



## Over- and Under-Performing Routes

The TPAC understands that transit providers are solely responsible for operating their services. As such, **transit providers have discretion to recommend and implement changes to their routes as needed**. Transit providers are encouraged to integrate the Service Guidelines and Performance Measures as they review and evaluate their transit services. This internal review process, as proposed for the Wake Transit Bus Plan, should consider transit operations as well as the impact of exogenous variables that may impact route productivity, such as gas prices.

However, the TPAC designed these performance standards and measures to strike a balance between setting realistic and achievable goals with a desire to encourage ongoing improvement. As such, the TPAC recommends that transit providers compare and contrast route performance relative to the Wake Transit Bus Plan standards. Routes that consistently over-perform relative to their standards may warrant additional investment; and conversely routes that consistently under-perform relative to their standard may warrant a reduced investment. It's necessary to recognize that not every route will meet all of the established standards, all of the time. Recognizing this, over-performing routes are defined as services that surpass at least three performance measures for three or more consecutive quarters. Under-performing routes are defined as routes that fall below the minimum standards for three or more performance measures for a period of three or more consecutive quarters.

Local transit providers will develop a report submitted to the TPAC quarterly that shows performance on individual performance measures at a route level. This report will also include information on the number of consecutive quarters the route has over- or under-performed relative to the standards. The TPAC will not be taking action on the routes on a quarterly basis, but transit providers will make the information available on a quarterly basis.

The TPAC recommends a tiered system for addressing over- and under- performing routes. This process is designed to be clear, consistent, and fair while ensuring the most cost-effective investments are prioritized.

1. New routes or routes undergoing significant changes (defined as a 20% change in revenue miles or hours) will be classified as new and exempt from performance measures services for a period of 18 months to build ridership and the market for transit services. This grace period is intended to reflect the major changes in transit service development in Wake County. The time period is longer than the one currently adopted by GoTriangle and GoRaleigh.
2. Local transit providers will review route productivity annually (in conjunction with the annual work plan process). **Routes identified as under- or over-performing will be considered as part of the local transit provider's existing route review process**. This process will be conducted in advance of the annual work plan development process and may consider corrective actions such as minor changes to include service design, strengthening connections, coordination with other routes; and/or marketing or information systems. Any actions resulting from this are at the discretion of the transit providers.
3. **Any significant changes to the funding of individual routes will be recommended as part of the update to the Wake Transit Bus Plan**, a process that is envisioned to occur at least once every four years. As part of this process, routes that have over- or under-



performed relative to at least three of their respective standards for the past three or more consecutive quarters will be subjected to more strenuous review. This process will include reviewing:

- The specific performance measures where over- or under-performance has been recorded, including duration and the magnitude of the gap.
- Exogenous variables out of the transit providers' control that may have contributed to over- or under-performance.
- Efforts under-taken by the transit provider to address over- or under-performance.

Routes that consistently over-perform set targets and have not received additional investment **may** be considered for additional resources. Additional resources may be used to advance the route classification to a higher tier or service (i.e. graduate service from a local route to a frequent route).

Likewise, routes that have exhausted their route development period and have not improved with annual adjustments **may** be recommended for a reduction or elimination of funding. For example, a reduction in funding may be used to move a route down a classification tier (i.e. from a community route to a demand response service).

# WAKE COUNTY TRANSIT PLAN: IMPLEMENTATION

## **Framework for Review of Work Plan Project Reporting Deliverables**

Following is a summary of the framework developed by the TPAC Planning and Prioritization Subcommittee to summarize and review reporting deliverables submitted on a quarterly basis by Wake Transit Work Plan project sponsors over the course of each fiscal year. The intent of the framework is to determine how the reported information will be used to inform decision making through the annual Wake Transit Work Plan development process. While the framework addresses the summarization and review of all project reporting deliverables, special emphasis is given to the bus service performance metrics reported for bus operations projects that will be evaluated against the Service Guidelines and Performance Measures adopted by the Wake Transit governing boards.

### **For Bus Service Project Reporting Deliverables:**

- 1) By the end of each month that follows the end of each quarter, project sponsors report bus service performance metrics through their project progress reports.
- 2) Within 60 days following the end of each quarter, GoTriangle staff will compile and summarize the bus service performance metrics reported by project sponsors on a template developed in coordination with the Planning and Prioritization Subcommittee.
- 3) The template will document service performance metrics on a rolling basis that covers up to six quarters of reported data for each bus operations project, with the actual number of quarters covered depending on the date of inception of the particular project.
- 4) On a quarterly basis, GoTriangle staff will hand over the summarized data in the established template to CAMPO staff for distribution to the Planning and Prioritization Subcommittee.
- 5) While the subcommittee will receive the data for each quarter, the subcommittee does not plan to review or discuss the data on a quarterly basis.
- 6) To coincide with the annual Wake Transit Work Plan development schedule, prior to the Planning and Prioritization Subcommittee meeting held in June of each year, GoTriangle staff will compile and summarize bus service performance data for all prior quarters of operation through the third quarter of each fiscal year.
- 7) CAMPO staff and/or GoTriangle staff will indicate on an established template the performance of each bus service project relative to the Service Guidelines and Performance Measures adopted by the Wake Transit governing boards, and CAMPO staff will prepare the summarized data and evaluation data for a structured review by the Planning and Prioritization Subcommittee at its June meeting.
- 8) At the Planning and Prioritization Subcommittee meeting scheduled for August of each year, CAMPO staff will lead discussions regarding any recommended changes to bus service projects based on the evaluation of data collected relative to the targets set in the adopted Service Guidelines and Performance Measures. Any recommendations made may be used to inform project funding requests submitted in September/October for the next fiscal year Wake Transit Work Plan.

# WAKE COUNTY TRANSIT PLAN: IMPLEMENTATION

## **Framework for Review of Work Plan Project Reporting Deliverables**

### **For All Other Project Reporting Deliverables:**

- 1) By the end of each month that follows the end of each quarter, project sponsors submit reporting deliverables for all Wake Transit-funded projects.
- 2) Within 60 days following the end of each quarter, GoTriangle staff compiles the reporting deliverables into a summary quarterly report.
- 3) To coincide with the annual Wake Transit Work Plan development schedule, prior to the Planning and Prioritization Subcommittee meeting held in June of each year, GoTriangle staff will compile the third quarter report for the respective fiscal year, which will also include cumulative reporting for the first two quarters of the fiscal year.
- 4) CAMPO staff will prepare the summarized information reflected in the third quarter report for a structured review to be conducted jointly by the Planning and Prioritization and Budget and Finance Subcommittees at a meeting held in June each year.
- 5) At a joint Planning and Prioritization/Budget and Finance Subcommittee meeting scheduled for July or August of each year, CAMPO staff will lead discussions regarding any recommended scope, funding, or schedule changes to existing or future programmed projects based on project progress and performance. Any recommendations made may be used to inform project funding requests submitted in September/October for the next fiscal year Wake Transit Work Plan.

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**From:** Bret Martin, Wake Transit Program Manager, Capital Area MPO

**To:** Wake County Transit Planning Advisory Committee (TPAC)

**Date:** 9/17/2020

**Re:** Wake Transit-Funded Bus Service Performance Review - Planning and Prioritization Subcommittee Findings (2020 Review)

At its August 21, 2019, regular meeting, the TPAC endorsed a framework for the Planning and Prioritization Subcommittee to review the performance of Wake Transit-funded bus services. The purpose of this review is to evaluate the performance of bus services against established targets set for each service type in the Wake Bus Service Guidelines and Performance Measures adopted by the Wake Transit governing boards. This review is scheduled to occur on an annual basis between June and August using quarterly performance metrics reported by project sponsors through the third quarter of the preceding fiscal year. The timing of this review is to allow the reported information and results of the associated review to inform project funding requests submitted in the fall for the next fiscal year Wake Transit Work Plan. The results of the review may also be used by the TPAC to inform or recommend potential changes to Wake Transit-funded bus services that maximize the productive and responsible use of bus service funding allocations. Such changes may be geared toward improving productivity for under-performing services or toward providing additional resources for over-performing services.

There are four (4) performance measures with established targets against which Wake Transit-funded bus services are evaluated. These measures include:

- Passenger Boardings per Revenue Hour or Trip (depending on service type)
- Cost per Passenger Boarding
- Farebox Recovery
- On-Time Performance

Per the adopted Wake Bus Service Guidelines and Performance Measures, a route is considered underperforming if, after an 18-month developmental period, it falls short of hitting three or more established targets for three or more consecutive quarters. A route is considered overperforming if, after an 18-month developmental period, it is hitting three or more established targets for three or more consecutive quarters. All other routes are considered neither underperforming nor overperforming.

### **Impacts of Coronavirus on Transit Service Productivity**

An unexpected and unfortunate reality facing all transit services, including Wake Transit-funded services, during the 3<sup>rd</sup> and 4<sup>th</sup> quarters of fiscal year (FY) 2020 is the onset of the Coronavirus Disease 2019 (COVID-19) pandemic in March. With social distancing and 'stay-at-home' measures imposed to control the spread of COVID-19, trips on public transportation for employment commuting and other types of personal transportation began to drop dramatically toward the end of the 3<sup>rd</sup> quarter of FY 2020. During this time, Wake County's transit providers shifted their focus toward enacting strict health and safety protocols while still providing lifeline-level services to the abundance of public transit users who continued to depend on the services previously enjoyed under pre-pandemic conditions.

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To match reduced demand and to better facilitate health and safety protocols, the providers reduced service on weekdays to weekend levels in late March of 2020. These actions, coupled with reductions in overall trip activity associated with the pandemic, inevitably resulted in reductions in the overall productivity and efficiency of Wake Transit-funded services. Accordingly, it is important to temper expectations of performance against the applicable targets with an understanding that these alternative conditions inevitably led to significant impacts.

### **Summary of Bus Service Performance Reviews By Provider**

The Planning and Prioritization Subcommittee reviewed bus service performance data from Q2 of FY 2019 through Q3 of FY 2020 at its August 25<sup>th</sup> regular meeting, which resulted in the following findings:

#### **GoRaleigh Bus Services**

GoRaleigh operates 11 fixed routes that are currently subject to the annual performance evaluation process, 10 of which are currently within an 18-month developmental period. However, seven (7) of those 10 will graduate from their 18-month developmental period in the first quarter of FY 2021. The remaining three (3) will not graduate from their 18-month developmental period until the fourth quarter of FY 2021. Following is a summary of these routes' performance:

- The GoRaleigh route that has graduated from its developmental period (Route 7: South Saunders) continues to consistently overperform with respect to all four (4) targets set through the 3<sup>rd</sup> quarter of FY 2020.
- Of the seven (7) GoRaleigh routes that are currently within their developmental period but are graduating from that status in the 1<sup>st</sup> quarter of FY 2021, four (4) of them (Routes 17: Rock Quarry, 18: Poole-Barwell, 18S: Poole, and 19: MLK-Sunnybrook) were minimally meeting two (2) to three (3) of the four (4) established performance targets in the 3<sup>rd</sup> quarter of FY 20. Routes 18 and 18S met the targets set for boardings per revenue hour and cost per boarding in the 3<sup>rd</sup> quarter of FY 20, with Route 18 also meeting the target set for on-time performance. Through the 2<sup>nd</sup> quarter of FY 2020, Route 18S consistently met its target for farebox recovery, but its performance with respect to that target has declined slightly in the 3<sup>rd</sup> quarter, likely as a result of impacts to ridership associated with the COVID-19 pandemic. Routes 17 and 19 are meeting the targets set for cost per boarding and on-time performance but are falling short of the targets set for boardings per revenue hour and farebox recovery. However, between its conversion to a frequent network route in January of 2019 and the end of 2019, ridership on Route 19 increased by 81.4 percent.
- The remaining three (3) of the seven (7) routes (Routes 26: Edwards Mill, 27: Blue Ridge, and 36: Creedmoor) that are currently within their developmental period but are graduating from that status in the 1<sup>st</sup> quarter of FY 2021 are consistently falling short of the boardings per revenue hour, cost per boarding, and farebox recovery targets. All three (3) are meeting targets set for on-time performance.
- The three (3) routes that will not graduate from their 18-month developmental period until the fourth quarter of FY 2021 (Routes 20: Garner, 33: Knightdale, and 401: Rolesville) are all falling short of the targets set for boardings per revenue hour, cost per boarding, and farebox recovery, although they have only had two (2) quarters of operation. Further, Route 401 is also falling short of the on-time performance target.

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Following is a table portraying the general performance of each Wake Transit-funded GoRaleigh route against the targets set for those routes by the adopted Wake Bus Service Guidelines and Performance Measures. Check marks indicate the applicable service is not underperforming with respect to the applicable targets for the three (3) consecutive quarters ending with the 3<sup>rd</sup> quarter of FY 20 (i.e., the service did not fall short of hitting the respective target for all of the last three [3] consecutive quarters reviewed or for all of the last two [2] consecutive quarters for services in operation for less than three [3] quarters). Routes shaded in pink are still in their 18-month developmental period.

Route	Boardings/Revenue Hour or /Trip	Cost/Boarding	Farebox Recovery	On-Time Performance
Route 7: South Saunders	✓	✓	✓	✓
Route 17: Rock Quarry	--	✓	--	✓
Route 18: Poole-Barwell	✓	✓	--	✓
Route 18S: Poole	✓	✓	✓	--
Route 19: MLK-Sunnybrook	--	✓	--	✓
Route 20: Garner	--	--	--	✓
Route 26: Edwards Mill	--	--	--	✓
Route 27: Blue Ridge	--	--	--	✓
Route 33: Knightdale	--	--	--	✓
Route 36: Creedmoor	--	--	--	✓
Route 401: Rolesville	--	--	--	--

It is important to note that the performance of Routes 26 and 27 through the 2<sup>nd</sup> quarter of FY 2020 were trending in a direction toward meeting set targets for boardings per revenue hour, cost per boarding, and farebox recovery before the onset of the COVID-19 pandemic in the 3<sup>rd</sup> quarter. It is also important to note that Routes 20 and 33 have both continued to trend in a direction toward meeting the same targets through the 3<sup>rd</sup> quarter of FY 2020, as can be expected for services in their developmental period.

It was noted by the Planning and Prioritization Subcommittee that three (3) of GoRaleigh's routes (Routes 26, 27 and 36) were far from approaching the passenger boardings per revenue hour, cost per boarding, and farebox recovery targets after having four (4) continuous quarters of

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operation before impacts from the pandemic began to emerge. These routes are nearing the end of their developmental period. In response to the subcommittee's 2019 review of the same routes, GoRaleigh staff developed a marketing plan to bring more attention to the routes within the communities served. However, the onset of the COVID-19 pandemic has stalled GoRaleigh's execution of the plan, as marketing for transit services during the pandemic has been focused on health and safety from physical distancing rather than pushing for additional ridership. GoRaleigh staff is monitoring how performance of these routes evolves coming out of the pandemic and then will look to make needed adjustments, if necessary.

### **GoTriangle Bus Services**

GoTriangle operates five (5) fixed routes that are currently subject to the annual performance evaluation process. All of these routes have graduated beyond their 18-month developmental period (i.e., Routes 100, 300, CRX, FRX, and DRX). Following is a summary of these routes' performance:

- The CRX, DRX, and FRX routes are all generally meeting a minimum of two (2) of the four (4) established performance targets. The DRX route is consistently overperforming with respect to three (3) of the four (4) targets and is officially overperforming in accordance with the adopted Wake Bus Service Guidelines and Performance Measures. In the 3<sup>rd</sup> quarter of FY 20, the CRX route is meeting its targets for boardings per trip and farebox recovery, and the FRX route is meeting its targets for boardings per trip and on-time performance.
- The CRX route fell short of its target for on-time performance through the entirety of FY 2020 but only fell short of its target for cost per boarding in the 3<sup>rd</sup> quarter, as impacts from the pandemic began to reduce service productivity. Accordingly, the CRX route was consistently overperforming in accordance with the adopted Wake Bus Service Guidelines and Performance Measures through the 2<sup>nd</sup> quarter. The FRX fell short of its targets for cost per boarding and farebox recovery through the entirety of FY 2020.
- The remaining two (2) routes (Routes 100 and 300) have consistently fallen short of their targets for passenger boardings per revenue hour or trip, cost per boarding, and farebox recovery through the entirety of FY 2020 and are officially underperforming per the adopted Wake Bus Service Guidelines and Performance Measures. Both are generally meeting their targets for on-time performance.

Following is a table portraying the general performance of each Wake Transit-funded GoTriangle route against the targets set for those routes by the adopted Wake Bus Service Guidelines and Performance Measures. Check marks indicate the applicable service is not underperforming with respect to the applicable targets for the three (3) consecutive quarters ending with the 3rd quarter of FY 20 (i.e., the service did not fall short of hitting the respective target for all of the last three [3] consecutive quarters reviewed).

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Route	Boardings/Revenue Hour or /Trip	Cost/Boarding	Farebox Recovery	On-Time Performance
Route 100	--	--	--	✓
Route 300	--	--	--	✓
Route CRX*	✓	✓	✓	--
Route DRX	✓	✓	✓	✓
Route FRX	✓	--	--	✓

It was noted by GoTriangle staff that underperformance on Route 100 can largely be explained by another competing route (Route 105) diluting ridership potential during peak periods. GoTriangle staff has actively monitored and analyzed this issue to develop solutions and is considering a reduction to the overall investment toward these two routes to improve overall productivity. No timeline for service changes has been set to date, but GoTriangle staff is looking at what can be done as quickly as possible when the system is able to transition out of its COVID-19 response, which may be by the summer of 2021.

Underperformance on Route 300 can largely be explained by how ridership productivity is measured for its service type (boardings per revenue hour versus per trip) for the purposes of the exercise to evaluate performance against adopted performance targets. How this route's performance is measured may need to be revisited by the subcommittee. It was also noted that ensuing improvements to connecting GoCary services will likely also improve Route 300's passenger boardings per trip. Beginning on October 17<sup>th</sup>, service on Route 300 will be provided between GoRaleigh Station and the Cary Depot only, and the state government loop in downtown Raleigh will be eliminated, which is expected to improve travel time and overall productivity. The portion of Route 300 between the Regional Transit Center and the Cary Depot will be replaced by Route 310.

### GoCary Bus Services

GoCary operates four (4) fixed routes that are currently subject to the annual performance evaluation process, which include Routes 3, 4, 5 and 6. All of these routes pre-existed Wake Transit and subsequently received Wake Transit funding to increase midday frequencies and expand the span of service to include Sundays and holidays. All four (4) of the routes are also beyond their original 18-month developmental periods. Following is a summary of these routes' performance:

- Three (3) of the four (4) routes (Routes 3: Harrison Avenue, 5: Kildaire Farm Road, and 6: Buck Jones Road) are generally meeting a minimum of two (2) of the four (4) established performance targets.
- Route 5: Kildaire Farm Road is the best performing route, consistently exceeding established targets for boardings per revenue hour, cost per boarding, and on-time performance. Per the adopted Wake Bus Service Guidelines and Performance Measures,

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Route 5 is officially overperforming. However, Route 5 has failed to meet its established target for farebox recovery for three (3) consecutive quarters through the 3<sup>rd</sup> quarter of FY 2020.

- Routes 3: Harrison Avenue and 6: Buck Jones Road are generally meeting established targets for cost per boarding and on-time performance but have consistently failed to meet established targets for passenger boardings per revenue hour and farebox recovery for the three (3) consecutive quarters ending with the 3<sup>rd</sup> quarter of FY 2020.
- One (1) of GoCary's Wake Transit-funded routes (Route 4: High House Road) has consistently fallen short of meeting all four (4) established targets for a minimum of three (3) consecutive quarters through the 3<sup>rd</sup> quarter of FY 2020. Accordingly, Route 4 is officially underperforming per the adopted Wake Bus Service Guidelines and Performance Measures.

Following is a table portraying the general performance of each Wake Transit-funded GoCary route against the targets set for those routes by the adopted Wake Bus Service Guidelines and Performance Measures. Check marks indicate the applicable service is not underperforming with respect to the applicable targets for the three (3) consecutive quarters ending with the 3rd quarter of FY 20 (i.e., the service did not fall short of hitting the respective target for all of the last three [3] consecutive quarters reviewed).

Route	Boardings/Revenue Hour or /Trip	Cost/Boarding	Farebox Recovery	On-Time Performance
Route 3: Harrison Avenue	--	✓	--	✓
Route 4: High House Road	--	--	--	--
Route 5: Kildaire Farm Road	✓	✓	--	✓
Route 6: Buck Jones Road	--	✓	--	✓

While Route 4: High House Road has consistently underperformed, major service changes to the GoCary system to be implemented in January of 2021 are anticipated to improve the route's productivity and on-time performance, with the route being made more direct and less circuitous along the High House Road corridor. The same service changes are also anticipated to improve the productivity of Route 3: Harrison Avenue, Route 5: Kildaire Farm, and Route 6: Buck Jones Road. These GoCary Wake Transit-funded services will continue to be monitored against the applicable performance targets after the implementation of these major service changes.

### GoWake Access Services

GoWake Access's Wake Transit-funded services have consistently met established performance targets for cost per boarding and farebox recovery. While the services are falling short with respect to boardings per revenue hour or per trip, their performance with respect to that particular target is not much less than the target threshold. GoWake Access's services are also falling short with respect to on-time performance. It is anticipated that additional funding for rural elderly, disabled and general public trips and the implementation of recommendations from the GoWake Access

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northeastern microtransit study will improve both productivity and on-time performance, particularly in areas of the county where meeting those targets is difficult because of low population and trip densities.