



MMVTA Transit System Performance Review

June 27, 2019

Performance Report

Mid Mon Valley Transit Authority d.b.a., MMVTA

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PUBLIC TRANSPORTATION SERVICE SNAPSHOT

Agency	Mid Mon Valley Transit Authority (d.b.a. MMVTA)		
Year Founded	1985		
Reporting Fiscal Year End (FYE)	2018		
Service Area (square miles)	44		
Service Area Population	79,666		
Annual Operating Statistics*	Fixed-Route	Paratransit (ADA)	Total (Fixed-Route + Paratransit)
Vehicles in Maximum Service (VOMS)	23	1	24
Operating Cost	\$3,951,690	\$15,679	\$3,967,369
Operating Revenues	\$659,311	\$2,600	\$661,911
Total (Actual) Vehicle Miles	908,379	6,413	914,792
Revenue Miles of Service (RVM)	769,929	3,206	773,135
Total Vehicle Hours	50,032	365	50,397
Revenue Vehicle Hours (RVH)	42,768	182	42,950
Total Passenger Trips	282,919	641	283,560
Senior Passenger (Lottery) Trips	36,061	0	36,061
Act 44 Performance Statistics			
Passengers / RVH	6.62	3.52	6.60
Operating Cost / RVH	\$92.40	\$86.15	\$92.37
Operating Revenue / RVH	\$15.42	\$14.29	\$15.41
Operating Cost / Passenger	\$13.97	\$24.46	\$13.99
Other Performance Statistics			
Operating Revenue / Operating Cost	16.68%	16.58%	16.68%
Operating Cost / Total Vehicle Hours	\$78.98	\$42.96	\$78.72
Operating Cost / Total Vehicle Miles	\$4.35	\$2.44	\$4.34
Total Passengers / Total Vehicle Hours	5.65	1.76	5.63
Operating Cost / RVM	\$5.13	\$4.89	\$5.13
RVM / Total Vehicle Miles	84.76%	49.99%	84.51%
RVH / Total Vehicle Hours	85.48%	49.86%	85.22%
Operating Subsidy / Passenger Trip	\$11.64	\$20.40	\$11.66

*Source: dotGrants 2018 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%, from \$535 million annually to \$800 million in the first year of the legislation. Public transportation organizations which 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.

At the same time Act 44 ushered in critical requirements for accountability, performance improvement, and maximum 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
- Reassess each organization on a five-year cycle

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

- Whether the organization achieved its performance targets set in the previous review; 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, failure to achieve performance targets and to determine if a financial penalty should be assessed if performance targets are not met in §427.12. Performance Reviews:

“(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 the initial review of Mid Mon Valley Transit Authority (d.b.a. MMVTA) in March 2014. Based on that review, PennDOT established five-year performance targets and agreed to MMVTA’s Action Plan to meet those targets. In March 2019, PennDOT conducted the five-year reassessment of MMVTA to determine if MMVTA successfully 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 2014 PERFORMANCE REVIEW

PennDOT conducted the initial review of Mid Mon Valley Transit Authority (d.b.a. MMVTA) in March 2014. Since finalizing the previous report, the following changes and other factors impacted operations, finance and statistical reporting at MMVTA, as well as performance targets established in 2014:

1. **Right-sized Administrative Staff** – MMVTA eliminated two full-time positions (i.e., Maintenance Director and Operations Manager) for an annual cost savings of approximately \$90,000 from salary and fringe benefits. Management determined the size and scale of MMVTA did not warrant in-house staffing for these positions since the contractor is responsible for all fleet maintenance needs and oversees daily operations. MMVTA currently outsources building maintenance not covered by the contractor.
2. **Short-Range Transit Plan Implementation** – In 2015, MMVTA developed a Short-Range Transit Plan in response to the 2014 Action Plan. This plan developed reasonable minimum ridership and revenue standards, reviewed cost recovery of the University of California contract, and assessed existing service. MMVTA implemented the following service adjustments in response:
 - a. Removed two Valley 2 runs;
 - b. Suspended Cal Commuter service during university breaks;
 - c. Changed Commuter A trip from 9:00 AM to 9:10 AM with an arrival time of 11:00 AM weekdays to Pittsburgh; and,
 - d. Eliminated three unproductive Commuter runs due to low ridership:
 - i. 8:05 AM from Pittsburgh to Donora
 - ii. 1:50 PM from Donora to Pittsburgh
 - iii. 5:15 PM from Donora to Pittsburgh
3. **Revised Pittsburgh Fare Structure** – MMVTA revised the fixed-route fare structure for Pittsburgh commuter service in January 2018. MMVTA simplified the Pittsburgh commuter route from multi-zone to two zones. Zone 1 consists of Washington County communities (i.e., Mid Mon Valley area, Crookham and Finleyville) to Pittsburgh and Zone 2 consists of Allegheny County stops to Pittsburgh.

2014 PERFORMANCE REVIEW DETERMINATIONS AND FINDINGS

The 2014 performance review compared MMVTA to a group of peer agencies based on the four performance criteria required by Act 44. MMVTA was found to be “In Compliance” for five performance criteria and “At Risk” for three.

Performance Criteria	FYE*	Determination	Rank (of 14)	Relation to Peer Average	Value	Peer Average
Passengers / Revenue Vehicle Hour	2011	At Risk	13	Worse	7.03	15.32
	Trend	In Compliance	12	Worse	-0.87%	1.15%
Operating Cost / Revenue Vehicle Hour	2011	In Compliance	10	Worse	\$82.30	\$72.17
	Trend	In Compliance	12	Worse	6.63%	4.25%
Operating Revenue / Revenue Vehicle Hour	2011	In Compliance	8	Better	\$13.54	\$13.48
	Trend	In Compliance	14	Worse	-1.24%	7.19%
Operating Cost / Passenger	2011	At Risk	14	Worse	\$11.70	\$5.67
	Trend	At Risk	14	Worse	7.57%	3.10%

*Note: The National Transit Database (NTD) information most current at the time of the peer review is the basis of the single year, and trend peer comparisons.

The 2014 performance review found that MMVTA was “In Compliance” for five performance criteria determinations and “At Risk” for three. MMVTA was at risk for passengers per revenue vehicle hour for the single-year determination and operating cost per passenger for the single-year and five-year trend determinations. MMVTA performed better than the peer group for the single-year operating revenue per revenue vehicle hour determination and performed worse in relation to the peer average for all other metrics.

MMVTA developed an Action Plan to address opportunities for improvement identified in the 2014 performance review report. Among the efforts MMVTA took to improve its performance were:

1. Develop reasonable minimum ridership and revenue service standards;
2. Proactively develop a farebox recovery policy and begin its implementation; and
3. Update the transit development plan.

PennDOT, in consultation with MMVTA management, established the following performance targets that the agency should attain before its next performance review:

- Increase passengers per revenue vehicle hour by at least 3.0% per year on average
- Increase operating revenue per revenue vehicle hour by at least 3.0% per year on average
- Contain increases in operating cost per revenue vehicle hour to no more than 3.0% per year on average
- Contain or reduce operating cost per passenger to no more than 0.0% per year on average

These performance targets were established using the most accurate data available at that time.

Performance Criteria	2018 Target	2018 Actual	Met Target
Passengers / Revenue Vehicle Hour	8.24	6.62	No
Operating Cost / Revenue Vehicle Hour	\$100.77	\$92.40	Yes
Operating Revenue / Revenue Vehicle Hour	\$17.08	\$15.42	No
Operating Cost / Passenger	\$12.22	\$13.97	No

MMVTA met one of four 2018 performance targets. Missed targets are those that are a function of ridership and revenue. From 2012 to 2018, ridership declined by approximately 52,600 trips. MMVTA attributes the decline to a decrease in ridership on the commuter routes and the CalU route. Ridership declined on the CalU route by 6.2% annually from 2015 to 2018 and by 7.6% for the commuter routes. MMVTA attempted to mitigate the decline in ridership by removing unproductive service, further coordinating with PAAC on pick-up/drop-off times and accepting the regional ConnectCard for fare payment, marketing to students, and simplifying the Pittsburgh commuter fare structure.

The decline in ridership also impacted revenue. From 2015 to 2018 fixed-route revenue decreased by \$81,000. The revenue decline is fully-attributable to declining passenger-paid fares. To offset passenger-fare declines, MMVTA simplified the Pittsburgh commuter fare structure and increased available advertising space for sale in 2018. MMVTA reported a 6% increase in commuter fares for FYE 2018 (\$22,000) following the fare restructuring and approximately \$20,000 in additional advertising space sold. In 2019, a route was developed offering transfers for customers in the Mid Mon Valley to connect via Freedom Transit for trips into central Washington County. The decision to offer transfers between the Mid Mon Valley and central Washington County was made in response to community demand for access to Washington, PA for county services.

Based on the completion of items from the 2014 Action Plan, recent changes in the Pittsburgh commuter fare structure, and coordinating transfers with Freedom Transit, PennDOT concludes that MMVTA demonstrated a good faith effort in achieving its 2018 performance targets.

2019 PERFORMANCE REVIEW DETERMINATIONS AND FINDINGS

The 2019 performance review compared MMVTA with a group of peer agencies based on the four performance criteria outlined by Act 44. MMVTA was found to be “In Compliance” for seven performance criteria and “At Risk” for one.

Performance Criteria	FYE	Determination	Rank (of 12)	Relation to Peer Average	Value	Peer Average
Passengers / Revenue Hour	2017	In Compliance	10	Worse	6.92	9.89
	Trend	In Compliance	3	Better	0.04%	-3.04%
Operating Cost / Revenue Hour	2017	In Compliance	8	Worse	\$92.63	\$84.81
	Trend	In Compliance	6	Worse	1.88%	1.46%
Operating Revenue / Revenue Hour	2017	In Compliance	3	Better	\$15.60	\$11.85
	Trend	In Compliance	7	Better	1.76%	1.01%
Operating Cost / Passenger	2017	At Risk	11	Worse	\$13.39	\$9.42
	Trend	In Compliance	4	Better	1.83%	4.82%

*Note: NTD information most current at the time of the peer review was the basis of the single year and trend peer comparisons.

The 2019 review found MMVTA to be “At Risk” for operating cost per passenger for the single-year FYE 2017 determination. MMVTA performed better than the peer group for operating revenue per revenue vehicle hour for the single-year FYE 2017 determination and five-year trends for passengers per revenue vehicle hour, operating revenue per revenue vehicle hour, and operating cost per

passenger. The 2019 performance review also identified actions that MMVTA could take to improve overall agency performance including:

1. Formalize contractor oversight procedures and document interactions;
2. Report Act 44 performance metrics to the Board; and
3. Segregate invoice review, approval, and payment responsibilities.

PennDOT identified additional opportunities for improvement during the 2019 performance review. The complete list of opportunities for improvement serves as the basis for MMVTA's Board-approved Action Plan.

2023 PERFORMANCE TARGETS

As required by Act 44, PennDOT and MMVTA management have agreed to performance targets for FYE 2023 identified in the table below. MMVTA should work to achieve these targets over the next five years to ensure continued eligibility for full Section 1513 funding. Performance targets are designed to be aggressive, yet achievable.

Performance Criteria	Fiscal Year End (FYE)			Target Annual Increase
	2017 Actual	2018 Actual	2023 Target	
Passengers / Revenue Vehicle Hour	6.92	6.62	6.95	1.0%
Operating Cost / Revenue Vehicle Hour	\$92.63	\$92.40	\$107.11	3.0%
Operating Revenue / Revenue Vehicle Hour	\$15.60	\$15.42	\$17.87	3.0%
Operating Cost / Passenger	\$13.39	\$13.97	\$15.42	2.0%

FINANCIAL REVIEW

MMVTA currently has a balanced operating budget. Operating cash reserves have increased since 2014. Noteworthy elements of MMVTA's financial condition are:

- MMVTA has \$24,620 in local and \$620,093 in state carryover funds in FYE 2018
- Combined carryover subsidies amount to 16.3% of total operating costs
- MMVTA received its full local match as required by Act 44
- Accounts payable and receivable amounts are negligible
- MMVTA does not maintain a line of credit

Management should continue taking appropriate actions to manage costs, achieve farebox recovery goals, and maintain cash reserves to preserve MMVTA's overall financial health.

NEXT STEPS

MMVTA management and the Board will develop an Action Plan in response to the complete list of "Opportunities for Improvement" identified in the performance review report. Some actions will be quickly implementable while others may take several discrete steps to achieve over a longer period. MMVTA's management must report to the Board and PennDOT quarterly on progress towards 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%, from \$535 million annually to \$800 million in the first year of the legislation. Public transportation organizations which 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.

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AGENCY DESCRIPTION

The Mid Mon Valley Transit Authority (MMVTA) was created in 1985 under the Municipal Authorities Act of 1945 to provide transit service to communities in the Monessen urbanized area. MMVTA was created at the time when the steel industry collapsed and the already-depressed local economy was further devastated.

Three private companies were providing some transit service, but were on the brink of closing. However, the 1980 Census found for the first time that 21 Mid Monongahela River Valley communities located in Washington, Westmoreland, and Fayette Counties qualified as the Monessen Urbanized Area. Thus these communities qualified to receive federal and state transit operating assistance:

- Allenport Borough
- Belle Vernon Borough
- California Borough
- Carroll Township
- Charleroi Borough
- Coal Center Borough
- Donora Borough
- Dunlevy Borough
- Elco Borough
- Fallowfield Township
- Fayette City Borough
- City of Monessen
- City of Monongahela
- New Eagle Borough
- North Belle Vernon
- North Charleroi Borough
- Roscoe Borough
- Rostraver Township
- Speers Borough
- Stockdale Borough
- Washington Township

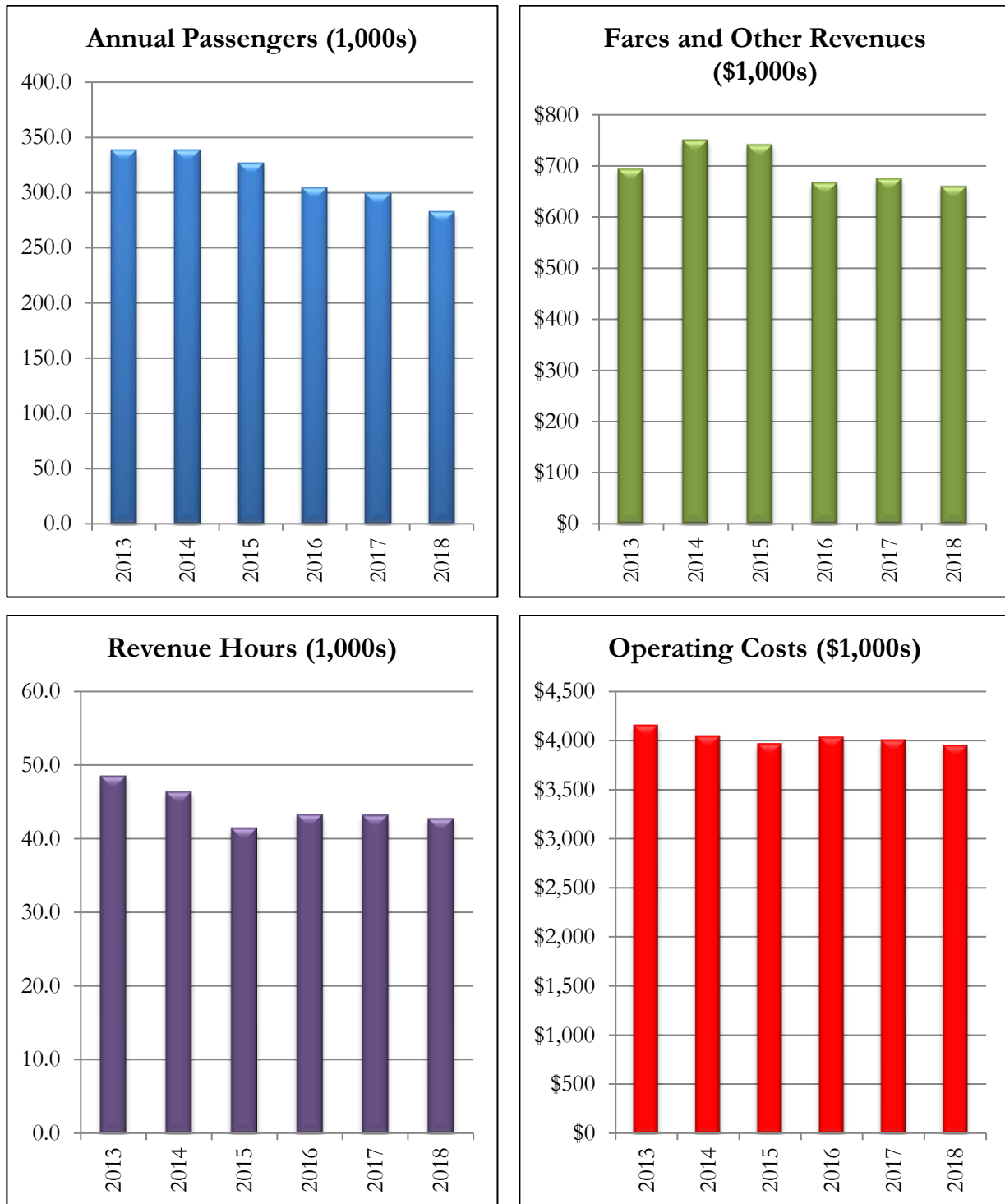
All 21 communities that formed MMVTA are represented on the Board of Directors. Each member municipality appoints a representative. Board members must be a taxpayer in, maintain a business in, or be a citizen of the municipality being represented.

MMVTA headquarters are in Charleroi, PA. and operations, maintenance and vehicle storage are in Donora, PA. MMVTA began transitioning to CNG in 2015. Fixed-route service is contracted to MV Transportation.

MMVTA offers urban fixed-route service throughout the Mon Valley area that operates daily. Service consists of four valley routes and four commuter routes into Pittsburgh. Fixed-route service has 23 vehicles operated in maximum service (VOMS). MMVTA provides service to California University of Pennsylvania (CalU). MMVTA provided 282,900 total fixed-route passenger trips in FYE 2018. **Exhibit 1** presents fixed-route bus statistics for MMVTA.

MMVTA also provides ADA paratransit service through a contract with a neighboring transit agency, Washington County Transportation Authority (WCTA, d.b.a., Freedom Transit). MMVTA provides approximately 640 ADA complementary passenger trips per year.

Exhibit 1: MMVTA Fixed-Route Bus Service Annual Performance Trends (2013-2018)



Source: NTD and PennDOT Legacy Reporting System (dotGrants)

PERFORMANCE REVIEW PROCESS

In March 2019, PennDOT initiated an Act 44-mandated performance review for MMVTA. The following outlines the review process:

1. Initial notification of performance review schedule and transmission of document request:
 - a. Review available data and request additional information.
 - b. MMVTA and PennDOT agree to a set of peer agencies for comparison.
2. Review the PennDOT-sponsored customer satisfaction survey (CSS).
3. Review of Act 44 variables including current performance, targets from the previous 2014 review, and Action Plan implementation.
4. Perform Act 44 performance criteria analysis.
5. Conduct onsite review, interviews, and supplementary data collection/reconciliation.
6. Evaluate performance, financial management and operations.
7. Report results and determine agency compliance with performance requirements.
8. Finalize performance review report.
9. Develop, implement and monitor a five-year Action Plan.
10. Provide technical assistance, if required, to help meet five-year performance targets.

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

CUSTOMER SATISFACTION SURVEY

In 2017, PennDOT sponsored a fixed-route rider survey for MMVTA based on 15 questions that addressed customer satisfaction, rider characteristics, and patterns in service usage. MMVTA surveyed their fixed-route passengers and collected 377 surveys during the first week of April 2017:

1. 98% of respondents indicated they were satisfied, or very satisfied, with the service.
2. 97% of respondents indicated they would continue using the service.
3. 96% of respondents indicated they would recommend the service to others.

Passengers were asked to rate a total of 19 performance measures related to public transportation from the user experience (e.g., driver and staff performance, capacity, the frequency of service, schedule adherence, clarity of bus schedules, etc.). In addition to standard questions, MMVTA included four custom questions. **Exhibit 2** provides a summary of the average customer service satisfaction score by performance measure.

MMVTA received the highest ratings in safe and competent drivers, driver courtesy and friendliness, and bus schedule availability. MMVTA received the lowest ratings for the frequency of weekend service, comfortable temperatures on the bus, comfort at bus stops, and comfortable bus seats.

Additionally, the survey distinguished between commuter and non-commuter respondents. **Exhibit 3** provides a summary of the average customer service satisfaction score by performance measure by respondent type.

Exhibit 2: Average Customer Satisfaction Score by Performance Measure

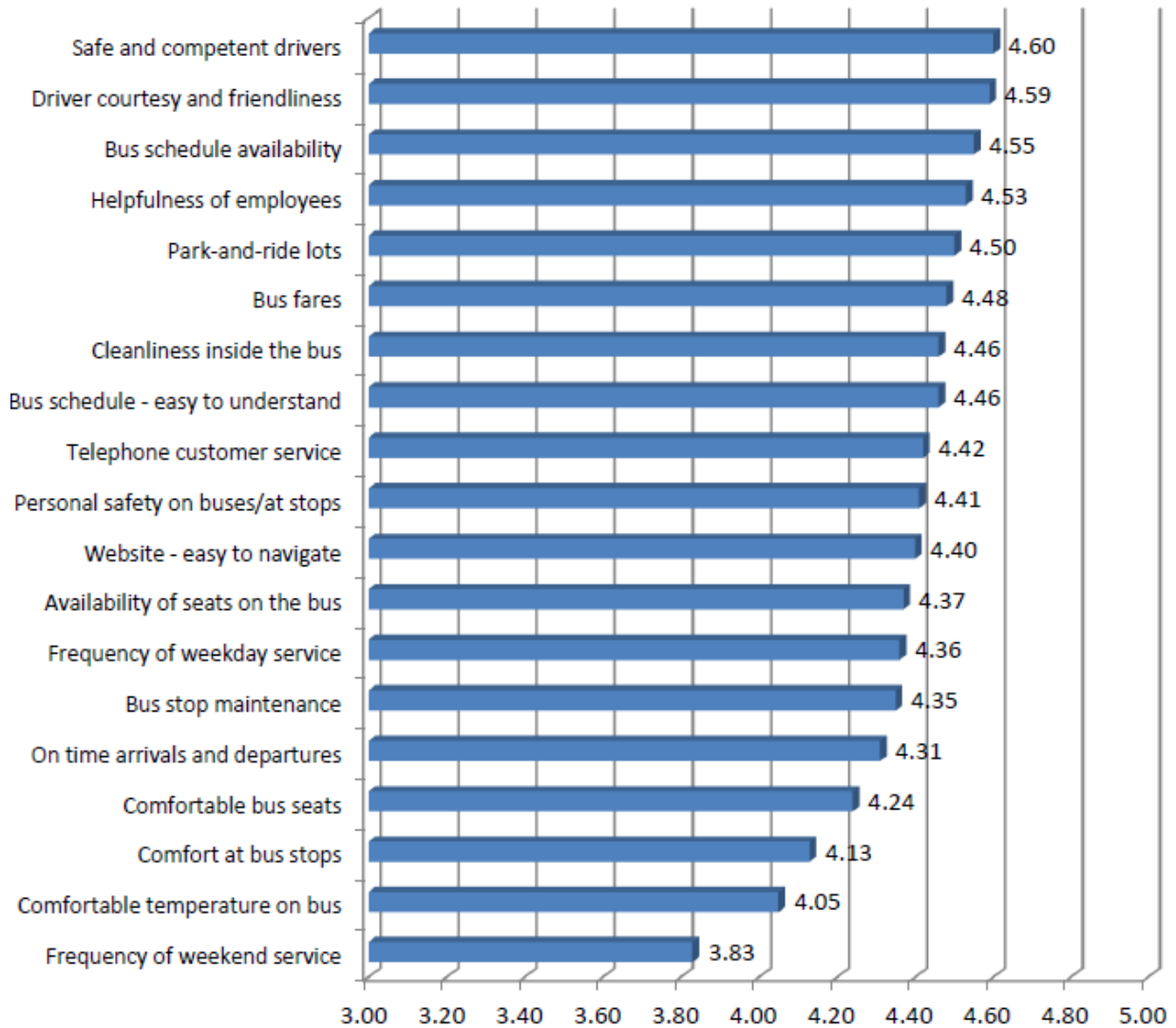
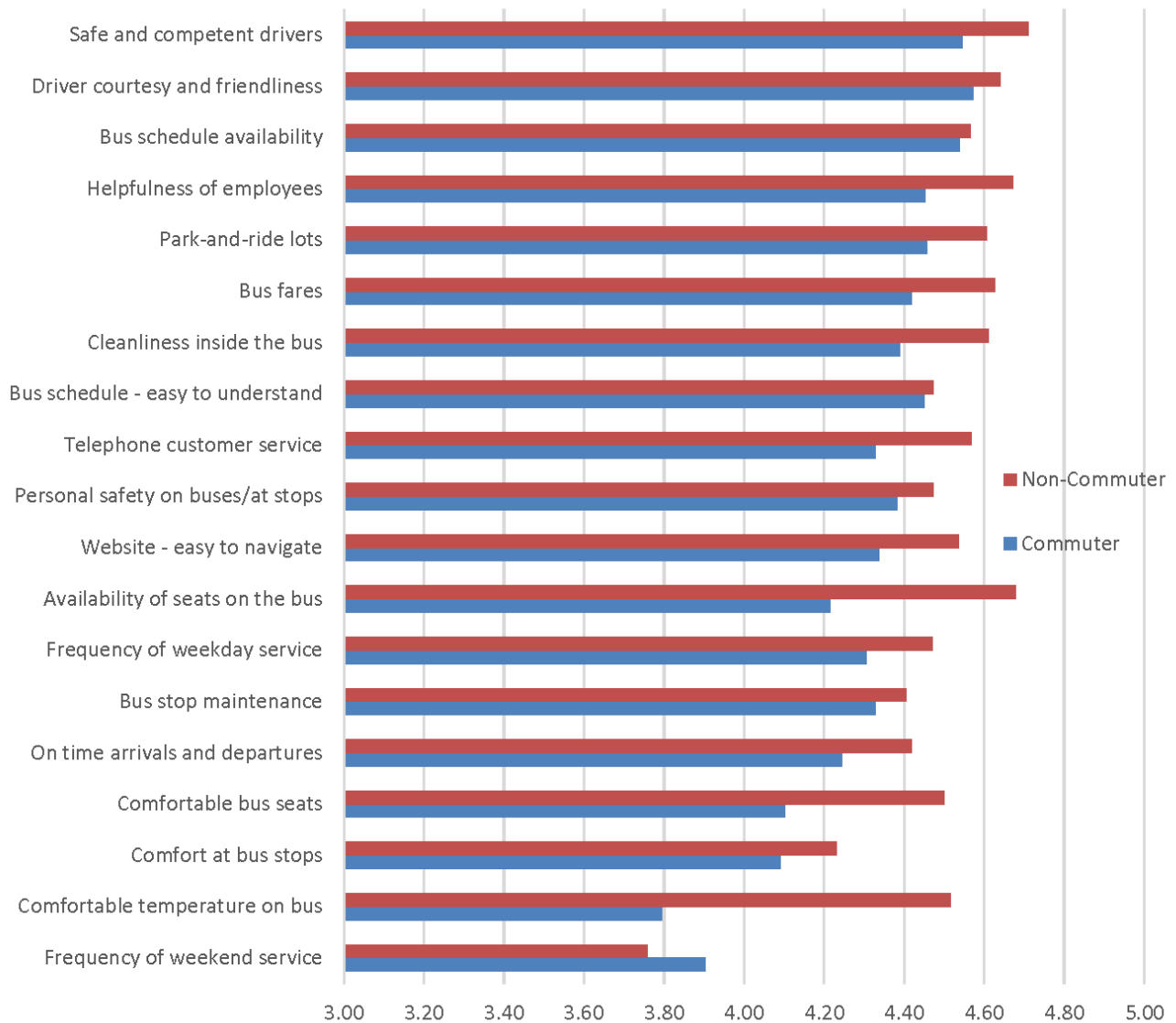


Exhibit 3: Average Customer Satisfaction Score by Respondent Type

The customer satisfaction survey identified several opportunities to improve the customer experience that MMVTA might consider when developing performance standards to improve fixed-route ridership as part of its Action Plan:

1. Assess whether ridership demand could sustain increased weekend service;
2. Assess on-bus temperatures;
3. Improve comfort of seats and at stops; and,
4. Evaluate service to improve on time arrivals and departures.

2014 ACT 44 PERFORMANCE ASSESSMENT

PRIOR REVIEW DETERMINATIONS AND FINDINGS

The 2014 performance review compared MMVTA to a group of peer agencies based on the four performance criteria required by Act 44. MMVTA was found to be “In Compliance” for five performance criteria and “At Risk” for three (**Exhibit 4**).

Exhibit 4: Previous Performance Review Act 44 Comparison Summary

Performance Criteria	FYE*	Determination	Rank (of 14)	Relation to Peer Average	Value	Peer Average
Passengers / Revenue Vehicle Hour	2011	At Risk	13	Worse	7.03	15.32
	Trend	In Compliance	12	Worse	-0.87%	1.15%
Operating Cost / Revenue Vehicle Hour	2011	In Compliance	10	Worse	\$82.30	\$72.17
	Trend	In Compliance	12	Worse	6.63%	4.25%
Operating Revenue / Revenue Vehicle Hour	2011	In Compliance	8	Better	\$13.54	\$13.48
	Trend	In Compliance	14	Worse	-1.24%	7.19%
Operating Cost / Passenger	2011	At Risk	14	Worse	\$11.70	\$5.67
	Trend	At Risk	14	Worse	7.57%	3.10%

*Note: NTD information most current at the time of the peer review was the basis of the single year and trend peer comparisons.

ACTION PLAN AND PERFORMANCE TARGETS

Using the four performance criteria, MMVTA’s fixed-route service was analyzed for FYE 2011 and over a five-year trend period from FYE 2006 to FYE 2011. MMVTA was “In Compliance” for five performance criteria and “At Risk” for three. MMVTA performed better in revenue-based criteria for the single year determination and worse for passenger and cost-based criteria.

MMVTA developed an Action Plan to address opportunities for improvement identified in the 2014 performance review. Among the steps MMVTA took to improve its performance were:

1. Develop reasonable minimum ridership and revenue service standards;
2. Proactively develop a farebox recovery policy and begin its implementation; and
3. Update the transit development plan.

The complete list of MMVTA’s previous Action Plan items and MMVTA’s progress in addressing previously identified opportunities for improvement is provided in **Appendix A: 2014 Performance Review Action Plan Assessment**.

The following performance targets were established with MMVTA:

- Increase passengers per revenue vehicle hour by at least 3.0% per year on average
- Increase operating revenue per revenue vehicle hour by at least 3.0% per year on average
- Contain increases in operating cost per revenue vehicle hour to no more than 3.0% per year on average
- Contain or reduce average operating cost per passenger

As shown in **Exhibit 5**, MMVTA met one out of four performance targets that were established during the 2014 performance review.

Exhibit 5: 2018 Performance Targets

Performance Criteria	2018 Target	2018 Actual	Met Target
Passengers / Revenue Vehicle Hour	8.24	6.62	No
Operating Cost / Revenue Vehicle Hour	\$100.77	\$92.40	Yes
Operating Revenue / Revenue Vehicle Hour	\$17.08	\$15.42	No
Operating Cost / Passenger	\$12.22	\$13.97	No

MMVTA reported progress to PennDOT on the implementation of the 2014 Action Plan. However, the following changes and other factors impacted MMVTA's ability to meet its 2018 targets:

1. **Right-sized Administrative Staff** – MMVTA eliminated two full-time positions (i.e., Maintenance Director and Operations Manager) for an annual cost savings of approximately \$90,000 from salary and fringe benefits. Management determined the size and scale of MMVTA did not warrant in-house staffing for these positions since the contractor is responsible for all fleet maintenance needs and oversees daily operations. MMVTA currently outsources building maintenance not covered by the contractor.
2. **Short-Range Transit Plan Implementation** – In 2015, MMVTA developed a Short-Range Transit Plan in response to the 2014 Action Plan. This plan developed reasonable minimum ridership and revenue standards, reviewed cost recovery of the University of California contract, and assessed existing service. MMVTA implemented the following service adjustments in response:
 - a. Removed two Valley 2 runs;
 - b. Suspended Cal Commuter service during university breaks;
 - c. Changed Commuter A trip from 9:00 AM to 9:10 AM with an arrival time of 11:00 AM weekdays to Pittsburgh; and,
 - d. Eliminated three unproductive Commuter runs due to low ridership:
 - i. 8:05 AM from Pittsburgh to Donora
 - ii. 1:50 PM from Donora to Pittsburgh
 - iii. 5:15 PM from Donora to Pittsburgh
3. **Revised Pittsburgh Fare Structure** – MMVTA revised the fixed-route fare structure for Pittsburgh commuter service in January 2018. MMVTA simplified the Pittsburgh commuter route from multi-zone to two zones. Zone 1 consists of Washington County communities (i.e., Mid Mon Valley area, Crookham and Finleyville) to Pittsburgh and Zone 2 consists of Allegheny County stops to Pittsburgh. Passenger farebox revenues increased by 6% (i.e., \$22,000) in FYE 2018 following this change.

ASSESSMENT

MMVTA met one of four 2018 performance targets. Missed targets are those that are a function of ridership and revenue. From 2012 to 2018, ridership declined by approximately 52,600 trips. MMVTA attributes the decline to a decrease in ridership on the commuter routes and the CalU route. Ridership

declined on the CalU route by 6.2% annually from 2015 to 2018 and by 7.6% for the commuter routes. MMVTA attempted to mitigate the decline in ridership by removing unproductive service, further coordinating with PAAC on pick-up/drop-off times and accepting the regional ConnectCard for fare payment, marketing to students, and simplifying the Pittsburgh commuter fare structure.

The decline in ridership also impacted revenue. From 2015 to 2018 fixed-route revenue decreased by \$81,000. The revenue decline is fully-attributable to declining passenger-paid fares. To offset passenger-fare declines, MMVTA simplified the Pittsburgh commuter fare structure and increased available advertising space for sale in 2018. MMVTA reported a 6% increase in commuter fares for FYE 2018 (\$22,000) following the fare restructuring and approximately \$20,000 in additional advertising space sold. In 2019, a route was developed offering transfers for customers in the Mid Mon Valley to connect via Freedom Transit for trips into central Washington County. The decision to offer transfers between the Mid Mon Valley and central Washington County was made in response to community demand for access to Washington, PA for county services.

Based on the completion of items from the 2014 Action Plan, recent changes in the Pittsburgh commuter fare structure, and coordinating transfers with Freedom Transit, PennDOT concludes that MMVTA demonstrated a good faith effort in achieving its 2018 performance targets.

2019 ACT 44 PERFORMANCE ASSESSMENT

The 2019 performance review compared MMVTA 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 MMVTA management using criteria defined in Act 44 and data from the most recently available National Transit Database (NTD), FYE 2017. The systems identified for peer comparisons include:

1. Washington County Transportation Authority – Washington, PA
2. Fayette Area Coordinated Transportation – Lemont Furnace, PA
3. Kings County Area Public Transit Agency – Hanford, CA
4. Altoona Metro Transit – Altoona, PA
5. New Castle Area Transit Authority – New Castle, PA
6. Midland-Odessa Urban Transit District – Midland, TX
7. Fredericksburg Regional Transit – Fredericksburg, VA
8. Golden Crescent Regional Planning Commission – Victoria, TX
9. C-TRAN – Elmira, NY
10. Mid-Ohio Valley Transit Authority – Parkersburg, WV
11. Billings Metropolitan Transit – Billings, MT

Results of the 2019 MMVTA analysis and peer comparison are presented in **Exhibit 6**. MMVTA was found to be “In Compliance” for seven measures and “At Risk” for one. The detailed data used to develop the peer comparison summary is presented in **Appendix B: Peer Comparisons**.

Exhibit 6: Current Performance Review Act 44 Peer Comparison Summary

Performance Criteria	FYE	Determination	Rank (of 12)	Relation to Peer Average	Value	Peer Average
Passengers / Revenue Hour	2017	In Compliance	10	Worse	6.92	9.89
	Trend	In Compliance	3	Better	0.04%	-3.04%
Operating Cost / Revenue Hour	2017	In Compliance	8	Worse	\$92.63	\$84.81
	Trend	In Compliance	6	Worse	1.88%	1.46%
Operating Revenue / Revenue Hour	2017	In Compliance	3	Better	\$15.60	\$11.85
	Trend	In Compliance	7	Better	1.76%	1.01%
Operating Cost / Passenger	2017	At Risk	11	Worse	\$13.39	\$9.42
	Trend	In Compliance	4	Better	1.83%	4.82%

ASSESSMENT

The 2019 review found MMVTA to be “At Risk” for operating cost per passenger for the single-year FYE 2017 determination. MMVTA performed better than the peer group for operating revenue per revenue vehicle hour for the single-year FYE 2017 determination and five-year trends for passengers per revenue vehicle hour, operating revenue per revenue vehicle hour, and operating cost per passenger.

2023 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 are intended to improve both the effectiveness and efficiency of service delivery. Act 89 requires agencies to maintain a fare policy to match fares to the rate of inflation, which ensures that revenue recovery keeps pace with anticipated 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 2019 performance review noted that MMVTA outperformed most of its peers in maintaining ridership over the five-year trend period where many peers experienced decline. Additionally, MMVTA contained increases in cost per passenger for the five-year trend better than the peer group but is “At Risk” for the single-year (FYE 2017) determination. MMVTA should continue to work toward achieving its FYE 2023 targets, focusing on efforts to increase ridership and contain operating costs.

The following performance targets were established in consultation with MMVTA:

- Increase passengers per revenue vehicle hour by at least 1.0% per year on average
- Contain operating cost per revenue vehicle hour increases to no more than 3.0% per year on average
- Increase revenue per revenue vehicle hour by at least 3.0% per year on average
- Contain operating cost per passenger trip increases to no more than 2.0% per year on average

Future year targets are based on the most recently available fiscal year-end data (i.e., FYE 2018). MMVTA should work to achieve these targets, as shown in **Exhibit 7**, over the next five years to ensure continued eligibility for full Section 1513 funding.

Exhibit 7: FYE 2023 Act 44 Performance Targets

Performance Criteria	Fiscal Year End (FYE)			Target Annual Increase
	2017 Actual	2018 Actual	2023 Target	
Passengers / Revenue Vehicle Hour	6.92	6.62	6.95	1.0%
Operating Cost / Revenue Vehicle Hour	\$92.63	\$92.40	\$107.11	3.0%
Operating Revenue / Revenue Vehicle Hour	\$15.60	\$15.42	\$17.87	3.0%
Operating Cost / Passenger	\$13.39	\$13.97	\$15.42	2.0%

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 C: 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 to deliver service more efficiently and effectively. It is important that service is both sensitive and 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 which have the potential to maximize productivity, to control operating costs, and 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 the convenience of MMVTA, Action Plan templates have been included in **Appendix C: Action Plan Template** (see pg. 36). 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. MMVTA holds a Transportation 101 class that educates public and human service agencies on transportation services offered in Washington and Westmoreland counties. This class expands the community profile of MMVTA by educating agencies that interact with existing and potential new riders of available transportation services.
2. MMVTA works with local utility companies and the U.S. Postal Service to send out rider and non-rider surveys to targeted communities. This type of direct-to-customer survey method can reach a diverse audience within MMVTA's service area without requiring in-person participation.

ELEMENTS TO ADDRESS IN PART 1 OF THE ACTION PLAN (P. 36)

1. MMVTA provides fixed-route service in the Monessen Urbanized Area, which is comprised of 21 Mid Monongahela River Valley communities located in Washington, Westmoreland, and Fayette Counties. As of April 2019, MMVTA passengers will be able to transfer onto Freedom Transit, which provides fixed-route service within central Washington County. This new service connects Freedom Transit's County Line B Route to MMVTA's Commuter A and Valley 1 routes and increases connectivity between the Mon Valley area and Washington, PA. MMVTA should explore additional opportunities for neighboring transit system connections by:
 - a. **Monitoring ridership on routes offering transfers to neighboring transit systems;**

- b. **Assessing demand for potential connections, and;**
 - c. **Identifying opportunities for partnerships to establish new transfer points.**
2. MMVTA uses social media to inform the public with rider alerts detailing service delays or changes, upcoming agency events, and transit-related news in the Mon Valley area. Some agencies have experienced success with marketing campaigns that use social media when targeting specific groups (e.g., university students). If invested in developing the Agency's social media presence, MMVTA should **develop a social media strategy that:**
- a. **Includes a social media policy or terms of use to help safeguard the agency for internal and external use;**
 - b. **Evaluates the different social media platforms and select a platform(s) that best suits the goals of the Agency, and;**
 - c. **Set goals and objectives for the social media platform(s) used and/or the marketing director (e.g., increase followers by 10 people a month AND/OR the marketing director sets a goal of interacting with five potential customers a month).**

OPPORTUNITIES TO INCREASE FIXED-ROUTE REVENUES

BEST PRACTICE

1. MMVTA contracts with a third-party company to sell advertising space on the fleet. Successful advertising sales accounted for 12% of total revenue as of FYE 2018. The decision to outsource advertising sales resulted in additional revenue without increasing operating costs.

ELEMENTS TO ADDRESS IN PART 2 OF THE ACTION PLAN (P. 36)

1. MMVTA's Farebox & Fare Policy Handbook was updated in January of 2018. The Handbook covers the fare and zone cost structure, ConnectCard purchase locations, and instructions for drivers on collecting fares. Act 89 requires agencies to maintain a fare policy to match fares to the rate of inflation; ensuring that revenue recovery keeps pace with anticipated increases in operating costs. MMVTA **update the Handbook to include a policy that ensures fares keep pace with inflation** to meet the requirements of Act 89.

OPPORTUNITIES TO CONTROL OPERATING COSTS

BEST PRACTICE

1. None.

ELEMENTS TO ADDRESS IN PART 3 OF THE ACTION PLAN (P. 37)

1. As invoices are received, MMVTA's Finance Director collects, tracks, and pays them. While this process is efficient, it lacks adequate oversight. To increase oversight and quality control, MMVTA should **develop formal procedures for tracking and paying invoices that segregate invoice payment duties amongst employees.** For example, the receptionist would open the bill and mark on it the date it was received. Then, the Executive Director would approve the bill for payment. Finally, the Finance Director would input the bill into

the accounting software including the bill date, vendor, due date and amount. Diversifying the segregation of duties for processing and approving bills reduces the risk of misappropriation and ensures invoices are paid when due.

2. MMVTA contracts for fixed-route transportation service. The scope of service establishes operating, maintenance, and performance standards the contractor must adhere to with clauses for liquidated damages for non-compliance. MMVTA performs spot checks as needed but lacks documentation and formalized procedures for oversight. Further, record keeping can be used by the agency for risk prevention / as a mitigation strategy in the event of an accident. MMVTA should **develop and implement official procedures for contractor oversight** that include:
 - a. **Documenting and maintaining records of all contractor interactions;**
 - b. **Developing a schedule for site visits; and,**
 - c. **Ensuring performance data used to assess vehicle maintenance and adherence to operating standards is documented by the contractor and provided to MMVTA.** For example, MMVTA could require the contractor to submit a quarterly report detailing operating statistics for fixed-route service that includes all measurements and statistics as required by Act 44.

OTHER OPPORTUNITIES TO IMPROVE PERFORMANCE

BEST PRACTICES

1. MMVTA's contractor developed a rewards program that incentivizes driver safety with contests and gift cards. The contractor reviews near-miss data captured by fleet cameras to verify safe driving behavior and drivers compete for the longest streak without near misses or incidents within a period.

ELEMENTS TO ADDRESS IN PART 4 OF THE ACTION PLAN (P. 38)

1. MMVTA has not held Board training in recent years and experienced significant turnover since the 2014 performance review. MMVTA **should increase the frequency of Board training sessions**. Board training could include online training or bringing in a representative from PPTA or PennDOT for a day-long workshop.
2. MMVTA's succession plan broadly outlines temporary staffing strategies for short- and long-term absences of the Executive Director. MMVTA should **expand the succession plan to include a cross-training policy for all employees and a timeline for the Board to follow when hiring new employees**.
3. Based on a review of Board materials, there is little evidence that MMVTA monitors and reports on progress towards achieving its Act 44 performance targets and implementation of the Action Plan. Act 44 targets and Action Plan action items are intended to be used to promote gains in service efficiency and effectiveness. MMVTA should **report on Act 44 performance targets and the Action Plan to the Board as part of regular meetings**.

Furthermore, MMVTA should **track additional measures of service efficiency to be reported to the Board** such as:

- a. **Mechanical breakdowns every 1,000 vehicle miles (maintenance);**
 - b. **Complaints every 1,000 passenger trips (customer service);**
 - c. **On-time performance (operations); and,**
 - d. **Farebox recovery (revenue).**
4. Management indicated that MMVTA will develop a strategic plan in 2019 as an update to the 2015 Short Range Transit Plan. The plan should serve as a framework for the Board to monitor agency performance and guide management-driven solutions to balance costs with service needs. MMVTA should **consider the following elements when developing the strategic plan:**
- a. **The long-term vision of a sustainable agency in line with an implementable transit development plan (i.e., TDP) and mission statement;**
 - b. **Success markers (i.e., goals) of sustainability;**
 - c. **Actionable steps (i.e., objectives) to achieve and maintain sustainability;**
 - d. **Metrics that will be used to monitor progress (e.g., performance scorecard including Act 44 performance targets); and,**
 - e. **A timeline to guide the integration of technology investments.**
5. MMVTA has limited administrative staff, consisting of the Executive Director, Finance Director, Marketing & Planning Director, and the Receptionist. MMVTA is staffed appropriately for an agency of its size because it contracts for fixed-route and non-fixed route service. MMVTA's proximity to CalU and the Douglas Education Center offers the opportunity to partner with local universities for talent given limited agency resources. MMVTA should **explore partnerships with local universities to develop and implement an internship program that aligns with agency needs (e.g., marketing, graphic design, data analysis, surveying, etc.).** This would provide MMVTA additional staff capacity at a minimal cost.
6. The cameras on MMVTA's buses are "G-force activated." If a bus hits the brakes suddenly or accelerates quickly, the cameras will record what is known as a "near-miss." MMVTA's fixed-route contractor records the number of G-force activations. MMVTA should **develop a safety target and performance metric based on "near-miss" data.**

FINANCIAL REVIEW

This financial review focuses on a high-level snapshot and trend indicators to determine if additional follow up by PennDOT is warranted, through the review of audit reports, other financial reports, and budgets. The review assesses the financial status based on:

- High-Level Indicators of Financial Health
- Total Public Transportation Operational Expenditures and Funding
- Fixed-Route Funding
- Paratransit Funding
- Source: PennDOT dotGrants Reporting System.
- Balance Sheet Findings

HIGH-LEVEL INDICATORS OF FINANCIAL HEALTH

As shown in **Exhibit 8**, MMVTA has 16.3% in total carryover subsidies to total annual operating cost. These reserves account for available liquidity in case of unexpected cost increases. MMVTA does not have a line of credit. MMVTA's total carryover subsidies have increased in recent years. MMVTA received their required local match to 1513 state operating subsidy for all analyzed years (2012-2018). MMVTA is below the typical liquidity target (i.e., 25% combined carryover subsidies and/or credit to annual operating costs) in case of unexpected cost increases. However, since MMVTA contracts for service delivery, this does not impact MMVTA's cash flow since contractor payments can be made when grant payments are received. As such, systems with contracted service are asked to maintain a total carryover subsidy per annual operating cost target of 16%+ or 2 months reserve.

TOTAL PUBLIC TRANSPORTATION OPERATIONAL EXPENDITURES AND FUNDING

MMVTA's operating budget decreased slightly from \$4.06 million in FYE 2014 to \$3.97 million in FYE 2018 (**Exhibit 9**). The decline in MMVTA's fixed-route budget can be attributed to lower fuel prices and a slight decrease in revenue service since FYE 2014. MMVTA's fixed-route budget remains relatively stable because fixed-route service is contracted. The fixed-route contract includes operations and maintenance. MMVTA covers all other costs including fuel, utilities, parts, and administration. Approximately 99.6% of MMVTA's operational expenses are for fixed-route service. The remaining operational expenses (0.4%) are for ADA paratransit service as shown in **Exhibit 10**.

MMVTA's operating funds come from a variety of sources including state funds, federal funds, local funds, passenger fares, and advertising. MMVTA has used state, federal and local funds to finance both its fixed-route and paratransit operations (**Exhibit 11**). Combined, federal and state subsidies are the largest share of income for MMVTA, accounting for 81.5% of total operating income. Passenger fares, advertising revenue, and other local funds are the remaining funding sources, representing approximately 18.5% of total operating income (**Exhibit 12**).

Exhibit 8: High-Level Financial Indicators

FYE 2018 Indicator	Value	Assessment Criteria / Rationale	Source
Total Carryover Subsidies / Annual Operating Cost	16.3%	A 16%+ target is set for contracted service agencies since contractor payments can be made when grant payments are received. This target demonstrates liquidity to account for unexpected cost increases or service changes without the need to incur interest fees from loans.	FYE 2018 Audit
Credit available/ Annual Payroll	0.0%	Only necessary if combined carryover subsidies are less than their target. This ensures that the agency maintains sufficient cash flow/liquidity to pay all current bills.	FYE 2018 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 2018
Accounts Payable (AP) 90+ days	0.0%	Target should be 0% over 90 days. Larger values indicate cash flow concerns.	MMVTA reported value
Accounts Receivable (AR) 90+ days	0.0%	Target should be 0% over 90 days. Larger values can cause cash flow problems.	MMVTA reported value
Debt / Annual Operating Cost	0.0%	Target should be 0%. Low debt amounts reduce borrowing costs.	FYE 2018 Audit

Exhibit 9: Public Transportation Operating Expense by Service Type

Service Type (In Millions)	FYE 2014	FYE 2015	FYE 2016	FYE 2017	FYE 2018
Fixed Route	\$4.04	\$3.97	\$4.04	\$4.01	\$3.95
Paratransit	\$0.01	\$0.01	\$0.01	\$0.02	\$0.02
Total*	\$4.06	\$3.98	\$4.05	\$4.02	\$3.97

* May not add due to rounding.

Exhibit 10: Public Transportation Operating Expense Trends by Service Type

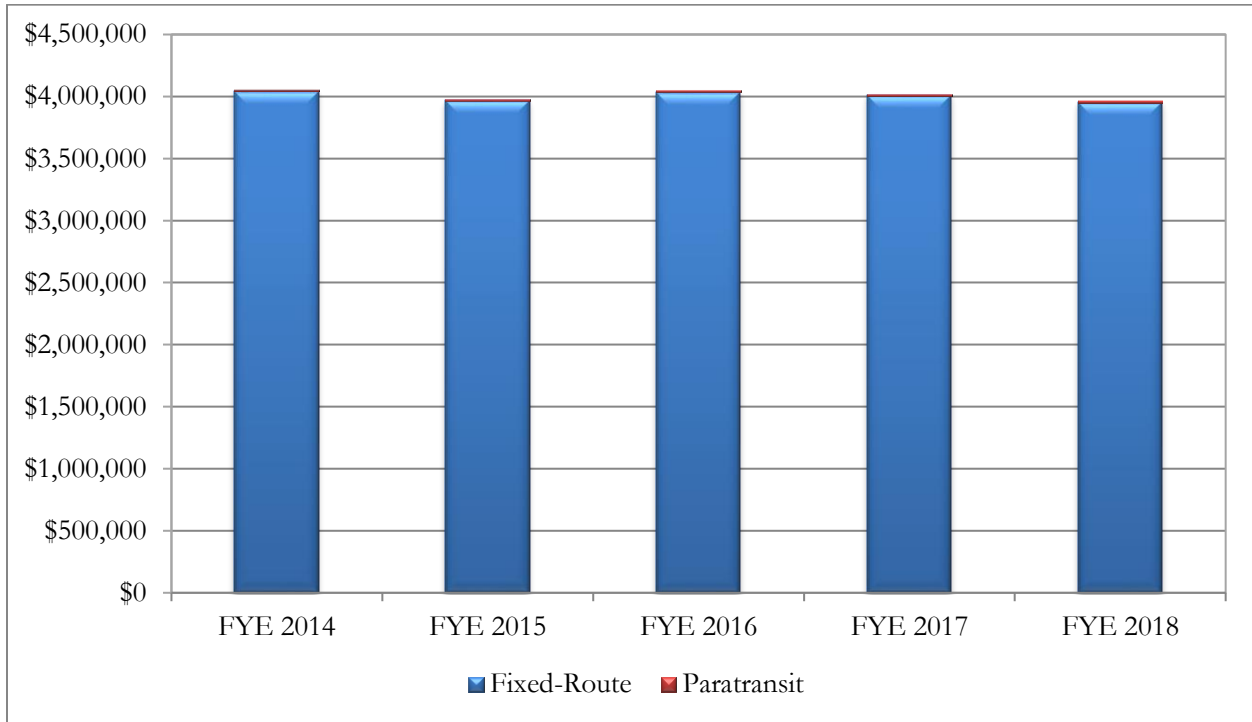
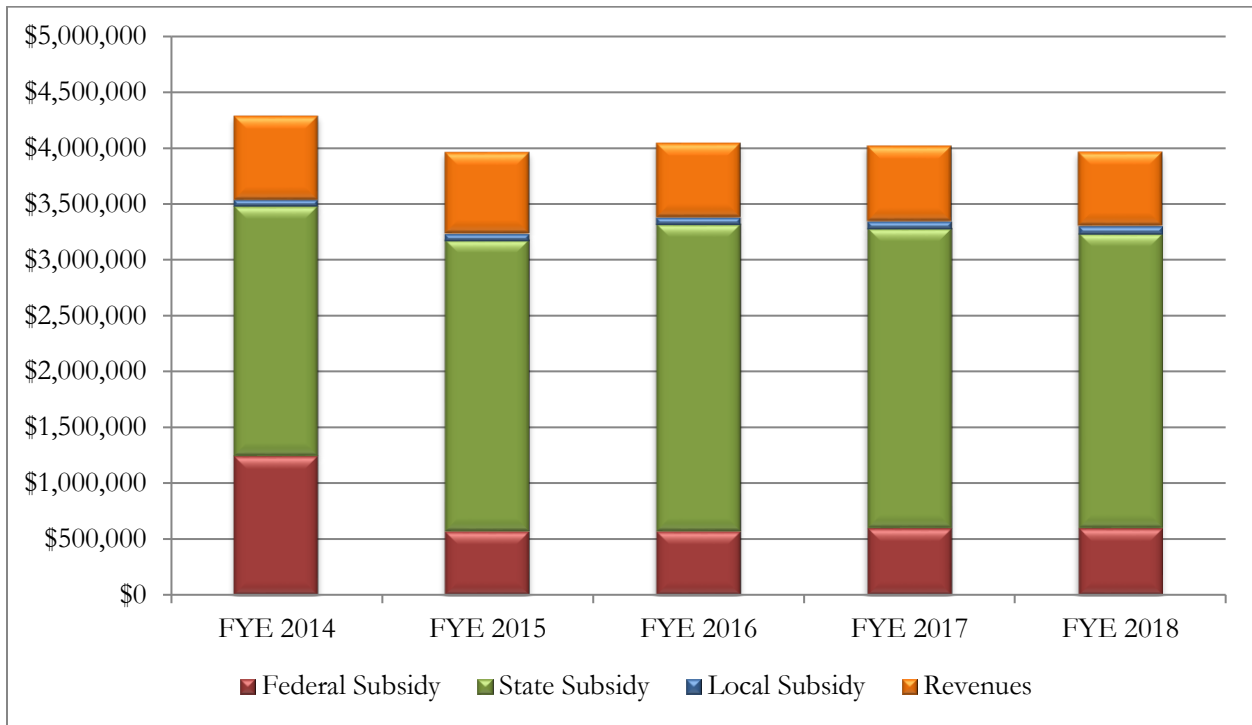


Exhibit 11: Percent of Total Public Transportation (Fixed-Route + Paratransit) Operating Budget by Funding Source

Funding Source	FYE 2014	FYE 2015	FYE 2016	FYE 2017	FYE 2018
Federal Subsidy	29.0%	14.4%	14.1%	14.9%	15.1%
State Subsidy	52.1%	65.6%	67.7%	66.5%	66.3%
Local Subsidy	1.4%	1.6%	1.6%	1.7%	1.9%
Revenues	17.6%	18.3%	16.5%	16.8%	16.7%
Local Subsidy / State Subsidy	2.7%	2.4%	2.4%	2.6%	2.8%

Exhibit 12: Total Public Transportation (Fixed-Route + Paratransit) Operating Budget by Funding Source



FIXED-ROUTE FUNDING

Fixed-route funding is about 99.6% of MMVTA's public transportation operation and comes from general revenues and government subsidies. Direct passenger fares represent between 14.4% and 16.6% of total operating funding (**Exhibit 13**). Advertising revenue increased by approximately 20,000 from FYE 2017 to FYE 2018. For FY 2018, advertising accounted for 12.0% of revenue. Based on the FYE 2014 to FYE 2018 dotGrants reporting, MMVTA operated using current year funding with \$620,093 in state funds being carried over in FYE 2018 and \$24,620 in local carryover funds available.

Exhibit 13: Fixed-Route Funding

Funding Source	FYE 2014	FYE 2015	FYE 2016	FYE 2017	FYE 2018
Revenues					
Passenger Fares	\$657,714	\$659,637	\$604,787	\$605,370	\$476,500
Advertising	\$59,157	\$54,903	\$50,788	\$59,573	\$79,235
Organization-Paid Fares ¹	\$0	\$0	\$0	\$0	\$93,720
Other- (Rental Income)	\$9,504	\$9,882	\$9,504	\$9,504	\$9,504
Other- (Refund)	\$23,675	\$0	\$0	\$0	\$0
Other- (Asset Disposal Proceeds)	\$0	\$7,176	\$0	\$0	\$0
Other- (Incidental Use/Insurance)	\$0	\$8,986	\$1,296	\$0	\$0
Other- (Interest)	\$0	\$0	\$136	\$287	\$352
Subtotal	\$750,050	\$740,584	\$666,511	\$674,734	\$659,311
Subsidies					
Federal Operating Grant	\$750,000	\$572,000	\$572,000	\$600,000	\$600,000
Act 44 (1513) State Prior	\$0	\$351,212	\$276,959	\$261,179	\$373,744
Act 44 (1513) State Current	\$2,225,051	\$2,240,772	\$2,453,326	\$2,399,883	\$2,245,467
Municipal Prior	\$153	\$0	\$0	\$0	\$0
Municipal Current	\$60,310	\$63,486	\$66,402	\$69,647	\$73,168
Act 44 (1513) Advertising	\$0	\$0	\$0	\$0	\$0
Special- (Federal)	\$491,230	\$0	\$0	\$0	\$0
Special- (State)	\$0	\$0	\$0	\$0	\$0
Special- (Local)	\$0	\$0	\$0	\$0	\$0
Subtotal	\$3,526,744	\$3,227,470	\$3,368,687	\$3,330,709	\$3,292,379
Total Funding	\$4,276,794	\$3,968,054	\$4,035,198	\$4,005,443	\$3,951,690
Passenger Fares/ Total Funding	15.4%	16.6%	15.0%	15.1%	14.4%

Source: PennDOT dotGrants Reporting System.

¹ Beginning in FY 2018, transit agencies were required to separate fare revenue reporting directly by third-party organizations.

PARATRANSIT FUNDING

Paratransit funding is about 0.4% of MMVTA's public transportation operation and consists of ADA service that is contracted through Freedom Transit. Local and state subsidies, as well as passenger fares, are used to finance paratransit operating costs (**Exhibit 14**). MMVTA's paratransit program increased from \$10,510 in FYE 2014 to \$15,679 as of FYE 2018. MMVTA's paratransit budget is significantly smaller than the fixed-route budget. Total ADA passenger trips decreased from 1,177 in FYE 2014 to 641 in FYE 2018 (**Exhibit 15**).

Exhibit 14: Paratransit Funding by Source

Category	FYE 2014	FYE 2015	FYE 2016	FYE 2017	FYE 2018
Revenues					
Passenger Fares	\$3,149	\$2,200	\$2,280	\$1,960	\$1,704
Advertising	\$598	\$556	\$513	\$602	\$800
Other – Rental Income	\$96	\$96	\$96	\$96	\$96
Subtotal	\$3,843	\$2,852	\$2,889	\$2,658	\$2,600
Subsidies					
Federal Operating Grant	\$0	\$0	\$0	\$0	\$0
Act 44 (1513) State Prior	\$0	\$0	\$0	\$0	\$0
Act 44 (1513) State Current	\$6,667	\$9,560	\$10,533	\$14,150	\$12,754
Municipal Prior	\$0	\$0	\$0	\$0	\$0
Municipal Current	\$0	\$0	\$258	\$346	\$325
Act 44 (1513) Advertising	\$0	\$0	\$0	\$0	\$0
Subtotal	\$6,667	\$9,560	\$10,791	\$14,496	\$13,079
Total Funding	\$10,510	\$12,412	\$13,680	\$17,154	\$15,679

Source: PennDOT dotGrants Reporting System.

Exhibit 15: Paratransit Operating Statistics

Operating Category	FYE 2014	FYE 2015	FYE 2016	FYE 2017	FYE 2018
Paratransit Operating Statistics					
Total ADA Trips	1,177	667	847	639	641
Total Miles ²	4,871	9,142	6,523	7,081	6,413
Total Hours	462	553	415	421	365
VOMS ³	75	1	1	1	1

Source: PennDOT dotGrants Reporting System.

² MMVTA entered into a new agreement with WCTA that changed the fee per passenger to be on a revenue mile basis. Though ADA ridership went down, changes in passenger trip destinations increase the average cost per passenger trip.

³ Prior to FYE 2015, NTD required MMVTA to report total ADA VOMS by Freedom Transit. In FYE 2015, NTD changed how MMVTA reports ADA VOMS to more accurately reflect MMVTA's smaller service area compared to Freedom Transit's total coverage of Washington County.

BALANCE SHEET FINDINGS

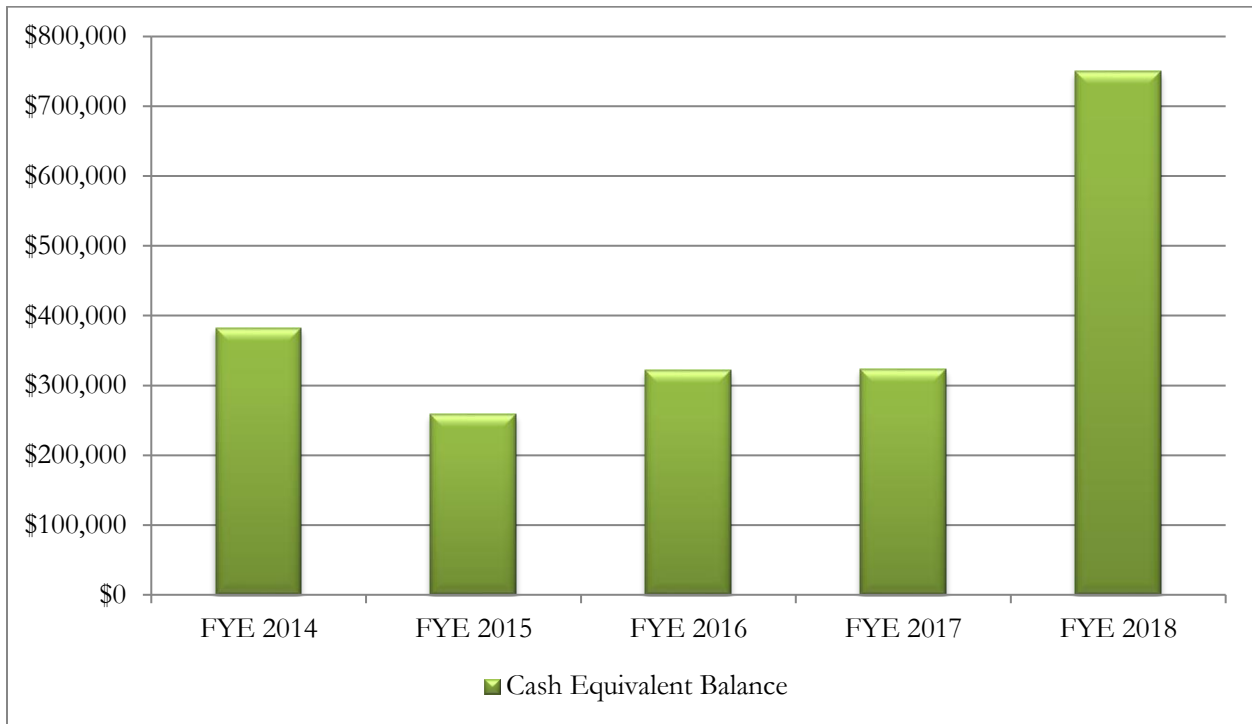
Review of balance sheets from MMVTA shows that in FYE 2018, the agency increased available cash on hand (**Exhibit 16** and **Exhibit 17**). Net current cash equivalent balance reported as of FYE 2014-2018 was \$750,194. MMVTA maintains a cash equivalent to 18.9% of total operating expenses as of FYE 2018. The FYE 2018 audit captured \$3.6 million in accounts payable, mostly attributable to incoming capital grants. MMVTA does not maintain a line of credit as of FYE 2018.

Exhibit 16: Balance Sheet Summary (FYE 2014 – FYE 2018)

Balance Sheet Report	FYE 2014	FYE 2015	FYE 2016	FYE 2017	FYE 2018
Current Assets					
Cash Equivalent Balance	\$381,900	\$258,421	\$321,629	\$323,379	\$750,194
Investments	\$0	\$0	\$0	\$0	\$0
Grant Receivable (incl. capital)	\$0	\$0	\$94,280	\$114,784	\$3,443,233
Other Accounts Receivable	\$20,001	\$63,680	\$34,600	\$13,202	\$16,096
Restricted Assets: Cash	\$0	\$0	\$0	\$0	\$0
Inventory Value	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500
Pre-paid Expenses	\$2,100	\$11,413	\$18,480	\$11,113	\$9,013
Current Liabilities					
Accounts Payable	\$233,825	\$230,690	\$255,280	\$235,445	\$3,633,280
Accrued Expenses	\$6,969	\$6,145	\$10,486	\$0	\$0
Deferred Revenue	\$100,352	\$312,775	\$290,001	\$398,169	\$644,713
Line of Credit	\$0	\$0	\$0	\$0	\$0
Total Operating Expense	\$4,055,250	\$3,980,466	\$4,048,878	\$4,022,597	\$3,967,369
(Cash Eqv. Bal. & Restricted Cash)/Total Operating Exp.	9.4%	6.5%	7.9%	8.0%	18.9%
Line of Credit/Annual Payroll	0.0%	0.0%	0.0%	0.0%	0.0%
Current Assets	\$406,501	\$336,014	\$471,489	\$464,978	\$4,221,036
Current Liabilities	\$341,146	\$549,610	\$555,767	\$633,614	\$4,277,993
Net Current Assets	\$65,355	-\$213,596	-\$84,278	-\$168,636	-\$56,957

Source: Annual Audit Reports and dotGrants

Exhibit 17: End-of-Year Cash Balance (FYE 2014 – FYE 2018)



ASSESSMENT

MMVTA currently has a balanced operating budget. Operating cash reserves have increased since 2014. Noteworthy elements of MMVTA’s financial condition are:

- MMVTA has \$24,620 in local and \$620,093 in state carryover funds in FYE 2018
- Combined carryover subsidies amount to 16.3% of total operating costs
- MMVTA received its full local match as required by Act 44
- Accounts payable and receivable amounts are negligible
- MMVTA does not maintain a line of credit

Management should continue taking appropriate actions to manage costs, achieve farebox recovery goals, and maintain cash reserves to preserve MMVTA’s overall financial health.

APPENDIX A: 2014 PERFORMANCE REVIEW ACTION PLAN ASSESSMENT

Last Updated September 14, 2014

Category	Suggested Action	Corrective Action	Observation
1. Ridership	Develop reasonable minimum ridership and revenue service standard for its routes and runs	MMVTA has started this process by first examining average loads for commuter services on weekdays for FY 14-15. All runs that fell below the average were eliminated. To further enhance this action, MMVTA has engaged in a Short-Term Transit Plan (STTP) initiative with SPC. The STTP will address not only ridership and revenue service standards but the scope includes a full determination of MMVTA's fixed-route services to provide a comprehensive understanding of the existing services, including ridership levels and patterns, route structure, operating conditions, and service performance to improve and meet targeted goals outlined in the Performance Review.	Estimated completion: 6/1/2015
1. Ridership	Complete customer satisfaction survey	MMVTA will include this recommendation into the short-term transit plan outreach	Estimated completion: 12/2014
1. Ridership	Conduct market analysis for customer potential	MMVTA will include this recommendation into the short-term transit plan to ensure projected routing and current routing meets market needs	Estimated completion: 5/2015
1. Ridership	Evaluate bus branding and advertising	MMVTA has determined that as vehicles are replaced a uniformed paint scheme will be implemented to match current low floor vehicles. The scheme includes Authority colors, logos, contact information and adequate space to continue advertising program with little interference to the	Complete

Category	Suggested Action	Corrective Action	Observation
		Authority brand while maintaining space for the important revenue source.	
1. Ridership	Update transit development plan	Currently underway with SPC	Estimated completion: 6/2015
1. Ridership	Updated marketing plan	Much of the marketing for FY 14-15 will entail outreach for the short-range transit plan and public launch of real-time information. The MMVTA Marketing Director will include a fully drafted marketing plan for new services based on the short-range transit plan for FY 15-16	Estimated completion: July 2015 and ongoing throughout each FY
1. Ridership	Coordinate schedules and system maps with PAAC	Currently underway with PAAC. Recently, on behalf of the regional providers, MMVTA requested regional signage at shared Downtown bus stops and now working with PAAC to pinpoint appropriate map and schedule to share on each other's websites	Estimated completion: 12/2014
2. Revenue	Proactively develop a farebox recovery policy and begin its implementation	Completed and farebox recovery and fares are tracked monthly and then the action for adjustment to occur on an annual basis	Completed
2. Revenue	Advance regional fare card and regional farebox revenue sharing plan	All regional participants in the ConnectCard system have adopted regional clearing house agreements; fare equipment maintenance agreements and will soon have adopted regional inoperability agreements with the Port Authority. MMVTA is currently piloting ConnectCards with approximately 50 customers and tentatively plans full production launch Winter 2015	Estimated completion: Initial completion target Spring 2015 – MMVTA projects this to be an ongoing and evolving joint regional project
2. Revenue	Review cost recovery of University of California contract	Currently underway with SPC through the Short-Term Transit Plan	Estimated completion: 6/2015

Category	Suggested Action	Corrective Action	Observation
3. Operating Cost	Re-evaluate span of service and days of the week that service is provided for commuter routes	Currently underway with SPC through the Short-Term Transit Plan. Preliminary service changes occurred July 1, 2014. More system-wide and detailed changes to occur for FY 15-16	Estimated completion: 6/2015
4. Other	Train local first responders on how to enter and disable MMVTA vehicles	MMVTA will coordinate with the current purchased transit contractor's safety manager to offer such training	Estimated completion: Initial completion August 2015. Ongoing yearly or more often as determined
4. Other	Conduct routine Board training	MMVTA will begin this process immediately pending September Board merger vote	Estimated completion: Ongoing
4. Other	Establish Citizens' Advisory Board	MMVTA will establish an advisory board through the short term transit plan process and maintain the board's presence at least on a quarterly basis	Estimated completion: Ongoing
4. Other	Develop a strategic plan	MMVTA to request PennDOT technical assistance in drafting a strategic plan	Estimated completion: Initial plan, July 2015 and ongoing
4. Other	Develop an unconstrained capital needs plan	Drafting underway	Estimated completion: November 2014 – Ongoing updates when needed
4. Other	Implement an asset management system	MMVTA is currently working with the purchased transportation contractor by contract is charged with maintaining the large majority of MMVTA assets to draft a management tool. This tool will include scheduled PMs for all assets and report card	Estimated completion: November 2014 – Ongoing updates when needed

Category	Suggested Action	Corrective Action	Observation
4. Other	Conduct annual employee satisfaction surveys	The MMVTA Executive Director will work with the MMVTA Board Executive Committee and Board HR Committee to revamp the employee review process and to include in the process a yearly satisfaction survey	Estimated completion: June 201 and yearly thereafter
4. Other	Re-evaluate governance structure, representation, and oversight of management	<p>MMVTA Board is set to take official action on Washington County merger/consolidation in September 2014. Therefore, this opportunity will be achieved through the creation of a new entity, governance structure, and bylaws.</p> <p>However, if this does not occur, MMVTA will immediately begin implementing Board training by making use of PPTA resources. Establishing a new Board bylaws committee along with the Authority's solicitor to address bylaws, minimum amount of annual local funds for each member, local match formula calculation and possible provision to remove member communities that do not meet the minimum local match contribution as allowable by law.</p> <p>Beginning in the late third quarter of 2015, if MMVTA's current structure remains, the Executive Director will meet with the Board Executive Committee and HR Committees respectively to draft goals and objectives for the organization for FY 15-16 and begin the process of strategic planning. With the HR Committee, a new Executive Director review process will be drafted and adopted by the Board for July 1, 2015.</p>	Ongoing

Category	Suggested Action	Corrective Action	Observation
4. Other	Evaluate items that have been deferred in expectation of regional consolidation and implement a plan to proceed with addressing items that have been deferred	<p>For FY 14-15 MMVTA has implemented the Fare Policy and will review fares collected and charged annually prior to the beginning of each fiscal year to determine if fare adjustments are required. A fare adjustment to commuter services of 10 cents per zone was added. MMVTA projects multiple years of small increment increases to the fare structure including local fares to keep pace with inflation and increases on cost to deliver service.</p> <p>A key to this opportunity is the short-term transit plan that is currently being produced in conjunction with SPC. This STTP will address all aspects of service delivery and will strive to improve services at the same time creating a cash reserve.</p>	Ongoing
4. Other	Develop performance targets for all key agency functions	The management team will begin drafting formal monitoring and performance target for all key agency functions into Fiscal Year Goals. MMVTA to also request PennDOT technical assistance for Strategic Planning drafting.	Estimated completion: Ongoing yearly goals starting FYE 15-16

APPENDIX B: PEER COMPARISONS

Comparison of MMVTA 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 2017 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 definition of the variables used in the calculations is 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 of service provided 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 fall into two categories: “In Compliance” and “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 2017 Single Year		5 Year Change Since FYE 2012		
	Value	Rank of 12	2012 Value	Annual Rate	Rank of 12
Washington County Transportation Authority	4.24	12	3.56	3.56%	1
Fayette Area Coordinated Transportation	5.48	11	5.12	1.37%	2
Kings County Area Public Transit Agency	14.64	2	20.52	-6.53%	10
Altoona Metro Transit	14.14	3	15.96	-2.39%	6
New Castle Area Transit Authority	11.23	5	12.01	-1.34%	4
Midland-Odessa Urban Transit District	8.53	7	11.56	-5.90%	9
Fredericksburg Regional Transit	7.15	8	10.25	-6.96%	11
Golden Crescent Regional Planning Commission	6.99	9	11.58	-9.62%	12
C-TRAN	15.53	1	17.09	-1.90%	5
Mid-Ohio Valley Transit Authority	10.90	6	12.72	-3.04%	7
Billings Metropolitan Transit	12.98	4	15.78	-3.83%	8
Mid Mon Valley Transit Authority	6.92	10	6.90	0.04%	3
<i>Average</i>	<i>9.89</i>		<i>11.92</i>	<i>-3.04%</i>	
<i>Standard Deviation</i>	<i>3.85</i>		<i>5.02</i>	<i>3.77%</i>	
<i>Average – 1 Standard Deviation</i>	<i>6.05</i>		<i>6.91</i>	<i>-6.82%</i>	
<i>Average + 1 Standard Deviation</i>	<i>13.74</i>		<i>16.94</i>	<i>0.73%</i>	
Act 44 Compliance Determination	In Compliance		In Compliance		
Compared to the Peer Group Average	Worse		Better		

Operating Cost / Revenue Vehicle Hour

Operating Cost / Revenue Hour (MB)					
System	FYE 2017 Single Year		5 Year Change Since FYE 2012		
	Value	Rank of 12	2012 Value	Annual Rate	Rank of 12
Washington County Transportation Authority	\$69.77	3	\$78.98	-2.45%	2
Fayette Area Coordinated Transportation	\$69.93	4	\$53.50	5.50%	12
Kings County Area Public Transit Agency	\$71.25	6	\$70.11	0.33%	4
Altoona Metro Transit	\$112.20	10	\$95.47	3.28%	9
New Castle Area Transit Authority	\$114.62	11	\$121.09	-1.09%	3
Midland-Odessa Urban Transit District	\$70.99	5	\$57.53	4.29%	11
Fredericksburg Regional Transit	\$72.63	7	\$66.74	1.71%	5
Golden Crescent Regional Planning Commission	\$51.76	1	\$43.02	3.77%	10
C-TRAN	\$125.80	12	\$112.54	2.25%	8
Mid-Ohio Valley Transit Authority	\$68.68	2	\$83.71	-3.88%	1
Billings Metropolitan Transit	\$99.65	9	\$90.31	1.99%	7
Mid Mon Valley Transit Authority	\$92.63	8	\$84.39	1.88%	6
<i>Average</i>	\$84.99		\$79.78	1.46%	
<i>Standard Deviation</i>	\$23.21		\$23.31	2.79%	
<i>Average – 1 Standard Deviation</i>	\$61.79		\$56.48	-1.33%	
<i>Average + 1 Standard Deviation</i>	\$108.20		\$103.09	4.26%	
Act 44 Compliance Determination	In Compliance		In Compliance		
Compared to the Peer Group Average	Worse		Worse		

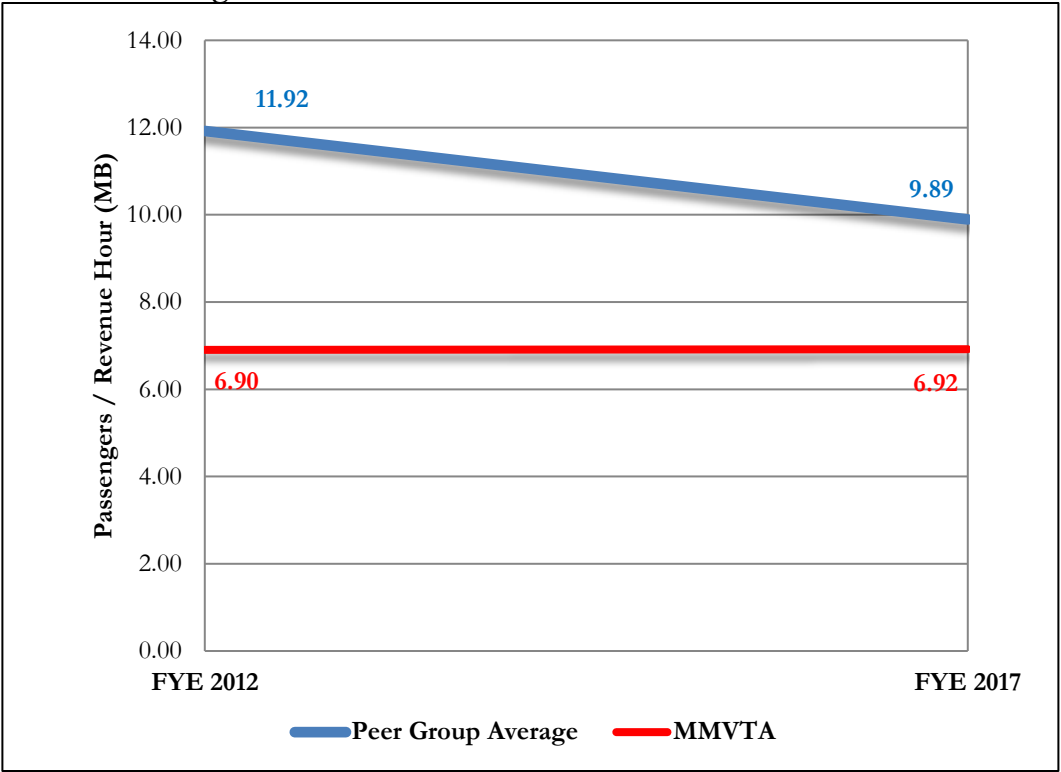
Operating Revenue / Revenue Vehicle Hour

Operating Revenue / Revenue Hour (MB)					
System	FYE 2017 Single Year		5 Year Change Since FYE 2012		
	Value	Rank of 12	2012 Value	Annual Rate	Rank of 12
Washington County Transportation Authority	\$7.41	9	\$6.43	2.88%	5
Fayette Area Coordinated Transportation	\$7.24	10	\$6.56	2.00%	6
Kings County Area Public Transit Agency	\$10.64	6	\$16.12	-7.97%	12
Altoona Metro Transit	\$19.42	2	\$19.43	-0.01%	9
New Castle Area Transit Authority	\$15.18	4	\$16.15	-1.23%	10
Midland-Odessa Urban Transit District	\$7.72	8	\$9.46	-3.99%	11
Fredericksburg Regional Transit	\$8.54	7	\$6.87	4.44%	2
Golden Crescent Regional Planning Commission	\$4.78	12	\$4.64	0.59%	8
C-TRAN	\$23.79	1	\$17.64	6.17%	1
Mid-Ohio Valley Transit Authority	\$6.77	11	\$5.69	3.55%	4
Billings Metropolitan Transit	\$14.63	5	\$12.06	3.94%	3
Mid Mon Valley Transit Authority	\$15.60	3	\$14.30	1.76%	7
<i>Average</i>	\$11.81		\$11.28	1.01%	
<i>Standard Deviation</i>	\$5.87		\$5.29	3.94%	
<i>Average – 1 Standard Deviation</i>	\$5.94		\$5.99	-2.93%	
<i>Average + 1 Standard Deviation</i>	\$17.68		\$16.57	4.95%	
Act 44 Compliance Determination	In Compliance		In Compliance		
Compared to the Peer Group Average	Better		Better		

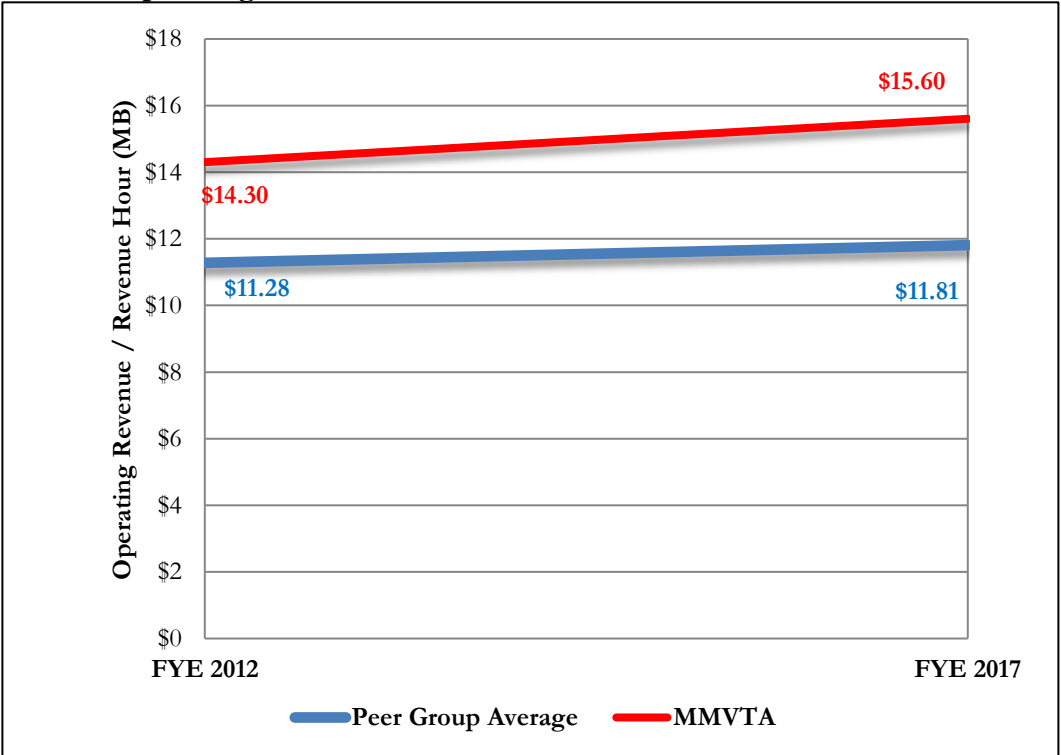
Operating Cost / Passenger

Operating Cost / Passenger (MB)					
System	FYE 2017 Single Year		5 Year Change Since FYE 2012		
	Value	Rank of 12	2012 Value	Annual Rate	Rank of 12
Washington County Transportation Authority	\$16.44	12	\$22.16	-5.80%	1
Fayette Area Coordinated Transportation	\$12.76	10	\$10.45	4.08%	5
Kings County Area Public Transit Agency	\$4.87	1	\$3.42	7.33%	9
Altoona Metro Transit	\$7.94	5	\$5.98	5.81%	7
New Castle Area Transit Authority	\$10.21	9	\$10.08	0.25%	3
Midland-Odessa Urban Transit District	\$8.32	7	\$4.98	10.83%	11
Fredericksburg Regional Transit	\$10.16	8	\$6.51	9.31%	10
Golden Crescent Regional Planning Commission	\$7.41	3	\$3.71	14.81%	12
C-TRAN	\$8.10	6	\$6.58	4.23%	6
Mid-Ohio Valley Transit Authority	\$6.30	2	\$6.58	-0.87%	2
Billings Metropolitan Transit	\$7.68	4	\$5.72	6.05%	8
Mid Mon Valley Transit Authority	\$13.39	11	\$12.22	1.83%	4
<i>Average</i>		<i>\$9.46</i>	<i>\$8.20</i>	<i>4.82%</i>	
<i>Standard Deviation</i>		<i>\$3.30</i>	<i>\$5.16</i>	<i>5.57%</i>	
<i>Average – 1 Standard Deviation</i>		<i>\$6.16</i>	<i>\$3.05</i>	<i>-0.74%</i>	
<i>Average + 1 Standard Deviation</i>		<i>\$12.77</i>	<i>\$13.36</i>	<i>10.39%</i>	
Act 44 Compliance Determination		At Risk		In Compliance	
Compared to the Peer Group Average		Worse		Better	

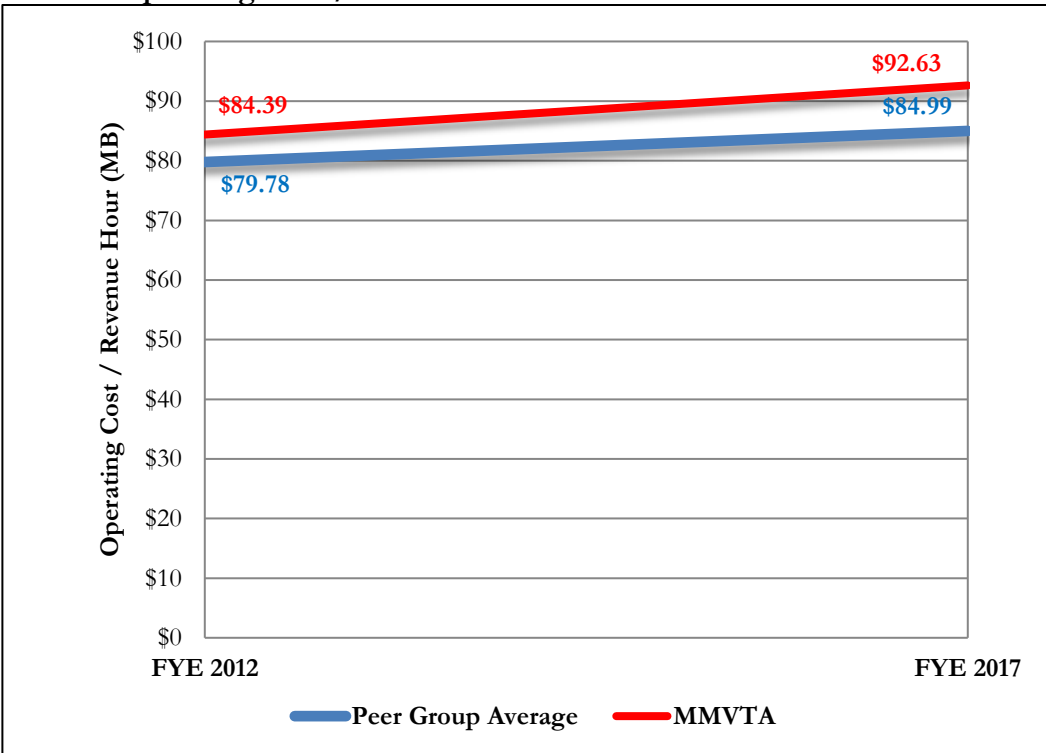
Trend – Passengers / Revenue Vehicle Hour



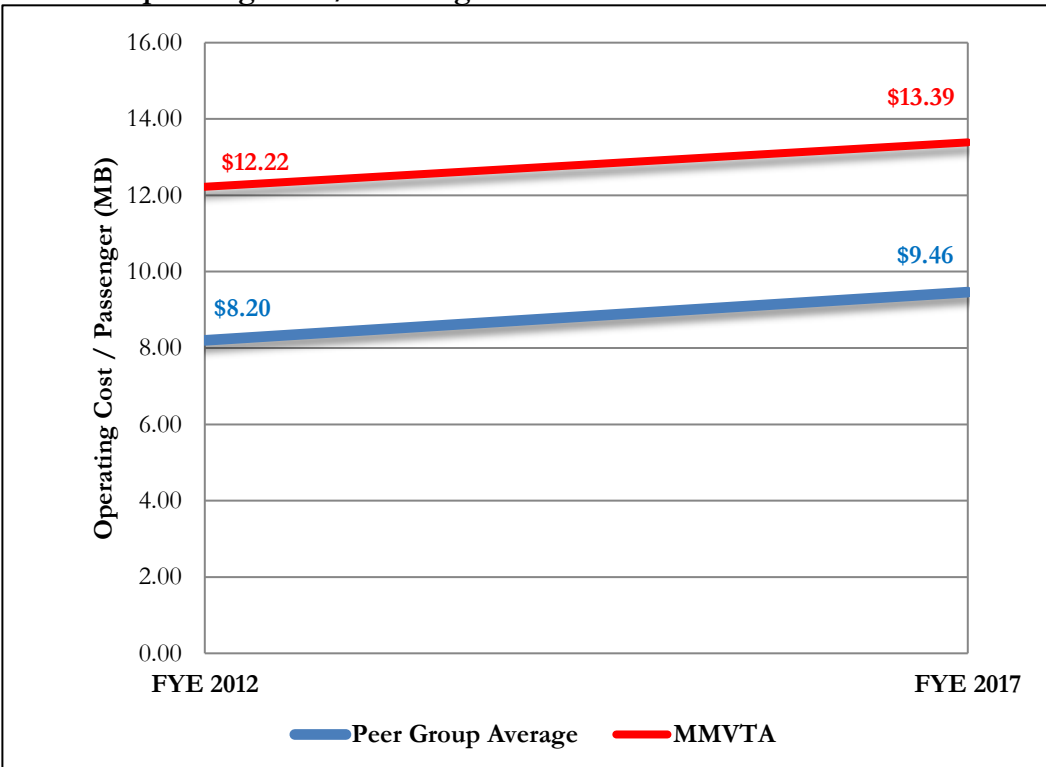
Trend – Operating Revenue / Revenue Vehicle Hour



Trend – Operating Cost / Revenue Vehicle Hour



Trend – Operating Cost / Passenger



APPENDIX C: ACTION PLAN TEMPLATE

PART 1- ACTIONS TO INCREASE PASSENGERS / REVENUE HOUR

Recommendation From narrative starting on page 12	MMVTA Action	Estimated Initiation Date	Estimated Completion Date
1. Monitor ridership on routes with transfers to neighboring transit systems, assess demand for potential connections, and identify opportunities for partnerships to establish new transfer points.			
2. Develop a social media strategy that: <ul style="list-style-type: none"> a. Includes a social media policy or terms of use to help safeguard the agency for internal and external use; b. Evaluates the different social media platforms and select a platform(s) that best suits the goals of the Agency, and; c. Set goals and objectives for the social media platform(s) used and/or the marketing director (e.g., increase followers by 10 people a month AND/OR the marketing director sets a goal of interacting with five potential customers a month). 			

PART 2 - ACTIONS TO INCREASE OPERATING REVENUE / REVENUE HOUR

Recommendation From narrative starting on page 12	MMVTA Action	Estimated Initiation Date	Estimated Completion Date
1. None.			

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

Recommendation From narrative starting on page 13	MMVTA Action	Estimated Initiation Date	Estimated Completion Date
1. Develop procedures for tracking and paying invoices that segregate duties amongst multiple employees.			
2. Develop official procedures for contractor oversight that include: <ul style="list-style-type: none"> a. Documenting and maintaining records of all contractor interactions; b. Developing a schedule for site visits; and, c. Ensuring performance data used to assess vehicle maintenance and adherence to operating standards is documented by the contractor and provided to MMVTA. 			

PART 4 - OTHER ACTIONS TO IMPROVE OVERALL PERFORMANCE

Recommendation From narrative starting on page 13	MMVTA Action	Estimated Initiation Date	Estimated Completion Date
1. Increase the frequency of Board training sessions.			
2. Expand the succession plan to include a cross-training policy for all employees and a timeline for the Board to follow when hiring new employees.			
3. Report on Act 44 performance targets and the Board-approved Action Plan to the Board as a part of regular meetings; track additional measures of service efficiency to be reported to the Board such as: <ul style="list-style-type: none"> a. Mechanical breakdowns every 1,000 vehicle miles (maintenance); b. Complaints every 1,000 passenger trips (customer service); c. On-time performance (operations); and, d. Farebox recovery (revenue). 			
4. Consider the following elements when developing the strategic plan: <ul style="list-style-type: none"> a. The long-term vision of a sustainable agency in line with an implementable transit development plan (i.e., TDP) and mission statement; b. Success markers (i.e., goals) for sustainability; c. Actionable steps (i.e., objectives) to achieve and maintain sustainability; and, d. Measurable actions to monitor progress (e.g., performance scorecard including Act 44 performance targets). e. A timeline to guide the integration of technology investments. 			
5. Partner with local universities to develop and implement an internship program that aligns with			

Recommendation From narrative starting on page 13	MMVTA Action	Estimated Initiation Date	Estimated Completion Date
agency needs (e.g., marketing, graphic design, data analysis, surveying, etc.).			
6. Develop a safety target and performance metric based on “near-miss” data captured from vehicle cameras.			

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