPC or other contractors.

Recommendation 14: Create a marketing plan to ensure that the public is aware of transit service, which can increase ridership. Priority: medium.

Website & Online Tools

Metro Transit has a section on the city’s website, which is maintained by the Transit Manager and the City Web Master. The website has easily identifiable subsections on information that is relevant to riders, including: the system map, individual route maps and schedules, fare information, a guide to ride, and more. The agency uses the city’s social media pages when needed, though Metro does not have policies related to social media nor does staff track the effectiveness of social media posts.

The website includes a Live Bus Map Web Portal to show vehicle locations and estimated arrival time to customers. The Lead Operations Supervisor works with Optibus and the AVL system to create and publish schedules in General Transit Feed Specification (GTFS).

Outreach and Customer Feedback

Through the TDP process, Metro established good working relationships with members of the advisory group and continues to meet with these stakeholders since the TDP was adopted.

Customers can provide feedback to Waukesha Metro Transit in-person at the Customer Service Window at the Transit Center, via the phone, or by email. All feedback is digitized in Word documents and a summary of valid complaints and commendations is created monthly. Operations staff follow established procedures to investigate and respond to customer complaints in a timely manner. Finally, the customer complaint report is also provided to the City of Waukesha Transit Commission. The public is also welcome to attend the Transit Commission and Public Works Committee meetings.

Response to COVID-19

At the start of the COVID-19 pandemic, Metro followed CDC guidelines to protect customers, operators, and other Metro staff. The agency provided masks to employees and customers and installed hand sanitizer stations on buses, at the Transit Center, and at the administrative office. The agency also increased cleaning frequency and implemented rear-door boarding and suspended fare payments until driver shields were installed.









During the pandemic, ridership fell on all services, but commuter routes saw very steep ridership declines. As a result, the agency reduced the number of commuter trips by about 50% and eliminated one commuter route entirely. Through the TDP process, those changes were made permanent, and the Transit Manager expects that additional reductions to commuter service are likely.

Metro received federal pandemic-related stimulus funding from the Coronavirus Aid, Relief, and Economic Security (CARES) Act of 2020, Coronavirus Response and Relief Supplemental Act (CRSSA) of 2021, and the American Rescue Plan Act (ARPA) of 2021. The agency used these funds to supplement operation costs and to offset some capital costs. The Transit Manager estimates that the agency still has enough COVID-relief funds remaining to supplement service for the next four years.

Summary

Table 15 summarizes the review team’s assessment of each functional area. Ratings are based on the degree to which the function’s structures and procedures are conducive to continued effective operations. Part V summarizes the review team’s conclusions and specific recommendations for each functional area.

Table 15. 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

Part V: Conclusions

Since their 2018 MPR, Waukesha Metro Transit has made several significant improvements to its operations and service. First, the agency implemented a fixed-route restructuring in 2023 and implemented a new fare system (WisGo) with fare capping. These were major recommendations included in their recently completed TDP. Metro also made some major strides updating its AVL and APC technology to have full coverage across its fleet. With these new systems, the agency is able to track on-time performance and ridership metrics in a way that will allow for improved performance monitoring and service delivery.

Metro’s two facilities, the Downtown Transit Center and the Administration and Maintenance Facility are both in a state of good repair. The agency made some improvements to the Administration and Maintenance Facility in the past few years and has more plans in store for the near future.

The agency’s structures and procedures are conducive to effective transit operations in four of the five functional areas. Transit operations is the only functional area identified as adequate with room for improvement due to concerns expressed by the Transit Manager that having a contract operator may not be effective in the future. This is due to limited competition for the contract in the area, which can drive up the cost and have a negative impact on performance. Recommendations of the 2023 MPR are summarized below in Table 16.

Table 16. Summary of Recommendations

Functional Area	Recommendation	Priority
Policy- and Decision-Making Processes	1 Conduct an assessment to determine if Waukesha Metro Transit would benefit from in-house transit operations.	High
	2 Increase employee wages and benefits to compete with other companies.	High
Transportation Operations	3 Track missed trips to document trends over time.	Medium
	4 Conduct a run time analysis on all routes since the implementation of the service restructure.	Medium
	5 Consider creating a program for regularly occurring continuing education on safety topics for all operators.	Low
	6 Consider conducting independent ride checks for performance review on an annual basis.	Low
Vehicle and Facility Maintenance	7 Create a budget specific to fleet replacement to ensure a smooth procurement process in the future.	Medium
Finance	8 Conduct a study to determine the feasibility of increasing 80.20 and 80.25 funding or to discover additional funding mechanisms.	High
	9 Explore potential operating structures that would allow for the agency to qualify for municipal insurance rate caps.	High
	10 Investigate new ways to fund a one-call, one-click reservation system for countywide transportation service providers.	Medium
Planning and Scheduling	11 Conduct a formal rider survey every one to three years to better understand the community’s transit needs and adapt service accordingly.	Medium
	12 Establish targets for key performance indicators, including ridership, productivity, and on-time performance.	High
	13 Complete a Zero-Emission Bus Transition Plan to outline strategies, infrastructure, and staffing needs required to meet Metro’s sustainability goals.	Medium
Marketing	14 Create a marketing plan to ensure that the public is aware of transit service, which can increase ridership.	Medium

Appendix A: Peer Performance Analysis

Agency 5-Year Summary

Operating Statistics, 2017-2021

Year	Passenger Trips	Operating Expenses	Revenue Hours	Fare Revenue	Service Area Population
2017	871,698	\$5,447,594	60,848	\$800,811	
2018	870,203	\$5,529,415	60,680	\$878,027	
2019	809,707	\$5,577,942	60,508	\$820,673	
2020	448,117	\$5,445,467	55,675	\$303,776	
2021	412,525	\$5,690,123	57,410	\$444,195	141,642

Metric	Total Change	Annual Rate of Change
Fare Revenue	-44.5%	-13.7%
Operating Expenses	4.5%	1.1%
Unlinked Passenger Trips	-52.7%	-17.1%
Vehicle Revenue Hours	-5.7%	-1.4%

Performance Measures, 2017-2021

Year	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
2017	\$6.25	\$89.53	14.33	-	-	\$0.92	14.70%	\$5.33
2018	\$6.35	\$91.12	14.34	-	-	\$1.01	15.88%	\$5.35
2019	\$6.89	\$92.19	13.38	-	-	\$1.01	14.71%	\$5.88
2020	\$12.15	\$97.81	8.05	-	-	\$0.68	5.58%	\$11.47
2021	\$13.79	\$99.11	7.19	2.91	0.41	\$1.08	7.81%	\$12.72

Annual Rate of Change

21.89%

2.58%

-15.8%

4.0%

-14.6%

24.3%

Wisconsin Peer Summary Operating Statistics

Agency	Revenue Hours	Passenger Trips	Operating Expenses	Fare Revenue	Service Area Population
Appleton	58,247	544,030	\$5,525,950	\$530,064	216,154
Eau Claire	47,998	432,019	\$4,460,345	\$708,731	77,027
Green Bay	50,285	495,371	\$5,328,903	\$558,115	176,664
Kenosha	59,963	1,080,782	\$6,431,594	\$1,448,403	99,894
La Crosse	62,356	510,235	\$5,408,836	\$251,832	79,727
Oshkosh	37,294	472,607	\$3,758,957	\$356,697	66,816
Racine	73,734	463,652	\$7,005,130	\$583,832	112,100
Waukesha	57,410	412,525	\$5,690,123	\$444,195	141,642
Average	55,911	551,403	\$5,451,230	\$610,234	121,253
Agency as a Percent of Average	103%	75%	104%	73%	117%

National Peer Summary Operating Statistics

Agency	Revenue Hours	Passenger Trips	Operating Expenses	Fare Revenue	Service Area Population
Cedar Rapids, IA	58,756	556,654	\$7,776,257	\$62,285	158,890
Davenport, IA	46,535	396,848	\$6,779,953	\$232,407	101,590
Gary, IN	67,652	424,632	\$7,692,734	\$355,651	102,746
Portage County, OH	49,368	344,367	\$5,881,875	\$1,580,837	162,466
Sioux Falls, SD	51,756	389,816	\$6,039,335	\$270,421	141,400
Topeka, KS	54,410	767,435	\$6,494,277	\$386,341	127,473
Waukesha	57,410	412,525	\$5,690,123	\$444,195	141,642
Wichita, KS	115,887	768,859	\$10,274,298	\$777,182	395,745
Average	62,722	507,642	\$7,078,607	\$513,665	166,494
Agency as a Percent of Average	92%	81%	80%	86%	85%

Wisconsin Peer Summary Performance Measures

Agency	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
Waukesha	\$13.79	\$99.11	7.19	2.91	0.41	\$1.08	7.81%	\$12.72
Racine	\$15.11	\$95.01	6.29	4.14	0.66	\$1.26	8.33%	\$13.85
Oshkosh	\$7.95	\$100.79	12.67	7.07	0.56	\$0.75	9.49%	\$7.20
La Crosse	\$10.60	\$86.74	8.18	6.40	0.78	\$0.49	4.66%	\$10.11
Kenosha	\$5.95	\$107.26	18.02	10.82	0.60	\$1.34	22.52%	\$4.61
Green Bay	\$10.76	\$105.97	9.85	2.80	0.28	\$1.13	10.47%	\$9.63
Eau Claire	\$10.32	\$92.93	9.00	5.61	0.62	\$1.64	15.89%	\$8.68
Appleton	\$10.16	\$94.87	9.34	2.52	0.27	\$0.97	9.59%	\$9.18
Average	\$10.58	\$97.84	10.07	5.28	0.52	\$1.08	11.10%	\$9.50
Standard Deviation	\$2.73	\$6.42	3.50	2.64	0.17	\$0.33	5.23%	\$2.73
Acceptable Range	\$13.31	\$104.25	6.57	2.64	0.35	\$0.75	5.87%	\$12.23
	Outside satisfactory range	Within satisfactory range	Within satisfactory range	Within satisfactory range	Within satisfactory range	Within satisfactory range	Within satisfactory range	Outside satisfactory range

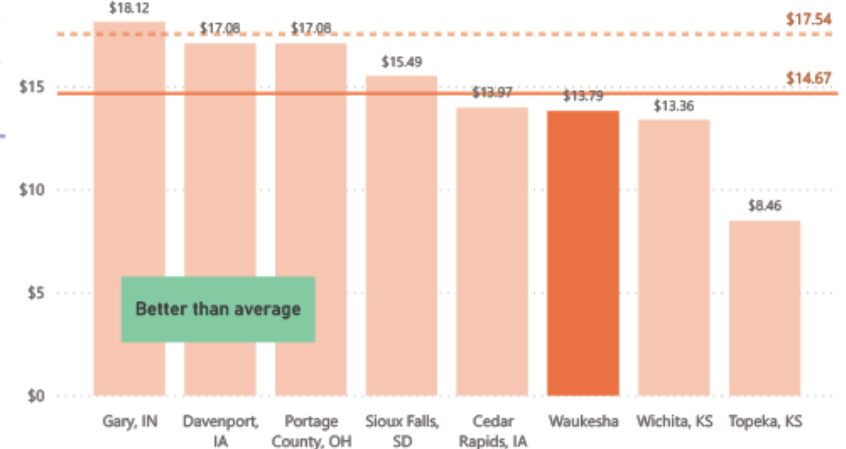
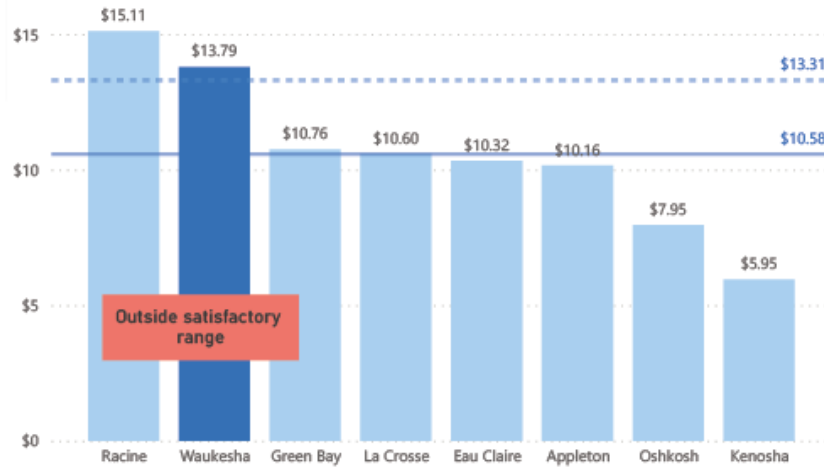
National Peer Summary Performance Measures

Agency	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
Wichita, KS	\$13.36	\$88.66	6.63	1.94	0.29	\$1.01	7.56%	\$12.35
Waukesha	\$13.79	\$99.11	7.19	2.91	0.41	\$1.08	7.81%	\$12.72
Topeka, KS	\$8.46	\$119.36	14.10	6.02	0.43	\$0.50	5.95%	\$7.96
Sioux Falls, SD	\$15.49	\$116.69	7.53	2.76	0.37	\$0.69	4.48%	\$14.80
Portage County, OH	\$17.08	\$119.14	6.98	2.12	0.30	\$4.59	26.88%	\$12.49
Gary, IN	\$18.12	\$113.71	6.28	4.13	0.66	\$0.84	4.62%	\$17.28
Davenport, IA	\$17.08	\$145.70	8.53	3.91	0.46	\$0.59	3.43%	\$16.50
Cedar Rapids, IA	\$13.97	\$132.35	9.47	3.50	0.37	\$0.11	0.80%	\$13.86

Average	\$14.67	\$116.84	8.34	3.41	0.41	\$1.18	7.69%	\$13.49
Standard Deviation	\$2.87	\$16.59	2.39	1.23	0.11	\$1.32	7.55%	\$2.71
Acceptable Range	\$17.54	\$133.43	5.95	2.18	0.30	(\$0.15)	0.14%	\$16.20

Better than average	Better than average	Within satisfactory range	Within satisfactory range	Within satisfactory range	Within satisfactory range	Better than average	Better than average
---------------------	---------------------	---------------------------	---------------------------	---------------------------	---------------------------	---------------------	---------------------

Operating Expense Per Passenger Trip



Operating Expenses per Passenger Compared to Peer Averages, 2017-2021

Peer Type ● Agency ● National ● WI



Annual Rate of Change

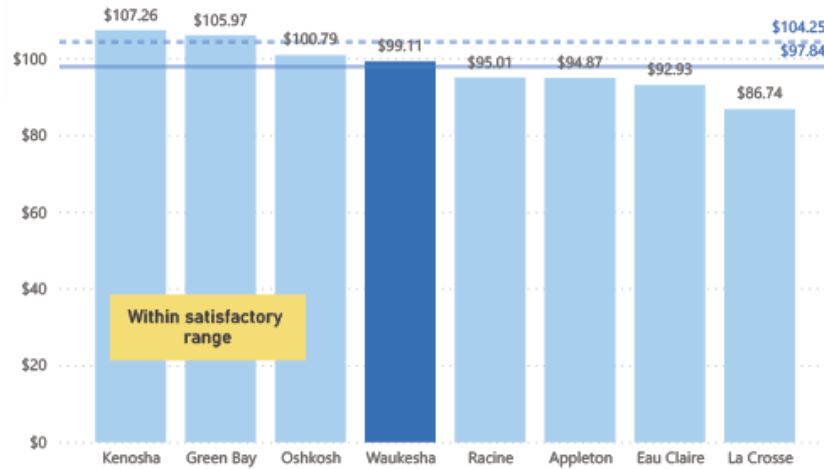
21.89%

	National	Wisconsin
Average	23.21%	18.58%
St. Dev.	9.62%	6.50%
Acceptable Range	32.83%	25.08%

Better than average
National Peers

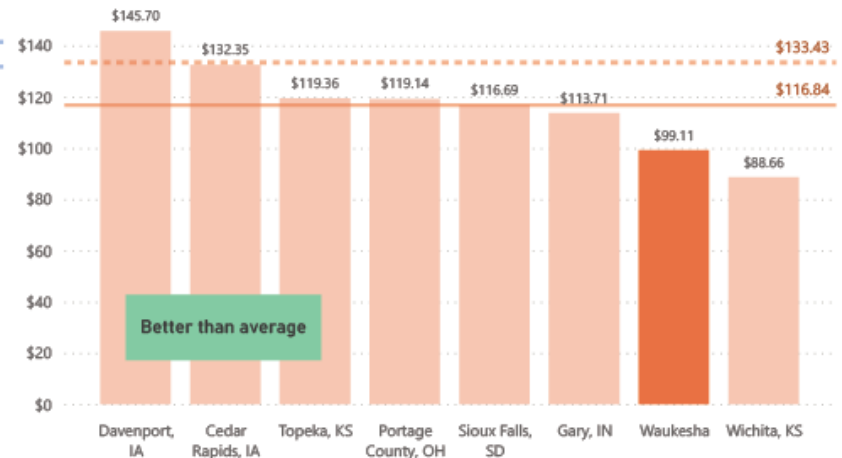
Within satisfactory range
WI Peers

Operating Expense Per Revenue Hour



Operating Expenses per Revenue Hour Compared to Peer Averages, 2017-2021

Peer Type ● Agency ● National ● WI



Annual Rate of Change

2.58%

	National	Wisconsin
Average	6.44%	3.57%
St. Dev.	4.32%	2.67%
Acceptable Range	10.76%	6.24%

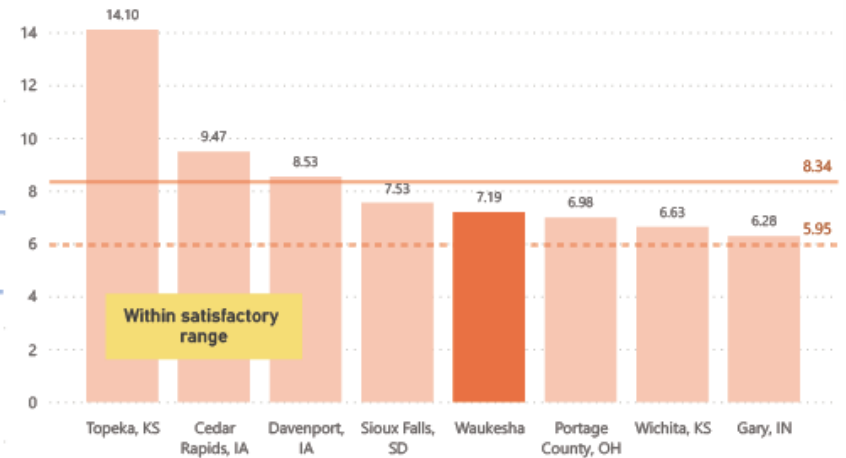
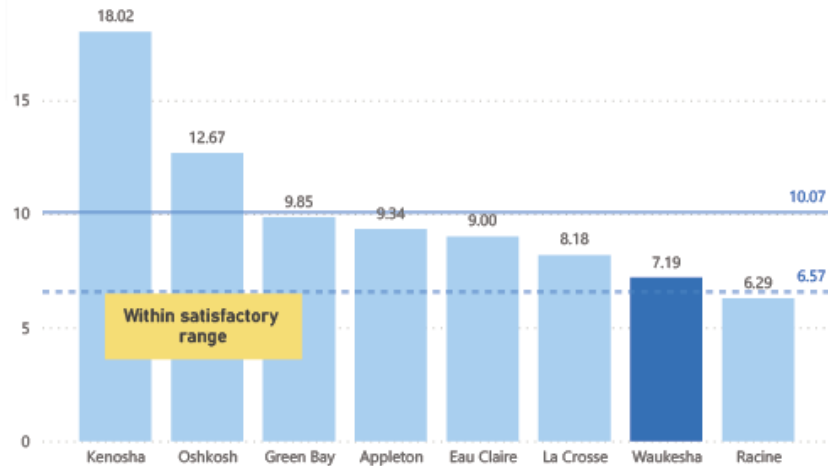
Better than average

National Peers

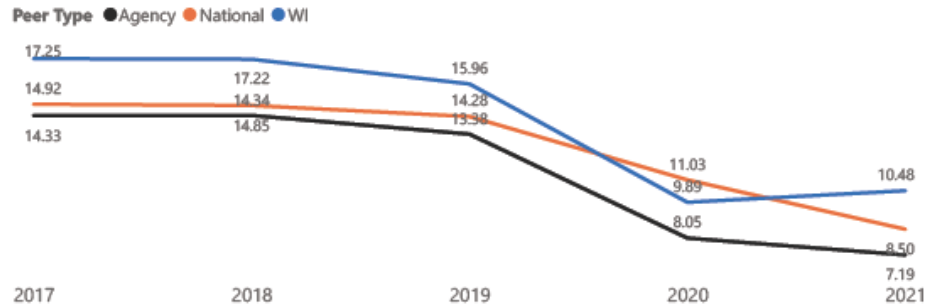
Better than average

WI Peers

Passenger Trips Per Revenue Hour



Passenger Trips per Revenue Hour Compared to Peer Averages, 2017-2021



Annual Rate of Change

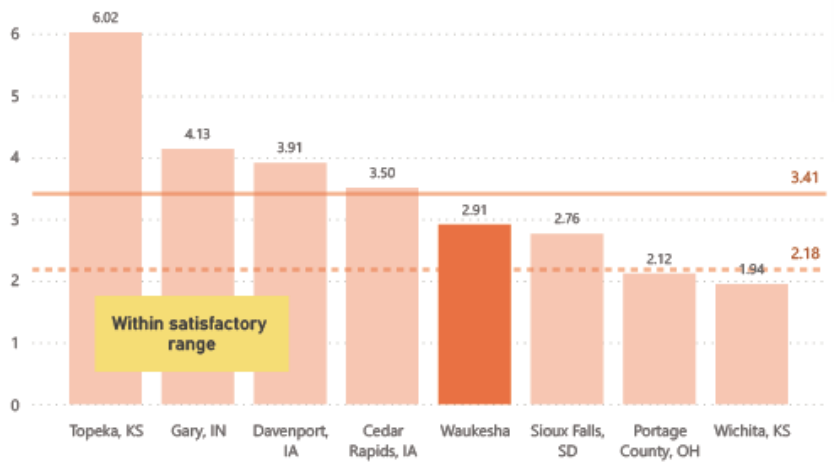
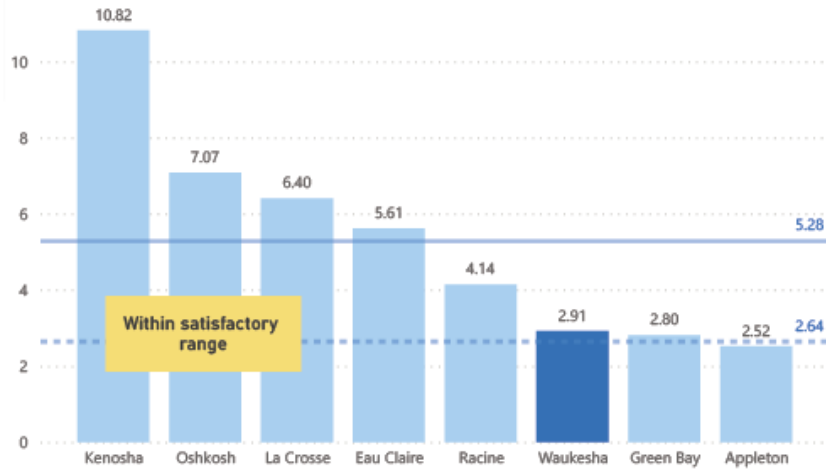
-15.84%

	National	Wisconsin
Average	-13.33%	-12.31%
St. Dev.	4.11%	6.67%
Acceptable Range	-17.44%	-18.98%

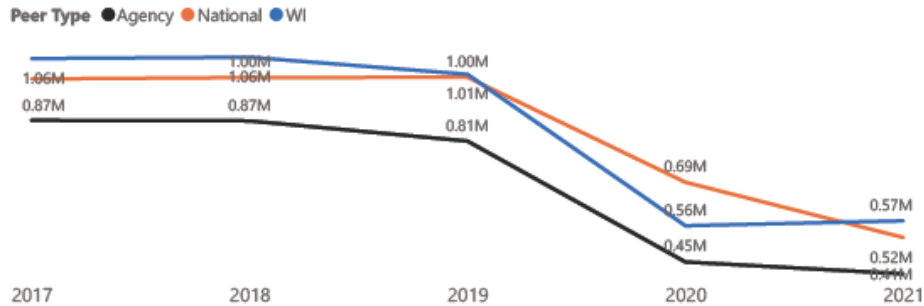
Within satisfactory range
National Peers

Within satisfactory range
WI Peers

Passenger Trips Per Capita



Passenger Trips Compared to Peer Averages, 2017-2021



Annual Rate of Change

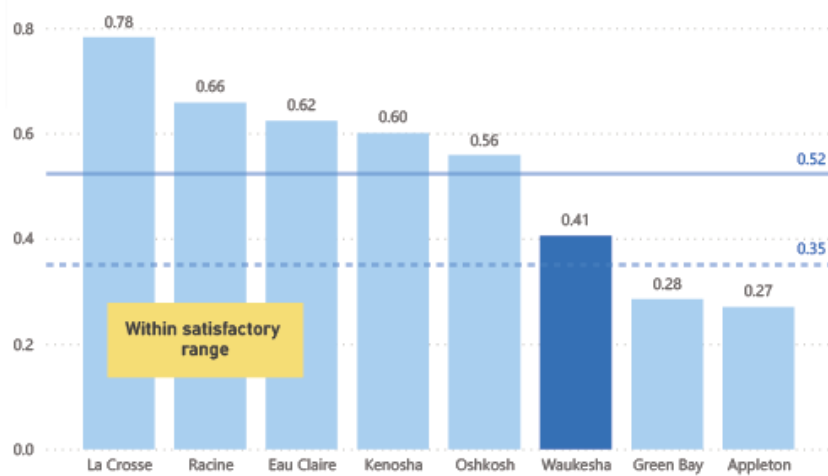
-17.06%

	National	Wisconsin
Average	-15.08%	-14.95%
St. Dev.	5.20%	5.07%
Acceptable Range	-20.29%	-20.02%

Within satisfactory range
National Peers

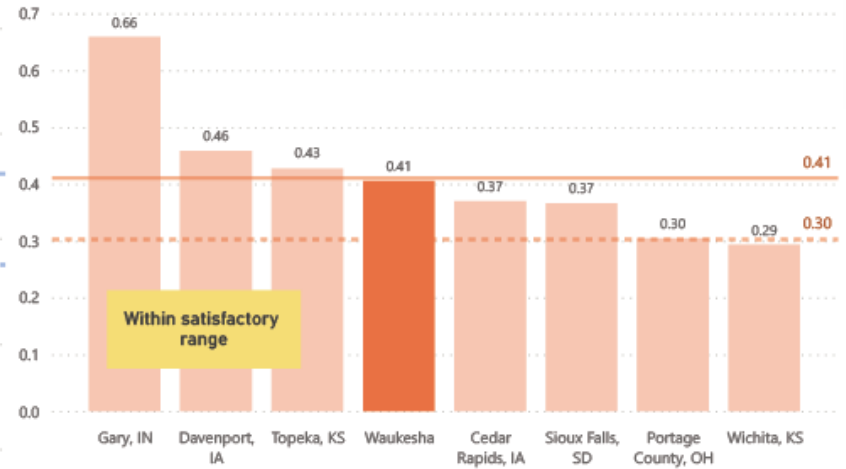
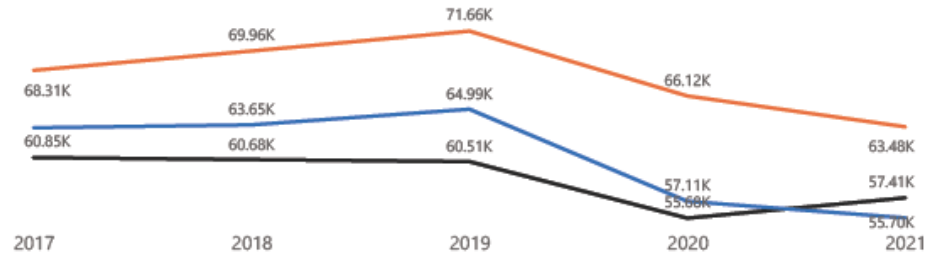
Within satisfactory range
WI Peers

Revenue Hours Per Capita



Revenue Hours Compared to Peer Averages, 2017-2021

Peer Type ● Agency ● National ● WI



Annual Rate of Change

-1.44%

	National	Wisconsin
Average	-2.04%	-2.83%
St. Dev.	3.43%	3.86%
Acceptable Range	-5.47%	-6.69%

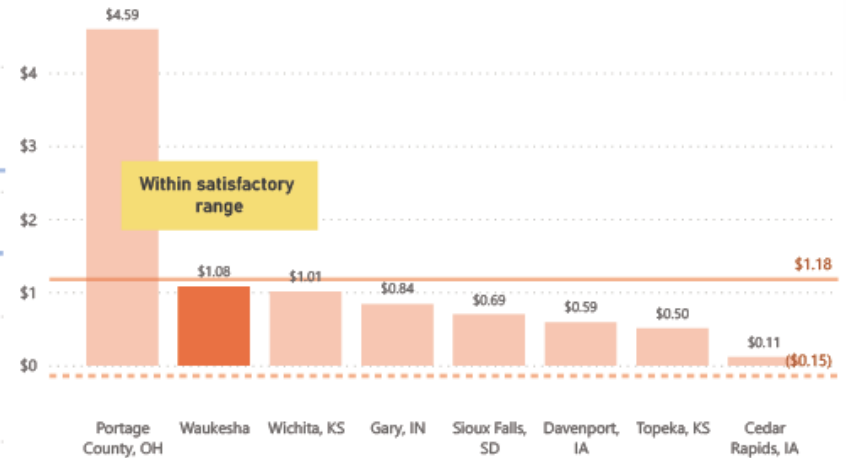
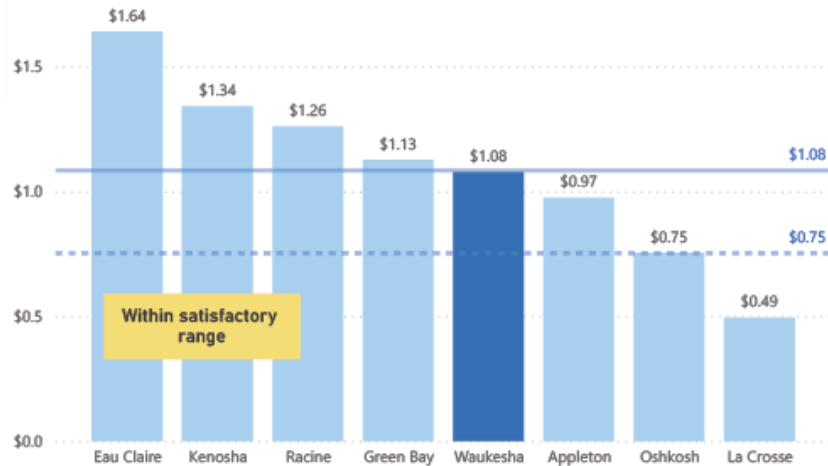
Better than average

National Peers

Better than average

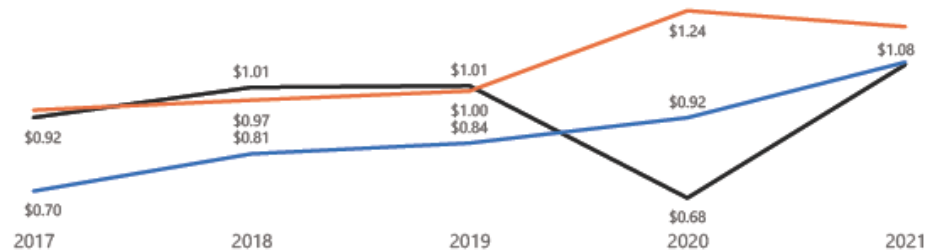
WI Peers

Average Fare Per Passenger Trip



Average Fare per Passenger Trip Compared to Peer Averages, 2017-2021

Peer Type ● Agency ● National ● WI



Annual Rate of Change

4.05%

	National	Wisconsin
Average	-2.67%	10.97%
St. Dev.	16.73%	9.11%
Acceptable Range	-19.39%	1.86%

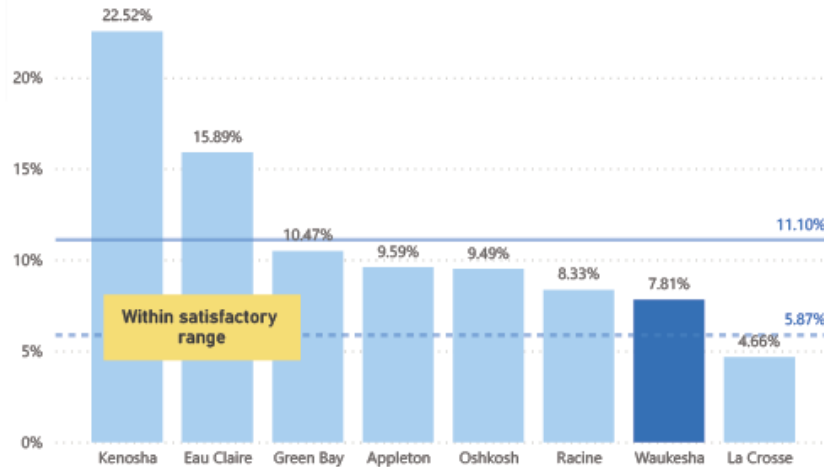
Better than average

National Peers

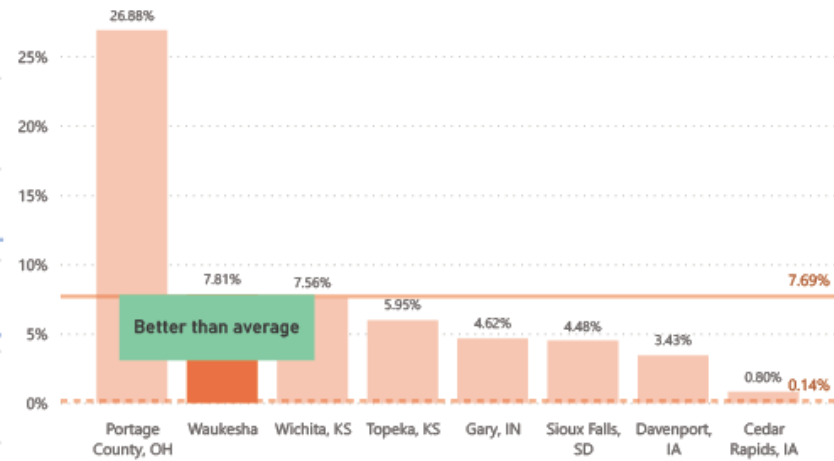
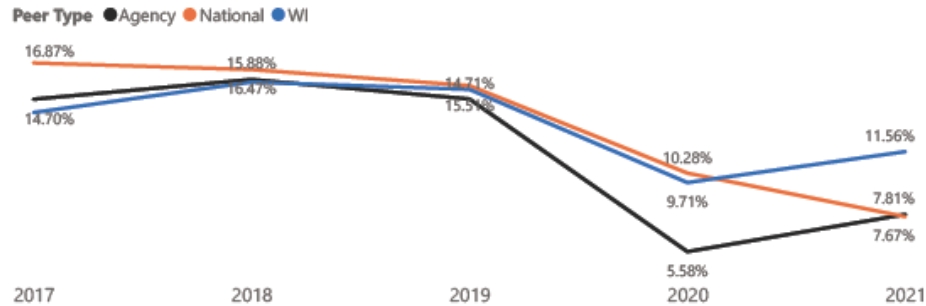
Within satisfactory range

WI Peers

Operating Ratio



Operating Ratio Compared to Peer Averages, 2017-2021



Annual Rate of Change

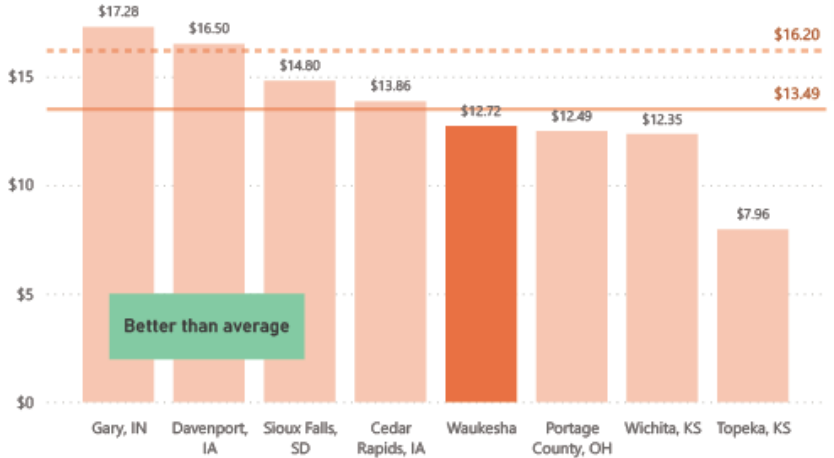
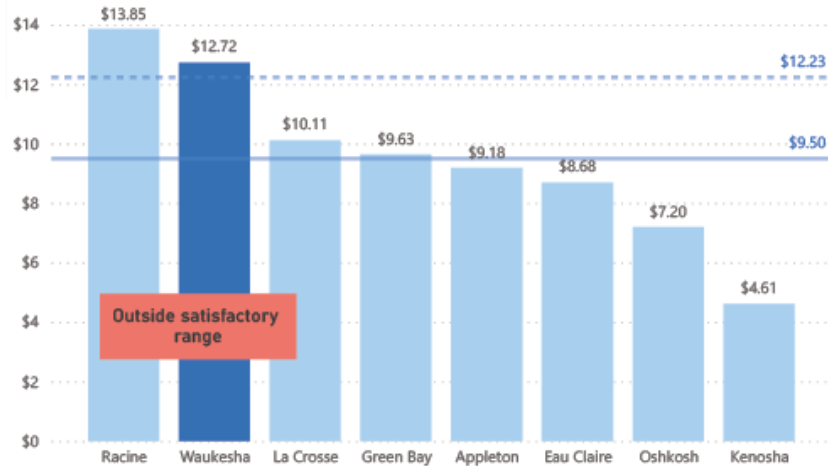
-14.63%

Better than average
National Peers

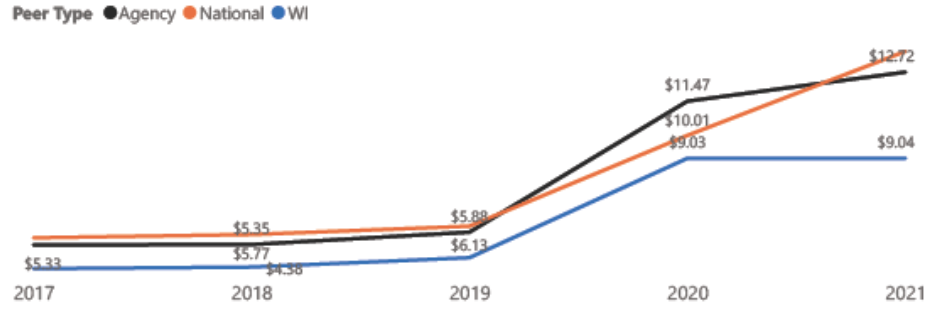
	National	Wisconsin
Average	-21.01%	-5.89%
St. Dev.	11.82%	11.87%
Acceptable Range	-32.83%	-17.76%

Within satisfactory range
WI Peers

Subsidy per Passenger Trip



Subsidy per Passenger Trip Compared to Peer Averages, 2017-2021



Annual Rate of Change

24.28%

	National	Wisconsin
Average	27.21%	19.45%
St. Dev.	13.42%	8.30%
Acceptable Range	40.63%	27.75%

Better than average
National Peers

Within satisfactory range
WI Peers

Agency Summary Relative to Peers

Performance Measure	Single Year (2021)		Trend Analysis (2017-2021)	
	WI Peers	US Peers	WI Peers	US Peers
Average Fare per Passenger Trip	Within satisfactory range	Within satisfactory range	Within satisfactory range	Better than average
Operating Expenses per Passenger Trip	Outside satisfactory range	Better than average	Within satisfactory range	Better than average
Operating Expenses per Revenue Hour	Within satisfactory range	Better than average	Better than average	Better than average
Operating Ratio	Within satisfactory range	Better than average	Within satisfactory range	Better than average
Passenger Trips per Capita	Within satisfactory range	Within satisfactory range	N/A	N/A
Passenger Trips per Revenue Hour	Within satisfactory range	Within satisfactory range	Within satisfactory range	Within satisfactory range
Revenue Hours per Capita	Within satisfactory range	Within satisfactory range	N/A	N/A
Subsidy per Passenger Trip	Outside satisfactory range	Better than average	Within satisfactory range	Better than average

Trend Summary Relative to WI Peers

Performance Measure	Agency Average Annual Rate of Change	WI Peer Average	WI Peer St. Dev.	WI Peer Acceptable Range	
Average Fare per Passenger Trip	4.05%	10.97%	9.11%	1.86%	Within satisfactory range
Operating Expenses per Passenger Trip	21.89%	18.58%	6.50%	25.08%	Within satisfactory range
Operating Expenses per Revenue Hour	2.58%	3.57%	2.67%	6.24%	Better than average
Operating Ratio	-14.63%	-5.89%	11.87%	-17.76%	Within satisfactory range
Passenger Trips per Capita					N/A
Passenger Trips per Revenue Hour	-15.84%	-12.31%	6.67%	-18.98%	Within satisfactory range
Revenue Hours per Capita					N/A
Subsidy per Passenger Trip	24.28%	19.45%	8.30%	27.75%	Within satisfactory range

Trend Summary Relative to US Peers

Performance Measure	Agency Average Annual Rate of Change	US Peer Average	US Peer St. Dev.	US Peer Acceptable Range	
Average Fare per Passenger Trip	4.05%	-2.67%	16.73%	-19.39%	Better than average
Operating Expenses per Passenger Trip	21.89%	23.21%	9.62%	32.83%	Better than average
Operating Expenses per Revenue Hour	2.58%	6.44%	4.32%	10.76%	Better than average
Operating Ratio	-14.63%	-21.01%	11.82%	-32.83%	Better than average
Passenger Trips per Capita					N/A
Passenger Trips per Revenue Hour	-15.84%	-13.33%	4.11%	-17.44%	Within satisfactory range
Revenue Hours per Capita					N/A
Subsidy per Passenger Trip	24.28%	27.21%	13.42%	40.63%	Better than average

Appendix B: Completed Questionnaire

The following are sheets from the completed MPR questionnaire, as submitted by Waukesha Metro Transit staff. These responses were reviewed and used to develop discussion items for the 2023 virtual review and this MPR final report.

RECOMMENDATIONS FROM PRIOR MPR			Waukesha Metro Transit	
#	Functional Area from Prior MPR	Recommendation	Priority	How has this recommendation been addressed? If not addressed, (a) what have been the barriers and/or (b) what steps have been taken toward completing it?
1	Policy- and Decision-Making Processes	No recommendations	--	
2	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	New AVL system (GMV Syncromatics) was installed in Fall 2021.
3		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	Two Ford Transits with wheelchair lifts are now part of the fleet and are primarily used as Supervisor vehicles
4		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	This was not feasible nor practical at the time nor did it seem to be a benefit in doing so.

RECOMMENDATIONS FROM PRIOR MPR			Waukesha Metro Transit	
#	Functional Area from Prior MPR	Recommendation	Priority	How has this recommendation been addressed? If not addressed, (a) what have been the barriers and/or (b) what steps have been taken toward completing it?
5		Increase extra board to accommodate expected increase in driver turnover rate.	Low	Given the labor shortage, this is a very inefficient use of operators.
6		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	The City converted North St. to two way traffic in Nov. 2022 and routing in the downtown was revised that improved operations and safety.
7	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	A formal review as not been done, however, we studied other systems experience with electric buses and currently is not feasible to move to but we currently monitor and are learning as this evolves.
8	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	This was not feasible nor realistic as we only operate in a very small portion of Pewaukee to Waukesha County Technical College (WCTC). WCTC did inquire about additional service and we made it known they would need to contribute and that was the end of the request.
9		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	This was not feasible nor practical at the time nor did it seem to be a benefit in doing so.

RECOMMENDATIONS FROM PRIOR MPR			Waukesha Metro Transit	
#	Functional Area from Prior MPR	Recommendation	Priority	How has this recommendation been addressed? If not addressed, (a) what have been the barriers and/or (b) what steps have been taken toward completing it?
10	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	SEWRPC completed the Waukesha area 2023-2027 TDP at the end of 2022 and was approved by both the City and County of Waukesha
11		Work with MCTS to address missed transfers between Route 1 and Gold Line.	High	This was worked on, however, Route 1 replaced the Gold Line so service on the entire east-west service from Downtown Waukesha to the Milwaukee Regional Medical Center is on the same schedule.
12		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	This was part of the TDP and some work was done this year. We have roughly 90% accessible of bus stops and can move to a higher % but getting to 100% will be extremely difficult nor feasible without significant investments of a greater sidewalk network in all the communities we serve.
13	Marketing	Conduct a customer satisfaction survey at least once every two years, and use the results to guide	High	This was not done in part due to COVID, however, SEWRPC did a lot of outreach and surveys in relation to the TDP.

RECOMMENDATIONS FROM PRIOR MPR			Waukesha Metro Transit	
#	Functional Area from Prior MPR	Recommendation	Priority	How has this recommendation been addressed? If not addressed, (a) what have been the barriers and/or (b) what steps have been taken toward completing it?
		service improvements and strategic planning efforts.		
14		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	We have worked a lot with the City Communications Team to have a strong social media presence and they have done a great job of incorporating our messaging into the overall City social media.

POLICY- AND DECISION-MAKING PROCESS		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
GENERAL				
1	How does the transit system interact with WisDOT on this topic (policy)?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
2	How does the transit system interact with other public transit systems on this topic (policy)?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
STAFFING & ORGANIZATION				

POLICY- AND DECISION-MAKING PROCESS		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
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?			It's a division of the City of Waukesha Public Works Department
4	Which of these functions are conducted "in-house" and which are outsourced to other units of government or organizations? (please name these)			
	Human Resources			In house
	Operations			In house
	Maintenance			In house
	Finance			In house
	Legal			Utilize City Attorney
	Marketing			Mainly in house
	Other (please note)			
5	Have labor costs changed significantly in the last few years? If so, how?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
6	Are there any clearly-identifiable barriers in place related to employee recruitment and retention? If so, please list briefly.	x		It is difficult to compete with the wages for other segments of the transportation industry (trucking, etc.). Also, due to the nature of the work, split shifts and night and weekend work is harder to fill
7	Has the transit system been impacted recently by high turnover or retirements?	x		
8	What is the starting wage for drivers (part-time and/or full-time)? How, if at all, does this change in the first year?			\$19.57/hour. It will change when the new union contract is ratified.

POLICY- AND DECISION-MAKING PROCESS		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
9	Is there a notable difference between benefits offered to part-time and full-time employees?	x		
10	What actions does the transit system undertake to improve employee retention?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
MANAGEMENT				
11	Who does the transit manager report to?			City Public Works Director
12	Who is responsible for leading the following activities? Please include names and/or job titles.			
	Preparing capital/operating budgets			Transit Manager, finance Director
	Providing input on staffing levels			Operations staff and Transit Manager
	Administering discipline			General Manager, Compliance Specialist, Lead Supervisors
	Hearing grievances			General Manager and Operations Supervisors
	Negotiating labor contracts			General Manager, Compliance Specialist and Finance Director
13	How often does management hold regular staff meetings?			Only as needed however management staff is in constant communication with one another
14	How often does the transit manager meet with their supervisor?			Only as needed however we communicate on at least a weekly basis
15	What training has management staff received in the past year, if any? Do you feel this is sufficient?			Reasonable suspicion training, IT quarterly training. FTA Drug and Alcohol Training, Yes.
16	What training is planned for management staff in the next year, if any? Do you feel this is sufficient?			Safety training. Yes
POLICY MAKING				

POLICY- AND DECISION-MAKING PROCESS		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
17	Is there a governance board, transit commission, or official oversight committee in place? If so, please name these group(s).	X		The City of Waukesha Transit Commission acts as the oversight board for Waukesha Metro and the City Council has final approval on matters. The Waukesha County Public Works Committee has oversight of the Waukesha County Transit matters with the County Board having final approval.
18	Briefly, what are the responsibilities of the board/commission?			Provide oversight, set policy and vote to recommend items to be approved by the Council
19	How many members are on the board/commission? What is its composition in terms of elected officials, staff, members of the public, etc.?			Transit Commission consists of 3 citizen members and 2 Alderpersons. Public Works Committee consists of 7 County Supervisors
20	What is the term of members?			Transit Commission term is 3 years.
21	How frequently does the board/commission meet?			As needed for both. Transit Commission averages once a month, Public Works Committee takes up transit matters once a quarter on average
22	Are board/committee meetings open to the public and publicized?	x		
23	Are board/committee meeting agendas, packets, and minutes posted online? If so, please provide a link.	x		https://waukesha.legistar.com/Calendar.aspx
24	Do transit system staff provide regular updates and/or written reports for board/committee meetings?	x		
25	Does the transit system track progress toward specific performance goals or completion of initiatives? If so, describe briefly.	x		We report annually on metrics to both the City and County and also report on a bi-weekly basis on project updates.

POLICY- AND DECISION-MAKING PROCESS		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
26	Who is involved with setting policy on:			
	Operations			Compliance Specialist, General Manager, Operations staff
	Route / service planning and changes			Transit Manager and Operations Staff
	Specifying / procuring equipment and rolling stock			Transit Manager and Maintenance Director
	Fare policy			Transit Manager, Finance Director and Operations staff
27	Provide an example of a recent policy-making process or policy change.	X		<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
COMPLIANCE				
28	Did the transit system have any deficiencies, corrective actions, or findings in the most recent FTA Triennial Review/WisDOT Compliance Site Review? If so, please describe briefly.		X	Past two triennials there were no findings and FTA just completed a drug and alcohol audit and we are in compliance.

TRANSPORTATION OPERATIONS		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
GENERAL				
1	Currently, what is the most important operational issue the transit system is experiencing?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
2	How does the transit system interact with WisDOT on this topic (operations)?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
3	How does the transit system interact with other public transit systems on this topic (operations)?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>

TRANSPORTATION OPERATIONS		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
4	For each mode (or service type) operated, how many vehicles are operated in maximum service?			Motorbus-16, Paratransit-3, Commuter Bus-7
5	How many of the following does the system currently employ?			
	Full-time drivers			30
	Part-time drivers			7
	Full-time operations/street supervisors			5
	Part-time operations/street supervisors			0
	Full-time other operations staff (e.g., dispatchers, communications staff) [please specify title]			2
	Part-time other operations staff (e.g., dispatchers, communications staff) [please specify title]			0
OPERATIONS MANAGEMENT AND SUPERVISION				
6	Is there an operations manager? If so, who (name and title)?	x		Richard Ticehurst, General Manager
7	Are operations supervisors scheduled and present during all hours of revenue service? If not, describe when.	x		
8	Are supervisors ever on call at home? If so, when?		x	
9	Is at least one dispatcher (or customer service staff) on duty for all hours of revenue service? If not, describe when these staff are on duty.	x		

TRANSPORTATION OPERATIONS		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
10	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?			Mechanic and operations supervisor. 4 am. Yes, they ensure service is ready for the day.
DRIVER COMMUNICATIONS				
11	How are route and service changes, safety bulletins, and other important policies communicated to drivers?			They are posted and also Supervisors will personally make operators aware of major changes. Use of marker board. All new or changed policies must be signed for.
12	Is there a specific employee guidebook for operations or a specific driver's manual? <i>If so, please ensure this is included in the shared documents.</i>	x		
13	Is there a cellular phone/digital device usage policy for drivers?	x		
14	Are job performance evaluations completed regularly for all driver staff? If so, how often, and what do they entail?		x	
15	Are there any incentive programs in place for driver performance? If so, briefly describe them?	X		Monthly customer service awards, extra shifts drawing. Can win statewide safety award from insurer TMI
DRIVER: PRE-TRIP / POST-TRIP				
16	Where do drivers report to when starting their shift?			Either at the Maintenance Facility or Transit Center
17	Do any drivers begin work at remote start points? If so, what is the procedure for checking in with dispatch/supervisors?	x		Mid-day reliefs at Transit Center. They radio in to the supervisor. Also Transit Center staff will interact with them as needed

TRANSPORTATION OPERATIONS		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
18	How far in advance of pull-out (in minutes) do drivers report?			10 minutes for pre-trip inspection
19	Is there a method for dispatchers (or other relevant staff) to communicate with maintenance staff to ensure that all routes have been assigned vehicles that are in good repair?	x		
20	Are all drivers required to personally check-in or report to a supervisor, dispatcher, or some other management person before going on duty? If so, describe this process. Is it face-to-face, by phone, etc.?	x		When at Maintenance Facility it is face to face, at Transit Center they will radio to Dispatch.
21	Prior to the start of their shift, how does the transit system ensure a driver is fit for duty?			When the driver reports, the Supervisor evaluates their appearance, speech, etc.
22	Is a pre-trip inspection required before a vehicle goes in service?	x		
23	Do drivers have a post-trip checklist? If not, what functions do drivers complete at the end of the shift?	x		
24	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?			Maintenance staff will do so at 12:30 am. No security system
DRIVER: IN-SERVICE				
25	Do drivers record the following information throughout the day? If so, how do they report it (e.g., a paper form, farebox, MDT, tablet)?			

TRANSPORTATION OPERATIONS		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
	Passenger boardings		x	
	Fare paid	x		For cash and old fare media only
	Arrival times	x		Paratransit only
	Start/end vehicle mileage	x		
	Other (please specify)			
26	Do drivers handle cash or tickets in any way?		x	
27	Is there an adopted on-time performance standard (e.g., window of time to be considered "on time") for each mode or service type you provide? If so, what are the standards?	x		0 to 5 minutes late.
28	Does the transit system track on-time performance for your demand response service? If so, how is this tracked? How often are results summarized and reviewed?	x		Through Ecolane software and is reported monthly.
29	Does the transit system track on-time performance at the start and/or end of a route ? If so, how is this tracked? How often are results summarized and reviewed?	x		Its through our AVL system and is done on a daily and weekly basis and summarized monthly.
30	Does the transit system track on-time performance at mid-points along a route ? If so, how is this tracked? How often are results summarized and reviewed?	x		All bus stops are tracked, however, only timepoints are considered for on time performance. We examine daily, weekly and summarize monthly.
31	Is there an adopted on-time performance goal (e.g., percent on time) for each mode or service type provided? If so, what are the goals?		x	We are in the process of determining a goal.

TRANSPORTATION OPERATIONS		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
32	Year-to-date, what was the actual level of on-time performance for each mode or service type you provided (e.g., percent on-time)?			72.3% for fixed route. 87.09% for paratransit
TRAINING				
33	Are drivers, dispatchers, and supervisors given training in how to respond to accidents and medical emergencies?	x		
34	Are drivers given training and direction in how to respond to passenger incidents?	x		
35	Do you have an accidents per mile goal (e.g., fewer than X accidents/100,000 miles)? If so, how have you performed in relation to your goal recently?	X		It is part of our PTASP. In compliance with goal.
36	Who administers the transit system's driver training program?			Training Supervisor, General Manager
37	Is the transit system's driver training program documented? If so, <i>please ensure this is included in the shared documents.</i>	x		
38	Have drivers been through specialized driver safety courses (e.g., Smith System, TSI, CTAA, WI RTAP, etc.)? If so, please note the course and briefly describe how it is applied.	X		TMI and Transdev programs
39	Approximately how long is the transit system's driver training program?			
	Number of classroom hours			40 hours

TRANSPORTATION OPERATIONS		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
	Number of behind-the-wheel hours			120 hours, 40 with senior driver
40	Is there a continuing education component to the transit system's driver training program? If so, please describe briefly <i>or list the internal document that you have shared that addresses this.</i>	X		Wheelchair securement annual and others as needed.
41	Do maintenance staff have any role in training new drivers? If so, please describe briefly <i>or list the internal document that you have shared that addresses this.</i>	X		Maintenance Director will explain different parts of vehicle.
42	Does the transit system provide or arrange for CDL training for inexperienced drivers when a CDL is required to operate one of its vehicles?	X		
43	Is there a retraining program for drivers with poor safety or complaint records? If so, please describe briefly <i>or list the internal document that you have shared that addresses this.</i>	X		Drivers with preventable accidents are required to go through 3 hours of re-training. Multiple valid complaints, etc. will receive re-training as needed.
44	Does the transit system's safety program offer incentives and recognition to drivers with good records? If so, please describe briefly.	X		We have safe driver awards and also system award from TMI (insurer)
45	Does the transit system have regular safety meetings with the following staff? If so, how often?			
	Drivers	X		All of these groups meet for our Safety Committee
	Mechanics	X		
	Administration	X		

TRANSPORTATION OPERATIONS		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
46	Does the transit system do driver ride checks ("ride-alongs") with management, supervisors, trainers, or other drivers? If so, how often?	x		This is provided for us through our Insurance carrier TMI and they will perform these checks 2-3 times/year. Supervisory staff will do ride checks as time permits.
47	Are drivers given specific training in the use of a passenger lift and how to properly secure a wheelchair?	x		
48	Who conducts safety training for maintenance workers?			Maintenance Director and other resources as needed.
WORK AND VEHICLE ASSIGNMENTS				
49	Does the transit system use specialized scheduling software (e.g. HASTUS) or other software to maintain a schedule database? If so, please describe briefly.	x		Optibus
50	How and how often do drivers select work assignments?			Typically 3 times a year
51	Are there rules or guidelines about the types of work completed by part-time employees? If so, please provide an overview or list the internal document that you have shared that addresses this.		x	
52	Are there requirements for driver breaks? If so, please provide an overview or list the internal document that you have shared that addresses this.		x	
53	Does the system employ standby drivers who report to work but are not immediately assigned work ("extra board")?	x		

TRANSPORTATION OPERATIONS		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
54	Does the system employ on-call drivers who are available for work, but do not report to work unless called in?		x	

MAINTENANCE		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
GENERAL				
1	What are the major challenges facing your maintenance program?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
2	How does the transit system interact with WisDOT on this topic (maintenance)?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
3	How does the transit system interact with other public transit systems on this topic (maintenance)?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
4	How many of the following workers does the system currently employ?			
	Full-time mechanics			3
	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			2

MAINTENANCE		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
5	Is a maintenance lead or supervisor on duty during all hours of revenue operations? If so, briefly describe who and how this is covered throughout the day.		x	
6	Is there a mechanic on duty during all hours of revenue operations? If not, describe when they are on duty.		x	Always on duty during weekday revenue hours and Saturday and Sunday evenings.
7	Are buses stored, maintained, and dispatched from the same facility? If not, please describe.	x		
8	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
9	Have mechanics had specific training on the vehicles they are maintaining? If so, from whom?	x		Bus manufacturers and also the vendor of the various systems on the bus
10	Who in the organization develops vehicle, equipment, and contracted services specifications?			Maintenance Director and Transit Manager
11	Is vehicle maintenance activity tracked using software? If so, which software? If not, how is this tracked?	x		Use RTA

DAILY VEHICLE SERVICING

MAINTENANCE		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
12	Where are revenue vehicles fueled? Who does the fueling and when?			In our wash lane, by the fuelers/washers and/or mechanics. It is done in the evening to get vehicles ready for the next day
13	How often are revenue vehicles fueled and fluid levels (e.g., oil, torque fluid, water, etc.) checked?			Daily
14	How often is mileage recorded for each vehicle?			Daily
15	How is vehicle reliability and maintenance tracked over time?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
16	How often are bus exteriors washed?			Daily
17	How often are vehicle interiors swept and wiped down?			Daily
INSPECTIONS AND PREVENTIVE MAINTENANCE				
18	At what mileage intervals are inspections performed?			In accordance with manufacturer specifications - refer to inspection forms
19	What work is done at each mileage interval? Please provide an overview <i>or list the internal document that you have shared that addresses this.</i>			In accordance with manufacturer specifications - refer to inspection forms
20	Year-to-date (or in the last calendar year), what percent of preventive maintenance inspections were performed on time?			100%
21	Do you track the number of road calls by month, year, etc.? Please describe how the number has changed over time and/or list the <i>internal document that you have shared that addresses this.</i>			Yes, generally we have fewer road calls as our bus fleet age is much lower than in past years.
REPAIRS				

MAINTENANCE		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
22	Is there a procedure for prioritizing repairs? If so, please provide an overview <i>or list the internal document that you have shared that addresses this.</i>	x		Most critical are generally assigned first provided parts are available. If there are simple repairs that can get a vehicle back up quickly and back on the road, those will be done first.
23	Is there a procedure to ensure that unsafe buses aren't used? If so, please provide an overview <i>or point to an internal document that you have shared that addresses this.</i>	x		Marked out of service and use of lock out/tag out.
24	Is there a procedure for assigning work to mechanics? If so, please provide an overview <i>or list the internal document that you have shared that addresses this.</i>	x		Generally there is only one mechanic on duty so they are assigned the work needed but the most pressing repairs are assigned first.
25	Do mechanics complete a work order form showing the nature of the repair, the hours (labor) required, and the parts used? <i>If so, please ensure this is included in the shared documents.</i>	x		
26	Does a maintenance lead or supervisor review driver defect reports?	x		
SHOP				
27	Does the vehicle maintenance and storage area have a sprinkler or other fire suppression system in place?	x		
28	Is there a separate room for the storage of hazardous/explosive materials?	x		
29	Is there a separate room for battery storage?	x		

MAINTENANCE		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
30	What is the date of the most recent fuel-oil storage tank inspection?			4/7/2023
31	Does the system have a procedure for disposing of recyclables and hazardous materials?	x		
32	Are the following required in the shop?			
	Eye protection	x		
	Safety shoes	x		
	Other (please list)		x	
33	Is there an office area for maintenance staff and recordkeeping?	x		
PARTS				
34	How do you determine from where and how often you purchase parts? Please provide an overview <i>or list the internal document that you have shared that addresses this.</i>			Spot checking of inventory, part requisition reports on RTA, mechanics reports of items needed
35	How do you determine from where and how often you purchase fuel? Please provide an overview <i>or list the internal document that you have shared that addresses this.</i>			Maintenance Director monitor fuel level and orders as needed. Red Jacket Monitoring System monitors fuel.
36	How do you determine from where and how often you purchase tires? Please provide an overview <i>or list the internal document that you have shared that addresses this.</i>			We lease tires from Goodyear so this is NA.
37	Is there a computerized parts inventory control process? If so, which software do you use?	x		RTA

MAINTENANCE		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
38	Are parts barcoded?	x		
39	Is there a method of confirming the inventory? If so, please describe briefly. How often?	x		Physical inventory count.
40	Is there a stock keeper in charge of the parts room? If so, who? If not, who supervises parts withdrawals?		x	Maintenance Director
41	Are all parts withdrawals documented? If so, how?	x		RTA work order tracks parts used.
42	Are there parts that you have difficulty procuring or keeping in stock? If so, please describe briefly.			Generally electronics have been difficult due to supply chain issues.
FACILITIES MAINTENANCE				
43	Does the system have transit shelters and/or other customer facilities? If so, who is responsible for maintaining them? How frequently are they cleaned?	x		Maintenance facilitator, cleaned monthly
44	Are facility management responsibilities clearly assigned to staff?	x		

PLANNING		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
GENERAL				
1	What do you want to accomplish in the next few years?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
2	In the past, has there generally been success in implementing planning recommendations?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>

PLANNING		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
3	How does the transit system interact with WisDOT on this topic (planning)?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
4	How does the transit system interact with other public transit systems on this topic (planning)?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
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), operations analysis, or other strategic plan completed?			2023-2027 TDP was completed at the end of 2022.
7	Who led the last TDP (or similar project) and what was the transit system's role in the process? Did any other local agencies participate? Please list.			SEWRPC led the effort and the transit manager and staff supported the effort and was involved in helping guide the process. There was an Advisory Committee representing business, educational, social service and governmental interests.
8	Is the TDP (or similar project) incorporated into the local long-range transportation plan for the community?	X		
9	To what extent has the transit system addressed the recommendations in the TDP (or similar project)? Approximately what percentage of the recommendations have been implemented or addressed?			The system re-design which was the biggest recommendation was implemented on 6/4/23. New fare system and fare capping recommendation has recently been implemented. These three were the biggest recommendations and account for approximately 75% of the recommendations. Others are in the process of being implemented or investigated further.

PLANNING		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
10	Does the transit system survey riders regarding the following? If so, how often is this information gathered?			
	Frequency of use	x		These are done by SEWRPC once every 10 years and also as needed for projects they are working on for us.
	Transportation alternatives/mode choice	x		
	Trip origins and destinations	x		
	Trip purpose	x		
	Level of satisfaction with service	x		
	Demographics	x		
PLANNING DATA / PERFORMANCE EVALUATION				
11	Who is responsible for monitoring daily transit system performance data?			Compliance Specialist, Transit Manager & Operation Supervisors
12	Outside of daily monitoring, what performance data are regularly or occasionally reviewed by staff?			On time performance and ridership data.
13	Does the transit system have automatic passenger counters (APCs)? If not, briefly describe how you collect ridership data.	x		
14	Does the transit system monitor maximum vehicle loads? If so, how and how often?	x		Our AVL system monitors it. Generally this is not an issue except with large group rides.
15	Does the transit system have an automatic vehicle locator (AVL) system or other GPS tools to track vehicle location? If so, briefly describe how this is used and if this differs by mode of service provided.	x		This is used to monitor route performance and assist the operations staff to make adjustments to get the routes back on time. The cumulative data assists in making adjustments to the schedules, etc. We do have our paratransit buses on

PLANNING		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
				our fixed route AVL system so the staff can see all vehicles at once.
SERVICE CHANGES				
16	How does the transit system respond to requests for service changes?			We will analyze the feasibility and ability to implement and recommend actions to the Transit Commission/Council if warranted.
17	Does the transit system evaluate the effectiveness of service changes? If so, how?	x		Yes, we evaluate ridership, rides/hour, on time performance, etc.
18	Generally, how often are routes and/or schedules updated?			Twice a year
19	When was the most recent notable service change or set of changes implemented? Generally, what was changed?			System re-design 6/4/23. Extended service to Milwaukee Regional Medical Center and made a number of changes to routes eliminating low performing segments allows the routes to be more linear and faster.
20	Have you instituted any new or substantially expanded programs or service (new mode or type of service) within the last few years? If so, please describe briefly.		x	
FIXED ROUTE SCHEDULES				
21	Are fixed route schedules arranged to have routes meet at transfer points?	x		
22	Are buses "held" for late arriving buses at transfer points? If so, briefly state the policy.	x		Yes, general policy is buses can be held up to 5 minutes but the Supervisor can deviate as needed given the circumstances.

PLANNING		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
23	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		Yes, there is an emergent issue that warrants to do so.
24	Is layover time or recovery time incorporated into schedules? If not, how is recovery time accommodated?	x		Yes, the goal is to have at least 5 minute layover per round trip at the Transit Center.
25	Does the transit system operate trippers (i.e., unique or supplementary scheduled trips for schools or workplaces)? If so, briefly describe.	x		We have 3 PM school trip routes and 1 AM school trip route.
26	Are schedules checked on a regular basis to determine if running time adjustments are warranted? If so, how is this completed?	x		We examine the AVL on time performance and also monitor feedback from the drivers, passengers, operations supervisors.
PUBLIC INPUT				
27	How does the transit system engage the public in planning decisions? Please provide an overview of the strategies you use and how often they are deployed <i>or list the internal document that you have shared addresses this.</i>			There was public outreach with the latest TDP including in person meetings, online feedback ,etc. We also encourage the public to provide feedback on service on a routine basis. As new projects come up, we will engage riders with surveys, etc.
28	Aside from the primary decision-making body (i.e., board or commission), is there an advisory group that provides input or direction on transit in your community? If so, please describe.	x		Yes, there was for the recent TDP and we continue to work with these resources on concerns, issues.
29	What guidelines are used to determine when a public meeting is needed? Please provide an overview <i>or list the internal document that you have shared that addresses this.</i>			For the City-10% reduction of revenue hours per route or fare change. For County-20% reduction of revenue hours per route per service day or fare change.

PLANNING		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
30	Does the transit system hold public meetings before adopting service changes?	x		
31	How are comments received at public meetings incorporated into service changes? Please provide an overview or list the internal document that you have shared that addresses this.			First, comments can be submitted at the meeting, via e-mail or US mail. The public hearing is held prior to any proposed service changes are voted on. The governing board then will consider the comments when considering to approval the proposed changes.
CAPITAL PLANNING				
32	Does the transit system have a Transit Asset Management (TAM) Plan and/or fleet replacement plan? <i>If so, please ensure this is included in the shared documents.</i>	x		
33	How many, if any, revenue vehicles are on order but have not yet arrived or have not yet been introduced to revenue service? Please describe briefly, including funding source(s) and which vehicles are being replaced.			0
34	Has the transit system analyzed whether the current fleet mix is most appropriate relative to existing/future demand? If so, when was this last evaluated?	x		It was evaluated after our latest service changes were approved.
35	Does the transit system have a facilities replacement/expansion plan? <i>If so, please ensure this is included in the shared documents.</i>		x	

PLANNING		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
36	Briefly, what types of facility improvements have been made in the last three years?			Replacement of flooring, paint, walkway repairs, expansion of parking lot to allow for training area. Replacement of office lighting to LED. New fueling system.
37	Briefly, what types of facility improvements do you expect to make in the next few years that you have secured funding for?			Interior re-model of admin/maint. facility. Replacement of AC condenser at Transit Center. Add perimeter fence for bus yard.
38	Briefly, what types of facility improvements do you expect you will need to make in the next three years but have not yet secured funding for ?			Replacement of next bus arrival signs at Transit Center concourse, Replacement of bus washer
39	What type of steps has the transit system made to improve energy efficiency and become more environmentally friendly?			Over the past several years, replaced old lighting with LED and replace HVAC equipment with more efficient systems and monitor open doors with security cameras.
40	Is facilities planning conducted as part of the annual budgeting process or as part of another budgeting process? Please describe briefly.			Facilities planning is part of the City of Waukesha capital improvement budget process
41	Does the transit system own and/or maintain customer amenities at transit stops, such as shelters, benches, enhanced signage, etc.? If so, please list the types of amenities.	x		Transit Center including indoor lobby, customer service window, indoor bathrooms, bus arrival sign in the lobby, covered concourse. We also have several bus shelters, roughly 90% of the bus stops are accessible
42	Does the transit system or its parent agency have an ADA Transition Plan or similar plan to program/implement ADA accessibility improvements? If so, please describe.		x	We do not have a formal plan but consistently working to make ADA improvements where feasible.
COORDINATION				

PLANNING		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
43	Does the transit system coordinate with other departments/municipalities/agencies regarding land use, housing and economic development, and related transportation projects? If so, please briefly describe how this coordination takes place.	x		A number of these groups were part of the TDP advisory committee and we worked with these groups prior to the TDP and continue to after. As developments are being proposed/plan, we work with the agency/department/business interests to provide feedback on what transit services could be provided.
44	Are transit system staff directly involved in updating the transportation element of local planning documents? If so, please list examples of those local planning documents.	x		The City and SEWRPC are currently updated the local comprehensive planning plan and the City is also working on a new 5 year strategic plan. In addition, the new TDP was incorporated as part of SEWRPC Vision 2050 plan update.
INFRASTRUCTURE INVESTMENT AND JOBS ACT (IIJA) - FEDERAL BIPARTISAN INFRASTRUCTURE BILL				
45	How is the transit system preparing for additional operating funds through the IIJA?			No prep work as this is the second year and the additional fundings allows us to not have to use as much federal relief funds for operations.
46	How is the transit system preparing for additional capital funds through the IIJA?			Per state statute, all of the additional 5307 funds has to go to operating so the amount of allocated capital funds is limited to 5339 and 5337 funds. We have planned more facilities improvements. We have applied for competitive awards (CMAQ & STP) for projects for future years.

FINANCE		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
GENERAL				
1	How does the transit system interact with WisDOT on this topic (finance)?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
2	How does the transit system interact with other public transit systems on this topic (finance)?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
3	Which staff positions are involved with the following:			
	Payroll			Administrative Specialist, Finance Director, Compliance Specialist
	Purchasing			Administrative Specialist, Finance Director, Compliance Specialist, Transit Manager, Maintenance Director
	Accounts payable			Administrative Specialist, Finance Director, transit Manager
	Accounts receivable			Administrative Specialist, Finance Director, Compliance Specialist
	General ledger			Finance Director
	User fare revenues			Administrative Specialist, Finance Director, Compliance Specialist, Transit Manager, Maintenance Director
4	When was the last time the transit system was subject to a financial audit?			Mar-23
ACCOUNTING AND PAYROLL				
5	Are security and backup systems in place for your computerized accounting system?	x		
6	Is there a secure database of employee records, pay rates, benefit elections, and other data?	x		

FINANCE		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
7	Are payroll checks approved/signed by someone other than the person who prepares them?	x		
REVENUE CONTROL				
8	Does the transit system have a written policy for cash handling procedures? <i>If so, please ensure this is included in the shared documents.</i>	x		
9	When collected aboard a vehicle in revenue service, are fares collected in a locked fare box?	x		
10	Do transit system vehicle have registering fare boxes?	x		
11	Who is responsible for removing fares from the vehicle?			Fuelers/Cleaners/Mechanics
12	Who counts the fares? When? Where?			Administrative Specialist, Transit Manager, Maintenance Director, Once a week in the vault room
13	Is there an activated security camera in the fare counting room?	x		
14	What is the average daily amount of cash collected?			\$400
15	Who reconciles cash collected with the passenger count?			Finance Director and Compliance Specialist.
16	Who is responsible for making the bank deposit? How often is this done?			Administrative Specialist. Once a week unless we receive a large payment.
17	Are bank deposits reconciled back to driver or fare box revenues?	x		

FINANCE		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
18	Are cash receipts for pass sales reconciled back to the number of passes issued?	x		
19	Are you responsible for other points of sale for fares aside from aboard vehicles (e.g., public counter, fare vending machines, etc.)? If so, please describe.	x		We currently have ticket vending machines at our Transit Center selling passes and 10 ride cards. Also sell them at our Transit Center Customer Service Window. We will sell direct to agencies and have sales outlets as well. We now also have a mobile payment through UMO and are distributing smart cards.
20	Are paper/electronic transfers issued? If so, what are the transfer rules for passengers?	x		90 minute transfer from first payment. Good on Waukesha and Milwaukee buses for that 90 minute period
21	Do you track how transfers are used between routes or services? If so, how and how often?	x		Record ridership and monitor on a monthly basis when doing ridership reports.
BUDGETING AND GRANTS				
22	Which staff members are involved in the annual budgeting process?			Transit Manager, Finance Director, Maintenance Director, Administrative Specialist, Compliance Specialist, Operations staff
23	Who prepares annual funding application to WisDOT?			Transit Manager and Finance Director
24	Does the transit system have (or recently had) any agreements with local partners (i.e., municipalities, educational institutions, businesses) for transit service, funding, and/or fares? If so, please list with whom and, generally, for what.	x		Service-Extension of Route 1 to Regional Medical Center- Agreements with Waukesha and Milwaukee Counties. Agreement with MCTS to join WisGo fare system.
25	Are annual capital and operating budgets part of local transportation improvement program (TIP) and/or capital improvement program (CIP)?	x		

FINANCE		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
26	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		This is done on a frequent basis and reported on a monthly basis in a financial statement.
27	What is the policy for handling unspent local funds previously obligated for transit? Please describe briefly.			Generally is returned to either the City or County.
28	Is there a transit fleet replacement fund in place? If so, please describe briefly.		x	
29	Is there a general transit capital replacement fund in place? If so, please describe briefly.		x	
30	Has the transit system worked with the MPO/RPC to seek grant opportunities for vehicle replacement and capital investments? If so, which grants and with whom have you worked?		x	We do not work with SEWRPC on this, however, we apply for funds on our own.
31	Has the transit system had to turn back grant funds in the past 5 years? If so, from which grants and under what circumstances?		x	

MARKETING		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
GENERAL				
1	What are some successful marketing activities you've completed?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
2	What are some unsuccessful marketing activities you've done?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
3	What is the perception of the system within the communities served?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
4	How does the transit system interact with WisDOT on this topic (marketing)?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
5	How does the transit system interact with other public transit systems on this topic (marketing)?			<i>No written response is needed for this question, but it is likely we will discuss this during the meetings.</i>
MARKETING FUNCTIONS				
6	What percent of the transit system's total annual operating budget goes to marketing?			0.40%
7	Does the transit system have any dedicated marketing staff? If so, how many FTE? If not, who is responsible for the marketing function?		x	The marketing duties are primarily split between the Transit Manager and Operations Specialist.
8	Does the transit system have a marketing plan, strategic plan, or other documentation of strategy for promoting the transit system? If so, how is it used and when was it last updated?		x	Nothing formally documented but we have set promotions for Back to School, new or changes to services, etc.
9	Do you contract for any marketing or customer information services from an outside vendor? If so, please describe briefly.	X		All of our graphics work is outsourced as it is much more cost efficient and effective.

MARKETING		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
10	What are the transit system's three largest marketing expenditures?			Graphic art work, Public Works newsletter and systems related to providing real time and GTFS (and real time GTFS).
MATERIALS				
11	Did the transit system use, create, or conduct the following in the last year ? If so, who, generally, is responsible for this effort?			
	System map	x		SEWRPC and contracted graphic artist
	Telephone information	x		Operations staff
	Website updates	x		Transit Manager and City web master
	Social media updates	x		City Communications Manager
	Individual route maps and schedules	x		Contracted graphic artist
	Rider or "how to ride" guide	x		City Communications Team (Video)
	Media contacts/press releases	x		City Communications Manager and Transit Manager
	Customer and/or public surveys	x		SEWRPC and Transit Manager
	Alternative language materials	x		Contracted graphic artist and/or community partners
	Business outreach	x		SEWRPC, Transit Manager
	School outreach	x		Operations Specialist and Transit Manager
	Board updates	x		Transit Manager
	Public meetings	x		Transit Manager
12	Does the transit system provide marketing materials in languages other than English? If so, please list which languages.	x		Spanish
13	If yes to the question above, how did you determine which languages to use?			Analysis of LEP plan in Title VI plan as well as community feedback

MARKETING		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
14	Does the transit system have a printed and/or online transit system map? If so, when was the map last updated?	x		Sep-23
15	Does the transit system provide customers with information about other transit and transportation options in the community (e.g. human services transportation, specialty services, intercity bus services)? If so, please describe how you do this.	x		Yes, the transit guide includes commuter bus information.
WEB PRESENCE				
16	Who is responsible for maintaining the transit system's website?			Transit Manager and City web master
17	Which of the following are available on the transit system's website?			
	System map	x		
	Individual route maps and schedules	x		
	Fare information	x		
	Rider or "how to ride" guide	x		
	Real-time bus location information	x		
	Trip planner	x		
	Board/committee meeting materials	x		
18	Does the transit system maintain route/schedule data in General Transit Feed Specifications (GTFS) [sometimes referred to as or "Google Transit" format]? If so, who creates and maintains it?	x		Lead Operations Supervisor works with Optibus and AVL system to create.

MARKETING		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
19	Does the transit system use and/or maintain Facebook, Twitter, and/or other social media pages? If so, briefly describe how, how often each is used, and who maintains them.		x	We do not have our specific pages, however, we are part of the City's social media pages.
20	Are policies in place to guide the use of social media as a marketing tool for the transit system?		x	
21	Does the transit system measure or evaluate the effectiveness of social media use for marketing and customer information purposed?		x	
MARKETING AND PROMOTIONS				
22	In the last few years, did the transit system conduct any advertising or promotional campaigns (other than publishing a schedule)? If so, briefly describe.	x		Annually, we do Back to School. This year we did print and digital. We also are promoting WisGo and will promote new and positive changes to the service.
23	How often does the transit system communicate with area schools and employers to promote or coordinate transit service?			See above for schools. In addition, we work closely with the school district on a routine basis
24	Does the transit system maintain a database of customer contacts and complaints? If so, briefly describe the format (e.g., spreadsheet, software, etc.) and how you analyze trends.	x		There are digital Word documents for each complaint and then a summary of valid complaints and commendations are created monthly. We look at if valid complaints are "one offs", trends or need for changes or re-training of operators
25	Is there an established procedure for investigating and responding to passenger complaints? If so, briefly describe.	X		There are two documents that Operations staff follow to investigate. It includes process for investigation as well as the time standards and protocols for each type of complaint.
26	Do customer complaint reports go to the governing board?	x		

COVID-19		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
GENERAL				
1	What actions did the transit system take to ensure employee health and safety during the COVID-19 pandemic?			Masks were provided to employees and passengers. Sanitizers were put on the buses and at the Transit Center as well as office. Back door entry only and no payment until driver shields installed. More frequent heavy cleaning of buses and facilities. Followed CDC guidelines.
2	Which of the above changes, if any, do you plan to maintain in the future?			Sanitizers are still in place and masks are still provided as requested.
3	How has the transit system revised the amount or type of service you deliver in response to the COVID-19 pandemic, if at all?			Numerous trips and an entire route of commuter service was first suspended and in January 2023, were eliminated so commuter service has been reduced by over 50% due to greatly reduced demand.
4	Which of the above changes, if any, do you plan to maintain in the future?			Those changes were made permanent and additional reductions to commuter service are likely.
5	In terms of ridership, which of the transit system's services and/or routes have been most significantly affected since the COVID-19 pandemic?			Commuter service by far and away
6	In terms of ridership, which of the transit system's services and/or routes have remained stable or performed well since the COVID-19 pandemic?			Local service and paratransit.
7	Has the transit system received new federal investments related to economic stimulus packages? If so, from which programs?			Yes, CARES, CRRSAA, ARPA

COVID-19		Waukesha Metro Transit		
#	Question	Yes	No	Response (as applicable)
8	How has the transit system spent federal stimulus funding? Are there unspent funds remaining?			To supplement operations funding due to lower ridership. Used some to offset capital costs. Yes, both the City and County have funds remaining.