



IndiGO Transit System Performance Review

October 6, 2020

Performance Report

Indiana County Transit Authority d.b.a., IndiGO

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PREFACE

Pennsylvania law requires transit agency performance reviews and five-year performance targets to improve efficiency and effectiveness of service

COVID-19: Transit-dependent populations are bearing a heavy burden

Transit agencies are navigating new demands, plummeting ridership, and higher costs

PennDOT will reevaluate performance targets when long-term impacts of the pandemic are known

Act 44 of 2007 and Act 89 of 2013 increased funding for public transportation in Pennsylvania. The laws also required transit agencies to improve the efficiency and effectiveness of service delivery through increased ridership, revenue, and cost containment. PennDOT evaluates every fixed-route transit agency in the Commonwealth at least once every five years to determine how well the agency satisfies these requirements through a performance review. Act 44 also requires PennDOT to develop five-year performance targets for each agency as part of the performance review process.

During the spring of 2020, COVID-19 caused significant social and economic disruptions as people sheltered in place to limit the spread of the disease. The adverse impacts throughout the Commonwealth of Pennsylvania were profound. The health and unemployment effects of Covid-19 disproportionately impacted senior, disabled, and low-income populations. These individuals also rely heavily on public transportation to meet their essential travel needs.

The impacts of COVID-19 on the public transportation industry were also numerous. Ridership decreased by more than 90 percent at some agencies during April 2020—the height of the pandemic in Pennsylvania. Revenues dropped as agencies opted to waive fares to limit bus driver interactions and possible disease transmission from the handling of tickets and currency. Agencies increased the frequency and extent of bus cleaning, causing higher operating costs. Some agencies furloughed drivers as they reduced service in response to plummeting passenger demand.

While transit agencies have begun to stabilize from the initial impacts of COVID-19, the long-term effects remain unknown. Social distancing guidelines could cause transit agencies to limit the number of passengers on buses and rail for years. Ridership, revenue, and operating cost trends used to develop this transit performance review report, including five-year performance targets, rely on information that predates the pandemic. PennDOT will continue to monitor the impacts of COVID-19 and reassess the transit agency's five-year performance targets when the long-term effects of the epidemic become known. If the performance targets are revised, they will be published as an addendum to this report.

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PUBLIC TRANSPORTATION SERVICE SUMMARY
Fiscal Year 2018-2019

Agency	Indiana County Transit Authority (d.b.a. IndiGO)		
Year Founded	1979		
Reporting Fiscal Year (FYE)	FYE 2019		
Service Area (square miles)	829		
Service-Area Population	88,880		
Annual Operating Statistics*	Fixed-Route	Paratransit (Shared-Ride + ADA)	Total (Fixed-Route + Paratransit)
Vehicles in Maximum Service (VOMS)	15	10	25
Operating Cost	\$2,742,513	\$618,952	\$3,361,465
Operating Revenues	\$602,515	\$607,676	\$1,210,191
Operating Subsidies	\$2,139,998	\$11,276	\$2,151,274
Total (Actual) Vehicle-Miles	453,771	279,398	733,169
Revenue Miles of Service (RVM)	441,872	199,689	641,561
Total Vehicle-Hours	36,644	13,158	49,802
Revenue Vehicle-Hours (RVH)	33,930	9,756	43,686
Total Passenger Trips	405,693	24,745	430,438
Senior Passenger (Lottery) Trips	19,746	19,079	38,825
Act 44 Performance Statistics			
Passengers / RVH	11.96	2.54	9.85
Operating Cost / RVH	\$80.83	\$63.44	\$76.95
Operating Revenue / RVH	\$17.76	\$62.29	\$27.70
Operating Cost / Passenger	\$6.76	\$25.01	\$7.81
Other Performance Statistics			
Operating Revenue / Operating Cost	21.97%	98.18%	36.00%
Operating Cost / Total Vehicle-Hours	\$74.84	\$47.04	\$67.50
Operating Cost / Total Vehicle-Miles	\$6.04	\$2.22	\$4.58
Total Passengers / Total Vehicle-Hours	11.07	1.88	8.64
Operating Cost / RVM	\$6.21	\$3.10	\$5.24
RVM / Total Vehicle-Miles	97.38%	71.47%	87.51%
RVH / Total Vehicle-Hours	92.59%	74.15%	87.72%
Operating Subsidy / Passenger Trip	\$5.27	\$0.46	\$5.00

*Source: dotGrants 2019 reporting

EXECUTIVE SUMMARY

Act 44 of 2007 addressed the dire financial needs of local public transportation organizations across the Commonwealth by increasing state funding for public transportation operations by about 50 percent, from \$535 million per year to \$800 million in the first year of the legislation. Public transportation organizations that had been on the verge of major service cuts and/or significant fare increases could maintain existing service and fares and, with a predictable and growing source of operating assistance, plan service changes.

Act 44 also ushered in requirements for accountability, performance improvement, and maximizing return on investment. It established a framework for PennDOT to work with local public transportation organizations to:

- Assess efficiency and effectiveness of service, financial stability, and general management/business practices;
- Agree to five-year targets for Act 44-mandated performance criteria;
- Develop an Action Plan for improvement and to achieve performance targets;
- Provide technical assistance to implement the plan at the request of the transportation organization; and
- Reassess each organization on a five-year cycle.

The reassessment at the end of each five-year cycle is to evaluate:

- Whether the organization met the agreed-upon performance targets; and
- The sufficiency and effectiveness of actions taken by the organization to improve performance and management practices in its efforts to meet performance targets.

Act 44 regulations address PennDOT actions regarding performance reviews, and the financial penalties for public transportation organizations that fail to meet performance targets. Section 427.12., Performance Reviews, states:

“(E) The application of funding adjustment will be as follows:

1. Operating fund reductions in Section 1513(G) of the Act (relating to operating program) may be implemented for grantees subject to this section that are not satisfying the minimum performance standards, considering all other provisions of Section 1513. A funding reduction may be assessed in cases when a local transportation organization fails to report progress of, or fails to implement the agreed upon strategic Action Plan, or both.”

PennDOT conducted a transit performance review for the Indiana County Transit Authority (d.b.a. IndiGO) in September 2015. Based on that review, PennDOT developed a performance report in 2016 that established five-year performance targets and agreed to IndiGO’s Action Plan to meet those targets. In July 2020, PennDOT reassessed IndiGO to determine whether IndiGO met its targets and what actions were taken to improve the agency’s performance and management practices to maximize the return on investment of Commonwealth funding. This report summarizes PennDOT’s findings.

IMPORTANT CHANGES SINCE THE 2015 PERFORMANCE REVIEW

PennDOT conducted the initial review of IndiGO in September 2015. Since finalizing the original IndiGO performance report in March 2016, the following changes and other factors impacted operations, finance, and statistical reporting at IndiGO, as well as the performance targets established in 2015:

- 1. IUP Enrollment Declining**—Indiana University of Pennsylvania (IUP) students provide 70 percent of IndiGO’s fixed-route ridership, and revenue agreements between the university and its largest off-campus housing complex (The Grove at Indiana) provide a significant source of fixed-route revenue. However, total enrollment has declined at IUP by 23 percent between 2015 and 2019, from 13,775 students to 10,636 students. Organization-paid fares (mainly from IUP and The Grove at Indiana) declined 17 percent, from \$583,347 in 2015 to \$484,013 in 2019.
- 2. WyoTech Campus Closed** – IndiGO successfully negotiated a revenue service agreement to shuttle students between WyoTech’s Blairsville technical school and its 800-bed student housing complex. However, the WyoTech campus closed in 2017.
- 3. Unproductive Service Eliminated** – As part of its contract with IUP, IndiGO previously provided service to IUP’s satellite campus in Punxsutawney, which served approximately 200 students. However, the service (Route 23) operated with low productivity, and IndiGO management stated that the number of non-university trips between Indiana and Punxsutawney was declining. IndiGO cut the Punxsutawney route in 2018.
- 4. Driver Shortages Encountered** – IndiGO reported driver shortages that impacted route coverage. Despite minor service adjustments, IndiGO experienced an increase in unscheduled overtime to meet daily pull-outs. Management stated that most of IndiGO’s drivers are older and the authority has had difficulty hiring new drivers.

2015 PERFORMANCE REVIEW DETERMINATIONS AND FINDINGS

The 2015 performance review compared IndiGO with a group of peer agencies based on the four performance criteria required by Act 44. IndiGO was found to be “In Compliance” for all eight performance criteria. IndiGO performed better than the peer group in most criteria but worse for passengers per revenue vehicle-hour and operating cost per passenger for the single-year period.

Performance Criteria	FYE*	Determination	Peer Rank (of 11)	Relation to Peer Average	Value	Peer Average
Passengers / Revenue Vehicle-Hour	2013	In Compliance	11	Worse	12.47	16.74
	Trend	In Compliance	2	Better	4.02%	1.05%
Operating Cost / Revenue Vehicle-Hour	2013	In Compliance	4	Better	\$65.64	\$79.86
	Trend	In Compliance	3	Better	-0.83%	1.55%
Operating Revenue / Revenue Vehicle-Hour	2013	In Compliance	3	Better	\$17.74	\$12.89
	Trend	In Compliance	1	Better	8.62%	2.21%
Operating Cost / Passenger	2013	In Compliance	7	Worse	\$5.26	\$5.03
	Trend	In Compliance	1	Better	-4.66%	0.54%

* NTD information most current at the time of the peer review.

IndiGO developed an Action Plan to address opportunities for improvement identified in the 2016 performance review report. Among the efforts IndiGO undertook to improve its performance were:

1. Included in Board packets progress reporting on strategic plan implementation.
2. Developed a system map depicting all available service within Indiana County.
3. Assessed shared-ride program costs and fare pricing to identify strategies that recover more of the actual cost of providing shared-ride service.

PennDOT, in consultation with IndiGO management, established the following performance targets that the agency was to attain before its next performance review:

- Increase passengers per revenue vehicle-hour annually by 2.0 percent;
- Contain yearly increases in operating costs per revenue vehicle-hour by 3.1 percent;
- Increase annual operating revenue per revenue vehicle-hour by 2.0 percent; and
- Restrict growth in the share of operating costs per passenger by 1.1 percent per year.

The following performance targets were established using the most accurate data available at the time.

Performance Criteria	2019 Target	2019 Actual	Met Target
Passengers / Revenue Vehicle-Hour	15.10	11.96	No
Operating Cost / Revenue Vehicle-Hour	\$23.68	\$17.76	No
Operating Revenue / Revenue Vehicle-Hour	\$76.01	\$80.83	No
Operating Cost / Passenger	\$5.04	\$6.76	No

Management reported that in addition to the four factors described previously, an increase in healthcare insurance premiums, an aging fleet, and higher utility costs contributed to IndiGO not meeting cost containment targets. Since the 2016 report was finalized, IndiGO worked to meet its performance targets and implement actions listed in the 2016 Action Plan. These actions included implementing a route realignment that added a new transfer center at the Indiana Mall to centralize transfers, creating detailed route maps and system maps published online and at hub locations, and developing a cost allocation plan to more accurately separate costs between fixed-route and demand-

response services. Furthermore, IndiGO began talks with the Southwestern Planning Commission (SPC) in late 2019 to update the authority’s strategic plan to include Transit Development Plan (TDP) elements.

2020 PERFORMANCE REVIEW DETERMINATIONS AND FINDINGS

The 2020 performance review compared IndiGO with a group of peer agencies based on the four Act 44 performance criteria. IndiGO was found to be “In Compliance” with eight performance measures and “At Risk” for none.

Performance Criteria	FYE*	Determination	Peer Rank (of 9)	Relation to Peer Average	Value	Peer Average
Passengers / Revenue Vehicle -Hour	2018	In Compliance	12	Worse	10.56	12.78
	Trend	In Compliance	11	Worse	-3.28%	-1.99%
Operating Cost / Revenue Vehicle-Hour	2018	In Compliance	4	Better	\$74.52	\$87.63
	Trend	In Compliance	9	Better	2.57%	2.85%
Operating Revenue / Revenue Vehicle-Hour	2018	In Compliance	2	Better	\$19.93	\$13.87
	Trend	In Compliance	5	Better	2.35%	0.85%
Operating Cost / Passenger	2018	In Compliance	10	Better	\$7.06	\$7.09
	Trend	In Compliance	8	Worse	6.05%	5.06%

*Note: Single-year and five-year trend peer comparisons are based on NTD information that was current at the time of peer review. Therefore, these factors differ from those presented on the Agency Profile page, which uses FYE 2019 data.

In 2020, IndiGO was found to be “In Compliance” with all Act 44 performance criteria. IndiGO performed better than the peer group for containing operating costs and increasing revenue, but worse for ridership-based criteria, specifically passengers per revenue vehicle-hour. Despite performing worse than the peer group for most ridership-based criteria, IndiGO maintains a high rate of passengers per revenue vehicle-hour for a rural agency. Fluctuations in ridership are directly tied to IUP enrollment, which has decreased in recent years. Given the decline in ridership between FY 2013 and FY 2018, IndiGO’s five-year trend for operating cost per passenger was worse than the peer group average.

The 2020 performance review examined additional steps, beyond those specified in the 2016 Action Plan, that IndiGO has taken to improve performance. The most important action was updating the strategic plan to incorporate TDP elements, a contingency scenario in the event that IUP is no longer a reliable source of ridership and revenue, and a long-term strategy for financial stability. The 2020 performance review also identified steps that IndiGO can take to improve overall agency performance, including:

1. Update marketing strategies to align with the goals of the strategic business plan and consider targeted outreach to increase non-university ridership.
2. Develop a revenue strategy to diversify income streams.
3. Monitor FRITS for additional tools and updates for opportunities to improve operational efficiencies.

PennDOT also identified additional opportunities for improvement during the 2020 performance review. The complete list of opportunities for improvement will serve as the basis for IndiGO’s Board-approved Action Plan.

2024 PERFORMANCE TARGETS

As required by Act 44, PennDOT and IndiGO management developed new five-year performance targets. Performance targets are designed to be aggressive yet achievable. IndiGO should work to achieve these targets, shown in the following table, over the next five years to ensure continued eligibility for full Section 1513 funding.

Performance Criteria	Fiscal Year			Target Annual Increase
	2018 Actual	2019 Actual	2024 Target	
Passengers / Revenue Vehicle-Hour	10.56	11.96	12.26	0.5%
Operating Cost / Revenue Vehicle-Hour	\$74.52	\$80.83	\$93.70	3.0%
Operating Revenue / Revenue Vehicle-Hour	\$19.93	\$17.76	\$20.59	3.0%
Operating Cost / Passenger	\$7.06	\$6.76	\$7.65	2.5%

FINANCIAL REVIEW

IndiGO currently has a balanced operating budget. Its net cash equivalent balance has increased since 2015. Noteworthy elements of IndiGO's financial condition as of FYE 2019 are:

- IndiGO had \$180,472 in local and \$580,595 in state carryover funds (cash reserves).
- Combined carryover subsidies were equal to 22.6 percent of total operational funding.
- IndiGO had a cash balance of available and restricted cash equal to 36.3 percent of total annual operating expenses.
- Current assets exceeded current liabilities.
- Overdue accounts payable and receivable amounts are negligible.
- IndiGO had no debt but planned to open a line of credit in 2020 to support its facility expansion capital project.
- IndiGO had a 20.7 percent fixed-route farebox recovery ratio, and passenger fares and other local revenues covered 36.3 percent of total operating expenses.

Management should continue taking appropriate actions to manage costs (i.e., containing cost growth within 3.0 percent annually), achieve farebox recovery goals, and maintain cash reserves to preserve IndiGO's overall financial health. IndiGO should take additional steps to determine the potential long-term impacts on agency operations from reduced revenue service agreements as a result of changes in IUP enrollment.

NEXT STEPS

IndiGO's management and Board will develop an Action Plan in response to the complete list of "Opportunities for Improvement" identified in this performance review report. Some actions will be quickly implementable, while others may take several discrete steps to achieve over a more extended period. IndiGO's management must report to the Board and PennDOT quarterly on progress toward accomplishing the Action Plan and meeting its performance targets.

INTRODUCTION

PURPOSE

Act 44 of 2007 addressed the dire financial needs of local public transportation organizations across the Commonwealth by increasing state funding for public transportation operations by about 50 percent, from \$535 million annually to \$800 million in the first year of the legislation. Public transportation organizations that had been on the verge of major service cuts and/or significant fare increases could maintain existing service and fares and, with a predictable and growing source of operating assistance, plan service changes.

Act 44 also ushered in critical requirements for accountability, performance improvement, and maximizing return on investment. It established a framework for PennDOT to work with local public transportation organizations to:

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PennDOT conducted a transit performance review for IndiGO in September 2015. Based on that review, PennDOT developed a performance report in 2016 that established five-year performance targets and agreed to IndiGO’s Action Plan to meet those targets. In July 2020, PennDOT reassessed IndiGO to determine whether IndiGO met its targets and what actions were taken to improve the agency’s performance and management practices to maximize the return on investment of Commonwealth funding. This report summarizes PennDOT’s findings.

AGENCY DESCRIPTION

Indiana County Transit Authority (d.b.a. IndiGO) was established in 1979 in Indiana County, Pennsylvania. IndiGO operates rural fixed-route and demand-response service in Indiana County. In early 2020 rabbitransit became the administrator for Indiana County's Medical Assistance Transportation Program (MATP) trips. IndiGO is governed by a seven-member Board of Directors appointed by the Indiana County Board of County Commissioners.

IndiGO relies heavily on the student population at Indiana University of Pennsylvania (IUP) for its fixed-route ridership and revenue. IndiGO contracts with IUP (to provide campus shuttle service) and with The Grove at Indiana, a student housing complex (to provide transportation to IUP). IUP historically has provided IndiGO with relatively high ridership and farebox recovery for a rural transportation provider. IndiGO also supplemented student ridership by serving the WyoTech technical school in Indiana County that had an 800-bed student housing complex.

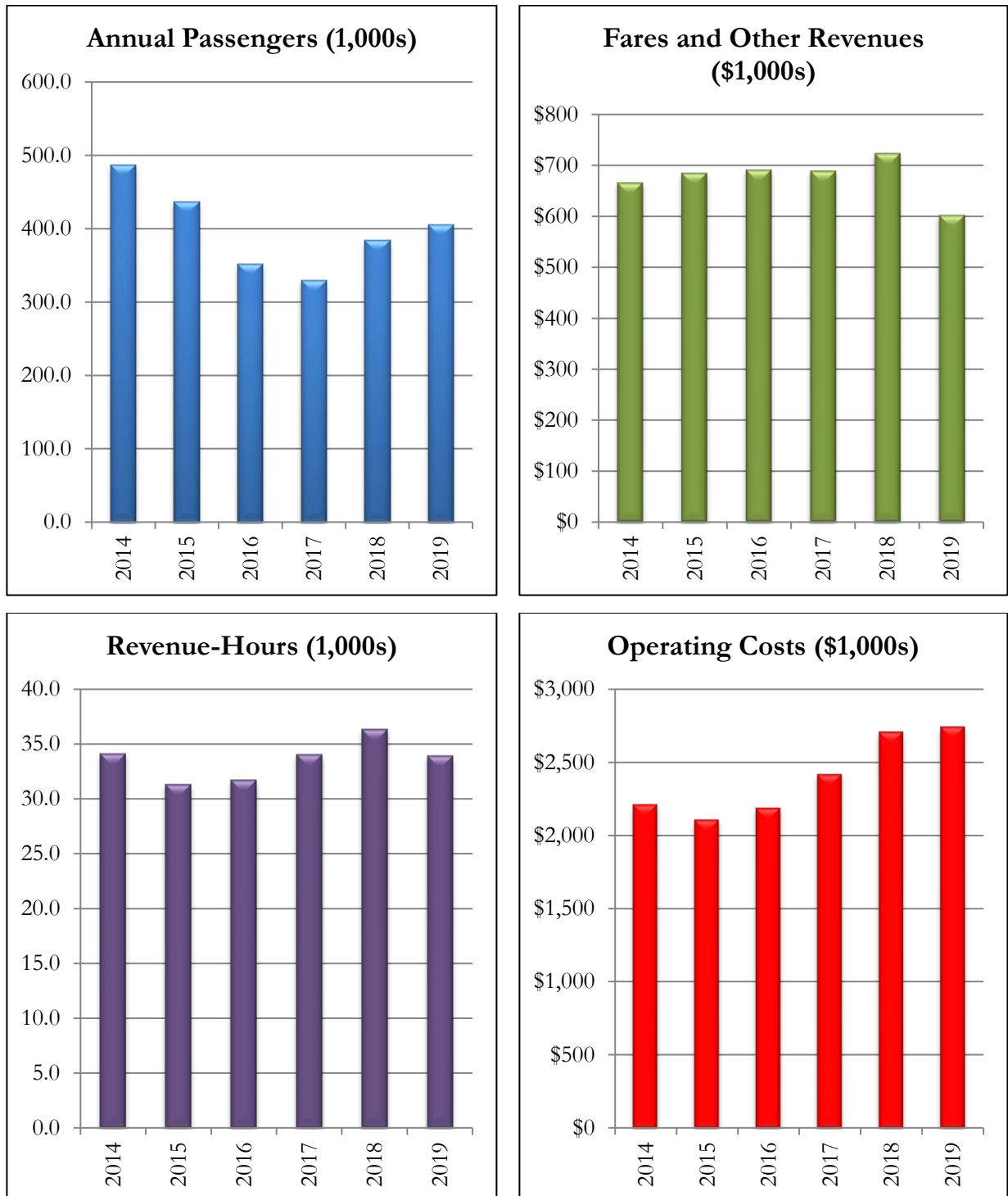
The current IUP contract took effect in August 2018 and provides shuttle service through July 2023, with guaranteed service for the following routes: Park-N-Ride Route 20/21; Late Night Shuttle Route 24; and Campus Express Route 22. The contract has a maximum value of \$1.3 million. The Grove at Indiana contracts with IndiGO for fixed-route service on routes 2, 4, and 12. In 2020, IndiGO implemented a route realignment that has all bus routes converge at the Indiana Mall for a centralized transfer point.

Since 2015, enrollment at IUP has declined, and the WyoTech campus closed in 2017. IndiGO's student ridership decreased proportionately. If these trends continue, IndiGO's traditional campus-based service will likely be reduced, and revenue service agreements with IUP adjusted accordingly.

PennDOT selected IndiGO as the pilot agency for the first round of implementing the statewide Fixed-Route Intelligent Transportation System (FRITS). Technology upgrades through FRITS include a suite of technologies such as real-time passenger information, mobile and web applications, flexible fare payment options, vehicle monitoring systems, etc. IndiGO deployed a simple mobile ticketing fare option in July 2019—a transitional solution while the FRITS implementation continues. IndiGO opened a publicly available compressed natural gas (CNG) fueling station in October 2018. In July 2020, IndiGO began a large capital facility expansion project to increase the square footage of administrative space, maintenance, and vehicle storage for the authority. The anticipated completion date for facility renovations is late 2021 to early 2022.

IndiGO provided 405,693 fixed-route passenger trips as of FYE 2019, with 15 vehicles operating in maximum service (VOMS). **Exhibit 1** presents fixed-route bus statistics for IndiGO. **Appendix A: Data Adjustments** on page 22 details minor data reconciliations between dotGrants and NTD reported operating statistics for IndiGO.

Exhibit 1: IndiGO Fixed-Route Bus Service Annual Performance Trends (FYE 2014–FYE 2019)



Source: NTD and PennDOT Legacy Reporting System (dotGrants)

PERFORMANCE REVIEW PROCESS

In July 2020, PennDOT initiated an Act 44-mandated performance review for IndiGO. The following outlines the review process:

1. Notify IndiGO of performance review schedule and transmit a document request.
2. Review available data and request additional information.
3. Agree upon a set of peer agencies for comparison (IndiGO and PennDOT).
4. Review the most recent customer satisfaction survey (CSS).
5. Assess Act 44 variables, including current performance, targets from the previous review, and Action Plan implementation.
6. Perform Act 44 performance criteria analysis.
7. Interview the management, staff, and Board.
8. Perform supplementary data collection and reconciliation.
9. Evaluate performance, financial management, and operations.
10. Report results and determine agency compliance with performance requirements.
11. Finalize the performance review report.
12. IndiGO develop, implement, and monitor a five-year Action Plan.
13. Provide technical assistance, if required, to help meet five-year performance targets.

These steps in the performance review process assess IndiGO's unique challenges, changes since the previous performance review, the accuracy and reliability of reported data, implemented practices, additional opportunities for improvement, and realistic goals to attain before the next review.

CUSTOMER SATISFACTION SURVEY

IndiGO conducted a customer satisfaction survey (CSS) between April 15, 2019, and April 19, 2019. The CSS consisted of 15 questions that address customer satisfaction, rider characteristics, and patterns in service usage. In addition to an analysis of system-wide results, the survey sampled two subpopulations of IndiGO's ridership (i.e., students and non-students). IndiGO collected 354 responses. Based on survey results, IndiGO has between 800 and 1,500 individual riders. The survey's margin of error is less than 4.6 percent. Results from the survey show:

1. Ninety-nine (99) percent of respondents indicated they were "satisfied" with IndiGO service.
2. Ninety-nine (99) percent of respondents indicated they would continue to ride IndiGO.
3. Ninety-six (96) percent of respondents indicated they would recommend IndiGO to others.

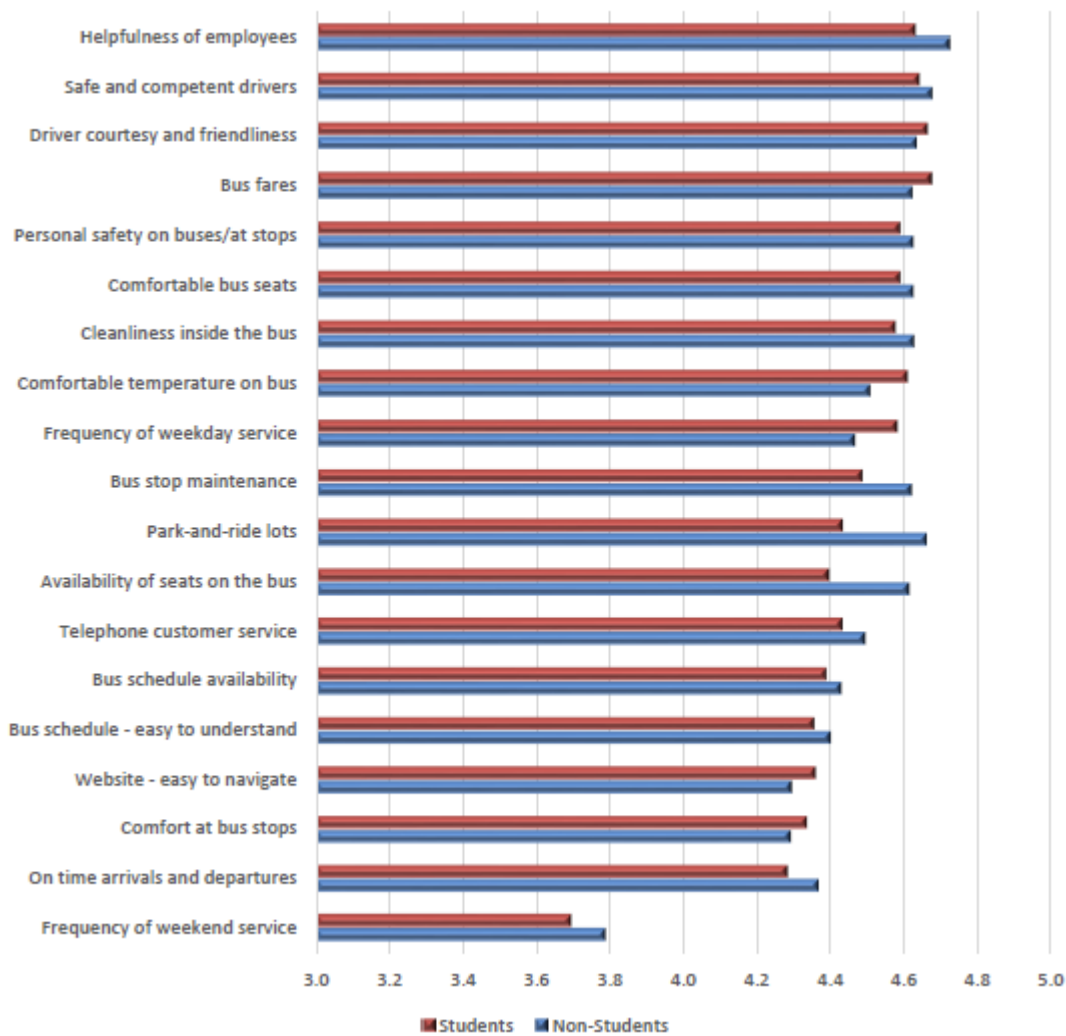
Riders rated a total of 19 performance measures addressing topics such as driver and staff performance, safety, capacity, frequency of service, schedule adherence, and clarity of bus schedules (**Exhibit 2**). The top-rated measures were:

1. Helpfulness of employees.
2. Safe and competent drivers.
3. Driver courtesy and friendliness.

Measures that received the lowest average scores were:

1. Frequency of weekend service.
2. On-time arrivals and departures.
3. Comfort at bus stops.

Exhibit 2: Average Customer Satisfaction Score by Performance Measure for Students and Non-Students



A total of 73 respondents (21 percent) provided feedback via the open-ended question on the survey. Themes included:

1. Complimentary of IndiGO's drivers and other staff;
2. Favorable comments about IndiGO's service;
3. Requests for additional weekend service;
4. Requests for additional stops;
5. Expressed concerns with driver performance; and,
6. Described poor experiences with on-time performance.

2015 ACT 44 PERFORMANCE ASSESSMENT

PRIOR REVIEW DETERMINATIONS AND FINDINGS

The 2015 performance review compared IndiGO to a group of peer agencies based on the four performance criteria required by Act 44. IndiGO was “In Compliance” for all eight performance criteria (**Exhibit 3**). IndiGO performed better than the peer group in most measures but worse for passengers per revenue vehicle-hour and operating cost per passenger for the single-year FYE 2013 period.

Exhibit 3: Previous IndiGO Performance Review Act 44 Comparison Summary

Performance Criteria	FYE*	Determination	Rank (of 14)	Relation to Peer Average	Value	Peer Average
Passengers / Revenue Vehicle-Hour	2013	In Compliance	11	Worse	12.47	16.74
	Trend	In Compliance	2	Better	4.02%	1.05%
Operating Cost / Revenue Vehicle-Hour	2013	In Compliance	4	Better	\$65.64	\$79.86
	Trend	In Compliance	3	Better	-0.83%	1.55%
Operating Revenue / Revenue Vehicle-Hour	2013	In Compliance	3	Better	\$17.74	\$12.89
	Trend	In Compliance	1	Better	8.62%	2.21%
Operating Cost / Passenger	2013	In Compliance	7	Worse	\$5.26	\$5.03
	Trend	In Compliance	1	Better	-4.66%	0.54%

*Note: Single-year and five-year trend peer comparisons are based on the latest-available NTD information at the time of the peer review.

ACTION PLAN AND PERFORMANCE TARGETS

IndiGO developed an Action Plan to address opportunities for improvement identified in the 2016 performance review report. Among the steps IndiGO took to improve its performance were:

1. Incorporated into Board packets progress reporting on strategic plan implementation.
2. Developed a system map depicting all fixed-route bus service within Indiana County.
3. Assessed shared-ride program costs and fare pricing to identify strategies that recover more of the actual cost of providing shared-ride service.

The complete list of IndiGO’s previous Action Plan items and IndiGO’s progress in addressing previously identified opportunities for improvement is provided in **Appendix B: 2015 Performance Review Action Plan Assessment**.

The following performance targets were established with IndiGO in 2015:

- Increase passengers per revenue vehicle-hour annually by 2.0 percent;
- Contain yearly increases in operating costs per revenue vehicle-hour by 3.1 percent;
- Increase annual operating revenue per revenue vehicle-hour by 2.0 percent; and
- Restrict growth in the share of operating costs per passenger by 1.1 percent per year.

As shown in **Exhibit 4**, IndiGO met none of its four performance targets.

Exhibit 4: 2019 IndiGO Performance Targets

Performance Criteria	2019 Target	2019 Actual	Met Target
Passengers / Revenue Vehicle-Hour	15.10	11.96	No
Operating Cost / Revenue Vehicle-Hour	\$23.68	\$17.76	No
Operating Revenue / Revenue Vehicle-Hour	\$76.01	\$80.83	No
Operating Cost / Passenger	\$5.04	\$6.76	No

ASSESSMENT

Since the initial performance report was finalized in 2016, IndiGO worked to address its performance targets and implement actions listed in the 2016 Action Plan as described above. Since finalizing the original IndiGO performance report in March 2016, the following changes and other factors impacted operations, finance, and statistical reporting at IndiGO, hindering IndiGO's ability to achieve the performance targets established in 2015.

1. **IUP Enrollment Declining** –Indiana University of Pennsylvania (IUP) students provide 70 percent of IndiGO's fixed-route ridership, and revenue agreements between the university and its largest off-campus housing complex (The Grove at Indiana) provide a significant source of fixed-route revenue. However, total enrollment has declined at IUP by 23 percent between 2015 and 2019, from 13,775 students to 10,636 students. Organization-paid fares (mainly from IUP and The Grove at Indiana) declined 17 percent, from \$583,347 in 2015 to \$484,013 in 2019.
2. **WyoTech Campus Closed** – IndiGO successfully negotiated a revenue service agreement to shuttle students between WyoTech's Blairsville technical school and its 800-bed student housing complex. However, the WyoTech campus closed in 2017.
3. **Unproductive Service Eliminated** – As part of its contract with IUP, IndiGO previously provided service to IUP's satellite campus in Punxsutawney, which served approximately 200 students. However, the service (Route 23) operated with low productivity, and IndiGO management stated that the number of non-university trips between Indiana and Punxsutawney was declining. IndiGO cut the Punxsutawney route in 2018.
4. **Driver Shortages Encountered** – IndiGO reported driver shortages that impacted route coverage. Despite minor service adjustments, IndiGO experienced an increase in unscheduled overtime to meet daily pull-outs. Management stated that most of IndiGO's drivers are older, and the authority has difficulty hiring new drivers.

Management also reported that an increase in healthcare insurance premiums, an aging fleet, and higher utility costs contributed to IndiGO not meeting cost containment targets.

2020 ACT 44 PERFORMANCE ASSESSMENT

The 2020 performance review compared IndiGO to a group of peer agencies based on the four performance criteria required by Act 44.

PEER AGENCY COMPARISONS

Peer agencies were identified through a collaborative process between PennDOT and IndiGO management using criteria defined in Act 44 and data from the most recently available National Transit Database (NTD), as of FYE 2018. The systems identified for peer comparisons were:

1. Indiana County Transit Authority – Indiana, PA
2. Hill Country Transit District – San Saba, TX
3. The Lawton Area Transit System* – Lawton, OK
4. City of Vacaville – Vacaville, CA
5. Shoreline Metro* – Sheboygan, WI
6. Las Cruces Area Transit – Las Cruces, NM
7. Metropolitan Transit Authority of Black Hawk County – Waterloo, IA
8. Janesville Transit System* – Janesville, WI
9. County of Lebanon Transit Authority – Lebanon, PA
10. Great Falls Transit District* – Great Falls, MT
11. Monroe County Transportation Authority – Scotrun, PA
12. Altoona Metro Transit* – Altoona, PA
13. Battle Creek Transit* – Battle Creek, MI
14. City of Dubuque* – Dubuque, IA
15. City of Alexandria* – Alexandria, LA

*Indicates a peer system also used in the 2016 performance report.

Results of the 2020 IndiGO analysis and peer comparison are presented in **Exhibit 5**. The detailed data used to develop the peer comparison summary is presented in **Appendix C: Peer Comparisons**.

Exhibit 5: Current Performance Review Act 44 Peer Comparison Summary

Performance Criteria	Fiscal Year	Determination	Rank (of 15)	Relation to Peer Average	Value	Peer Average
Passengers / Revenue-Hour	2018	In Compliance	12	Worse	10.56	12.78
	Trend	In Compliance	11	Worse	-3.28%	-1.99%
Operating Cost / Revenue-Hour	2018	In Compliance	4	Better	\$74.52	\$87.63
	Trend	In Compliance	9	Better	2.57%	2.85%
Operating Revenue / Revenue-Hour	2018	In Compliance	2	Better	\$19.93	\$13.87
	Trend	In Compliance	5	Better	2.35%	0.85%
Operating Cost / Passenger	2018	In Compliance	10	Better	\$7.06	\$7.09
	Trend	In Compliance	8	Worse	6.05%	5.06%

ASSESSMENT

In 2020, IndiGO was “In Compliance” with all Act 44 performance criteria. IndiGO performed better than the peer group for containing operating costs and increasing revenue, but worse for passengers per revenue vehicle-hour. Despite performing worse than the peer group for most ridership-based criteria, IndiGO maintains a high rate of passengers per revenue vehicle-hour for a rural agency. Fluctuations in ridership are a function of IUP enrollment, which has decreased in recent years. Given the decline in ridership between FYE 2013 and FYE 2018, IndiGO’s operating cost per passenger for the five-year trend was worse than the peer group average.

2024 PERFORMANCE TARGETS

Act 44 requires that PennDOT and transit agencies establish five-year performance targets for each of the four Act 44 metrics for fixed-route service. Setting performance targets for these metrics and regularly reevaluating performance is intended to improve both the effectiveness and efficiency of service delivery. Act 89 requires agencies to maintain a policy to adjust fares for inflation to keep pace with increases in operating costs.

PennDOT uses the most recent audited and agency-verified values for passengers, operating costs, and operating revenues as the baseline from which to develop the targets. Five-year targets are then developed based on realistic and achievable expectations of improvement.

The 2020 performance review noted that IndiGO outperformed most of its peers in revenue growth and cost containment over the five-year trend period and is “In Compliance” for all eight metrics. However, IndiGO’s rate of passengers per revenue vehicle-hour, which is significantly based on IUP student ridership, decreased 3.28 percent annually. In August 2020, IndiGO reported adjustments to its service contract with IUP to reflect university changes in response to COVID-19. Because IndiGO may face a long-term scenario of reduced service to IUP, the authority should continue to work toward achieving its FYE 2024 targets, focusing on efforts to increase non-university ridership and contain operating costs.

The following performance targets were established in cooperation with IndiGO:

- Increase passengers per revenue vehicle- hour by at least 0.5 percent per year on average.
- Contain operating cost per revenue vehicle-hour increases to no more than 3.0 percent per year on average.
- Increase revenue per revenue vehicle-hour by at least 3.0 percent per year on average.
- Contain operating cost per passenger trip increases to no more than 2.5 percent per year on average.

Future-year targets are calculated based on the most recently available data (i.e., FY 2018-19). IndiGO must work to achieve these targets, listed in **Exhibit 6**, over the next five years to ensure continued eligibility for full Section 1513 funding.

Exhibit 6: FYE 2024 Act 44 Performance Targets

Performance Criteria	Fiscal Year			Target Annual Increase
	2018 Actual	2019 Actual	2024 Target	
Passengers / Revenue Vehicle-Hour	10.56	11.96	12.26	0.5%
Operating Cost / Revenue Vehicle-Hour	\$74.52	\$80.83	\$93.70	3.0%
Operating Revenue / Revenue Vehicle-Hour	\$19.93	\$17.76	\$20.59	3.0%
Operating Cost / Passenger	\$7.06	\$6.76	\$7.65	2.5%

FUNCTIONAL REVIEW

Functional reviews are used to determine the reasons behind performance results found in the Act 44 comparisons, to catalog best practices to share with other transit agencies, and to identify opportunities for improvement that should be addressed in the Action Plan (see **Appendix D: Action Plan Template**). Functional review findings are organized by a brief description of the Act 44 variables guiding the performance review: passengers, revenues, and operating costs.

The following sections summarize ways in which IndiGO could deliver service more efficiently and effectively. It is important that service is responsive to the community's needs to achieve optimum service levels. The observations recorded during the review process are categorized as Best Practices or Elements to Address in the Action Plan. Best Practices are those exceptional current practices that are beneficial and should be continued or expanded.

Elements to Address in the Action Plan are recommendations that have the potential to maximize productivity, to control operating costs, and/or to achieve optimum revenue levels, which will enhance the system's future performance for one or more of the Act 44 fixed-route performance factors.

For IndiGO's convenience, Action Plan templates are included in **Appendix D: Action Plan Template** (see pg. 33). Some actions will be quickly implementable while others may take several discrete steps to achieve over a longer period. The template provides a simple-to-follow order of key findings of this report that should be addressed in the Action Plan.

OPPORTUNITIES TO INCREASE FIXED-ROUTE RIDERSHIP

BEST PRACTICE

1. IndiGO held a customer service roundtable at the Indiana Mall with representatives from fixed-route and demand-response services to answer questions from the community and receive feedback. Staff also helped seniors sign up for shared-ride service.

ELEMENTS TO ADDRESS IN PART 1 OF THE ACTION PLAN

1. Management indicated that before COVID-19 IndiGO was discussing with the Southwestern Pennsylvania Commission (SPC), the 10-county regional Metropolitan Planning Organization (MPO), the need to **update IndiGO's 2014 strategic business plan and include a transit development plan (TDP) element**. IndiGO still plans to pursue a strategic business plan update in 2020. IndiGO should **include a contingency scenario that accounts for the loss of IUP ridership given the decline in enrollment and uncertainty surrounding COVID-19 and its impacts on the university**.
2. IndiGO developed a marketing plan in 2014 with strategies for ridership growth and outreach tools to increase engagement within the community. Management **should update marketing strategies to align with the goals of the strategic business plan and consider targeted outreach to increase non-university ridership**.
3. In 2018 IndiGO cut unproductive service to Punxsutawney (i.e., Route 23) that also served the IUP satellite campus. However, IndiGO acknowledged there is still community interest in

traveling to Punxsutawney from rural northern Indiana County. IndiGO should **assess alternative fixed-route transportation options for residents in northern Indiana County to meet travel demand**. For example, the Area Transportation Authority of North Central Pennsylvania (ATA) currently services southern Jefferson County. A partnership between IndiGO and ATA might enable trips between northern Indiana County and destinations such as Punxsutawney.

4. IndiGO believes there are opportunities to increase ridership and revenue from new employers relocating to Indiana County, specifically development surrounding the Urban Outfitters warehouse. Other transit systems in Pennsylvania have coordinated with local planning commissions to incorporate transit-friendly considerations as part of the permitting process for new development. IndiGO should **coordinate with the Indiana County Planning Commission on potential transit-friendly regulations for site development**. These regulations would help transit amenities such as bus pads and shelters get built for nonresidential development, residential development, and existing development when expansion plans trigger land development review and approval thresholds.

OPPORTUNITIES TO INCREASE FIXED-ROUTE REVENUES

BEST PRACTICE

1. IndiGO has experienced success in negotiating service agreements to support service between multi-family house/student dormitories and higher-learning institutions.

ELEMENTS TO ADDRESS IN PART 2 OF THE ACTION PLAN

1. IUP notified IndiGO in early August 2020 that the university will only invite freshmen for in-person classes in the Fall 2020 semester. IndiGO adjusted its contract with IUP accordingly, resulting in a loss of about \$76,000 in anticipated revenue. Additional contract changes will be likely with The Grove at Indiana, resulting in the potential loss of another \$60,000. Management should **develop a revenue strategy as part of its update to the strategic business plan that identifies new opportunities to diversify income streams** in case existing university-based contracts no longer provide a steady source of income.

OPPORTUNITIES TO CONTROL OPERATING COSTS

BEST PRACTICE

1. IndiGO conducts high-level independent quarterly financial reviews with an outside accounting firm to help identify any potential issues in preparation for the annual audit.

ELEMENTS TO ADDRESS IN PART 3 OF THE ACTION PLAN

1. IndiGO began a facility expansion project in August 2020 that, in conjunction with a new publically available CNG fueling station that opened in October 2018, will establish a new baseline cost for utilities. As IndiGO updates its strategic business plan, it should **address the authority's long-term financial stability in how it manages any planned service**

changes as a result of the TDP element and builds adequate reserves in the event of unexpected changes in operating costs.

OTHER OPPORTUNITIES TO IMPROVE PERFORMANCE

BEST PRACTICES

1. IndiGO closely coordinates with Indiana County Emergency Management (911 EMA) and has a role in Indiana County emergency operations in the event of evacuations.

ELEMENTS TO ADDRESS IN PART 4 OF THE ACTION PLAN

1. IndiGO operates with a small administrative staff. In its transit planning efforts to address Indiana County's rural transportation needs, IndiGO may benefit from partnering with SPC to leverage their transportation planning skills in mapping and demographic analysis. IndiGO should **coordinate with SPC to support ongoing transit planning efforts** given limited IndiGO staff and resources.
2. IndiGO was one of the first agencies in Pennsylvania to implement the fixed-route Intelligent Transportation System (FRITS) on its fixed-route fleet. Additional features may soon become available, such as the business intelligence tool to improve data analytics for system performance monitoring. IndiGO should **monitor FRITS enhancements for updates and new analytical tools that will provide additional insights on ways to improve operational efficiency and customer service.**
3. IndiGO expressed difficulty in filling its vacant Board seat. Many current Board members have long tenures and may be retiring from the Board in the next few years. It would benefit IndiGO to identify ideal skill sets and experience desirable on its Board (e.g., finance, human services, higher education, transportation, etc.). IndiGO should **identify needed skill sets for the Board and communicate these needs to the county commissioners as they look to fill vacant seats.**
4. Management provides the Board with a monthly director's report addressing general business, fixed-route service, shared-ride, and personnel topics. It also includes tables for ridership by bus route and farebox revenue. However, the Board could benefit from a snapshot of agency performance that summarizes additional aspects of agency operations, including customer service, safety, service reliability, and breakdowns. Management should **develop a concise monthly performance dashboard report for the Board for fixed and demand-response services that details:**
 - a. Total ridership, senior ridership, and IUP ridership;
 - b. Farebox recovery;
 - c. Customer service call volume, the purpose of calls, and rider complaints;
 - d. Safety metrics (e.g., the number of vehicle collisions and onboard incidents);
 - e. Service reliability data (e.g., on-time performance, missed trips);
 - f. The number of road calls and reason; and
 - g. Act 44 targets and agency performance.

The dashboard report should include an annual comparison of current monthly progress to the prior fiscal year to help identify potential trends in system performance.

FINANCIAL REVIEW

This financial review considers high-level snapshot data and trend indicators to determine whether additional follow-up by PennDOT is warranted. It is based on the examination of audit reports, other financial reports, and budgets. This review assesses the agency based on:

- High-Level Indicators of Financial Health
- Total Public Transportation Operational Expenditures and Funding
- Fixed-Route Funding
- Paratransit Funding
- Balance Sheet Findings

HIGH-LEVEL INDICATORS OF FINANCIAL HEALTH

As shown in **Exhibit 7**, IndiGO has carryover subsidies (i.e., cash reserves) equal to 22.6 percent of total annual operating costs. These reserves provide liquidity in case of unexpected cost increases. IndiGO's total carryover subsidies have decreased in recent years. IndiGO should work to build total carryover subsidies to a level greater than 25 percent of annual operating costs. IndiGO does not maintain a line of credit as of FYE 2019. However, management stated that the authority plans to secure a line of credit in 2020 to support its capital facility expansion project.

TOTAL PUBLIC TRANSPORTATION OPERATIONAL EXPENDITURES AND FUNDING

IndiGO's total operating budget increased from about \$2.7 million in FYE 2015 to about \$3.4 million in FY 2019 (**Exhibit 8**). In FYE 2019, 81.6 percent of IndiGO's operational expenses were for fixed-route service. The remaining operating costs (18.4 percent) were for paratransit service, as shown in **Exhibit 9**. Fixed-route bus service operating cost increased from \$2.1 million in FYE 2015 to \$2.7 million in FYE 2019. The cost of providing paratransit trips remained consistent over that period, at approximately \$600,000 per year.

Agency-wide operating funds come from a variety of sources, including state funds, federal funds, local funds, passenger fares, and advertising. Subsidy allocation for rural agencies is determined at the state level, where the use of state funds to leverage additional federal funds is maximized across the Commonwealth to meet rural agency needs. Federal and state subsidies are the largest share of income for IndiGO, accounting for 62.0 percent of total operating income. Local subsidy and revenues (e.g., passenger fares, organization-paid fares, advertising) are the remaining funding sources, representing 38.0 percent of total operating income, as shown in **Exhibit 10** and **Exhibit 11**. IndiGO received its required local match to its Section 1513 state operating subsidy.

Exhibit 7: High-Level Financial Indicators

Indicator	FYE 2019 Value	Assessment Criteria / Rationale	Source
Total Carryover Subsidies / Annual Operating Cost	22.6%	Combined target 25%+. This provides liquidity to cover unexpected cost increases or service changes without incurring interest fees from loans.	FYE 2019 Audit
Credit available/ Annual Payroll	0.0%	Only necessary if combined carryover subsidies are less than 25% of annual operating costs. This ensures that the agency maintains sufficient cash flow / liquidity to pay all current bills.	FYE 2019 Audit and PennDOT dotGrants
Actual Local Match / Required Match	100.0%	Target 100%+. Local match that exceeds required minimums gives a transit agency flexibility to change service, to accommodate unexpected cost changes, and make capital investments.	PennDOT dotGrants 2019
Accounts Payable (AP) 90+ days	0.0%	Target should be 0% over 90 days. Larger values indicate cash flow concerns.	IndiGO reported value
Accounts Receivable (AR) 90+ days	0.0%	Target should be 0% over 90 days. Larger values can cause cash flow problems.	IndiGO reported value
Debt / Annual Operating Cost	0.0%	Target should be 0%. Low debt amounts reduce interest expense.	FYE 2019 Audit

Exhibit 8: Public Transportation Operating Expense by Service Type (In Millions) (FYE 2015–FYE 2019)

Service Type	FYE 2015	FYE 2016	FYE 2017	FYE 2018	FYE 2019
Fixed-Route	\$2.1	\$2.2	\$2.4	\$2.7	\$2.7
Paratransit	\$0.6	\$0.6	\$0.6	\$0.7	\$0.6
Total	\$2.7	\$2.7	\$3.0	\$3.4	\$3.4

Exhibit 9: Public Transportation Operating Expense Trends by Service Type (FYE 2015–FYE 2019)

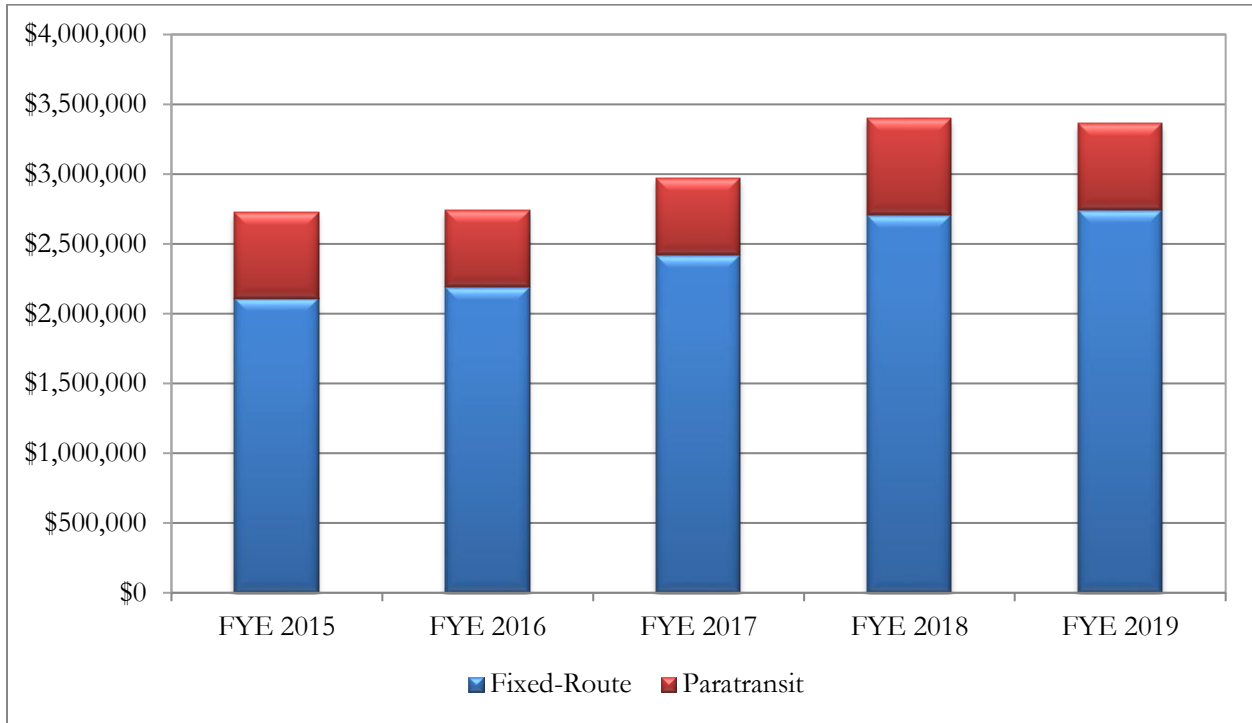
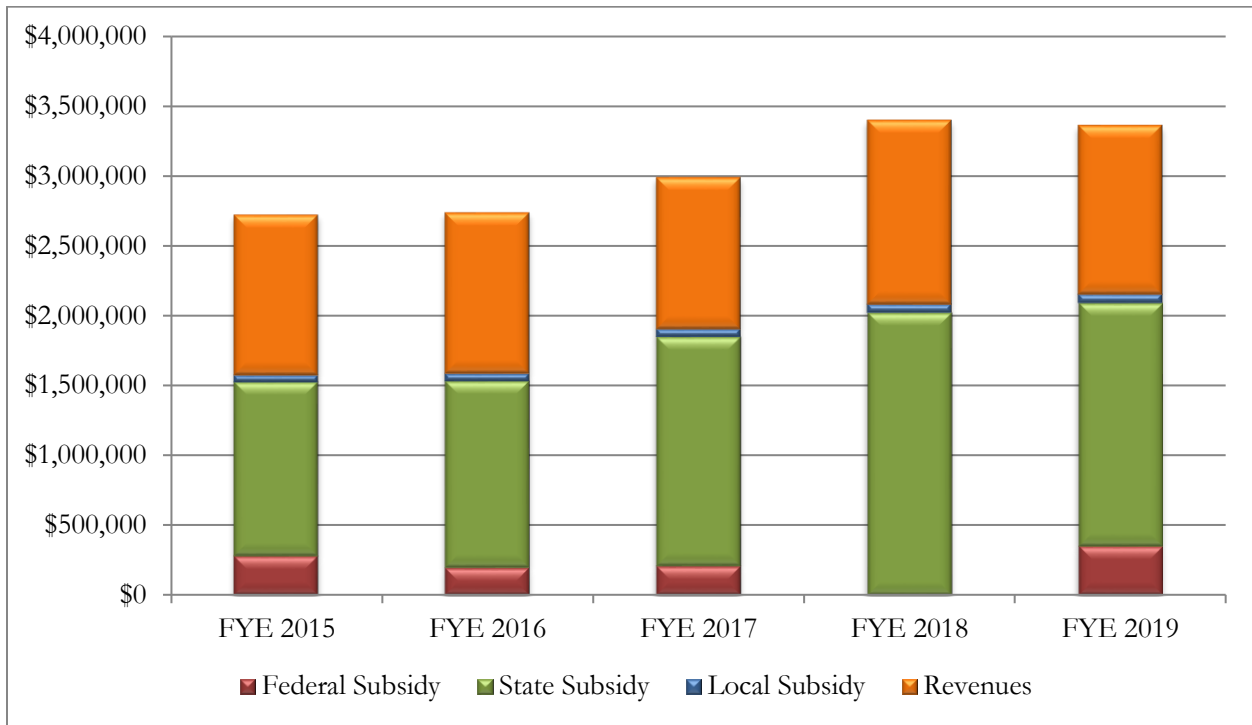


Exhibit 10: Percentage of Total Public Transportation (Fixed-Route + Paratransit) Operating Budget by Funding Source and Fiscal Year (FYE 2015–FYE 2019)

Funding Source	FYE 2015	FYE 2016	FYE 2017	FYE 2018	FYE 2019
Federal Subsidy ¹	10.2%	7.2%	7.0%	0.0%	10.3%
State Subsidy	45.7%	48.7%	54.7%	59.4%	51.7%
Local Subsidy	2.0%	2.1%	2.0%	1.9%	2.0%
Revenues	42.1%	42.1%	36.3%	38.8%	36.0%
Local Subsidy / State Subsidy	4.4%	4.3%	3.7%	3.1%	3.8%

¹ Federal subsidy allocation for rural agencies is determined at the state level, where the use of state funds to leverage additional federal funds is maximized across the Commonwealth to meet rural agency needs.

Exhibit 11: Total Public Transportation (Fixed-Route + Paratransit) Operating Budget and Funding Sources by Fiscal Year (FYE 2015–FYE 2019)



FIXED-ROUTE FUNDING

Fixed-route service, funded by general revenues and government subsidies, accounts for 81.6 percent of IndiGO's public transportation operating expenses. Between 2015 and 2019, direct passenger fares represented between 20.7 and 31.0 percent of total operating funding (**Exhibit 12**), with IndiGO's high rate of farebox recovery tied to revenue service agreements with IUP, The Grove at Indiana, and until 2017, WyoTech technical school. Based on the FYE 2015 to FYE 2019 dotGrants reporting, IndiGO operated using current-year funding with \$580,595 in state funds and \$180,472 in local funds carried over into FY 2019-20.

Exhibit 12: Fixed-Route Funding

Funding Source	FYE 2015	FYE 2016	FYE 2017	FYE 2018	FYE 2019
Revenues					
Passenger-Paid Fares	\$69,427	\$69,602	\$68,538	\$75,478	\$84,556
Organization-Paid Fares (Sum of Charter & Route Guarantees)	\$583,347	\$599,981	\$604,686	\$605,615	\$484,013
Advertising	\$30,002	\$14,848	\$11,045	\$42,212	\$31,417
Total Recoveries	\$0	\$0	\$0	\$0	\$0
Other - Misc.	\$2,067	\$3,803	\$724	\$693	\$2,529
Other - Adult Services Grant Passes	\$0	\$3,494	\$4,550	\$0	\$0
Other - Non-Transportation	\$117	\$0	\$0	\$0	\$0
Other - MATP	\$308	\$0	\$0	\$0	\$0
Other - SAFTI	\$0	\$0	\$0	\$0	\$0
Subtotal	\$685,268	\$691,728	\$689,543	\$723,998	\$602,515
Subsidies					
Federal Operating Grant	\$277,216	\$88,369	\$208,086	\$0	\$347,365
Act 44 (1513) – State Prior Year	\$0	\$0	\$0	\$27,760	\$2,839
Act 44 (1513) – State Current Year	\$1,090,302	\$1,242,073	\$1,476,909	\$1,892,610	\$1,723,639
Act 44 (1513) – Local Current Year (Municipal)	\$54,427	\$57,148	\$60,005	\$63,005	\$66,155
Special Operating Grants – Federal Share (5311)	\$0	\$108,180	\$0	\$0	\$0
Special Operating Grants – State Share	\$0	\$0	\$0	\$0	\$0
Subtotal	\$1,421,945	\$1,495,770	\$1,745,000	\$1,983,375	\$2,139,998
Total Funding	\$2,107,213	\$2,187,498	\$2,434,543	\$2,707,373	\$2,742,513
Fare Revenue / Total Funding	31.0%	30.6%	27.7%	25.2%	20.7%

Source: PennDOT dotGrants Reporting System

PARATRANSIT FUNDING

Paratransit service (i.e., shared-ride and ADA complementary service), funded by state subsidies and passenger fares, accounts for 18.4 percent of IndiGO's public transportation operating expenses (**Exhibit 13**). Paratransit funding slightly increased from \$615,217 in FYE 2015 to \$618,952 in FYE 2019. Total ADA passenger trips increased from 402 in FYE 2015 to 611 in FYE 2019 (**Exhibit 14**).

Exhibit 13: Paratransit Funding by Source

Category	FY 2015	FY 2016	FY 2017	FY 2018	FY 2019
Revenues					
Passenger Fares	\$21,470	\$17,034	\$14,964	\$12,603	\$14,042
Advertising	\$0	\$0	\$0	\$1,995	\$1,750
Shared-Ride Lottery	\$357,695	\$366,238	\$312,831	\$317,779	\$354,380
PwD Reimbursement	\$13,404	\$17,730	\$14,190	\$12,901	\$8,133
PwD Passenger Fares	\$2,382	\$3,129	\$2,504	\$2,277	\$1,435
AAA	\$57,545	\$49,307	\$48,080	\$49,154	\$51,814
MH/MR	\$0	\$0	\$0	\$0	\$0
MATP Admin	\$8,220	\$7,250	\$4,709	\$133,165	\$111,122
Other – MATP Contract Rate Adj.	\$0	\$0	\$0	\$64,126	\$65,000
Other – Revenue Interest	\$0	\$0	\$0	\$0	\$0
Subtotal	\$460,716	\$460,688	\$397,278	\$594,000	\$607,676
Subsidies					
1 Federal Operating Grant	\$0	\$0	\$0	\$0	\$0
2 Act 44 (1513) State Prior Year	\$0	\$0	\$18,662	\$90,643	\$4,019
3 Act 44 (1513) State Current Year	\$154,501	\$90,675	\$140,450	\$5,763	\$7,257
4 Special – (Local)	\$0	\$0	\$0	\$0	\$0
Subtotal	\$154,501	\$90,675	\$159,112	\$96,406	\$11,276
Total Funding	\$615,217	\$551,363	\$556,390	\$690,406	\$618,952

Exhibit 14: Paratransit Operating Statistics

Operating Category	FY 2015	FY 2016	FY 2017	FY 2018	FY 2019
Paratransit Operating Statistics					
Senior Trips	23,498	21,187	18,552	19,041	19,079
Total ADA Trips	402	431	793	596	611
Total Paratransit Trips	27,055	22,933	20,592	26,282	24,745
Total Miles	311,078	276,175	231,474	313,728	279,398
Total Hours	14,753	11,562	1,246	14,475	13,158
VOMS	11	8	9	11	10

Source: PennDOT dotGrants Reporting System

BALANCE SHEET FINDINGS

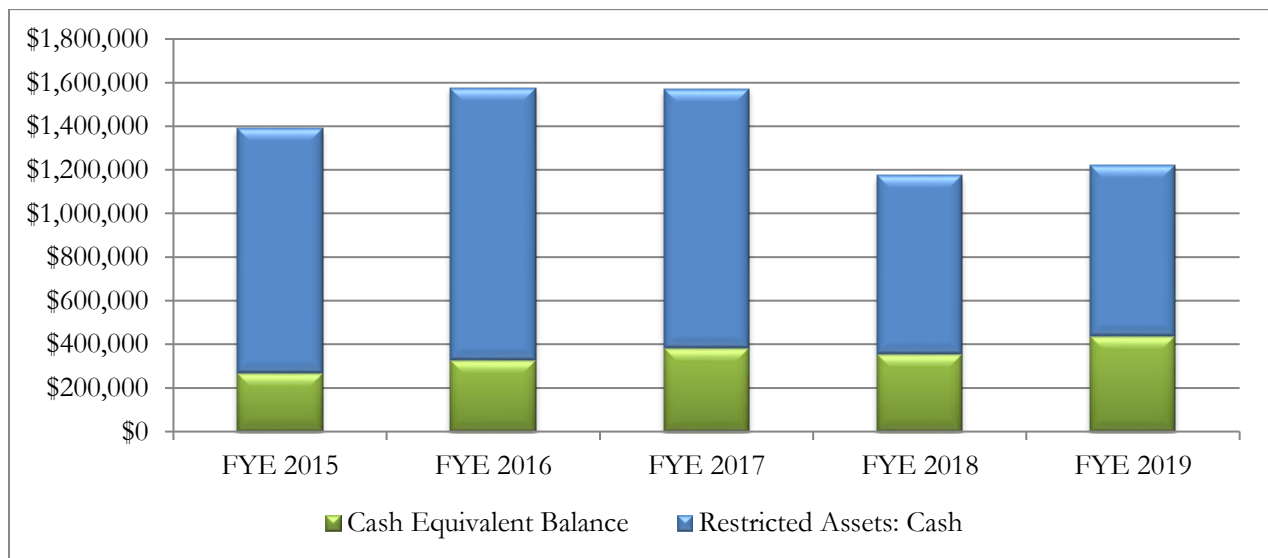
Review of balance sheets shows that IndiGO increased its available cash on hand between FYE 2015 and 2019 (**Exhibit 15** and **Exhibit 16**). Net current cash equivalent balance reported was \$388,093, and restricted cash was \$785,045. IndiGO had a total cash equivalent balance of cash and restricted cash equal to 36.3 percent of total operating expenses as of FYE 2019. The FYE 2019 audit reported \$604,254 in accounts payable at fiscal year end.

Exhibit 15: Balance Sheet Summary (FYE 2015–FYE 2019)

Balance Sheet Report	FYE 2015	FYE 2016	FYE 2017	FYE 2018	FYE 2019
Current Assets					
Cash Equivalent Balance	\$266,441	\$327,751	\$382,406	\$355,484	\$435,680
Grants Receivable (including capital)	\$102,101	\$58,435	\$58,537	\$56,543	\$565,931
Other Accounts Receivable	\$159,946	\$203,238	\$154,982	\$159,672	\$123,280
Restricted Assets: Cash	\$1,123,426	\$1,247,813	\$1,188,798	\$820,289	\$785,045
Inventory Value	\$75,061	\$75,082	\$79,192	\$64,369	\$44,826
Prepaid Expenses	\$34,498	\$34,194	\$23,967	\$15,958	\$15,266
Current Liabilities					
Accounts Payable (including capital)	\$117,195	\$117,463	\$107,672	\$77,839	\$604,254
Accrued Expenses	\$141,728	\$207,695	\$193,996	\$195,352	\$192,636
Deferred Revenue	\$1,123,426	\$1,247,813	\$1,188,798	\$820,289	\$785,045
Total Operating Expense	\$2,722,430	\$2,738,861	\$2,973,933	\$3,397,779	\$3,361,465
(Cash Eqv. Bal + Restricted Cash)/ Total Operating Exp.	51.1%	57.5%	52.8%	34.6%	36.3%
Line of Credit / Annual Payroll	0.0%	0.0%	0.0%	0.0%	0.0%
Current Assets	\$1,761,473	\$1,946,513	\$1,887,882	\$1,472,315	\$1,970,028
Current Liabilities	\$1,382,349	\$1,572,971	\$1,490,466	\$1,093,480	\$1,581,935
Net Current Assets	\$379,124	\$373,542	\$397,416	\$378,835	\$388,093

Source: Annual Audit Reports and dotGrants

Exhibit 16: End-of-Year Cash Balance (FYE 2015–FYE 2019)



ASSESSMENT

IndiGO currently has a balanced operating budget. Its net cash equivalent balance has increased since 2015. Noteworthy elements of IndiGO's financial condition as of FYE 2019 are:

- IndiGO had \$180,472 in local and \$580,595 in state carryover funds (cash reserves).
- Combined carryover subsidies were equal to 22.6 percent of total operational funding.
- IndiGO had a cash balance of available and restricted cash equal to 36.3 percent of total annual operating expenses.
- Current assets exceeded current liabilities.
- Overdue accounts payable and receivable amounts are negligible.
- IndiGO had no debt but planned to open a line of credit in 2020 to support its facility expansion capital project.
- IndiGO had a 20.7 percent fixed-route farebox recovery ratio, and passenger fares and other local revenues covered 36.3 percent of total operating expenses.

Management should continue taking appropriate actions to manage costs (i.e., containing cost growth within 3.0 percent annually), achieve farebox recovery goals, and maintain cash reserves to preserve IndiGO's overall financial health. IndiGO should take additional steps to determine the potential long-term impacts on agency operations from reduced revenue service agreements as a result of changes in IUP enrollment.

APPENDIX A: DATA ADJUSTMENTS

There were minor discrepancies in operating statistics reported between NTD and dotGrants and adjustments to offset insurance dividends reported as revenues. Fixed-route revenue was revised to account for the removal of insurance rebates, and fixed-route operating costs were offset by those amounts accordingly. Pennsylvania began reporting total operating statistics on behalf of rural agencies to NTD in FY 2014-15.

Fixed-Route Revenue	FYE 2014	FYE 2015	FYE 2016	FYE 2017	FYE 2018
dotGrants reported revenue	\$741,268	\$685,268	\$691,728	\$689,543	\$723,998
NTD reported revenue	-	\$652,774	\$669,583	\$689,543	\$804,434
Insurance rebate adjustment	(\$74,733)	-	-	-	-
Reconciliation adjustment	-	\$32,494	\$22,145	-	(\$80,436)
Adjusted revenue	\$666,535	\$685,268	\$691,728	\$689,543	\$723,998

Fixed-Route Operating Costs	FYE 2014	FYE 2015	FYE 2016	FYE 2017	FYE 2018
dotGrants reported operating costs	\$2,285,313	\$2,107,213	\$2,187,498	\$2,417,543	\$2,707,373
NTD reported operating costs	-	\$2,107,213	\$2,187,498	\$2,434,543	\$2,707,373
Insurance rebate adjustment	(\$74,733)				
Reconciliation adjustment	-	-	-	(\$17,000)	-
Adjusted operating costs	\$2,210,580	\$2,107,213	\$2,187,498	\$2,417,543	\$2,707,373

The following Act 44 performance metrics were calculated for IndiGO.

Act 44 Performance Metrics	FYE 2014	FYE 2015	FYE 2016	FYE 2017	FYE 2018
Passengers/RVH	14.27	13.95	11.08	9.67	10.56
Revenue/RVH	\$19.53	\$21.88	\$21.81	\$20.26	\$19.93
Operating Cost/RVH	\$64.78	\$67.27	\$68.96	\$71.03	\$74.52
Operating Cost/Passenger	\$4.54	\$4.82	\$6.22	\$7.34	\$7.06

APPENDIX B: 2015 PERFORMANCE REVIEW ACTION PLAN ASSESSMENT

Last Updated in 2019

Category	Suggested Action	Progress	Status
1. Ridership	Develop a system map depicting all available services within Indiana County.	Detailed route maps and system maps have been completed and published on the web site, in all ride guides, hub location.	Completed in 2016.
1. Ridership	Update TDP every five years to account for changes in service area demographics.	IndiGO will apply for technical assistance funds in 2018 to study and realign all routes due to the end of the lease at our center and to reestablish a transfer point at recently acquired land.	IndiGO awaiting funding to hire consultant to update TDP.
2. Revenue	Expand marketing plan to include a budget tied to a schedule and expected return on investment.	Marketing manager has been hired, plan has been updated.	Completed in 2017.
2. Revenue	Evaluate the revenue potential of advertising on bus shelters.	IndiGO will begin managing the exterior bus and shelter advertising program in-house to maximize potential.	Completed in 2017.

Category	Suggested Action	Progress	Status
3. Operating Cost	Develop an annual target for maintenance parts turnover.	IndiGO was evaluating the Fleetnet product available through AVAIL while FRITS was being implemented. Currently, IndiGO is evaluating RTA as a potential maintenance software to monitor parts turnover.	Ongoing.
3. Operating Cost	Assess shared-ride program costs and fare pricing to identify strategies that recover more of the actual cost of shared-ride service.	IndiGO analyzed service and reduced full-time positions for fixed-route and shared-ride operators, reducing operating costs by eliminating benefit cost to those positions. IndiGO adopted a higher deductible health plan providing additional cost savings. IndiGO added trips to shared-ride to increase ridership per hour by adding MATP clients.	Completed in 2018.
3. Operating Cost	Perform an Administrative and Maintenance Time Study for shared-ride and update cost allocation plan.	Currently waiting for guidance on cost allocation.	Ongoing.
4. Other	Incorporate into Board packets progress reporting on strategic plan implementation.	Currently in discussion with SPC to support a strategic plan update with a TDP element.	Ongoing.
4. Other	Expand the annual evaluation of the Executive Director to include measures directly tied to performance goals of the strategic plan.	IndiGO will revisit action item when the strategic business is updated.	Ongoing.

Category	Suggested Action	Progress	Status
4. Other	Evaluate the potential of internship programs with IUP.	IndiGO developed an internship with IUP to assist with GIS updates and marketing. IndiGO will seek a safety intern to develop and implement safety measures recommended by TSA and the U.S. Department of Homeland Security.	Completed in 2016.
4. Other	Implement FRITS to improve passenger communications and ridership.	IndiGO completed coordinates for all stops and routes. Data is live on Google and ready for FRITS.	Completed in 2019.

APPENDIX C: PEER COMPARISONS

Comparison of IndiGO with the selected peer systems was completed using NTD-reported data and PennDOT dotGrants legacy statistics. Due to its consistency and availability for comparable systems, the NTD FYE 2018 Reporting Year database was selected as the primary data source used in the calculation of the five-year trend Act 44 metrics:

- Passengers / revenue vehicle-hour
- Operating cost / revenue vehicle-hour
- Operating revenue / revenue vehicle-hour
- Operating cost / passenger

The variables used in the calculations are defined as follows:

- Passengers: Annual unlinked passenger boardings by mode for both directly-operated and purchased transportation
- Operating Costs: Annual operating cost of services provided (excluding capital costs) by mode for both directly-operated and purchased transportation
- Operating Revenue: Total annual operating revenue generated from farebox and other non-state, non-federal sources by mode for both directly-operated and purchased transportation
- Revenue Vehicle-Hours: The total annual number of “in-service” hours by mode for both directly-operated and purchased transportation
- Average: Un-weighted linear average of all values being measured across all peer transit agencies
- Standard Deviation: Standard deviation of all values being measured across all peer transit agencies

Act 44 stipulates that metrics be designated as either “In Compliance” or “At Risk.” The following criteria are used to make the determination:

- “At Risk” if costlier than one standard deviation **above** the peer average in:
 - The single-year or five-year trend for Operating Cost / Revenue Vehicle-Hour
 - The single-year or five-year trend for Operating Cost / Passenger
- “At Risk” if performing worse than one standard deviation **below** the peer group average in:
 - The single-year or five-year trend for Passengers / Revenue Vehicle-Hour
 - The single-year or five-year trend for Operating Revenue / Revenue Vehicle-Hour

Passengers / Revenue Vehicle-Hour

Passengers / Revenue-Hour (MB)					
System	FYE 2018 Single-Year		Five-Year Change Since FYE 2013		
	Value	Rank of 15	2013 Value	Annual Rate	Rank of 15
Hill Country Transit District	14.20	6	14.35	-0.22%	4
The Lawton Area Transit System	9.54	14	10.94	-2.70%	10
City of Vacaville	11.03	10	13.69	-4.23%	12
Shoreline Metro	15.53	3	11.96	5.37%	1
Las Cruces Area Transit	13.80	7	20.78	-7.86%	15
Metropolitan Transit Authority of Black Hawk County	10.24	13	13.94	-5.98%	14
Janesville Transit System	18.08	1	15.39	3.27%	2
County of Lebanon Transit Authority	11.84	9	10.90	1.68%	3
Great Falls Transit District	12.33	8	13.17	-1.31%	5
Monroe County Transportation Authority	7.51	15	8.42	-2.26%	7
Altoona Metro Transit	15.15	4	16.38	-1.55%	6
Battle Creek Transit	14.61	5	16.61	-2.53%	8
City of Dubuque	10.66	11	12.15	-2.59%	9
City of Alexandria	16.58	2	22.16	-5.64%	13
Indiana County Transit Authority	10.56	12	12.47	-3.28%	11
<i>Average</i>	12.78		14.22	-1.99%	
<i>Standard Deviation</i>	2.93		3.66	3.49%	
<i>Average – 1 Standard Deviation</i>	9.84		10.56	-5.48%	
<i>Average + 1 Standard Deviation</i>	15.71		17.88	1.50%	
Act 44 Compliance Determination	In Compliance		In Compliance		
Compared to the Peer Group Average	Worse		Worse		

Operating Cost / Revenue Vehicle-Hour

Operating Cost / Revenue-Hour (MB)					
System	FYE 2018 Single-Year		Five-Year Change Since FYE 2013		
	Value	Rank of 15	2013 Value	Annual Rate	Rank of 15
Hill Country Transit District	\$93.82	11	\$61.80	8.71%	15
The Lawton Area Transit System	\$65.33	3	\$60.52	1.54%	4
City of Vacaville	\$60.71	1	\$45.75	5.82%	13
Shoreline Metro	\$75.19	6	\$68.29	1.94%	5
Las Cruces Area Transit	\$77.80	7	\$70.10	2.11%	8
Metropolitan Transit Authority of Black Hawk County	\$84.20	9	\$72.46	3.05%	10
Janesville Transit System	\$120.18	14	\$100.74	3.59%	11
County of Lebanon Transit Authority	\$85.67	10	\$81.32	1.05%	3
Great Falls Transit District	\$81.35	8	\$73.84	1.96%	6
Monroe County Transportation Authority	\$102.80	12	\$114.01	-2.05%	1
Altoona Metro Transit	\$136.80	15	\$96.41	7.25%	14
Battle Creek Transit	\$119.74	13	\$99.56	3.76%	12
City of Dubuque	\$61.42	2	\$63.05	-0.52%	2
City of Alexandria	\$74.99	5	\$67.75	2.05%	7
Indiana County Transit Authority	\$74.52	4	\$65.64	2.57%	9
<i>Average</i>		<i>\$87.63</i>	<i>\$76.08</i>	<i>2.85%</i>	
<i>Standard Deviation</i>		<i>\$22.87</i>	<i>\$18.65</i>	<i>2.77%</i>	
<i>Average – 1 Standard Deviation</i>		<i>\$64.76</i>	<i>\$57.44</i>	<i>0.09%</i>	
<i>Average + 1 Standard Deviation</i>		<i>\$110.50</i>	<i>\$94.73</i>	<i>5.62%</i>	
Act 44 Compliance Determination		In Compliance	In Compliance		
Compared to the Peer Group Average		Better	Better		

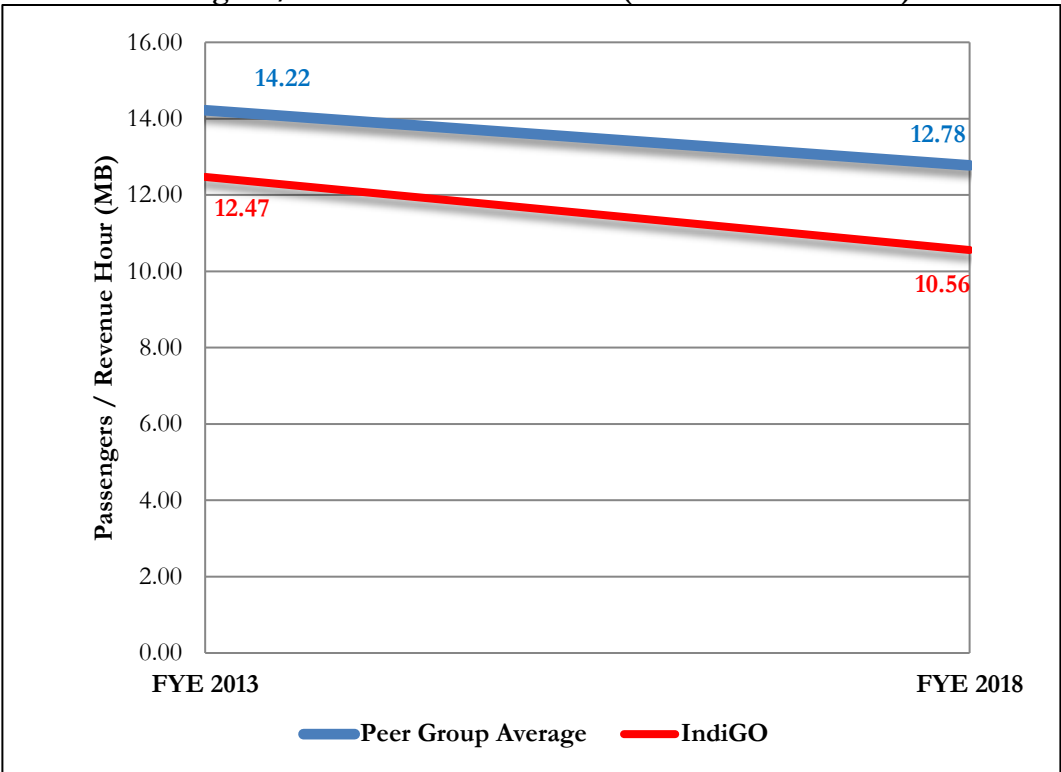
Operating Revenue / Revenue Vehicle-Hour

Operating Revenue / Revenue-Hour (MB)					
System	FYE 2018 Single-Year		Five-Year Change Since FYE 2013		
	Value	Rank of 15	2013 Value	Annual Rate	Rank of 15
Hill Country Transit District	\$9.05	13	\$8.35	1.61%	6
The Lawton Area Transit System	\$8.84	14	\$9.08	-0.53%	10
City of Vacaville	\$13.31	8	\$9.53	6.91%	3
Shoreline Metro	\$15.53	7	\$12.34	4.70%	4
Las Cruces Area Transit	\$16.64	4	\$16.94	-0.36%	9
Metropolitan Transit Authority of Black Hawk County	\$15.84	5	\$16.89	-1.28%	11
Janesville Transit System	\$17.88	3	\$20.75	-2.93%	13
County of Lebanon Transit Authority	\$15.53	6	\$19.19	-4.14%	14
Great Falls Transit District	\$12.80	9	\$9.06	7.15%	2
Monroe County Transportation Authority	\$7.31	15	\$11.47	-8.61%	15
Altoona Metro Transit	\$20.93	1	\$19.46	1.46%	7
Battle Creek Transit	\$11.84	11	\$11.60	0.40%	8
City of Dubuque	\$10.15	12	\$6.93	7.95%	1
City of Alexandria	\$12.43	10	\$13.70	-1.93%	12
Indiana County Transit Authority	\$19.93	2	\$17.74	2.35%	5
<i>Average</i>		<i>\$13.87</i>	<i>\$13.54</i>	<i>0.85%</i>	
<i>Standard Deviation</i>		<i>\$4.08</i>	<i>\$4.60</i>	<i>4.55%</i>	
<i>Average – 1 Standard Deviation</i>		<i>\$9.79</i>	<i>\$8.94</i>	<i>-3.70%</i>	
<i>Average + 1 Standard Deviation</i>		<i>\$17.94</i>	<i>\$18.13</i>	<i>5.39%</i>	
Act 44 Compliance Determination		In Compliance	In Compliance		
Compared to the Peer Group Average		Better	Better		

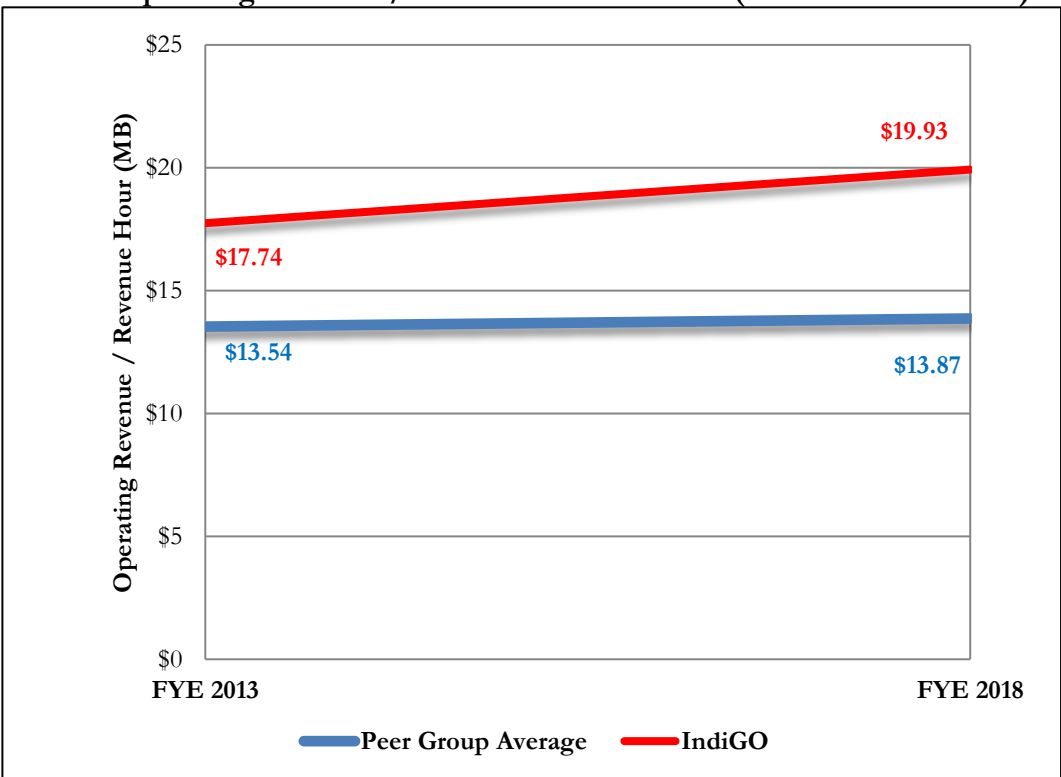
Operating Cost / Passenger

Operating Cost / Passenger (MB)					
System	FYE 2018 Single-Year		Five-Year Change Since FY 2013		
	Value	Rank of 15	2013 Value	Annual Rate	Rank of 15
Hill Country Transit District	\$6.61	7	\$4.31	8.94%	12
The Lawton Area Transit System	\$6.85	9	\$5.53	4.36%	7
City of Vacaville	\$5.50	3	\$3.34	10.50%	14
Shoreline Metro	\$4.84	2	\$5.71	-3.25%	1
Las Cruces Area Transit	\$5.64	4	\$3.37	10.82%	15
Metropolitan Transit Authority of Black Hawk County	\$8.22	13	\$5.20	9.61%	13
Janesville Transit System	\$6.65	8	\$6.55	0.31%	4
County of Lebanon Transit Authority	\$7.23	11	\$7.46	-0.62%	2
Great Falls Transit District	\$6.60	6	\$5.61	3.31%	6
Monroe County Transportation Authority	\$13.69	15	\$13.54	0.22%	3
Altoona Metro Transit	\$9.03	14	\$5.89	8.93%	11
Battle Creek Transit	\$8.20	12	\$5.99	6.46%	9
City of Dubuque	\$5.76	5	\$5.19	2.12%	5
City of Alexandria	\$4.52	1	\$3.06	8.15%	10
Indiana County Transit Authority	\$7.06	10	\$5.26	6.05%	8
<i>Average</i>		<i>\$7.09</i>	<i>\$5.73</i>	<i>5.06%</i>	
<i>Standard Deviation</i>		<i>\$2.21</i>	<i>\$2.48</i>	<i>4.52%</i>	
<i>Average – 1 Standard Deviation</i>		<i>\$4.88</i>	<i>\$3.25</i>	<i>0.54%</i>	
<i>Average + 1 Standard Deviation</i>		<i>\$9.31</i>	<i>\$8.21</i>	<i>9.58%</i>	
Act 44 Compliance Determination		In Compliance	In Compliance		
Compared to the Peer Group Average		Better	Worse		

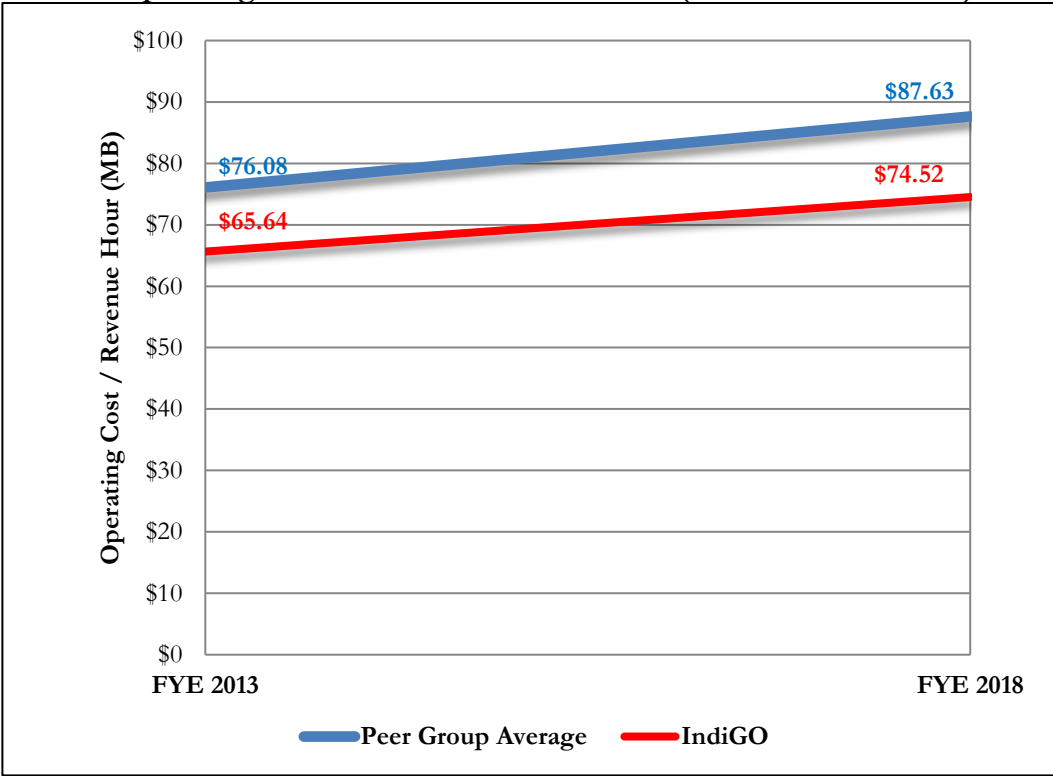
Trend – Passengers / Revenue Vehicle-Hour (FYE 2013-FYE 2018)



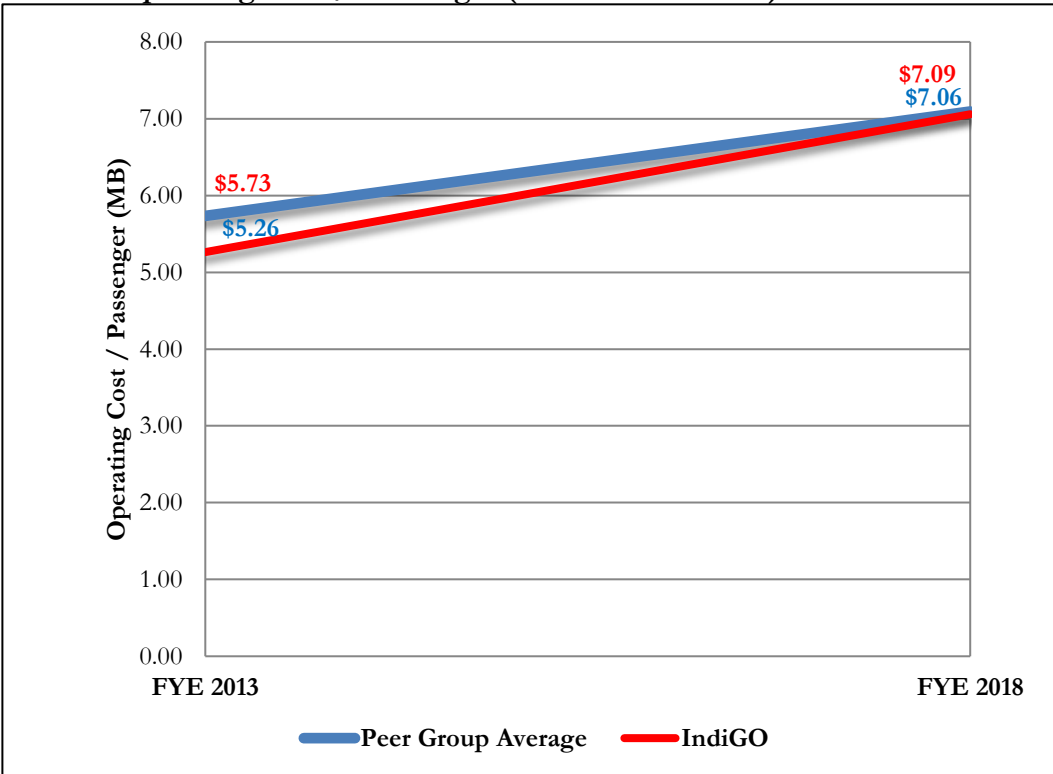
Trend – Operating Revenue / Revenue Vehicle-Hour (FYE 2013–FYE 2018)



Trend – Operating Cost / Revenue Vehicle-Hour (FYE 2013–FYE 2018)



Trend – Operating Cost / Passenger (FY 2013–FYE 2018)



APPENDIX D: ACTION PLAN TEMPLATE

PART 1 – ACTIONS TO INCREASE PASSENGERS / REVENUE-HOUR

Recommendation From narrative starting on page 10	IndiGO Action	Estimated Initiation Date	Estimated Completion Date
1. Update IndiGO’s strategic business plan to include a TDP element and a contingency scenario accounting for the potential long-term loss of IUP ridership.			
2. Update marketing strategies to align with the goals of the strategic business plan and consider targeted outreach to increased non-university ridership.			
3. Assess alternative fixed-route transportation options for residents in northern Indiana County to meet travel demand.			
4. Coordinate with the Indiana County Planning Commission on potential transit-friendly regulations for site development.			

PART 2 – ACTIONS TO INCREASE OPERATING REVENUE / REVENUE-HOUR

Recommendation From narrative starting on page 11	IndiGO Action	Estimated Initiation Date	Estimated Completion Date
1. Develop a revenue strategy as part of IndiGO’s update to the strategic business plan that identifies new opportunities to diversify income stream.			

PART 3 – ACTIONS TO REDUCE OR CONTAIN OPERATING COST / REVENUE-HOUR

Recommendation From narrative starting on page 11	IndiGO Action	Estimated Initiation Date	Estimated Completion Date
1. Address IndiGO’s long-term financial stability in how it manages any planned service changes as a result of the TDP element and builds adequate reserves to weather unexpected changes in operating costs.			

PART 4 – OTHER ACTIONS TO IMPROVE OVERALL PERFORMANCE

Recommendation From narrative starting on page 12	IndiGO Action	Estimated Initiation Date	Estimated Completion Date
1. Coordinate with SPC to support ongoing transit planning efforts.			
2. Monitor FRITS enhancements for updates and new analytical tools that will provide additional insights on ways to improve operational efficiency.			
3. Identify needed skill sets for the Board and communicate these needs to county commissioners as they look to fill vacant seats.			
4. Develop a concise monthly performance dashboard report for the Board for fixed-route and demand-response services that details <ul style="list-style-type: none"> a. Total ridership, senior ridership, and IUP ridership; b. Farebox recovery; c. Customer service call volume, the purpose of calls, and rider complaints; d. Safety metrics (e.g., the number of vehicle collisions and onboard incidents); e. Service reliability data (e.g., on-time performance, missed trips); f. The number of road calls and reason; and, g. Act 44 targets and agency performance 			

Recommendation From narrative starting on page 12	IndiGO Action	Estimated Initiation Date	Estimated Completion Date
The dashboard report should include an annual comparison of monthly progress compared to the prior fiscal year to help identify potential trends in system performance.			

