

FINAL REPORT
OF THE
AMERICAN PUBLIC TRANSPORTATION ASSOCIATION
PEER REVIEW PANEL
FOR
THE CITY OF EVERETT
Everett, Washington

December 2014



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FINAL REPORT
OF THE
AMERICAN PUBLIC TRANSPORTATION ASSOCIATION
PEER REVIEW PANEL
ON THE
TRANSIT REVIEW
PROVIDED FOR THE
CITY OF EVERETT

PANEL MEMBERS:

J. Barry Barker
Richard DeRock
Todd Hemingson
John Muth
Jeff Nelson
Greg Hull

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Michael P. Melaniphy, President

TABLE OF CONTENTS

I.	INTRODUCTION	1
II.	OBSERVATIONS & RECOMMENDATIONS.....	3
III.	CONCLUDING REMARKS.....	7
	APPENDIX.....	8
	A – Peer Review Request	
	B – Peer Review Agenda	
	C – Document List	

I. INTRODUCTION

In July, 2014, Mr. Ray Stephanson, Mayor of the City of Everett contacted the American Public Transportation Association (APTA) to request a peer review of the Everett Transit system in an effort to strategize for the effective management of its resources and plan for a sustainable future. Through discussions between APTA, City of Everett, and Everett Transit staff, it was determined the review would be conducted December 9 – 12, 2014. A panel of industry peers was then assembled with the requisite knowledge, experience and understanding of municipally governed and operated transit systems. The peer review panel consisted of the following public transit professionals;

J. BARRY BARKER

Executive Director
Transit Authority of River City (TARC)
Louisville, KY

RICHARD DEROCK

General Manager
Link Transit
Wenatchee, WA

TODD HEMINGSON

Senior VP – Strategic Planning & Development
Capital Metro
Austin, TX

JOHN MUTH

Deputy Director
Charlotte Area Transit System
Charlotte, NC

JEFF NELSON

General Manager
MetroLink
Rock Island County, IL

GREG HULL

Assistant VP – Public Safety, Operations, Technical Services
American Public Transportation Association
Washington, DC

The panel convened in Everett, Washington on December 9, 2014. Panel coordination and logistical support was provided by APTA Staff Advisor Greg Hull. Mr. Hull also coordinated panel member input in the drafting of this peer review report.

Methodology

The APTA Peer Review process is well established as a valuable resource to the public transit industry. Highly experienced and respected transit professionals voluntarily provide their time and support to address the scope required. The panel conducted this peer review through documentation review, briefings, operations observations, and interviews with staff and key stakeholders of Everett Transit and the City of Everett, including members of Everett City Council and staff of Community Transit.

Scope of Report

The scope of this review focused on optimizing strategies for effective service delivery of the City of Everett's public transit services. The review focused on the following areas:

- Review current contracts & agreements with Community Transit to determine appropriateness and effectiveness
- Review facilities to determine utility and effectiveness
- Review organization structure to determine appropriateness and effectiveness

The observations and recommendations provided through this peer review are offered as an industry resource as a means of strengthening Everett Transit programs, practices and strategies.

II. OBSERVATIONS AND RECOMMENDATIONS

OPENING COMMENTS

Everett Transit’s operations date back to as early as 1893. Although a smaller system by national comparison, it provides vital paratransit and fixed route service and many other programs typically offered by effective transit agencies.

It is clear to the panel that the staff of Everett Transit are highly committed and passionate regarding the various services they provide to the citizens of Everett. Notwithstanding staff dedication, there are opportunities for strengthening efficiencies and effectiveness.

It was not apparent to the panel that there is a long term City vision for the future service direction of Everett Transit that staff could identify with. Consequently Everett Transit appears to be waiting for things to happen and consequently transit functions are largely focused on survival.

The benefits derived through inter-agency supportive services that have been developed in partnership with Community Transit do not appear to be fully understood by all relevant stakeholders. This has resulted in stakeholders not fully appreciating the benefits of what has been put into place through this partnership and therefore not realizing additional benefits that could be achieved from what might be developed in the future. While much transit service information has been provided by Everett Transit staff to stakeholders, the message regarding rationale and positive outcomes of service decisions does not appear to be adequately understood. Communication of service decisions consequently appears to be a clear issue and a continuing challenge for all concerned.

1. CONTRACTS AND AGREEMENTS WITH COMMUNITY TRANSIT

In the view of the panel, the contracts and agreements that have been developed between Everett Transit and Community Transit are mutually beneficial and equitable to all concerned. As the review panel members have found through their own local experiences, no transit agency is “an island to itself”. Consequently, regional coordination and cooperation is critical to long range success and benefit to the communities at large.

The *Swift* BRT service has been a net positive program for both Everett Transit and Community Transit as well as all residents of the area. However, not all Everett stakeholders understand or appreciate the benefits derived from the *Swift* agreement or the positive return on investment to Everett.

The paratransit service agreement with Community Transit is a good first step to improved paratransit service delivery. However, as with the *Swift* agreement, not all stakeholders understand or appreciate the benefits derived to Everett through the current paratransit agreement. In the view of the panel, while the current service delivery model is an improvement over what it used to be, it remains confusing and complex to users of the paratransit service who are part of a vulnerable population with unique needs. For example,

within the current service model, transfers are required between Everett Transit and Community Transit vehicles which create significant difficulty for paratransit customers and also increase trip costs. Additionally, paratransit customers often have to make multiple phone calls to schedule a trip which adds to the confusion and complexity of travel.

RECOMMENDATIONS

- The panel recommends that Everett Transit continues its current agreement with Community Transit on the *Swift* BRT service.
- Continue to build on the success of the *Swift* service and explore additional opportunities for inter-agency collaboration.
- There are opportunities to reduce paratransit costs and improve service delivery by expanding the relationship with Community Transit. Opportunities for paratransit service improvements could include incremental steps such as;
 - A common certification process
 - A common reservation/ call center

2. FACILITIES

Everett Transit is facing multiple challenges with respect to its various facilities. In the view of the panel, the Everett Station is a great community and regional facility that is not living up to its potential of being a welcoming point of entry to the City of Everett. General signage of the station is inadequate, way-finding is a challenge, and insufficient approaches to security have led to loitering and a general sense that the facility is an unsafe environment. Local police presence at Everett Station is not apparent on a regular basis and negative conditions have led to unwanted reactive actions including the removal of doors from the public restroom toilet stalls.

Although the facility is the property of Everett Transit, it is managed on behalf of Everett Transit through the City's Property Management group. Based on the panel's understanding, the facility management costs and revenue shortfalls for the facility are borne by Everett Transit. There appears to be restrictions on Everett Transit as to the ability to attract tenants which includes a belief that reaching out to businesses to locate at Everett Station would generate conflict with local private developers. It is obvious that parking is critical to the success of Everett Station, however, in the view of the panel, parking in the station vicinity is inadequate.

As part of its operational observations, the panel had the opportunity to tour Everett Transit's North Base and Administration & Maintenance Facility. In the view of the panel, both facilities lack adequate space and are in need of significant capital.

RECOMMENDATIONS

- The panel recommends that Everett Transit be enabled to engage the local business development community in discussions to help guide the City in exploring future strategies for Everett Station, including what is presently the Sound Transit side of the building.
- As Everett Transit is a public transit agency and is not an experienced landlord or developer, consideration should be given to whether it may be in the City's best interests

to have some other civic entity assume the role of developing the Station and surrounding area as well as the budget responsibility for the facility.

- Investment in Everett Station upkeep is needed now to avoid early decay of the building and maintaining its public image. All parties concerned would benefit from a clearer development plan from the City for this site.
- In the view of the panel, more commuter-related businesses for the Station would be appropriate.
- Engage the Everett Police Department in reviewing practical options for providing a consistent level of police presence at Everett Station (Example: using Station space for a small satellite precinct office)
- The panel is not aware of any approved long-term capital strategy for the Everett Transit North Base and Administrative operating facilities. The absence of such a strategy exposes the agency to fiscal and operational uncertainty. The panel encourages Everett Transit and the City to review the condition of these facilities and develop contingency and long term strategies for facility needs of Everett Transit.

3. ORGANIZATION STRUCTURE

In the view of the panel, the number of senior level positions at Everett Transit is consistent with transit agencies of similar size across the U.S. It also appears to the panel that the current staffing level of Everett Transit is meeting basic needs of the organization and services being provided although with current day-to-day workloads, there is minimal organizational capacity for creative development of services. The panel noted that Everett Transit has been able to leverage use of available City resources from other City Departments for functions such as vehicle maintenance support.

The panel also found that the minimal level of operations field supervision results in a minimal level of service oversight, particularly on weekends. Due to organization support needs, operations supervisors are required to handle other duties that result in a reduction of field operations oversight. The panel noted that Customer Service support is only available between 8 to 5 pm on weekdays and that there is no coordinated focus for customer service.

RECOMMENDATIONS

- Review operations supervisor staffing levels and assignment of other duties to ensure appropriate operations service oversight. The panel appreciates that fiscal constraints may preclude the addition of new supervisory positions, however other options such as developing a small budget for “relief supervisors” drawing from time to time from the operator ranks may offer a practical alternative for staffing support.
- Review opportunities to provide customer support during Everett Transit’s hours of service.
- Review current means of communication with customers and the general public and consider opportunities for expanding avenues of communication to include new resources such as social media; interactive trip-planning; blogs, etc.

OTHER OBSERVATIONS

The panel noted that informational presentations to civic leaders is largely limited to Council meetings. In the interest of enhancing communication with Council members regarding transit service decisions and outcomes, it may be helpful to review how information and what types of information (data, etc.) are conveyed to Council.

The panel recommends that the organization review what data should be communicated to which levels within the organization as well as the information needs of all stakeholders. In the view of the panel there is not an adequate level of communicating the successes and benefits derived from various initiatives. Consideration should also be given to review what types of performance data are currently being communicated to key stakeholders and the general public and determine what particular data would provide the best value and interest. A format for sharing such data could conceivably be provided as a regularly updated “dashboard” on the Everett Transit web-site.

While Everett Transit has a set of service standard guidelines, it would be timely to review whether those guidelines are in effect as intended or whether they need to be changed.

As a final consideration, the panel noted that there are several post-secondary institutions within the City of Everett. Across the U.S. there is a growing level of partnership between local transit agencies and post-secondary schools wherein student tuition is nominally increased to enable transit transportation upon presentation of the student I.D. card. This becomes a “win-win” scenario that addresses both student transportation needs and supplementary funding support to the transit agency. The panel would be pleased to provide examples of where this concept has been successfully implemented.

III. Concluding Remarks

The panel sincerely appreciates the professional support, assistance, and courtesy extended throughout the peer review process by the staff and stakeholders of Everett Transit and the City of Everett.

The panel will stand available to clarify and follow up on any aspects of this review.

APPENDIX



OFFICE OF THE MAYOR

Ray Stephanson
Mayor

July 22, 2014

Michael P. Melaniphy
President and Chief Executive Officer
American Public Transportation Association
1666 K Street, NW Suite 1100
Washington DC 20006

Dear Mr. Melaniphy,

The city of Everett, Washington is a municipality of approximately 104,000 citizens, located about 30 miles north of metropolitan Seattle. Everett is the largest aerospace industrial center in the state clustered around The Boeing Commercial Airplane Company, home to Naval Station Everett and the USS NIMITZ and the site for Washington State University expansion in Western Washington.

Everett Transit is the city's prized municipally operated transit system with a rich history dating back to 1893. Although a smaller system, Everett Transit has consistently provided services not usually found in city systems of its size such as expanded para-transit services, seven day a week service, later night service and service on all but three holidays. Everett Transit is part of the city, but it receives no funding from the general fund and must operate solely within its own revenues, primarily a dedicated sales tax and fare box. Among Everett Transit's assets is Everett Station, a 60,000 square foot office and multi-modal facility on a 10-acre parking and bus facility site.

Our Transit review is part of a larger effort by the City of Everett to manage resources and plan for a sustainable future. We believe an APTA Peer Review is a most responsive means to address Everett Transit.

We are interested in reviewing our contracts and agreements with our regional partner, Community Transit of Snohomish County, with emphasis on the following:

1. Do the agreements meet the stated mutual goals?
2. Are the terms of the agreements reasonable and equitable?
3. Are there other areas for mutual cooperation that should be explored?

CITY OF EVERETT 2930 Wetmore, Suite 10A Everett, WA 98201 425-257-7115 Fax 425-257-8729



OFFICE OF THE MAYOR

Ray Stephanson
Mayor

A second major concern is facilities. Everett Transit's main base is land locked on a single city block and consequently must lease auxiliary space for buses and storage a few blocks away. As noted before, Everett Transit is responsible for Everett Station. We would like a review of our facilities with the following questions in mind:

1. What is working and not working with the current configuration?
2. What are the projected facility needs? Size, function, location.
3. What are the expected challenges to meet future facility needs?
4. What timeframe should Everett plan for to meet projected facility needs?
5. Everett Station – a complete review of the management, services, security, costs, cost recovery.
 - a. Is the current model meeting station needs?
 - b. What can Everett Transit do to increase revenue and reduce costs?
 - c. What can Everett Transit do to improve the customer experience and perception at the station?

A third area of interest is organizational structure:

1. Is Everett Transit appropriately staffed for the tasks?
2. Are we "top heavy"?
3. How are agencies of similar size and relationship to city government staffed?

With this scope of study we are open to additional reviews should the workload warrant. We question whether a single visit will be sufficient. From your experience would a one-time larger review be more effective, or a series of smaller, more focused visits? We understand cost and the availability of evaluators play a role in our approach. Your guidance is appreciated.

We do not have specific reviewers in mind and trust APTA to provide a team of experts who will understand municipally governed and operated systems. Someone with experience in para-transit operations and coordination is desirable. We are hoping to address at least the first issue within the next two to three months as it will help us with an ongoing discussion with our City Council.

Appendix A



OFFICE OF THE MAYOR

Ray Stephanson
Mayor

Thank you for your consideration. Please direct all future correspondence to:

Debra Bryant
CAO/CFO
City of Everett
dbryant@everettwa.gov
425-257-8700

Sincerely,


Ray Stephanson
Mayor

APTA Peer Review of Everett Transit December 9 - 12, 2014

Appendix B

The Team:

Barry Barker, Executive Director, TARC (Louisville)
Richard DeRock, General Manager, Link Transit
John Muth, Deputy Director, CATS (Charlotte)

Jeff Nelson, General Manager, MetroLink (Rock Island County)
Linda Watson, President/CEO, Capital Metro (Austin)
Greg Hull, Team Facilitator, APTA

Time	Agenda Item	Attendees	Location
Monday, December 8, 2014			
6:00 p.m.	Welcome dinner		Lombardi's 1620 W. Marine View Dr., Everett
Tuesday, December 9, 2014			
8:00 a.m. to 10:00 a.m.	Settle in, welcome & introductions Review objectives/agenda discussion Everett Transit Environment Overview: agency structure, organizational structure, statistics, relationship with neighboring agencies, financials (deficit and forecast for ET and COE) Service structure for fixed route and paratransit		Everything will take place in the Transit 2nd floor Training Room unless otherwise specified.
10:00 a.m. to 1:00 p.m.	Everett Station: cost, cost recovery, station uses, customer experience & perception	Tom Hingson, Mary Lamb, Joan Olsen, Mike Palacios	Everett Station
12:00 p.m.	Working lunch		
1:00 p.m. to 3:00 p.m.	Stakeholder meeting	JT Dray	
3:00 p.m. to 5:00 p.m.	Meeting with City Council Members	Ron Gipson, Scott Bader	City Hall
Wednesday, December 10, 2014			
8:00 a.m. to 1:00 p.m.	Paratransit: City's ADA plan, policies and procedures, agreement with Community Transit	Tom Hingson, George Baxter, Dorothy Spiwak, Brian Senyitko	
12:00 p.m.	Working lunch		
1:00 p.m. to 3:00 p.m.	Stakeholder meeting	Victor Harris	
3:00 p.m. to 5:00 p.m.	Community Transit Relationship: <i>Swift</i> agreement, Paratransit agreement, ORCA agreement, other potential partnerships	Tom Hingson, George Baxter, Joy Munkers, June DeVoll	
Thursday, December 11, 2014			
8:00 a.m. to 11:00 a.m.	Financials: revenues/expenses, farebox recovery, fare policy	Tom Hingson, George Baxter, Mary Lamb	
11:00 a.m. to 1:00 p.m.	Facilities: fleet size, maintenance needs, current configuration and future bus parking	Tom Hingson, George Baxter, Bob Carlson	North Base
12:00 p.m.	Working lunch		
2:00 p.m.	Peer review panel deliberations		
Friday, December 12, 2014			
8:00 a.m. to 10:00 a.m.	Exit conference	Tom Hingson, George Baxter	
10:00 a.m.	Depart for airport		

DOCUMENT LIST

Appendix C

1. Everett Transit 2015 Proposed Operating Budget
2. Everett Transit Development Plan 2014-2019 and 2013 Annual Report
3. Everett Transit- Community Transit BRT Agreement (12/05/07)
4. Everett Transit- Community Transit Paratransit Service Letter of Understanding (December, 2009)
5. *SWIFT* Bus Rapid Transit Presentation (11/13/14)
6. Everett Transit Comprehensive Plan Update; Chapter 5: Service Evaluation
7. 2013 Summary of Public Transportation: Washington State D.O.T. (December, 2014)
8. Everett Transit Annual Bus Boardings: 2006-2014
9. Everett Transit Paratransit Trips: 200- 2014
10. Everett Transit Paratransit History Summary (8/15/80)
11. Everett Transit Senior/ Disabled Van Transportation Information Sheet
12. Everett Transit Paratransit Application Form
13. Everett Transit Paratransit Notification of Application Approval
14. *SWIFT* Pamphlet- *5 Years of Service*
15. Fare Revenue Summary Chart: 2005- 2015
16. Everett Transit Revenue Streams (October, 2014)
17. Everett Transit & Everett Station: Fund 425 Operating Revenue & Operation Expense (As of October 31, 2014)
18. Interview Documents provided by J.T. Dray:
 - Personal Agenda Outline
 - Comments on *E.T.A.* (Everett Transit Arrivals)