Paratransit Plan Exhibit 7 of 14

EXHIBIT 7: TIMELY SERVICE

This exhibit contains the procedures for Measuring Service Quality for TOPS and the OTP Procedure for RTS Access.

Table of Contents

[Measuring Service Quality for TOPS, Version 7, Effective April 1, 2016 2](#_Toc500335366)

[1.0. Transit Organization Performance Scorecard 2](#_Toc500335367)

[2.0. Goal Setting 4](#_Toc500335368)

[3.0. On-Time Performance Standards 5](#_Toc500335369)

[4.0 Activities 7](#_Toc500335370)

[5.0. Tools and Inputs 9](#_Toc500335371)

[6.0. Auditing and Conformity 12](#_Toc500335372)

[7.0. Collection and Calculation Procedures for Operations Units 14](#_Toc500335373)

[OTP Procedure for RTS Access, Version 4, Effective April 01, 2016 14](#_Toc500335374)

[1.0. Criteria 14](#_Toc500335375)

[2.0. Goals and Scorecard Points for Fiscal Year 2016-2017 15](#_Toc500335376)

[3.0. Collecting and Calculating Time Points 15](#_Toc500335377)

# Measuring Service Quality for TOPS, Version 7, Effective April 1, 2016

This document explains the measurement procedure for the On Time Performance metric in the Service Performance Index of the Quality Service Delivery strategic pillar.

## 1.0. Transit Organization Performance Scorecard

RGRTA uses strategic pillars to identify areas essential to success. RGRTA uses the Transit Organization Performance Scorecard (TOPS) as a tool to measure and monitor performance in the strategic pillars. Each pillar has a correlating performance index, or category, in the scorecard. Each index contains one to three distinct performance indicators, or metrics. At regular intervals the metrics are measured, delivered, and communicated.

The Financial Performance Index (FPI) assesses RGRTA's Financial Sustainability Pillar and has a goal of 40.0 points in all four quarters. The Customer Satisfaction Index (CSI) assesses RGRTA's Customer Service Excellence Pillar and has a goal of 30.0 in the first and third quarters and 25.0 points in the second and fourth quarters. The Service Performance Index (SPI) assesses RGRTA's Quality Service Delivery and has a goal of 30.0 points in the first and third quarters and 25.0 points in the second and fourth quarters. The Employee Engagement Index (EEI) assesses RGRTA's Employee Engagement pillar and has a goal of 0.0 points in the first and third quarters and 10.0 points in the second and fourth quarters.

### 1.1. Quality Service Delivery

The Quality Service Delivery pillar uses the Service Performance Index (SPI). SPI uses one success indicator, on-time performance, for all operations units. The SPI points are allocated between RTS Monroe and RTS Access based on their respective percentage of the total customers served by the Authority, with the balance of points allocated evenly amongst the Regionals. As a result, 93% of the SPI points are allocated to RTS Monroe, 1% to RTS Access, and 6% to the seven regional subsidiary companies combined. SPI is worth a total of 25 points for two quarters and a total of 30 points for two quarters. Because the Employee Engagement Index will be measured in Q2 and Q4 only, EEI points were redistributed to SPI and CSI for Q1 and Q3.

The ScoreCard Points for SPI are 30 points in Q1 April to June, 25 points in Q2 July to September, 30 points in Q3 October to December, and 25 points in Q4 January to March. The SPI business impact is that customers consistently indicate that on-time performance is the most important element of RTS bus service.

The purpose of SPI is to measure how successful we are at picking up customers at the scheduled time. The SPI is measured monthly. The success indicator for the SPI is on-time performance (OTP).

The Operations Units measured in the SPI are Monroe, Access, Genesee, Livingston, Ontario, Orleans, Seneca, Wayne, and Wyoming.

The service to measure in the SPI is as follows: RTS Monroe measures OTP for fixed route service. RTS Access is the paratransit service provider for Monroe County and measures demand response service for OTP. Regional companies measure OTP on a set of routes with published schedules wherein route deviation may occur. While Regionals may offer flex route or dial-a-ride service, those services are not used to measure OTP.

## 2.0. Goal Setting

Goals and points are determined annually and approved by the start of each fiscal year (April). The historical performance for each operations unit factor into the goals they are assigned. Goals are approved by the CEO and presented to the Board of Commissioners at the March Board Meeting prior to the start of the new fiscal year.

## 3.0. On-Time Performance Standards

### 3.1. Definitions

Fixed Route: service only operates according to pre-defined, published routes and schedules. RTS Monroe provides fixed route service.

On Time: bus arrives or departs at a time point within the applicable performance window for its scheduled time or at the schedule time; also called Normal.

On-Time Performance (OTP): is the percentage of service that is running on time within the allowable window.

Paratransit: transit for eligible persons in accordance with the Americans with Disabilities Act where service is provided at the customer’s request, and is based on a defined service area and scheduled pickups rather than on fixed routes. RTS Access provides paratransit service in Monroe County.

Route Deviation: a form of demand response service which operates on a base set of routes with published schedules, but may deviate up to 3/4 of a mile from the base route. The Operator must return to the point of deviation and then continue on the base route according to the published schedule. All regional companies conduct some portion of the demand response service with route deviation.

Valid Time Point: is the exact location and arrival time for the bus.

Window: the bus is on time if it arrives or departs at a valid time point within a pre-established number of minutes before or after its scheduled time.

### 3.2. Performance Windows

Each scheduled time point for a route has a range of minutes, or “window.” When the bus arrives or departs within the window for the scheduled time point, it is On Time.

Fixed Route service from RTS Monroe has a window of 2:00 minutes Early to 5:00 minutes Late. Paratransit service from RTS Access has a window of 10 minutes Late. Route Deviation service from RTS Regionals has a window of 5 minutes Early to 5 minutes Late and this applies to base route locations only.

### 3.3. Measurement Criteria for Fixed Route and Route Deviation

Published schedules identify the scheduled times and stop locations to customers. Any operations unit with a published schedule must compare the time they actually arrive at an official route stop location with the fixed time in their published schedule. All operations units must measure actual arrival time for every stop location listed in their published schedules.

### 3.4. Measurement Criteria for Route Deviation

For companies with route deviation, only the time points (stop locations with a published time) on the base routes are measured for OTP. Regional companies compare the time they actually arrive at the stop location on the base route with the time in their published schedule.

### 3.5. Measurement Criteria for Paratransit

Customers call and schedule a pickup time and location in advance. RTS Access Paratransit operations must compare the time they actually arrive at the arranged location with the scheduled pickup time.

### 3.6. Repository for Results

After measurements are collected and calculated, the results for each company must be entered into designated spreadsheets on the RTS Shared network drive (S drive). The Director of Analytics consolidates the results in the TOPS subfolders for the current fiscal year in the Analytics network drive.

## 4.0 Activities

1. Perform measurement or designate employee(s) to perform measurement and report results. (Regional Managers, Director of RTS Bus Operations, VP of Operational Initiatives)

2. Input value into TOPS Monthly Data spreadsheets on the Shared network drive. (Regional Managers, Director of RTS Bus Operations, VP of Operational Initiatives)

3. Input values into TOPS workbooks and score sheets on the Analytics drive. (Director of Analytics)

4. Verify that the monthly values are within established control limits. (Director of Analytics)

5. Review and discuss final numbers and issues if necessary. (Leadership, CEO)

6. Provide requested summary data to CEO. (Director of Analytics)

### 4.1 General Schedule

1. On the second Friday of the month: Managers, Directors, and VPs measure the SPI metrics and input the values into their spreadsheets on the Shared network drive. The Director of Analytics consolidates the information into the TOPS workbook on the Analytics drive.

2. On the first Thursday of the month: The Board of Commissioners holds a meeting.

3. In the months of August, November, February, and May: The Board reviews quarterly TOPS results during the Board Meeting.

## 5.0. Tools and Inputs

### 5.1. About CAD/AVL Technology

RTS Monroe and RTS Access use a computer aided dispatch and automatic vehicle location (CAD/AVL) system called OrbCAD. When OrbCAD is functioning normally, radio communications and GPS equipment broadcast the real-time locations of buses in service. An OrbCAD database (LTDB) captures the timestamp and location data.

### 5.2 RTS Monroe

RTS Monroe uses the following tools:

1. OrbCAD system, Radio Communication System and OrbCAD Long-term Database

2. Operations Report Database

3. RADIAN

4. OpsDailyWorksheetv6.xlsm

5. Route Ranking Summary Vx (deployed from Crystal Reports)

6. RSA by Route Vx – Daily (deployed from Crystal Reports)

7. Measurement of daily RSA.xlsx

8. Trapeze FX schedules

9. Trapeze OPS work assignments

10. Trapeze PASS application and reports

RTS Monroe uses the following inputs:

1. GPS timestamps/time points

2. Work Schedules

### 5.3 RTS Access

RTS Access uses the following tools:

1. OrbCAD system, Radio Communication System and OrbCAD Long-term Database

2. Trapeze PASS application and reports

3. Scheduled pickups

4. Paper manifests

RTS Access uses the following inputs:

1. GPS timestamps/time points

2. Work Schedules

3. Operators

### 5.4 RTS Livingston

RTS Livingston uses the following tools:

1. OrbCAD system and OrbCAD Long-term Database

2. Operations Report Database

3. RADIAN

4. LATS RSA by Route Vx (deployed from Crystal Reports)

5. Paper manifests

6. Published Schedules

RTS Livingston uses the following inputs:

1. GPS timestamps/time points

2. Work Schedules

3. Operators

### 5.5 RTS Ontario

RTS Ontario uses the following tools:

1. Route Match system

2. Scheduled pickups

3. RADIAN

4. On Time Performance – CATS (deployed from Route Match, Fixed Route Reporting)

5. Paper manifests

6. Published Schedules

RTS Ontario uses the following inputs:

1. GPS timestamps/time points

2. Work Schedules

3. Operators

### 5.6 RTS Genesee, Orleans, Seneca, Wayne, and Wyoming

RTS Regionals use the following tools:

1. Published schedules

2. OTP.xlsx

3. Paper manifests

RTS Regionals use the following inputs:

1. Regional Managers

2. Managers of Operations

3. Work Schedules

4. Operators

## 6.0. Auditing and Conformity

Employees with roles associated with Quality and Performance Measurement may audit the collection and calculation procedures during periodic review. Such audits may occur randomly or when results vary by more than two standard deviations. For Regional operations units, the audits involve review of the paper manifests and a check of mathematical accuracy. For operations units using CAD/AVL technology, the audits involve review of the onboard technology and supporting databases. Regional operations units must collect time points manually; therefore, data spot checks are conducted to verify compliance with the OTP standards and best practices are provided for measuring OTP.

### 6.1. Best Practices for Regional Operations Units

1. Operators must log their actual arrival time at each stop/time listed in the published schedule, whether or not they pick up a customer.

2. Managers must ensure the fields on the paper manifests match the published schedule locations.

3. Managers must always calculate the same total time points for a route; the total time points are derived from the published stop locations for that route.

4. Managers may not estimate OTP for fields that are not filled in by the Operator with an actual arrival time.

5. When Operator’s runs go to “the end of the line,” they must log their actual arrival time AND their actual departure time.

6. Managers may only use actual arrival times when categorizing and calculating OTP.

### 6.2. Spot Checks

The Director of Analytics and staff may routinely conduct spot checks of OTP data.

## 7.0. Collection and Calculation Procedures for Operations Units

Specific procedures for the operations units are on the intraweb.

End of Measuring Service Quality for TOPS procedure in Exhibit 7.

# OTP Procedure for RTS Access, Version 4, Effective April 01, 2016

This document explains the collection and calculation procedures for the On Time Performance metric at RTS Access. These measurements support the Service Performance Index of the Quality Service Delivery strategic pillar.

## 1.0. Criteria

Service to Measure: Paratransit Service is provided at an eligible customer’s request, and is based on a defined service area and scheduled pickups rather than on fixed routes. RTS Access provides paratransit service in Monroe County.

Total Sample: Monday through Sunday.

Route Randomization: Full population of all service.

Arrival Times: Arrival times are used for OTP calculations. Customers call and schedule a pickup time and location in advance. RTS Access operations must compare the time they actually arrive at the arranged location with the scheduled pickup time for each customer.

## 2.0. Goals and Scorecard Points for Fiscal Year 2016-2017

In the scorecard, Service Quality will be worth 30 of 100 points in Quarters 1 & 3, and 25 of 100 points in Quarters 2 & 4. The quarterly score includes all operations units. Below are the goals and ranges assigned to RTS Access.

Access Quarter 1 and Quarter 3: 95.0%, 0.33 points, % Range: 90% minimum to 100% maximum, Point Range: 0.229 minimum to 0.425 maximum. Access Quarter 2 and Quarter 4: 95.0%, 0.27 points, % Range: 90% minimum to 100% maximum, Point Range: 0.191 minimum to 0.354 maximum.

## 3.0. Collecting and Calculating Time Points

RTS Access buses and Dispatch have the OrbCAD and radio systems. OrbCAD collects and records time point data throughout the run; the data is sent to Trapeze PASS. Operators also record time point data manually using paper manifests; the paper manifests serve as a backup source of data. In cases where backup data is needed, the Dispatcher inputs the data from paper manifests into the Trapeze PASS system. All time-point data, whether collected automatically from OrbCAD or manually from paper manifests, resides in Trapeze PASS.

The Administrative Assistant uses Trapeze PASS to generate the report that calculates on-time performance.

### 3.1. Process

A. Dispatchers

1. Distribute Operator manifest sheets to each Operator at the beginning of work.

2. Log on with OrbCAD.

3. Collect completed paper manifests.

4. If failures are noted on the manifests or if Trapeze is missing auto arrival data, input the time points from the paper manifests into Trapeze PASS.

B. Operators

1. Log on with OrbCAD and complete route.

2. Use Operator manifest sheets as a backup method for recording the pickup times. If OrbCAD or the radios fail, make a note on the manifest.

The Operator records the actual pickup time in the pickup time column, in the space above the official scheduled pickup time. The Operator indicates if OrbCAD malfunctions in the notes area.

C. Administrative Assistant

1. On the first day of the month, run the On-Time Compliance Report in Trapeze PASS. The date range is for the month prior.

2. Save a copy of the On-Time Compliance Report to 01\_Access\_OTP in the Reports folder for the year. Name the PDF file by month.

3. Email the On-Time Compliance Report to the Director of Analytics.

If the Administrative Assistant is unavailable, the VP of Operational Initiatives or another designee performs the process.

### 3.2. Trapeze PASS (On-Time Compliance Report)

1. Launch Trapeze Reports.

2. Select Productivity Reports > On Time Compliance.

3. Click Process & Run Report.

4. Select the On Time Compliance parameters specified here and click OK.

a. From Date/To Date: select the start and end dates for the month.

b. Type: select 1 Live

c. From Route/To Route: select all routes

d. Report Type: Summary

e. Group By: Route

f. Pickup Time Base: Sched. Time, Early/Late: -10/+10

g. Will-Call Time Base: Sched. Time, Early/Late: -10/+10

h. Exclude Exception Day: Select

i. Providers: All

j. Ada Codes: All

k. Funding Sources: All

5. Trapeze provides the On Time Performance Report.

6. Email the value of the Grand Total for column Scheduled Trips LateOnly % On-Time to the Director of Analytics.

### 3.3. Formula

Each scheduled time point for paratransit has a window of 10 minutes Late. Although all time points are tracked, only Late time points are used to calculate on-time performance. A Late time point is considered Abnormal. A time point that is on time is considered Normal.

Late divided by Total Time Points = Fraction of Abnormal Time Points

1 Minus Fraction of Abnormal Time Points Multiplied by 100 = On Time Performance %

To do the calculation:

Divide the total number of Late time points by the total number of time points for the month.

Subtract the fraction from 1 and multiply by 100.

Q1% + Q2% + Q3% + Q4% divided by 4 = Annual %

The quarterly percentages are averaged to calculate the annual percentage.

### 3.4 Destination for Calculated Data

Analytics network drive

End of OTP Procedure for RTS Access in Exhibit 7

End of Exhibit 7

There are 14 total Exhibits available for public comment.