



## CHAPTER XIII

# Implementation Plan

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This chapter describes an implementation plan for expanded service to be provided by Eagle Transit. This incorporates a review of institutional arrangements, service plan timing, responsibilities, capital planning and timing, and the steps taken to implement changes. This implementation plan should act as a guide or “blueprint” for service design and timing.



### INSTITUTIONAL PLAN

The LSC team recommends that general public transit service, operated by Eagle Transit, remain under the control of the Board of County Commissioners for Flathead County. The county has the legal and financial capabilities to ensure the stability of transportation services within the community.

### SERVICE PLAN

The service plan should be operated as detailed in Chapter XII and implementation and detailed planning should begin immediately.

#### Planning Steps

##### Benefits:

- This service plan attempts to benefit all residents of Flathead County. Equitable service is difficult due to development patterns and density. Cost-effective and efficient service is offered in areas of greatest need.

##### Timing:

- The service plan should begin in mid-2006 once funding is secured for additional capital and operations. This additional funding must be in the form of local match. One option is to use TransADE funding as local match.

**Responsibility:**

- The Transit Manager will be responsible for planning and implementing the service plan as detailed. Approval from the Eagle Transit Advisory Board, the Area Agency on Aging, and ultimately the County Commissioners will be needed prior to this plan being implemented.

**Implementation Steps:**

- Eagle Transit will need to acquire dispatching and scheduling software prior to moving forward with a deviated fixed-route system in Kalispell.
- Eagle Transit will need to market new services.
- Additional funding will need to be secured in the form of local match.
- Ridership data by location should be entered into a database for analysis prior to determining the exact deviated fixed-route service area.

**Work to Improve the Status of Public Transportation at the State Level**

As home to one of Montana’s small rural transportation providers, Eagle Transit should work toward a leadership role in increasing the status of public transportation (particularly rural public transportation) among the state’s decision-makers. One obvious area that merits particular focus is funding. Every session of the State Legislature considers measures that would either help rural transit programs or harm them (such as measures to restrict transportation funding for highway use only). Eagle Transit has had success in securing discretionary grants from Montana’s statewide leaders. Eagle Transit should continue to pursue these funds as well as advocate for public transportation at local conferences and with the Montana Transit Association.

**CAPITAL RECOMMENDATIONS**

**Vehicle Replacement**

The LSC team recommends that Eagle Transit purchase ten vehicles over the short term. Total cost is estimated for six-years at approximately \$745,000. Vehicles are a combination of body-on-chassis, medium-sized buses, and vans. Table XIII-1 details the recommendations for vehicle replacement purchases over the next six years.



Table XIII-1 Capital Replacement Plan							
Vehicle Type	# Passengers	2007	2008	2009	2010	2011	2012
Body-On-Chassis	17		XX		X		
Mini-Bus	23	XX		X		XX	XX
Van	6			X			

## Facility

Eagle Transit’s maintenance and operations facility is only two years old. There is ample land available for expansion of this facility which serves Eagle Transit well. In the short term, there is no need for facility expansion; however, ongoing maintenance and upkeep of the facility will be necessary. The eight-bay facility does not currently have a bus wash bay and this may be something to think about in the next 10 years. Currently, buses are washed at a local car wash. The last TDP included the addition of a part-time bus washer; however, this never occurred. The drivers are responsible for washing the buses periodically. This is not something being recommended in this TDP.

## Bus Shelters

It is recommended that three bus shelters be purchased and installed at select locations in Kalispell. These locations include the FVCC, the Medical Center, and the Kalispell Center Mall. Additional shelters would be purchased over time. Shelters are estimated to cost approximately \$8,000 each.



Shelters not only provide an amenity to passengers, but can be used for advertising the system and promoting the system as open to anyone in the community. The shelters create a sense of solidarity for the system as passengers know that a bus **will** serve the fixed shelters. Advertising revenue can be generated from the stops as well.

## Scheduling and Dispatch Software

Eagle Transit should investigate and purchase scheduling and dispatch software to aid in the implementation of the deviated fixed-route service in Kalispell, as well as aid in scheduling ADA rides for the paratransit dial-a-ride service. This software is estimated to cost approximately \$50,000. Support services should be considered throughout the life of the software and budgeted accordingly. On-call support is generally available at a small cost to agencies once a system contract is established.

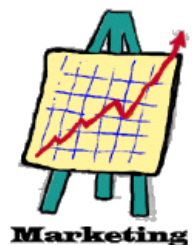
## Bike Racks

Eagle Transit and Flathead County residents realize the need for alternative modes of transportation. Installing bike racks on buses is one way of providing another alternative to the private automobile. As stated previously, agencies must realize that the bus trip does not begin or end at the bus stop, but the bus trip is only one component to the total trip. Bike racks should be installed on all new buses as older ones are replaced. This is currently a planned capital expenditure; however, costs for racks can exceed \$1,200 per unit.

## MARKETING PROGRAM

### Developing a Marketing Plan

Marketing functions influence every aspect of a transit system, from the way the telephone is answered to the color of the vehicles. The following Marketing Plan provides steps to develop a positive environment and image for Eagle Transit. Much of the information is taken from *The Manager's Guide to Market Planning: Marketing in Rural Transit*, a fact sheet from the University of Kansas Transportation Center.



The transit manager would need to handle most of the marketing duties. These duties would most likely be assigned to the administrative assistant at some point, but more realistically would be divided between the two positions. It is also assumed that Eagle Transit would use a consultant for major marketing promotions. For example, Eagle Transit does not currently have the software or equip-

ment to mass produce schedules, and it makes more sense to contract for that particular job. This will be true for other major marketing promotions discussed in the following pages.

Several steps are needed to develop a marketing plan for Eagle Transit:

1. Set marketing goals, objectives, and strategies.
2. Establish an action plan.
3. Calculate the budget.
4. Evaluate marketing efforts.

### Set Marketing Goals, Objectives, and Strategies

Without goals, objectives, and strategies, it is difficult to evaluate the success of any transit agency. The goals for Eagle Transit's public transit service are and should be relatively high, realistic, and attainable. The objectives and strategies should be specific and quantified. The more specific objectives and strategies are, the easier it is for managers to understand, approve, assign priorities to, and allocate resources for achievement. Specificity of objectives and strategies also makes it measurable and suitable for future evaluation.

### The Marketing Action Plan

The action plan consists of the projects and activities designed to achieve the stated goals and objectives, along with feedback and evaluations to measure the level of success of any given project or activity.

Several different marketing areas are involved in the action plan. Four areas are external to the transit agency:

- Public perception (image)
- Governmental/political leaders
- Business community
- Media

The remaining areas involve the transit agency itself. These include:

- Public information
- Merchandising
- Promotions and special services
- Equipment
- Passenger amenities

## *Implementation Plan*

- Routes/schedules/services
- Personnel
- Facilities and maintenance
- Fares and resources
- Planning

**Public Perception (Image):** The perceptions of the public are difficult to identify. Perceptions are made up of individuals' thoughts. The types of people hired, their appearance, the condition and design of the buildings and equipment, the type of media received, and other factors contribute to public perception. As the transit agency makes changes and improvements, people will change their preconceived notions.

Public perception may include the following activities for the transit agency.

- **Operating Policies** – A formalized set of operating policies should be adopted for consistency in performance of services. This does not need to be a complicated process—simply a written documentation of each activity, an explanation of how it is to take place, and the person responsible.
- **Design and Use of a Logo** – The logo will portray, identify, and define a transit agency and strongly promotes its image in advertising. The logo identifies agency vehicles, equipment, shelters, and facilities, as well as maps, schedules, and other agency materials. The logo design could be a community effort through a contest or through a designer. An area contest provides residents with a feeling of participation in the transit system. Basic guidelines include:
  - > Logo should be unique.
  - > Logo should be simple, geometric, understood by all, and have a strong visual impact.
  - > Logo should communicate in all two-dimensional and three-dimensional applications (ex: letterhead, uniforms, bus wraps, shelters, schedules, etc.). Avoid extremely decorative forms.
  - > Logo should reproduce well in black and white, as well as color.

As a preliminary legal step, a copyright check and filing should be made on any adopted logo.

The most important aspect for success of a public image program is in its implementation. Standards should be set for application and use. Defining the standards should include shape, size, proportion, color, and materials. Consistency of logo use reinforces the transit system's identity.

- **Public Information** – The public information area of marketing is important because this is how people learn what the system is and how to use it. Some possibilities for presentation include prepared user information aids, media coverage, community meetings, a citizens’ advisory committee, interior bus cards, telephone information service, system or route schedules on restaurant placemats, system map, information bulletins, and printed schedules.



One example of public information from the above list includes passenger bus schedules. The bus schedule can be one of the most informative pieces produced by the transit agency. It provides the opportunity to show people what service is available, how easy it is to use the bus, and other agency information. The bus schedule should be placed in areas where patrons are likely to see and take it. If schedules are hard to find or unavailable when needed, this will hinder usage. A sample bus schedule is provided in Appendix I.

### Calculate the Marketing Budget

The marketing budget is a tough field for many transit agencies. According to the American Public Transit Association, transit providers typically budget between 0.75 and 3.0 percent of their gross budget on marketing promotions (excluding salaries). Although this is less than most private sector businesses, public sector organizations can rely more heavily on media support for their public relations programs.

In reality, transit agencies must ask themselves questions, such as, “Will we get more riders with this campaign?” or “Will we get additional revenues from this marketing effort?” or “Why should we advertise something we are losing money operating?” Answers to these questions are subjective and may be influenced politically or may be continual efforts toward a particular market segment. The following text provides some “Rules of Thumb” that may be used.

## Implementation Plan

Marketing budget per peak vehicle	=	\$800 to \$1,200
Amount of line revenue generated for each marketing dollar spent	=	\$13 to \$16
Marketing budget per rider (excluding transfers)	=	\$0.015 to \$0.02
Amount per person in the service area	=	\$0.22 to \$0.25

3-5% of operating costs expended as follows:

Salaries and/or Consultant Services	66%
Printing Materials	19%
Advertising	7%
Merchandising	4%
Other Direct Expenses	4%
<hr/>	
TOTAL	100%

During the transit service changes for Eagle Transit, a first year budget of approximately \$15,000 is anticipated. This would include the cost of printing schedules as well.

The first year marketing budget of \$15,000 will use the above rules of thumb for the different marketing strategies.

Salaries and/or Consultant Services	\$9,000
Printing Materials	\$3,000
Advertising	\$2,000
Merchandising	\$500
<u>Other Expenses</u>	<u>\$500</u>
TOTAL Marketing	\$15,000

## Evaluation of Efforts

Evaluating the effectiveness of any marketing program is the key to refinement of the program and the development of new ideas. Marketing must return something on its investment if it is to benefit the agency and the bus riders. The following Marketing Evaluation form is designed to help evaluate all marketing efforts. Reviewing evaluations before



starting new efforts will prevent costly mistakes that were made in the past. However, it must also be remembered that times, people, and services do change and should be carefully reviewed before eliminating a new marketing idea.

## MONITORING PROGRAM

Monitoring should begin immediately when service is re-initiated. Data collection is essential to evaluate the service performance and to determine if changes should be made in the service delivery. This section provides information on data collection, databases, and standard reports which should be prepared.

## DATA TO BE COLLECTED

Data to be collected fall into three basic categories. The first is ridership data, second is on-time performance, and third is financial.

### Ridership

Passenger boarding data should be collected continually. There is a trade-off between data collection efforts and the value of information. It is just as easy to collect too much data as it is to collect insufficient data.

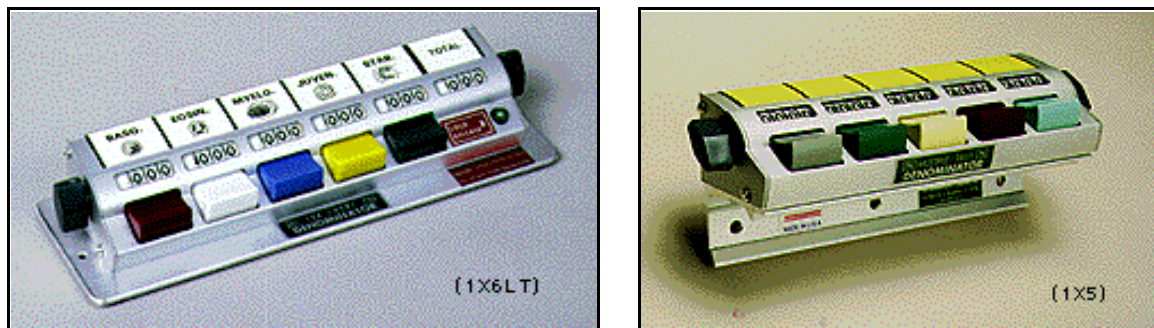
Passenger boardings should be recorded daily by route, fare category, and by trip. One goal all transit agencies should strive for is the implementation of Intelligent Transportation Systems, such as Mobile Data Terminals (MDT). Mobile Data Terminals include features such as recording each passenger by fare category as they board. This capability should be programmed into the capability of the software as it is implemented. Mobile Data Terminals also allow both data and voice communication between operator and dispatcher. It is similar to having an alphanumeric pager on the dashboard. Several successful agencies across the United States implementing MDTs include Central Ohio Transit Authority, Colorado Springs Transit, Tri-Met - Oregon, Milwaukee County Transit System, Ann Arbor Transportation Authority, and Montgomery County Transportation Authority.



**MDTs in use**

Passenger boarding data can also be collected using tally boards on the buses. Two sample counters are shown in Figure XIII-1. Sufficient buttons are required to record passengers in each fare category. A driver's log sheet should then be used to record the passenger counts at the end of each trip. The drivers do not need to calculate the number of passengers for that trip, but record the running total by fare category. As data are entered, the calculation of passengers on each trip can be made. An effective approach is to prepare the driver's log sheet for each of the drivers' runs. This will provide preprinted route and trip information, and the driver will need only to record the date and the passenger count data.

**Figure XIII-1**  
**Manual Passenger Boarding Counters**



Twice each year, a full boarding and alighting count should be completed. If passenger boardings are counted using the MDTs and integrated with Automatic Vehicle Location (AVL), the data can be recorded automatically. If it must be done manually, this is a more intense effort and will require the use of additional personnel. Passenger counts are recorded for passengers boarding and alighting by stop for a full day. This information records the passenger activity at individual stops and is useful to determine if stops are appropriately placed and what amenities should be provided. If a stop has little or no activity, it would not warrant a bench or shelter, and may not even be appropriate as a designated stop. Data collection forms should be prepared for each route showing the stops and providing space to record the passenger counts. An example used for an existing system is provided. Similar sheets should be prepared in advance for the boarding and alighting data collection.

Time: \_\_\_\_\_ am / pm

# Breckenridge Route

# of carryover passengers: \_\_\_\_\_

ID	Bus Stop	ON	OFF	W/CH ON	W/CH OFF
34	Frisco Station				
46	Summit Boulevard @ School Road				
89	Main St @ 6th				
94	Granite Street				
50	Ophir Mountain Village				
21	County Commons				
95	Hwy 9 @ Farmer's Korner				
74	Hwy 9 @ Tiger Run				
97	Hwy 9 @ Vienna Townhomes				
13	Hwy 9 @ Breckenridge Rec. Ctr				
18	Park Ave. @ City Market				
6	Park Ave. @ 4 O'Clock Road				
110	Breckenridge Station				
110	Breckenridge Station				
108	Park Ave. @ River Mountain Lodge				
18	Park Ave. @ City Market				
98	Hwy 9 @ Breck Inn				
97	Hwy 9 @ Vienna Townhomes				
74	Hwy 9 @ Tiger Run				
95	Hwy 9 @ Farmer's Korner				
50	Ophir Mountain Village				
21	County Commons				
109	Summit Co Comm. Ctr				
94	Granite Street				
89	Main St @ 6th				
46	Summit Boulevard @ School Road				
34	Frisco Station				

**EXTRAS**


## *Implementation Plan*

Finally, an onboard passenger survey should be conducted periodically. We recommend that a survey be conducted six months after service changes have been implemented. Following that, passenger surveys should be conducted at least every two years. Survey instruments with questions appropriate for Eagle Transit should collect information about passenger demographics, trip characteristics, and perceptions of the transit service.



# ❄ Snow Express Survey ❄



This survey is being conducted by the Western Transportation Institute-Montana State University/Bozeman on behalf of the Big Sky Transportation District. Participation in the survey is strictly voluntary.

Route: \_\_\_\_\_

Time Boarded: \_\_\_\_\_

**1. What is your primary reason for being in Big Sky today? (check only one)**

- Work
- Skiing/outdoor recreation
- School
- Shopping
- Other (specify) \_\_\_\_\_

**2. How do you normally travel in Big Sky? (check only one)**

- Owned vehicle
- Snow Express
- Rented vehicle
- Other (specify) \_\_\_\_\_
- Carpool

**3. I usually ride the bus \_\_\_?\_\_\_ days a week: (check only one)**

- One day
- Two days
- Three days
- Four days
- Five days
- Six - seven days
- This is my first time
- Less than once a month

**4. How frequently would a bus need to pass by a pick-up point for you to consider using the service? (check only one)**

- Every hour (60 minutes)
- Every 45 minutes
- Every 30 minutes
- Every 20 minutes
- Every 15 minutes
- Every 10 minutes
- I would not use a bus, regardless of the frequency

**5. How much you would be willing to pay for a one-way bus ride within Big Sky? \$\_\_\_\_\_ per ride**

**6. To what level do you agree or disagree with the following statements about the Snow Express? (Please answer even if you are not a user)**

	Strongly Agree		Neutral		Strongly Disagree	Don't Know
a) The buses are attractive.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) The drivers are courteous.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) The vehicles are comfortable.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) The vehicles appear clean and well maintained.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) There is adequate information about the service.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f) The schedule is easy to understand.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**7. If there was one thing you could change about the Snow Express, what would it be?**

**8. How important are the following features when choosing to ride a public bus system in Big Sky? (Please answer even if you are not a user)**

	Very Important		Neutral		Not Important
a) An attractive bus.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) A smooth ride.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) Friendly drivers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) Easy to read schedules.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) Frequent service.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f) Service from the Bozeman Airport to Big Sky.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g) Service from the City of Bozeman to Big Sky.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*Please continue on other side*

**9. Where are you coming FROM and going TO on this bus trip?**

	FROM	TO
Meadow Village Center	<input type="checkbox"/>	<input type="checkbox"/>
Moonlight Basin	<input type="checkbox"/>	<input type="checkbox"/>
Bucks T-4 (or anywhere along Highway 191)	<input type="checkbox"/>	<input type="checkbox"/>
Hidden Village / The Pines	<input type="checkbox"/>	<input type="checkbox"/>
Firelight Area	<input type="checkbox"/>	<input type="checkbox"/>
Westfork Center	<input type="checkbox"/>	<input type="checkbox"/>
Mountain Village Center	<input type="checkbox"/>	<input type="checkbox"/>
Other condos ( <i>please specify</i> ) _____	<input type="checkbox"/>	<input type="checkbox"/>
Other area not listed ( <i>please specify</i> ) _____	<input type="checkbox"/>	<input type="checkbox"/>

**10. Are you a visitor or resident of Big Sky?**

- Visitor / Tourist                       Seasonal Resident  
 Year-round Resident                       Second Homeowner

**11. What is the zip code of your primary residence? \_\_\_\_\_**

**12. How old are you? \_\_\_\_\_**

**13. Gender:**

- Male                       Female

**14. Did you have a vehicle available to make this trip?**

- Yes                       No

**15. Have you filled out this survey earlier today?**

- Yes                       No

**Please provide any other comments you may have about transit/bus/transportation issues in the Big Sky area.**

**Thank you for your time!**

## **On-Time Performance**

With any transit system, it is important to monitor on-time performance. An on-time performance goal should be established. For instance, an attainable on-time goal of 95 percent for the service may be considered for system changes. Minor adjustments to routes may be needed to ensure that schedules and headway adherence can be maintained.

To record on-time performance, drivers should report actual arrival and departure times at designated bus stops along the routes and at major stops, such as Kalispell Center Mall and Prairie Springs Development, to the coordinator. It should be emphasized that drivers should not leave prior to a scheduled stop time in order to make up time along a route. Leaving early could cause riders to miss a bus.

The dispatcher should then record this information so that the number of trips running late can be determined. Again, this capability could be integrated with the MDT and database system so that the data is entered directly by the driver. This effort should continue for the first three months of service. After that, on-time data should be checked randomly to ensure that performance remains acceptable.

## **Demand-Response Performance**

### **Missed/Late Trips**

Continual missed and/or late trips can cumulatively impact overall service efficiency, on-time performance, and contribute to negative perceptions of transit service. Eagle Transit should adopt a standard of performance for this service. A late trip may be considered as more than 5 minutes after the latest scheduled time, but less than 10 minutes after the latest scheduled pick-up time. A missed trip should be indicated if a passenger is picked up 20 minutes or later, or not at all, after a scheduled pick-up time. Missed and late trips should be monitored by the transportation coordinator on a daily basis. Data related to these categories should be compiled into the monthly performance report so that repeated occurrences may be addressed. If missed/late trips continue to occur after a three-month period, adjustments should be considered as a corrective measure.

## **Financial Data**

Eagle Transit should carefully track financial data. Accounts should be kept so that separate costs can be tracked for each route. Financial data are required to evaluate performance measures such as the operating cost per hour of service and the cost per passenger-trip. Currently, this is tracked by Eagle Transit and reported to the County Accounting Office. This should remain the system for accounting practices into the future.

## **DATABASE FORMAT**

Several options are available for storing the data. The recommended approach is to set up databases in Microsoft Access to record passenger data. Example databases and assistance can be provided. A separate database should be set up for routine passenger data and a second for the boarding and alighting counts.

If the buses are equipped with Mobile Data Terminals (MDT), passenger count data can be entered directly into the database by the driver. The touch screen capability will allow the driver to record passenger boardings at each stop. This, combined with Automatic Vehicle Location systems, can record the data automatically by stop, eliminating the need for separate boarding and alighting counts. Similarly, drivers could report their arrival at the downtown transfer center via the MDT, and the time could be recorded automatically into a database for on-time performance. These capabilities should be programmed into the new software capabilities as they are implemented.

Onboard survey data can be entered into a database such as Access or a spreadsheet program such as Excel.

## **STANDARD REPORTS**

Eagle Transit should provide monthly performance reports. The report should include performance data for the current month, the same month in the previous year, year-to-date performance, and the prior year-to-date performance. Information which should be reported includes passenger boardings by route, passengers per revenue-hour by route, total passengers by fare category, total passengers, and

system passengers per revenue-hour. Financial information should be reported including the operating cost and the cost per passenger. The average fare should be calculated and reported based on operating costs and passenger counts.

Quarterly reports should be considered for providing recent trends and interim performance data to elected officials, the public, and other stakeholders. Additionally, an annual report should be compiled and presented. A sample report format is provided. The information for these reports can be easily generated from the databases and the accounting system.

### **Performance Monitoring Categories**

Transit performance measures serve as a guide to find out how a transit system performs. Performance measures define the type of data to be collected and give the tools necessary to identify transit system deficiencies and opportunities.

It is worth noting that criteria used for the selection of performance measures include the following:

- Be measurable.
- Have a clear and intuitive meaning, so that it is understandable to those who will use it and to non-transportation professionals.
- Be acceptable and useful to transportation professionals.
- Be comparable across time and between geographical areas.
- Have a strong functional relationship to actual system operations so that once changes occur in system operations, changes to the system can readily be determined.
- Provide the most cost-effective means of data collection.
- Where appropriate, be based on statistically-sound measurement techniques.
- Be consistent with measures identified for other systems.

Performance measure categories that Eagle Transit should use include:

- On-time Performance
- Missed/Late Trips
- Passenger No-Shows
- Service Denials
- Fleet Maintenance

Many of these measures have been described above. Other performance measures that should be used are:

**Passengers/Hour:** Number of total monthly and annual passengers divided by the corresponding revenue-hours. (Pax/hour)

**Passengers/Mile:** Number of total annual passengers divided by the annual revenue-miles. (Pax/mile)

**Vehicle-Miles/Service Area:** A good measure of the level of service being provided. The service area must be realistically identified. As an example, a county system may say they serve the entire county, but in fact much of the county is very rural and service is never provided. (Veh.-miles/Serv. area)

### Distance Traveled Between Mechanical Breakdowns – Service/Road Calls

Vehicle breakdowns are inevitable. Although frequent occurrences can create disruptions in a transit system, it is important to track the frequency and type of mechanical failures of each vehicle in addition to monitoring a fleet's age. Monitoring of vehicle breakdowns is one method of reducing system disruptions and may allow an agency to improve monitoring of vehicle replacement schedules and preventative maintenance practices. Data collection efforts should include date, time of day, type of failure, age of vehicle, vehicle number, vehicle mileage, and how the situation was rectified. Monitoring of these items will allow an agency to recognize repeated types of mechanical breakdowns, breakdowns related to vehicle type, age or mileage, and assist with preventative maintenance programs. Wheelchair lift failures should also be monitored. Data should be included in the monthly report.

Additional fleet maintenance performance measures may include:

**Accidents/1,000 miles:** Measure of driver safety. Accidents must be defined as a standard. (Accid/ 1,000 miles)

**Average Age of Fleet:** A good single indicator of vehicle replacement needs, although individual vehicle inventories, ages, and mileage should be tracked. (Avg. age of flt.)

## Eagle Transit Monthly Operating Report September 2007

### Ridership

Route	September 2007			September 2006		
	Passengers	Hours	Passengers per Hour	Passengers	Hours	Passengers per Hour
1						
2						
3						
4						
Total						

### Passengers by Fare Category

	September 2005	September 2004
Adult Cash		
Senior, Disabled Cash		
Monthly Pass		
Discount Monthly Pass		
Punch Pass		
Route-Deviation		
Demand-Response		
Extended Demand-Response		
General Public Demand-Response		

### Financial

Item	2007 Budget	2007 YTD	Percent of Budget	2006 YTD
Admin Salaries/Benefits				
Operating Salaries/Benefits				
Maintenance				
Rental/Leases				
Utilities				
Fuel and Oil				
Tires				
Insurance				
Taxes				
Other				
Total				

## FINANCIAL PLAN

### Operating Funding

The six-year operations and capital budget is provided in Table XIII-2. Capital costs, including bus purchases, are estimated at approximately \$236,000. Projected annual operating cost of approximately \$640,000 for 2007 for a total cost of \$876,000. Subsequent years are provided at an annual increase of three percent. The cost projection incorporates the ten individual elements discussed in Chapter XII:

1. Route-deviation service in Kalispell
2. ADA service in Kalispell
3. Increased service in Columbia Falls
4. Increased service in Whitefish
5. Limited commuter service
6. Downtown Kalispell shuttle system
7. Operations Manager Position
8. Marketing program
9. Capital improvements
10. Countywide Dial-a-Ride service and expansion in South Valley

Implementation of the full service plan will *not* require a local financial contribution of the entire \$876,000. There are some adjustments and built-in revenue sources that will moderate the cost, as well as FTA shares and local donations. The Federal Transit Administration's Section 5311 Program provides capital, operating, and administrative cost assistance to support public transit services in communities with populations less than 50,000. The 5311 Section can provide operating assistance at 54 percent of the net operating deficit, or in the case of the Eagle Transit service, \$345,000. The remainder—an amount of \$294,000—is a local match obligation. It must be noted that the \$345,000 in operating assistance is the maximum that the Section 5311 Program could provide and is not guaranteed. Section 5311 funds are allocated to states on a formula basis. The State of Montana receives a fixed level of funding, which is in turn allocated to individual transit programs in the state. The existing Section 5311 recipients will require operating assistance in future years at increased levels, reflecting increased operating expenses for items such as fuel and insurance. Fortunately, funding levels in the Section 5311 program have grown modestly in recent years. The recently passed Safe, Efficient, Flexible, Transportation Equity Act – A Legacy for Users or SAFTEA-LU has increased funding dramatically for the State of Montana and will

support higher expenses and expansion of existing transit programs, and may also support new starts within the state.

The local match for operating assistance may be provided as a cash match, or through contract revenue. If the transit program provides services for other entities and organizations under contract, the revenue derived from provision of these services may be utilized as local match. Contract revenues may be used as match, even if they are derived from federal sources. The prohibition against using federal funds to match federal funds does not apply in this situation. The only federal funds that may not be used to match Federal Transit Administration grants are other FTA funds. This provision allows communities to integrate certain client transportation services with public transit services and apply the cost of operating the client transportation services to the match. The contract match is most effective when the contract service passengers are carried on the existing public transit services, without the need to operate additional services.

As indicated, the local match obligation, for administrative and operating assistance is \$294,000. These matching funds will be required each year, and the amount will increase as costs escalate over time provided that estimated revenue is sustained annually. The disadvantage of utilizing general funds without a dedicated funding source is that changing fiscal and political climates could jeopardize the availability of funds in a future year.

It must be noted that administrative costs can be applied for at an FTA 80/20 split, where Eagle Transit would be responsible for a local match of 20 percent of these costs. Administrative costs covered at the 80 percent federal match are at the discretion of MDT. It is likely that some of the administrative costs could be applied for at this split and thereby reduce the local match. However, at this point, administrative costs are shown to be at the 54/46 split until MDT determines if they will allow these costs to be matched at 20 percent.

Table XIII-2 Transit Plan, 2007-2012 (assumed 3% inflation)						
	2007	2008	2009	2010	2011	2012
<b>EXPENSES</b>						
<b>OPERATING</b>						
Kalispell Deviated Fixed Routes <i>(Service from 7:30a to 5:30p, expanded in 2009 with added route)</i>	\$284,139	\$292,664	\$451,444	\$464,987	\$478,936	\$493,305
Kalispell ADA Service <i>(ADA Certified Passengers)</i>	\$128,097	\$131,940	\$135,898	\$139,975	\$144,174	\$148,499
Columbia Falls Daily Service <i>(Service from 7a to 6p w/add commuter service in 2008)</i>	\$117,525	\$159,568	\$164,355	\$169,286	\$174,365	\$179,596
Whitefish Demand-Response Service <i>(Service from 8a to 5p, M,W,F)</i>	\$80,136	\$82,540	\$85,016	\$87,566	\$90,193	\$92,899
Countywide Dial-A-Ride Service <i>(Service in South Valley on T,Th starting in 2008)</i>	\$15,000	\$23,175	\$23,870	\$24,586	\$25,324	\$26,084
Downtown Kalispell Shuttle <i>(Service in Downtown Kalispell 6 days/week for 6/hrs per day)</i>		\$101,088	\$104,121	\$107,244	\$110,462	\$113,775
Marketing Program	\$15,000	\$15,450	\$15,914	\$16,391	\$16,883	\$17,389
<b>Subtotal</b>	<b>\$639,897</b>	<b>\$806,424</b>	<b>\$980,617</b>	<b>\$1,010,036</b>	<b>\$1,040,337</b>	<b>\$1,071,547</b>
<b>CAPITAL</b>						
Vehicle Purchase and Replacement	\$160,000	\$160,000	\$125,000	\$60,000	\$160,000	\$160,000
Dispatching and Scheduling Software	\$50,000	\$1,000	\$1,030	\$1,061	\$1,093	\$1,126
Other Capital (Equip/Office/Hardware/Software)	\$2,000	\$2,060	\$2,122	\$2,185	\$2,251	\$2,319
Passenger Shelters	\$24,000	\$16,000	\$8,000	\$8,240	\$8,487	\$8,742
<b>Subtotal</b>	<b>\$236,000</b>	<b>\$179,060</b>	<b>\$136,152</b>	<b>\$71,486</b>	<b>\$171,831</b>	<b>\$172,186</b>
<b>TOTAL EXPENSES</b>	<b>\$875,897</b>	<b>\$985,484</b>	<b>\$1,116,769</b>	<b>\$1,081,522</b>	<b>\$1,212,168</b>	<b>\$1,243,733</b>
<b>REVENUES</b>						
<b>FTA/MDT PROGRAM FUNDS</b>						
FTA 5311 Program <i>(Operating with 46% match)</i>	\$345,544	\$380,882	\$473,308	\$487,507	\$502,133	\$517,197
FTA 5311 or 5309 Program <i>(Capital with 13% match)</i>	\$204,329	\$155,030	\$117,880	\$61,893	\$148,771	\$149,079
<b>Subtotal FTA Funding</b>	<b>\$549,873</b>	<b>\$535,912</b>	<b>\$591,188</b>	<b>\$549,400</b>	<b>\$650,904</b>	<b>\$666,275</b>
<b>LOCAL MATCH/SYSTEM REVENUE</b>						
Local Match Capital	\$31,671	\$24,030	\$18,272	\$9,593	\$23,060	\$23,107
Local Match Operating	\$294,353	\$324,455	\$403,188	\$415,284	\$427,743	\$440,575
<b>Subtotal Eagle Match</b>	<b>\$326,024</b>	<b>\$348,485</b>	<b>\$421,460</b>	<b>\$424,878</b>	<b>\$450,802</b>	<b>\$463,682</b>
Downtown Business Match	\$0	\$101,088	\$104,121	\$107,244	\$110,462	\$113,775
<b>Total Local Match</b>	<b>\$326,024</b>	<b>\$449,573</b>	<b>\$525,581</b>	<b>\$532,122</b>	<b>\$561,264</b>	<b>\$577,458</b>
<b>TOTAL REVENUES</b>	<b>\$875,897</b>	<b>\$985,484</b>	<b>\$1,116,769</b>	<b>\$1,081,522</b>	<b>\$1,212,168</b>	<b>\$1,243,733</b>
<p>Note: *To be used as a guide for future service. Actual expenses may vary depending on services provided. Contingent upon future funding levels from Flathead County and other local contributors. Vehicle purchase cost based upon \$80,000 per unit for bus and \$50,000 for body-on-chassis. May vary depending on selected vehicle and specifications.</p>						

## **Capital Funding**

Table XIII-2 indicates that the capital expense for the purchase of vehicles in 2007 will be \$160,000. Table XII-2 includes other capital items such as bus shelters and signs, and computer hardware and software. The estimated cost of the other capital items is \$76,000, with a total first year capital cost of \$236,000. Some of these other capital items are optional. Vehicles, however, are essential. There are two primary federal sources for transit capital funding—the Federal Transit Administration Section 5311 rural program discussed earlier and the Section 5309 program. Both provide up to 80 percent of the cost of equipment (90 percent of the cost of ADA-related equipment such as wheelchair lifts). The local match for acquisition of \$160,000 of vehicles is \$21,472 (based upon the current 86.58/13.42 funding split in Montana). Unlike the match for operating assistance, this match must be in cash.

Depending upon the size of the vehicles, equipment can be expected to last anywhere from 5 to 12 years. The medium-size buses that would be used for the Eagle Transit deviated fixed-route service would last up to 12 years. Eagle Transit should anticipate capital replacement costs and reflect the annualized match requirements in yearly budgets. Ideally, vehicle replacements might be spread over several years so that match obligations are not maximized in a single year. There are also creative financing strategies, such as loan funding, to extend the period for payment of the cash match.

As mentioned earlier, Section 5311 funds are allocated to states based upon formula, and are in turn allocated within states through an application process. Eagle Transit would compete with other existing and new Section 5311 capital applicants for funding. The Section 5309 program, which provides funding for buses and equipment for both urban and rural areas, has been entirely earmarked by Congress in recent years. Eagle Transit would also need to work through its Congressional delegation to pursue earmarked funds, such as the \$200,000 they will receive next year to be used for vehicle purchase. The issue with earmarked funding is that a local match is required.

## *Implementation Plan*

The cost of the remaining capital items—computer software and hardware, and bus shelters and signs—would be \$76,000. The federal share would be \$65,800, and the local share would be \$10,200 in cash for these items.

The details of the financing plan to support the Eagle Transit Service will emerge as the community refines the plan. The most sustainable transit programs are those that have a diversified funding foundation. A number of funding sources have been identified. The financing plan should not be necessarily limited to these sources alone, particularly if some of the suggested sources do not materialize. It also might be noted that if there are not sufficient funds available to support implementation of the full plan as described, the service could be scaled back to match the resources available. Additional service elements could be added incrementally as resources were secured. Conversely, if additional needs develop beyond the capacity of the service plan as designed and additional resources were also available, the scope and scale of service could certainly be expanded.

## **MANAGEMENT RECOMMENDATIONS**

Coordination should continue between Eagle Transit and the local agencies within the county. There is currently no formal mechanism for this coordination. The existing Transit Advisory Board—which includes some of the social service agencies within the county and other community representatives—is an appropriate representation to continue the coordinated efforts. Local government and private entities are recommended to provide some staff time and financial support for some of the coordination activities in order to cover some of the local match requirements. This plan includes several recommendations for coordination activities among the existing local agencies.

- Eagle Transit should ***continue to effectively coordinate services with the SPARKS Program, United Way, Senior Citizen groups, FVCC, and others***, as needed within the county and the communities. The existing transit services among the providers has worked well and provides a high level of service for the clients of each program. An additional coordinated effort should be for the agencies to coordinate passenger/driver training for all types of clients. The agencies should provide training annually for all drivers, dispatchers, and administration who deal directly with passengers. Training costs should be distributed evenly among the agencies.

- The second area of coordination is the **marketing and promotional programs**. Additional Eagle Transit promotional efforts will allow visitors and residents to have information on all available transit services within the county. Information may be provided in such a way that users see an integrated public transit system. Eagle Transit may consider a new brochure with all surrounding transportation services, such as the Snow Bus and possible future Glacier National Park service. A marketing plan for presentations to local agencies regarding local transit service would need to be implemented.

### **Implementation Steps:**

- Eagle Transit should continue to distribute transit brochures to local agencies. The social service agencies should use Eagle Transit to promote client independence and self-sufficiency for clients.
- Eagle Transit hours of operations and services should continue to be publicized regularly.
- Local governments and private entities should continue to provide financial support for the transit services.
- The Transportation Advisory Board should continue to meet on a monthly basis to stay informed on transportation options in the county.
- Purchasing of vehicle or office parts/equipment should continue to be consolidated into a cooperative effort with the Montana Department of Transportation.
- Continue to develop coordinated marketing/public education and promotional materials.

## **LAND USE PLANNING AND DEVELOPMENT REVIEW**

Eagle Transit should be included in the review of development proposals for facilities which will generate transit trips. Eagle Transit should comment on the ability to provide transit service either because of location or because of design for the facility. This will be done by the administration staff of Eagle Transit or the AOA working with the county and city engineering departments on a case-by-case basis. An initial meeting with the engineering departments should be set up in order for administrative staff to overview the reason why Eagle Transit needs to be included in the development process.

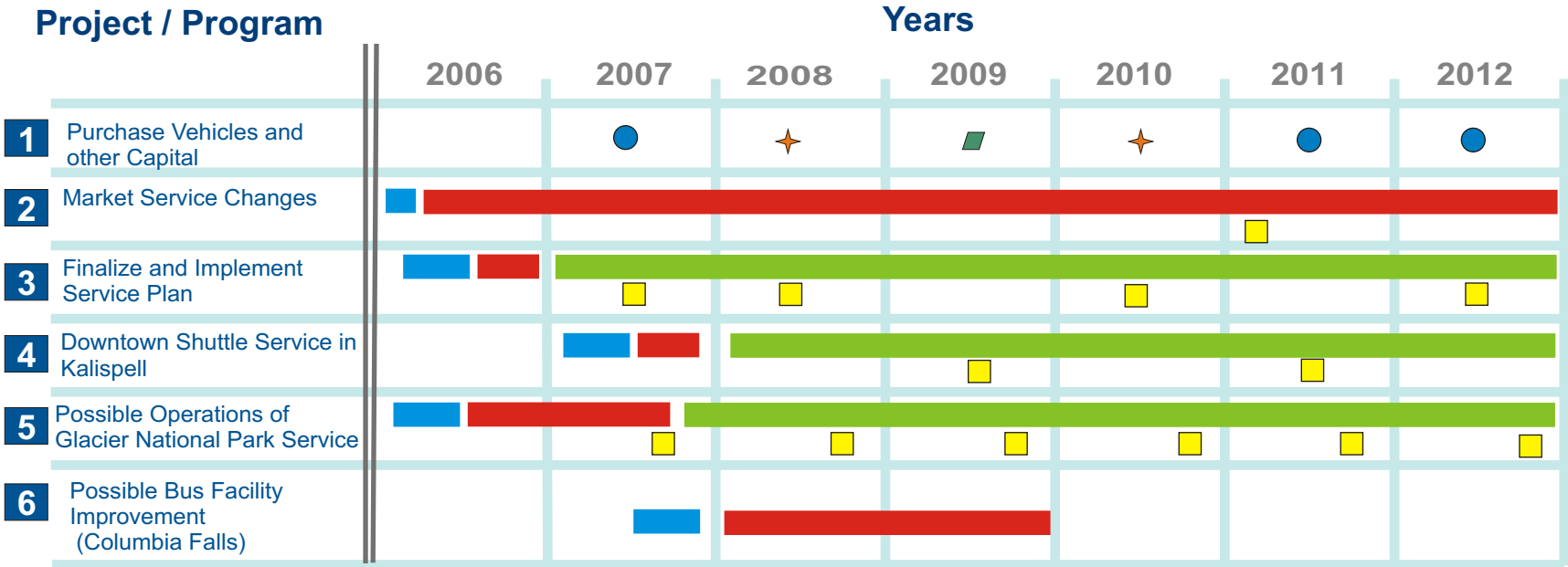
Community leaders should be educated about the characteristics of transit service. Services are improved and costs are lowest when transit trip ends to and from developments can be concentrated. Changes in development patterns occur very

slowly and will require a long-range vision to direct the growth so that transit service may be provided when and where it is needed in the future.

## **IMPLEMENTATION TIME LINE**

Figure XIII-2 presents a time line for implementation and steps to be taken for system changes. The LSC team has recommended a planning phase for each recommended project and program in order to aid in the development of the projects and programs. Evaluation of projects and programs should follow implementation of each program.

# Figure XIII-2 Short-Term Plan Time Line



- LEGEND**
- Feed Back
  - Purchase Bus
  - ✦ Purchase Body-on-Chassis
  - ▀ Purchase Van
  - Planning Phase
  - Implementation Phase
  - Operations

