Performance Plan and Analysis

HYDE COUNTY

January 2012

Participant Signatures:

Transit System Representative:	Date:	/	/ 20
ITRE:	Date:	/	/ 20
NCDOT Mobility Development Specialist:	Date:	/	/ 20

By signing this document, participants indicate their agreement with the statements outlined in this plan and declare their commitment to advancing the performance, service and operation of the transit system.

INTRODUCTION

The Performance Planning Analysis is conducted at the system's request as a part of a Technology Plan, after the system is identified as needing assistance, or as part of the 5-year plan. The purpose of this plan is to provide the transit system with a guide to achieve higher performance measures and improve business practices. The system also has the opportunity to independently update the plan to track performance and create a solid foundation for future improvements.

Much of the performance planning process is based on self-reflection and accurate self-reporting. The most valuable Performance Plan is one where the transit system has thoughtfully and accurately answered the questions. To begin the Performance Planning Analysis process, the Business Practices Questionnaire and Employee Information Worksheet are sent to the transit system and a data set is requested. After the completed questionnaire is received and examined, a site visit is conducted. Once the site visit is complete, further analysis of the information is conducted and recommendations are created.

Methods of Analysis: The Business Practices Questionnaire [Appendix A] and Employee Information Worksheet [Appendix B] cover topics such as human resources, operational policies, organizational culture and the system's planning process. Providing as much detail as needed to fully complete the questionnaire is encouraged because the depth of responses is also analyzed. The way the question is answered, the amount of detail provided and other aspects of the responses illustrate how well the system is prepared for the process and how they view their performance. Vehicle Utilization Data (VUD) Compilation [Appendix C] is used to analyze performance on specific performance measures from a single collection period and over time.

Reports are requested as needed, including reports on cancellations and no shows. Other items, such as daily driver manifests and funding source rates are collected and reviewed to understand application of business practices in day-to-day operations.

This report includes recommendations, which include a target area and a preliminary objective for improvement. Specific steps for achieving the objectives are listed with defined timeframes. These objectives are only the first steps in improving performance. As the system grows and develops, goals will be adjusted and the planning process will be revised.

SYSTEM OVERVIEW

Strongest Area:	Hyde County does a remarkable job of attracting riders from non-traditional funding sources and providing efficient revenue service.
Area Needing Most Improvement:	The transit system could further expand service by attracting seasonal riders and providing tourism-based services.

THE FUTURE FOR SYSTEM NAME

Every transit system must strive to improve and create an image of their future upon which to base goals and measure success. The expectations listed here provide the transit system with a vision of where their system is going and where they want to be in the near future. The future for the transit system has been developed by the system representatives, with the assistance of ITRE.

☐ TRANSIT SYSTEM TO FILL OUT

PERFORMANCE PLANNING EVALUATION CHECKLIST

Major areas discussed in this Performance Plan are listed in this table with a general rating of the system's policies, progress or achievements in that area.

Rating Key

	Exceptional		Below Average
	Above Average		Needs substantial improvement
	Average		

Performance Measure	Rating/Category
Other Data Analysis	
◆ Cancelations	N/A
◆ No Shows	
◆ Percentage of subscription and demand response trips	N/A
Comparisons To VUD Peer Group	
◆ Weekday Passengers Per Service Hour	
◆ Weekday Passengers Per Revenue Hour	
◆ Weekday Passengers Per Service Mile	
◆ Weekday Passengers Per Revenue Mile	
◆ Weekday Average Daily Passengers	

RECOMMENDATIONS

Throughout the analysis, look for the Recommendation Flag to identify areas that relate to specific recommendations and the Quality Check ☑ indicating strong points.

1. Target Area: Improved performance measures

Every community transportation system should aspire to grow their business and increase effectiveness in providing service.

Goals:

Performance Measure	Current Level	Growth %	6 months	12 months	18 months
Weekday Average Daily Passengers	67	10%	73	81	89
Weekday Passengers per Service Mile	0.116	5%	0.122	0.128	0.135
Weekday Passengers per Revenue Mile	0.174	3%	0.180	0.185	0.191
Weekday Passengers per Service Hour	2.88	5%	3.03	3.18	3.34
Weekday Passengers per Revenue Hour	4.54	3%	4.68	4.82	4.96
Weekday Average Daily Passengers	67	10%	73	81	89

Steps to Improvement:

6 Months	- Through the 5-year CTSP, explore opportunities for serving seasonal residents and short-term visitors - Evaluate mix of lift and non-lift vehicles
12 Months	-
On-Going	- Continue to market transportation services to employment centers and other destinations

2. Target Area: Preparation for growth

Objective: Set the system up so that it can easily handle expansion

Steps to Improvement:

6 Months	- Explore affordable scheduling assistance software packages that will assist with record-keeping, billing, and reporting
12 Months	- Begin making business practice changes to match the requirements of the scheduling assistance software
18 Months	- Implement scheduling assistance software

Data and Questionnaire Analysis

1. Comparisons To Vehicle Utilization Data (VUD) Peer Group:

Vehicle Utilization Data was used to understand the system's performance in comparison to peer systems in the state. See the last page for a map of the VUD Peer Groups.

1.A. Current Summary Statistics: The table below compares descriptive statistics from Fall 2011 VUD for HYDE COUNTY TRANSIT with other counties in their peer group.

Weekday Statistics	Group 4		HYDE		% Difference
	#	%	#	%	
Average Daily Passengers	176		67		-62%
Average Daily No Shows	7	4%	3	4%	-57%
Average Daily Wheelchair Passengers	11	6%	1	1%	-91%
Total Vehicles	17		6		-65%
Lift Vehicles	11	65%	3	50%	-73%
Service Hours	74		23		-69%
Revenue Hours	59	80%	15	64%	-75%
Deadhead Hours	15	20%	8	36%	-44%
Service Miles	1,707		575		-66%
Revenue Miles	1,345	79%	383	67%	-72%
Deadhead Miles	362	21%	192	33%	-47%
Passengers Per Service Hour	2.49		2.88		16%
Passengers Per Revenue Hour	3.31		4.54		37%
Passengers Per Service Mile	0.106		0.116		10%
Passengers Per Revenue Mile	0.140		0.174		25%

1.A.1. Weekday Average Daily Passengers: Hyde County has considerably less population than other counties in the peer group. ☑ With 67 passengers per day (>10 trips per vehicle per day), the transit system may be running at capacity.

1.A.2. Weekday Average Daily Wheelchair Passengers: At the site visit, the transit system indicated that there are very few customers within the service area that require lift vehicles. ☑ This statistic validates this belief.

1.A.3. Lift Vehicles: ☑ With so few trips requiring lift vehicles, the transit system is correct to have a smaller lift vehicle percent than the peer average as long as there are no capacity constraints for trips requiring lift equipped vehicles.

1.A.4. Weekday Passengers per Service/Revenue Mile/Hour: ☑ The transit system does an excellent job of ensuring the efficient delivery of passengers and excels in all efficiency categories compared to the peer group.

2. Vehicle Utilization Data Compilation Analysis

The August VUD for 2011 was disrupted by Hurricane Irene. For this reason, Hyde reported an entire week of VUD starting with Thursday, August 18 and continued through Wednesday, August 24.

2.A. Capital Assessment Form: ☑ The transit system does a good job of taking vehicles out of service when there are no trips to perform.

2.B. Performance Indicators: There is considerable variation in service requirements during the week. Large swings in passengers and service/revenue hours/miles typically indicates inaccuracies in the data. The 18.70 passengers per revenue hour for Saturday, Aug. 20 may be accurate due to the highly efficient revenue service generated by this particular employment center. It is expected that the statistics in the graphs will change dramatically on the weekends. For this collection period, the weekend is in the middle of the collection period.

With such a sparsely populated geography, need to take most trips out of the county, and accurate recording of service times, it is not surprising that Hyde Transit has large gaps in the daily use of its vehicles. Most of these gaps can be explained as waiting times for out of county and Ocracoke runs.

☑ The transit system is commended for operating on weekends.

2.C. Driver Analysis: There is a potential mistake in data entry for driver Beasley's revenue hours on 8/18, as the miles per revenue hour compute to over 100 mph. Using a basic scheduling software that checks the math on verified runs and automatically reports the VUD will help to alleviate these mistakes in the future.

3. Historic Vehicle Utilization Data Statistics

The table below gives the system's VUD performance information over the past three years as well as the system's current performance in each area and the percent change from the first collection period.

	Spring 2009	Fall 2009	Spring 2010	Fall 2010	Spring 2011	Fall 2011	Difference
Average Daily Passengers	68	58	56	48	69	67	-2%
Passengers per Service Mile	0.069	0.102	0.076	0.093	0.086	0.116	41%
Passengers per Revenue Mile	0.119	0.158	0.120	0.125	0.108	0.174	32%
Passengers per Service Hour	2.22	3.11	2.03	2.27	3.45	2.88	23%
Passengers per Revenue Hour	3.03	4.53	2.96	3.36	4.16	4.54	33%

3.A. Weekday Average Daily Passengers: The average daily passengers have remained stable over a 3 year period. The transit system should continually strive to increase passenger trips by acquiring new funding sources and providing innovative service to county residents and visitors.

3.B. Weekday Passengers per Service/Revenue Mile/Hour: ☑ The efficiency of the system has increased substantially over a 3 year period.

4. Other Data Analysis:

Hyde is unable to provide information at this level because it does not use scheduling software.

Current Monthly Statistics (Average Weekday)	#	%
Total Scheduled Passengers	N/A	
Total Passengers Carried		
Subscription Passengers		
Demand Response Passengers		
Cancellations		
Subscription Cancellations		
Demand Cancellations		
No Shows		
Subscription No Shows		
Demand No Shows		

5. Manifest Review

5.A. Data

5.A.1. Space for All Necessary Information: Yes

5.A.2. Manifests Filled Out Completely: Yes

5.A.3. Data Looks Accurate: Yes

5.B. Legibility

5.B.1. Data Entered Consistently: Yes

5.B.2. Easy to Read Numbers: Yes

5.B.3. Easy to Determine Who Rode or Why Not: Yes

5.C. Number of Manifests: Ok

5.D. Ordered

5.D.1. Format Allows for Ordering of Manifests: No

5.D.2. Pickup and Drop-off Times are Correct: No

5.D.3. Appears that the Office Controls the Information, Not the Driver: No. However, the innovative method of paying drivers by the run and not by the hour incentivizes the drivers to find the most efficient way of delivering the trips.

5.E. Clients on Manifest Ride: Yes

6. Employment, Training and Staff:

ITRE has not been able to receive a copy of the Business Practices Questionnaire. Therefore, information in the following sections comes from memory from the site visit and may be incorrect or incomplete.

The following analysis is based on the corresponding sections of the Business Practices Questionnaire, Employee Worksheet and site visit. If needed, a comparison was made to the day-to-day documents (manifests, etc) received from the system.

6.A. Job Advertisement [Questionnaire Sections 1a – 1c]:

6.B. Designation of Staff Duties and Driver Work Assignment [Questionnaire Section 1c, 1d, 3k – 3m]: ☑ The transit system has a very innovative method for paying drivers. Instead of paying by the hour, they pay by the run. Each run has a pre-determined payment for the driver. With this payment plan, the transit system can be confident that drivers are not taking longer to perform the run than necessary.

6.C. Staff Software Utilization and Computer Proficiency [Questionnaire Sections 1b and 1d]: ☑ Staff appears to be comfortable using a system of linked Excel spreadsheets that meets its current needs. Transit-specific scheduling software is not utilized in this operation. With the small size of the transit system and the skillsets of the office staff, it can continue to successfully operate without software. However, the system is not in a position to handle growth without implementing some kind of scheduling software that assists with data collection and reporting. It is recommended that the system transition to a basic scheduling assistance software to prepare for future growth.

7. Operations and Administrative Policies:

7.A. Repairs and Routine Maintenance Policy [Questionnaire Section 4a – 4d]: ☑ The system has implemented AssetWORKS, which will assist in tracking and scheduling maintenance.

7.B. Scheduling Policy and Procedure, Use of Real-time Dispatching [Questionnaire Section 3a – 3c, 3e, 3f and 3m]: ☑ Schedules are determined the day before the run occurs. Once on the road, the drivers tend to manage their schedules independently.

7.C. Vehicle Outstationing [Questionnaire Section 5c]: There is a continual issue with drivers having to come back to the base to switch vehicles. Vehicles are outstationed but are switched at the office on a regular basis due to capacity constraints.

7.D. Policies and Procedure for Emergencies, Sick Drivers or Vehicle Breakdown [Questionnaire Section 3m]:

7.E. Charges and Procedures for No Shows or Cancellations, Administrative Fees and Fuel Charges [Questionnaire Sections 3e – 3j, 5.b.2, 7f , 7g, 8b and 8c]:

7.F. Reports and Self-evaluation (data availability and accessibility) [Questionnaire Sections 5d, 6h and 6i]: ☑ The transit system is able to pull most information quickly using the system it has developed in-house.

7.G. Interagency Coordination and Trip Brokering [Questionnaire Sections 5a and 5b]: There are no options for brokering trips within the county.

7.H. Out of County Services [Questionnaire Section 3n]: Hyde must continually go out of county for most medical appointments. Many of the trips are to Washington and Greenville. Due to its' isolated location, the only opportunity for coordination is with Beaufort County and these opportunities are limited.

7.I. Service Types [Questionnaire Section 3o]:

7.J. Community Visibility [Questionnaire Section 9a-9c]: ☑ The transit system has one of the most distinctive van logos in the entire state.

8. Billing, Funding Sources and Budgeting:

8.A. Billing Methods and Rates [Questionnaire Section 5.a.2, 7a, 7b]:

8.B. Costs of Service [Questionnaire Section 8a]:

8.C. Rate Setting [Questionnaire Sections 8e]:

8.D. Funding Sources [Questionnaire Sections 6f, 6j, 7c – 7e, and 8f]: Hyde Transit does not carry any Medicaid trips, which sets it apart from its peers. ☑ Instead, the transit system has focused on finding other sources within the community and has done an excellent job of outreach.

8.E. Budgeting [Questionnaire Sections 2e, 8d and 8g]: As a non-profit, the transit system must accurately budget because the county will not bail them out in case of an issue.

9. Planning:

9.A. Procedure for Policy Change and Review Process [Questionnaire Sections 2d, 3d, 6b – 6e, 6g]:

9.B. Service Planning, Expansion and Review Process [Questionnaire Section 6a, 6b and 6g]:

Other Areas of Analysis

During the performance planning process, many aspects of a system's performance are analyzed; all of the areas of analysis are listed below. Only those that need comment are included in the body of the Plan.

- Total passenger trips
- Deadhead Miles and Hours
- Cancelations and no shows for subscription trips and demand response trips
- Number of wheelchair passengers
- Number of lift-equipped vehicles
- Weekday Average Daily Passengers
- Weekday Average No Shows
- Weekday Average Wheelchair Passengers
- Total Vehicles
- Lift Vehicles
- Weekday Service Hours
- Weekday Revenue Hours
- Weekday Service Miles
- Weekday Revenue Miles
- Deadhead Miles and Hours
- Hiring practices
- Designation of staff duties and driver work assignment
- Software utilization and computer proficiency
- Organizational structure
- Work environment
- Repairs/routine maintenance policy
- Use of real-time dispatching
- Vehicle out stationing
- Policy and procedure for emergencies, sick drivers or vehicle breakdown
- Charges for no shows and cancellations
- Administrative Fees and Fuel Surcharge
- Reports and self-evaluation, availability and ability to access data
- Interagency Coordination
- Billing methods and Rates
- Cost of Service
- Rate Setting
- Funding Sources
- Budget Process
- Policy change procedure and review process
- Service planning, expansion and review process
- Community awareness and relationship