

# American Public Transportation Association (APTA) Peer Review

Regional Transit Committee

October 15, 2014

# Executive requested peer review, Metro contacted APTA

- Long history of industry peer reviews by APTA
  - Opportunity to engage with and receive feedback from other transit agencies
- Review Metro's service delivery and financial management practices and strategies
  - Requested in Spring 2014

# Diverse, knowledgeable, and highly respected Peer Review panel

- 5 Industry peers with experience in executive leadership, financial management, and service planning
- 2 APTA advisors



# Panel learned about Metro from various perspectives in late July

- Peer Review conducted July 29 – 31, 2014
- Presentations by Metro's managers
- Meetings with local jurisdiction representatives
- Discussion with Executive Constantine



# Commended Metro overall, offered recommendations

- Broad and very good range of services offered by Metro
  - High quality service
  - Importance on customer support services
  - Effective fare policies and programs with ORCA
  - Impressive partnerships with local businesses
- 7 Recommendation areas



# Fare Policy

Recommendations	Action Plan
<ul style="list-style-type: none"><li>• Revisit discounted fares and fare rates<ul style="list-style-type: none"><li>• Premium and DART services</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Fare policy report</li><li>• Access fares increase in March 2015</li></ul>
<ul style="list-style-type: none"><li>• Review paratransit fare structure<ul style="list-style-type: none"><li>• Compared to federal requirements</li></ul></li></ul>	
<ul style="list-style-type: none"><li>• Evaluate farebox recovery</li></ul>	

# Financial

Recommendations	Action Plan
<ul style="list-style-type: none"><li>Review Transit Revenue Stabilization Reserve</li></ul>	<ul style="list-style-type: none"><li>Budget proposal for Revenue Stabilization Reserve<ul style="list-style-type: none"><li>50% of one year's worth of sales tax</li></ul></li></ul>
<ul style="list-style-type: none"><li>Review Revenue Fleet Replacement Fund<ul style="list-style-type: none"><li>Most transit agencies use 20% local reserve</li></ul></li></ul>	<ul style="list-style-type: none"><li>Fund Management Policy Review in Winter 2015</li></ul>

# Labor

Recommendations	Action Plan
• Eliminate inefficient work rules and position classifications	• Interest Arbitration with ATU Local 587 • PACE Initiative
• Reduce and control health care costs	
• Explore contracting services for cost-efficiency	• Alternatives Services in proposed budget



# Operations

Recommendations	Action Plan
<ul style="list-style-type: none"><li>• Integrate with Sound Transit</li></ul>	<ul style="list-style-type: none"><li>• Transit Integration Report (September 2014)</li></ul>
<ul style="list-style-type: none"><li>• Review Vehicle Maintenance practices</li></ul>	<ul style="list-style-type: none"><li>• Vehicle Maintenance APTA Peer Review</li></ul>
<ul style="list-style-type: none"><li>• Examine staffing levels and functions of Design &amp; Construction</li></ul>	<ul style="list-style-type: none"><li>• New project management reporting system for D&amp;C</li></ul>
<ul style="list-style-type: none"><li>• Evaluate changing radio control center function to service management center</li></ul>	<ul style="list-style-type: none"><li>• Budget proposals</li></ul>

# Paratransit

Recommendation	Action Plan
<ul style="list-style-type: none"><li>Evaluate appropriate sizing and pricing of ADA services</li></ul>	<ul style="list-style-type: none"><li>Consistent with 2009 Performance Audit</li><li>Policy decision requiring further discussion</li></ul>

# Performance Management

Recommendations	Action Plan
<ul style="list-style-type: none"><li>Review the amount and types of data generated</li></ul>	<ul style="list-style-type: none"><li>Tier Boards and Performance Measures of Emphasis (PMEs)<ul style="list-style-type: none"><li>Shown in 2015-16 Metro Business Plan</li></ul></li></ul>
<ul style="list-style-type: none"><li>Reduce customer call wait times</li></ul>	<ul style="list-style-type: none"><li>Customer Service Panel in Fall 2014</li></ul>

# Policy Directives

Recommendations	Action Plan
<ul style="list-style-type: none"> <li>Conducted external Comprehensive Operations Analysis</li> </ul>	<ul style="list-style-type: none"> <li>Service Guidelines Update in Spring 2015</li> </ul>
<ul style="list-style-type: none"> <li>Continue developing alternative services</li> </ul>	<ul style="list-style-type: none"> <li>Expanded Alternative Services Plan in budget</li> </ul>
<ul style="list-style-type: none"> <li>Compare service productivity by service type</li> </ul>	<ul style="list-style-type: none"> <li>Long range plan</li> </ul>
<ul style="list-style-type: none"> <li>Revisit transit shelter policies</li> </ul>	
<ul style="list-style-type: none"> <li>Prioritize the myriad of mandated policy initiatives</li> </ul>	

# Summary of Action Plan

## Actions Underway

- 2015-16 Budget Proposal and Business Plan discussions
- Fare Policy Report
- Interest Arbitration with ATU Local 587
- Metro and Sound Transit Integration

## Upcoming Actions

- Fund Management Policy Review
- Vehicle Maintenance Peer Review
- Customer Service Panel
- Service Guidelines Update
- Long range plan