Testimony to NE IL Public Transit Task Force – System Performance Working Group

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Metra
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In your testimony, please indicate whether and how your agency assesses the level of performance of each of the items listed within the three overall categories below. If your agency does not track one of the items, please indicate this. Please also indicate any other criteria or measures your agency thinks are important in assessing system performance.

Determining how well the transit system is meeting the needs of the region is an ongoing and multifaceted process. No one measure can tell the complete story, and there is a continuing balance that we attempt to strike between the amount of data we gather and our ability to respond to it. Gathering data for the sake of gathering data is not a prudent use of limited staff resources, but collecting data that allows decision makers to evaluate the performance of the system and adjust practices to improve that performance is critically important.

1) How well does the current system perform to meet the needs of its customers?

a. Service frequency and reliability (including a definition of what each service board defines as "on-time")

Service frequency and reliability are two of most important service characteristics to our customers. Metra customers rank service frequency in the top five most important characteristics, but reliability is far and away the most important characteristic to Metra customers, with more than three times as many people indicating it was most important. So we take pride in the fact that 84% of Metra customers were satisfied with getting to their destination on time and 83% were satisfied with the number of scheduled trains in rush hour. We understand our customers' desire for additional off-peak service as only 2/3 of Metra customers were satisfied with the number of scheduled trains in non-rush hours.

Beyond survey results, Metra monitors and evaluates on-time performance and capacity utilization on at least a monthly basis. Metra staff, along with representatives of Metra's commuter rail partners (BNSF and Union Pacific), as well as freight railroad partners, attend a daily briefing on the previous day's delayed trains. Metra also holds monthly meetings with internal staff and external partners to discuss any outstanding issues pertaining to the prior month's delayed trains in preparation for monthly on-time performance reporting to the Metra Board of Directors. Metra defines on-time as those regularly scheduled trains arriving at their last station stop less than six minutes behind schedule. On a quarterly basis Metra meets with both BNSF and the Union Pacific to discuss ongoing, as well as urgent scheduling and service reliability issues. Senior Metra Operations staff may also initiate high-level discussions with various freight partners on an as-needed basis to solve particular service reliability issues. For example, recent discussions with senior Canadian National Railroad staff led to improved on-time performance on Metra's Heritage Corridor Line.

b. Rider experience, from researching route(s) to actual travel

Metra's customers are generally pleased with the service we provide them. In the most recent Customer Satisfaction Survey in 2011, 90% of customers are satisfied with Metra's service, overall. Metra customers valued on-time performance above all else, as mentioned previously, and 84% were satisfied with Metra performance. The other important attributes of Metra service were availability of seating, safety of train operation, value of service, and cleanliness. The survey indicated 85% of Metra customers were satisfied with the availability of seating, 97% were satisfied with the safety of train operation, and 83% were satisfied with the value of service and the cleanliness of trains.

c. Customer communications (via all channels-online, phone, and in person both at stations/stops and on board vehicles)

Metra uses a wide range of communications channels to provide information to and receive feedback from its customers. To keep riders informed about policies, budgets, service matters and other issues, Metra may use onboard announcements, onboard fliers, platform announcements, scrolling platform signs, station posters, emailed alerts, Twitter, our desktop and mobile websites, our train tracker tool, our passenger newsletter, press releases and the news media. To hear from riders, Metra uses our Passenger Services phone line, a customer service email address and occasionally a subject-specific email address, an online customer service form, public hearings and public comment periods at Board meetings. In addition, Metra has a Citizens Advisory Board made up of Metra riders and others whose mission is to provide input to our agency about our policies, programs and services. Overall, Metra customers appear to be reasonably satisfied with these efforts. 95% were satisfied with availability of schedule and route information, and 90% were satisfied with availability of service information on Metra's website.

d. Mobility management for physically challenged individuals

Metra strives to make its system accessible to persons with disabilities at a level that meets or exceeds the requirements of the Americans with Disabilities Act (ADA). In May 1998, all trains on the Metra system became ADA-accessible, with at least one car equipped with a lift. Metra designated "key stations" on each rail line and pledged to ensure, at a minimum, that all key stations would be ADA accessible. All key Metra stations are ADA accessible, with one partial exception on the Heritage Corridor platforms at the Joliet station, but work is underway to address this. As of December 2012, approximately 70% of Metra stations are fully ADA-accessible, representing nearly 90% of Metra's weekday boardings. One current Metra project will add Visual Information System displays at over 30 Metra stations to provide accommodations above those required by federal or state law and better inform all sighted passengers.

In addition to physical improvements to address mobility management, Metra established an ADA Advisory Committee to provide recommendations on Metra's compliance with ADA, to facilitate a dialogue between Metra and the disability community, and to increase the use of Metra's services by people with disabilities. The committee meets quarterly.

Metra also provides what is called P-8 service (short for paragraph 8 of the Jones II Consent Decree). P-8 is a shuttle service from a qualified origin to the next accessible station. Metra does this at no additional charge to the passenger and does not require certification of disability status. Reservations may be made any time the day before the ride is needed or with as little as three hours' notice when necessary. If

someone who ordinarily rides from a non-accessible station were to break a leg, for example, he or she could use the service during recuperation without going through a formal certification process. P-8 connections are guaranteed - that is, if you miss the train because the ride is late, and another train is not available right away, the driver will take you to your destination station. In the unusual event the train is late, the driver will wait until it arrives.

e. Security (including both hard data and measurements of customer perceptions of security)

Security is a critical element of the success of a transit system. Riders need to feel safe in order to have confidence to rider the transit network. Metra's Police force of 100 commissioned officers takes the lead in this area. In 2013, so far, Metra Police deployed officers to ride trains during morning and afternoon rush hour periods to increase visibility and the safety of our system, customers, employees, and critical infrastructure. To date, in 2013, this has included nearly 28,000 train inspections and over 19,000 facility checks. On a regular basis, Metra police track arrests and incidents by district, day of week, and time of day to identify trends and appropriately deploy resources. Overall, the security expectations of Metra's customers appear to be well addressed. 97% are satisfied with personal safety on train, and 95% are satisfied with personal safety at the boarding and alighting stations.

f. Integration of services between modes and service providers

In a region with multiple transit service boards, service coordination and the integration of services between modes and providers is essential. Metra is actively engaged with the CTA and Pace on a daily basis to ensure that this happens. The service boards hold quarterly service coordination meetings to ensure that upcoming changes in service are known and discussed so that the appropriate adjustments or notifications can be made to accommodate pending changes. These meetings also allow for the identification of potential issues long before any changes go into effect so they can be addressed appropriately. In the case of major projects, such as the Red Line South Track Renewal, specific project teams from the impacted services boards meet on a regular basis to ensure coordination on all issues related to the project.

Service coordination is essential to effectively provide coverage to trip end points throughout the region. The fixed nature of Metra's rail network requires multimodal options to serve the "first and last mile," as it is often known. Metra has successfully partnered with Pace and the TMA of Lake Cook to develop a system of 12 routes connecting seven suburban Metra stations along three rail lines to serve a cluster of major employment campuses in Chicago's northern suburbs. Metra participates financially in the support of these routes, but Metra also benefits from the rail ridership generated by these connecting services. In addition to these types of shared shuttle connections, numerous privately funded shuttles operate between select suburban Metra stations and various corporate campuses. Metra works closely with organizations to develop and promote suburban shuttle connections.

In addition to public buses, as well as shared and private shuttles, Metra encourages and supports other connecting alternatives for suburban employers, such as Pace's innovative vanpool program, which provides for Metra's reverse-commute passengers to park Pace vans at or near suburban Metra stations overnight and use them to reach job sites in the morning. Providing connections between residential areas and suburban Metra stations, feeder-bus services offer another way for passengers to access their origin station. In areas where commuter parking is at or near capacity, Metra has worked with Pace and with the local community to identify remote parking locations that can be linked to the nearest Metra station via a feeder bus. Both the feeder-bus service and the remote parking locations allow for

increased ridership. In the Naperville area alone, 12 feeder routes and four park-n-ride services account for more than 1,400 daily passenger trips.

In general, Metra customers are reasonably satisfied with the integration of service. More than seven in ten riders are satisfied with ease of transferring to other transit services, the ease of paying for transfers, the coordination of schedules among Metra, CTA, and Pace for transfer, and with signs directing to other Service Boards when transferring. In order to further service integration, Metra has agreed to partner with the CTA and Pace on their Open Fare Payment System and acceptance of the Ventra card, which will offer the region's riders even greater flexibly.

2) How well does the current system perform to meet the needs of the community?

a. Level of transit access and service equity in the 6-county area

You asked how well does the system meet the needs of the community.... To answer this question, we must take a look at history. While Metra was formed in the early 1980's, commuter rail service has operating in the region since the early 1900's. Many of the lines in operation today, were also in service at the turn of the century. Metra's service area is also the nation's busiest rail hub. Six of North America's seven major freight railroads pass through the region, and Chicago's rail network handles approximately 1,300 trains (500 freight and 760 Metra, Amtrak, and NICTD passenger trains) each day. Metra interfaces with other train traffic on every line, and train movements are carefully choreographed among all operators to avoid conflicts with other trains on the same line, and traffic at grade crossings, while maintaining service reliability. Passenger service on the BNSF line and three UP lines is operated by these railroads under terms specified by purchase of service agreements with Metra, while the remaining lines are operated directly by Metra employees. Metra also operates service on two lines via trackage rights agreements with Canadian National and via a trackage lease agreement with Norfolk Southern.

Since 1983, Metra has continued to enhance and expand the system. Over $6 billion has been invested into state of good repair across the system while expanding service into new markets. In 1996, the North Central Service—the first new commuter rail line in the Chicago area in 70 years—opened, and was further upgraded in 2006. Over the last twenty years, the SWS and UP-W lines have been extended and 28 new stations have been added throughout the system. Over 120 bridges have been replaced, and improvements have been made to approximately 160 stations. These projects have helped us better serve existing customers, and attract new ones.

Service improvements to enhance our core markets and expand to serve new markets are tied closely to increases in capital and operating dollars. Today, only limited opportunities exist for improving core services without major capital dollars. In many cases, adding an express train requires major capital dollars for equipment and rail infrastructure (signals, crossovers, etc.) to support the additional train and additional operating dollars are necessary to not only operate the service, but also for items such as servicing the fleet, operating the stations, and managing the control towers. Metra continues to explore ways to use our existing fleet in order to expand midday and evening services, but many of these improvements will require Metra to look to funding assistance to make them a reality.

b. Transit access to jobs in the region

The Metra system is a hub and spoke system, with eleven lines serving five downtown terminals. The system is designed primarily to serve Metra's principal customer base: suburban residents who work in downtown Chicago. Nearly 90% of all Metra AM boardings are destined for jobs in the Central Business District (CBD), thus the economy downtown Chicago is vitally important to Metra. Metra coordinates with CTA to provide last-mile connections for areas beyond walking distance from our downtown terminals, with express service to Illinois Center and Streeterville.

In areas beyond the Loop, Metra works with Pace, CTA, employers, and others to serve the fast-growing reverse commute and non-CBD commute job markets.

c. Service availability across differing populations

As part of Metra's recently updated Title VI Program and Policy, Metra established new system-wide service standards, including service availability. Metra's service availability standards measure the percentage of the regional population living within a given distance of a Metra or CTA rail station. (CTA stations are included in these calculations, as both transit systems provide rail service to downtown Chicago.) Metra measures compliance with this standard for both minority and non-minority populations in the region. For all three sub-areas reviewed and for the Metra service area as a whole, rail transit service is available to more than 70% of the population within the distances specified by the Metra service availability standard. Recent surveys, indicate that 78% percent of Metra customers responded that they were satisfied with "availability of transit when and where they need to go". This was consistent across all Metra lines, with exception of the Heritage Corridor which has very limited service compared to Metra's other lines.

d. Prioritization of system and service expansions

In 2012, Metra initiated its first comprehensive strategic plan since the agency's founding in 1983. This is a critically important document that will guide the agency for years to come, helping the agency to prioritize spending decisions and use the agency's scarce dollars in the most efficient and effective way possible.

As part of the Strategic Plan, Metra developed a set of Strategic Priorities to guide capital decision-making. The Strategic Priorities support Metra's mission, vision, and values, align with agency goals and objectives, and will provide direction for potential projects moving through the evaluation process. The six priorities below, as determined after considering input from Metra staff, the Metra Board of Directors, and the public, are:

1. *Safety*
2. *State of Good Repair*
3. *Projects Mandated by Regulation*
4. *Completion of Ongoing Multi-Year Projects*
5. *Service Enhancements*
6. *Service Expansions*

The priorities will help guide near term capital programming decisions as well as potential long term funding decisions. During the Strategic Plan process, a list of 35 potential long term enhancement/expansion projects was identified. These projects range in the level of planning work that has been done to investigate them. Metra was awarded funding from the Unified Work Program (UWP) to perform a Cost-Benefit analysis of these projects to help determine which projects should move forward if and when funding becomes available.

e. Maximizing economic development linked to transit

Metra plays a vital role in the economic development of Northeastern Illinois. A world class transit system is critical to the success of the region's Central Business District, whether attracting new employers, or influencing existing employers to grow in downtown Chicago. In turn, maintaining a strong employment base in Chicago's core helps to leverage the region's existing transit infrastructure and get the most out of past investments in the transit system. Despite the historic out-migration of office growth to the suburbs and despite a faltering economy, Chicago's CBD, already the second largest in the U.S., is still expected is to add nearly 165,000 jobs between 2010 and 2040.

In suburban areas, Metra is a key connection to economic development. According to results of the Metra Communities Study by RE/MAX in 2013, the median sales price of homes in towns that Metra commuter trains serve rose twice as fast as the median price in suburban communities without Metra service in the seven county Chicago real estate market. But merely providing transit service is not sufficient to bring about economic development. Because of this, since 1998, Metra has participated in over 100 RTA Community Planning projects and dozens of other projects led by CMAP and others to support Transit Oriented Development throughout the region. These planning studies seek to build walkable, mixed-used communities that can grow ridership and encourage investment into transit served areas and transit supportive designs.

f. Route planning (including measurements of available capacity utilization and reverse commute routes, and suburb-to-suburb transportation)

Metra staff review capacity utilization on a monthly basis, with a special emphasis on any weekday trains that exceed 98% average daily capacity utilization. A vehicle load factor of 98% indicates that all passengers may be seated with 2% of the total seats still available. When possible, rolling stock assignments may be adjusted; however, Metra is very limited in its ability to add seating capacity to trains where capacity utilization is excessively high, due to limited resources (rolling stock, storage facilities, labor, etc.). In general, significant changes in route planning must be accompanied by significant capital investments.

g. Sustainability performance

Metra is committed to operating in a sustainable manner and contributing to the overall sustainability of the region. During the development of Metra's Strategic Plan, one of the goals of the plan was identified as Supporting Agency and Regional Sustainability. Objectives underneath this goal included strategies that improve operational efficiencies and strategies that increase environmental friendliness of Metra operations. This is an outgrowth of Metra's active participation in the development of the RTA's Regional Green Transit Plan. The plan focuses on (1) growing ridership and market share, (2) promoting transit-oriented development, (3) improving operational efficiency and (4) greening the transit system. Key initiatives highlighted in the Plan include bringing the region's system to a state of good repair, expanding technical assistance and funding efforts related to transit-oriented development, studying and piloting more efficient locomotives, and installing additional pollution control technologies on trains.

3) How efficiently and effectively the system operates

In order to provide context for evaluation of Metra's performance in service efficiency and effectiveness, measurements of Metra's relative operating cost, fare revenue, and operating deficit by both passenger trips and passenger miles are compared to similar measures for the five other large commuter rail agencies in the U.S. (Long Island Rail Road, Metro-North Railroad, New Jersey Transit, Southeastern Pennsylvania Transit Authority, and Massachusetts Bay Transportation Authority) using 2011 National Transit Database (NTD) data. The RTA uses a similar approach in evaluating the performance measures of each of the service boards relative to their respective peers in the Sub-Regional Peer Report.

Among the six large commuter rail agencies, Metra has the second-lowest operating cost per passenger trip and operating cost per passenger mile, behind SEPTA with the lowest cost per passenger trip and Metro-North with the lowest cost per passenger mile. Metra has the lowest fare revenue per passenger trip and fare revenue per passenger mile of all six large commuter rail agencies. This means that not only does Metra have lower fare revenue to fund operations than our peers, but we also have more contained operating costs.

A final measure of effectiveness and efficiency is public funding. This exact data point is not available from our commuter rail peers, but operating deficit is a close analog. Operating deficit is derived from subtracting fare revenue from operating costs. Metra has the second-highest operating deficit per passenger trip, behind LIRR, and the third-highest operating deficit per passenger mile, behind LIRR and just behind MBTA. This does not provide a full picture of public funding as it does not reflect the fact that other revenue can be used to cover the operating deficit, but it is the best available from National Transit Database data.

Overall, Metra operations are effective and efficient in comparison with our commuter rail peers.

a. Costs per trip and per mile

Operating Cost per Passenger Trip and Passenger Mile

Agency	City Center	Costs per Passenger Trip	Rank	Costs per Passenger Mi.	Rank
Metra	**Chicago, IL**	**$8.24**	**5**	**$0.36**	**5**
LIRR	New York, NY	$11.09	2	$0.51	1
MNR	New York, NY	$11.13	1	$0.35	6
NJT	New York/Philadelphia	$10.54	3	$0.42	3
SEPTA	Philadelphia, PA	$6.31	6	$0.44	2
MBTA	Boston, MA	$8.33	4	$0.40	4

Data: 2011 National Transit Database (NTD)

b. Revenue per trip and per passenger

Passenger Fare Revenue per Passenger Trip and Passenger Mile

Agency	City Center	Fare Revenue per Pass. Trip	Rank	Fare Revenue per Pass. Mi	Rank
Metra	**Chicago, IL**	**$3.34**	**6**	**$0.15**	**6**
LIRR	New York, NY	$5.93	3	$0.27	1
MNR	New York, NY	$6.93	1	$0.22	4
NJT	New York/Philadelphia	$6.23	2	$0.25	3
SEPTA	Philadelphia, PA	$3.58	5	$0.25	2
MBTA	Boston, MA	$3.74	4	$0.18	5

Data: 2011 National Transit Database (NTD)

c. Public funding per trip, per passenger and per capita

Operating Deficit per Passenger Trip and Passenger Mile

Agency	City Center	Public Funding per Pass. Trip	Rank	Public Funding per Pass. Mi.	Rank
Metra	**Chicago, IL**	**$4.90**	**2**	**$0.22**	**3**
LIRR	New York, NY	$5.16	1	$0.24	1
MNR	New York, NY	$4.19	5	$0.13	6
NJT	New York/Philadelphia	$4.31	4	$0.17	5
SEPTA	Philadelphia, PA	$2.73	6	$0.19	4
MBTA	Boston, MA	$4.59	3	$0.22	2

Data: 2011 National Transit Database (NTD)