

**EXHIBIT A7 – PERFORMANCE MEASURES & REPORTING REQUIREMENTS 22-542  
TRANSIT OPERATIONS**

Contractor shall track performance measures and complete reports as required by the FTA, FDOT, Florida Commission for the Transportation Disadvantaged (FCTD) and County. This Exhibit is intended to illustrate the performance measures and reports required of Contractor. County reserves the right to add, modify, or delete the performance measures and reports listed herein.

Records, data, and all information in support of Lake County Connection and LakeXpress shall be maintained in an electronic format using County system of record, which is currently Route Match for all scheduling data and other systems County requires to ensure data integrity. Contractor shall provide all information and reports as required and will permit access to books, records, subcontracts, accounts, other sources of information, and facilities as may be requested by the County and State and Federal auditors. All updated reports and records shall be maintained by the Contractor in a safe and secure area, consistent with confidential and non-confidential record storage practices.

**1. Performance Measures**

The following performance measures shall be tracked separately for paratransit and fixed route service:

1.1. **Safety Measures:** The purpose of these measures is to track progress towards keeping the service safe for customers and to protect County assets.

1.1.1. Counts of all accidents and injuries and per 100,000 vehicle miles.

1.1.2. Details of all accidents and injuries (route, day of week, time of day, description, or accident, estimated cost of damage, number of days vehicle was deemed out of service, preventable status as deemed by contractor and recap of employee re-training where applicable).

1.1.3. Number of security incidents on board the vehicle.

1.1.4. Number of drug and alcohol tests performed with test dates and times including reason for testing (pre-employment, post-accident, reasonable suspicion, other). No names or results are to be included.

1.1.5. Employee attendance percent at safety meetings (# signed in/total number of employees), with copies of all safety meeting agendas.

1.1.6. Copies of all posted safety memos and operational policies, including minutes of employee safety committees or similar workgroups.

1.2. **Reliability Measures:** Contractor must track routine measures of reliability to ensure residents can depend on services:

1.2.1. Number of miles between service interruptions including a listing of all service interruptions for each month, broken down by date, vehicle type, vehicle number, type of interruptions and brief description of interruption.

1.2.2. On-time performance of operator reports (list total number of miss out-no report / total reports by run cut).

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- 1.2.3. Number of late gate departures (list total number of late gate departures / total departures), as measured by AVL system.
- 1.2.4. Average number of available vehicles for revenue service at first report for each day of the month.
- 1.2.5. Average on-time performance and number of service delays missed trips, and road calls (Overall and by route for the month, day of the week and peak & off-peak periods).
- 1.2.6. List of special events, weather, traffic accidents or similar conditions that impact on-time performance, listed by date, times, and route.
- 1.2.7. List of all vehicles towed, by date, time, and reason, along with the method used for continuing the trip. This may include a brief narrative if necessary.
- 1.2.8. Document all trips verified as a Paratransit no-show or late cancellations.
- 1.3. **Friendliness Measures:** Service shall be viewed as friendly to current and prospective riders. The friendliness of the service is measured by:
  - 1.3.1. Total number of calls received at the Call Center.
  - 1.3.2. Total number of complaints of any form tracked separately into categories of:
    - 1.3.2.1. Safety
    - 1.3.2.2. Reliability
    - 1.3.2.3. Friendliness
    - 1.3.2.4. Cleanliness & Comfort
    - 1.3.2.5. Planning/Service requests
  - 1.3.3. Contact responsiveness (amount of time between receiving the complaint and resolving it to the rider's satisfaction).
- 1.4. **Operational Measures:** Operations is the foundation of Transit Services. Operational measures demonstrate the demand for service which also drives Federal, State, and local funding. Operational measures include:
  - 1.4.1. Ridership or passengers by mode, hour, miles and stop.
  - 1.4.2. Service delivery or the total revenue and vehicle hours and miles.
  - 1.4.3. Service disruptions including missed trips and wheelchair lift and ramp failures.
  - 1.4.4. Wheelchair and bicycle usage.
  - 1.4.5. Service disruptions and missed trips.

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1.5. **Maintenance Measures:** All maintenance activities must be documented by vehicle, noting the date and odometer reading at the time of service, including the amount of oil, transmission fluid, and fuel used and any warranty work. Other maintenance measures include:

1.5.1. Number of bus trade-out performed, regardless of reason, to include the date, time, route, reason for trade, number of passengers on board at time of trade, and method to return the bus to the facility (driven or towed).

1.5.2. Number of field repairs performed to include date, time, route vehicle number, reason for repair, number of passengers on board at time of trade, and method of how the bus returned to the facility (driven or towed.)

1.5.3. List of all vehicles and the actual mileage for the month, year-to-date and life-to-date.

1.5.4. List of all vehicles receiving a preventive maintenance inspection and the miles since the prior inspection.

1.5.5. List of all vehicles receiving deep-cleaning and dates performed.

**1.6. Performance Reporting**

Contractor shall work with the County to develop a mutually acceptable reporting format for each performance measure and within the required timeframe (Daily, Weekly, Monthly, Quarterly, and Annually).

1.6.1. Daily Reports. The following performance measures shall be compiled into a daily report to be submitted to County each weekday morning with information from the prior day. Information for Friday, Saturday, and Sunday are to be submitted on Monday mornings.

1.6.1.1. Fixed route and paratransit ridership counts.

1.6.1.2. On-Time Performance average.

1.6.1.3. Fixed route buses operating more than fifteen (15) minutes behind published schedule.

1.6.1.4. Paratransit buses operating more than thirty (30) minutes behind promised schedule.

1.6.1.5. Service disruptions and missed trips including:

1.6.1.5.1. In-service vehicle failures

1.6.1.5.2. Lift failures on vehicles in service

1.6.1.5.3. Passenger disturbances

1.6.1.5.4. Passenger injuries and vehicle accidents/incidents

1.6.1.5.5. Buses running out of fuel in vehicle service

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- 1.6.1.6. Fixed route and paratransit dispatch logs.
- 1.6.1.7. Completed Customer Service Reports
- 1.6.1.8. Down vehicle detailed status with total number of days down.
- 1.6.1.9. Daily on-board technology report.
- 1.6.2. Monthly Reports. Contractor must complete and transmit to County staff electronic monthly reports no later than the 10th day of the following month. These reports include:
  - 1.6.2.1. Paratransit Operations Report
    - 1.6.2.1.1. Trips made including the number of passengers by program or grant, trip purpose, and trip type.
    - 1.6.2.1.2. Revenue and vehicle hours and miles.
    - 1.6.2.1.3. One-way eligible customer trips requested.
    - 1.6.2.1.4. Capacity and eligibility denials.
    - 1.6.2.1.5. Trips refused.
    - 1.6.2.1.6. ADA Trips scheduled and then rescheduled more than 60 minutes from requested time.
    - 1.6.2.1.7. Advance and late cancellations.
    - 1.6.2.1.8. No-shows, missed trips and late trips.
    - 1.6.2.1.9. PCAs, companions, or escorts transported.
    - 1.6.2.1.10. Customers (eligible customers).
    - 1.6.2.1.11. Eligible will-call trips.
    - 1.6.2.1.12. Vehicle and revenue hours and miles.
    - 1.6.2.1.13. Number and percent of on-time one-way trips.
    - 1.6.2.1.14. Unmet trip requests by type, and the reason the trip was denied.
    - 1.6.2.1.15. Fares and passes collected.
    - 1.6.2.1.16. Monthly tracking of funds by program or grant (CTD) indicating whether the number of trips is less than or exceeds the monthly budget and the year-to-date budget.
    - 1.6.2.1.17. Complaints and commendations.

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- 1.6.2.1.18. Excessively long ADA trips report.
- 1.6.2.2. Fixed Route Operations Report
  - 1.6.2.2.1. Ridership by route, block, day and mode.
  - 1.6.2.2.2. Vehicle and revenue hours and miles
  - 1.6.2.2.3. Efficiency (passengers per vehicle revenue hour ratio)
  - 1.6.2.2.4. Farebox collection
    - 1.6.2.2.4.1. Fixed Route- Route, Block and Day
    - 1.6.2.2.4.2. Paratransit- Expected vs. Actual
  - 1.6.2.2.5. Revenue and vehicle hours and miles
  - 1.6.2.2.6. Road Call Report identifying preventable and/or non-preventable road calls and the causes
  - 1.6.2.2.7. Accident and incidents
  - 1.6.2.2.8. Missed and late trips
  - 1.6.2.2.9. Fuel consumption
  - 1.6.2.2.10. Preventive maintenance
  - 1.6.2.2.11. Complaints and commendations
- 1.6.2.3. Contractor Staffing Level Report to identify any position vacancies and turnover rate since the start of the fiscal year.
- 1.6.2.4. Customer Relations Report
  - 1.6.2.4.1. Customer contacts by type, operator, and location.
  - 1.6.2.4.2. Daily summary of telephone performance for each separate call group (reservations, dispatch, general information) including:
    - 1.6.2.4.2.1. Number of calls received.
    - 1.6.2.4.2.2. Number of calls answered.
    - 1.6.2.4.2.3. Number of abandoned calls.
    - 1.6.2.4.2.4. Average hold time for all calls by hour for each day.
    - 1.6.2.4.2.5. Maximum hold time for all calls by hour for each day.

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1.6.2.4.2.6. Average and maximum hold times for abandoned calls.

1.6.2.4.2.7. Average talk time.

1.6.2.4.2.8. Number of agents on duty by hour of each day.

1.6.2.5. Invoices.

**1.6.3. Quarterly Reports**

1.6.3.1. Drug and Alcohol in accordance with FTA and Human Resources requirements.

1.6.3.2. Percent daily and monthly expenses by category: General Administration, Vehicle Operations, Vehicle Maintenance, and Non-Vehicle Maintenance.

1.6.3.3. DBE Report and DBE Report documents monthly and quarterly amounts paid to DBE subcontractor(s).

1.6.3.4. DBE Participation Report documenting the total amount paid to DBE subcontractors noting any discrepancies.

1.6.3.5. Safety Manager Ride Check Reports.

1.6.3.6. Preventive Maintenance Reports.

1.6.3.7. Ridership Trends for Fixed Route and Paratransit.

**1.6.4. Annual Reports**

Contractor is required on an annual basis at the end of County fiscal year to provide a breakdown by percentage of the expenses attributed to the following categories: General Administration, Vehicle Operations, Vehicle Maintenance, and Non-Vehicle Maintenance. Contractor must submit the required data to County no later than 45 days after end of County fiscal year. Contractor will provide within 60 days of Contract, a Percentage Breakdown of Expenses Report based on the hourly and trip rate bid.

1.6.4.1. Additional annual reports include:

1.6.4.1.1. Drug and Alcohol in accordance with FTA and Human Resources requirements.

1.6.4.1.2. Annual Operating Report for Transportation Disadvantaged (TD) Program.

1.6.4.1.3. National Transit Database (NTD) in accordance with FTA guidelines, Contractor will be responsible for the tracking, collecting and preparation of NTD report data. County may also require random sampling of passenger loads, as required by

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NTD every three years. County will work with Contractor to develop data collection processes and procedures. Contractor will also be required to participate in and support NTD audits and program reviews as needed.

1.6.4.1.4. Federal Triennial and State Management Reviews. Contractor will participate in Triennial and State Management Reviews (TR and SMR's) and specialized reviews as required in accordance with 49 CFR.

1.6.4.1.5. Transit Asset Management Plan (TAM). Contractor shall maintain inventories of LakeXpress and LCC assets used to support the transit operation including all County supplied and/or funded:

1.6.4.1.5.1. Office and facility furnishings and equipment.

1.6.4.1.5.2. Revenue collection equipment.

1.6.4.1.5.3. Computer hardware, software, and ancillary equipment.

1.6.4.1.5.4. Radio, tablets, MDU, security cameras, automatic voice annunciation, AVL and head sign, automatic passenger count systems.

1.6.4.1.5.5. Facility, door, and revenue collection equipment keys, swipe cards and readers and any security cameras.

1.6.4.1.5.6. Maintenance equipment and tools.

1.6.4.1.5.7. Any such other items of equipment or fixed assets that may be supplied by or funded by the County to the Contractor over the life of the Contract which is not currently enumerated in this solicitation.

1.6.5. Per Occurrence Reports

1.6.5.1. Accident and Incident report to include a copy of written police reports and/or contractor report within 24 hours of occurrence, including a copy of the post-accident drug test results if applicable.

1.6.5.2. Critical Accident and Incident with documentation of immediate verbal notification where fatalities, serious injuries, felonies, or media attention has or may occur.

1.6.5.3. Extended Service/Special Events including rides provided, number of minutes or hours of service, miles, trips, origin and destination addresses, number of riders per trip.