

Valley Transit Strategic Plan

Transportation Development Scenarios

Valley Transit



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Introduction

This memo outlines recommendations for future strategic development of the Valley Transit system. These recommendations were developed after stakeholder input processes that included workshops, surveys, and public meetings, as well as collaboration with Valley Transit staff. This memo outlines the overall goals that were drawn from the planning process and the strategies that need to be implemented over a 10-year time frame to achieve these goals. The prescribed strategies include service design changes to the transit system, changes to Valley Transit's organizational structure, and changes to Valley Transit's operational procedures. Funding opportunities are also identified, along with ways to build the technical capacity of the transit system.

The strategies listed in this memo reflect the Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis that was completed as part of the planning process. For the future development of Valley Transit, the community listed many potential opportunities. These reflect growing markets, new partnerships, and shifting transportation needs throughout the community. Additionally, the recommended strategies work to address perceived weaknesses, and make the agency resilient against future threats.

Actions to be taken by Valley Transit and partners are prioritized into four general groups:

- **Near Term Recommendations** – Actions that can be taken immediately, and at a relatively neutral cost. These recommendations will optimize existing resources of the transit system.
- **3-Year Scenario** – Actions that should be taken in years 1-3, and represent a moderate increase in capital and/or operating investment
- **5-Year Scenario** – Actions that should be taking in years 5-10, and represent a more significant increase in capital and/or operating investment.
- **10-Year Scenario** – Actions that represent a fully developed, multimodal transportation system. This option will require significant, stable funding.

These actions are intended to be cumulative in nature, carried out in sequential order. The 5-Year Scenario assumes that the actions in the 3-Year Scenario have been completed. Some initiatives can be pursued concurrently; however in general longer term strategies will be more successful if the foundations set in the earlier phases of implementation are successful.

Goal Statements

Each strategy outlined in this memo is intended to work toward a set of goal statements that are derived from the core values of Valley Transit. The elements of the action plan were developed with these goals in mind.

Goal #1: Valley Transit is a fiscally responsible organization that is accessible and supports a high quality of life in the Fox Cities.

Strategies are oriented toward operational efficiency of the organization, and how well the transit system supports development.

Goal #2: Excellence in customer service is a central value of Valley Transit, and the organization continuously monitors and exceeds customer expectations.

Strategies will emphasize improving the transit user experience, and building the capacity of Valley Transit to deliver an excellent core product.

Goal #3: Transit Services in the Fox Cities will be direct, on-time, and easy-to-use.

Strategies will improve how well the Valley Transit system operates on a daily basis, and will be measurable.

Goal #4: Transportation infrastructure in the Fox Cities will embrace many modes of transportation, and offer seamless connections for all people traveling to, from, or within the region.

Strategies will be inclusive of all transportation modes, and Valley Transit's role as a part of the regional transportation network.

Goal #5: Transit needs in the Fox Cities will be met efficiently, and in a manner that is consistent with its mission.

Strategies and recommendations will be from a regional perspective and be developed in a cost-effective manner.

Goal #6: Valley Transit is funded in a manner that promotes stability and resilience, and is flexible to accommodate a growing region.

Strategies will recommend that Valley Transit grows and changes with the community, and that the agency can withstand fiscal hardships and have a diverse portfolio of funding sources.

Near Term Scenario – Optimizing Existing Resources

The first scenario for development of Valley Transit focuses on improvements to management and operations with minor modifications as recommended in the 2009 Transit Development Plan (TDP), and 2010 Comprehensive Operations Analysis. These are prioritized as initial steps in moving forward with the strategic planning process. Delivery of these strategies is intended to be accomplished using the existing fiscal and staff resources of Valley Transit. The foundation set here positions Valley Transit to develop the structures necessary to improve transit service and connect communities. Most of the recommendations here are not related to expansion or contraction of the Valley Transit route network, but instead relate to internal management and performance tracking practices. Before large scale transportation investments are made, the system should build on existing efficient practices and dedicate staff accordingly. The intent is to lay the groundwork for future changes.

Service Description

In the Near Term Scenario, the fixed route network will be similar to the current network with minor schedule modifications to adjust and add buses and drivers. Routes with consistently late buses should be modified and any reduction in running time should be redistributed as added revenue service.

The paratransit network will continue with eligibility requirements corresponding to the specifications of the Americans with Disabilities Act (ADA). The ADA requires that “equivalent” demand response service is provided to people who are unable to use fixed-route transit due to a disability or physical barrier, that reside within $\frac{3}{4}$ mile of fixed-route transit. Expansion of non-ADA paratransit services will be limited by the funding support of local municipalities. Communities that feel strongly about additional non-ADA paratransit services will be required to provide higher levels of support for those services, while other communities will have the opportunity to control costs of non-ADA services by funding only the minimal required level.

Connector service should continue in its current configuration and pricing structure. Monitoring of origins and destinations will provide management with information on where future fixed route or higher level Connector (frequency/response time) services can be provided.

Management and Operations

In the Near Term Scenario, on-time performance and reliability is the primary focus of all operations. Investing in more frequent service and improved infrastructure will help ensure that the existing services operate as effectively as they possibly can.

On-Time Performance Committee

The first step in doing this will be to develop an internal on-time performance workgroup or process. The group should include street supervisors, management, maintenance staff, schedulers, and bus operators as needed. The objectives of this work group will be to identify parts of the transit network where there are schedule adherence issues, identify causes and potential remedies for on-time performance issues, and to rapidly monitor and implement solutions. On-time performance issues will be identified from three sources, 1) customer inquiries, 2) bus operator and supervisor observations, and 3) schedule adherence data from automatic vehicle locators (AVL). Staff activities to support this committee include:

- Field observations and ride checks
- Regular polling of AVL data
- Operations staff training
- Market research and community outreach activities

There can be multiple reasons for buses running off schedule. Traffic congestion, a passing freight train, a passenger that requires assistance with a wheelchair or mobility device, fluctuations in ridership, scheduling errors, and driver behavior all contribute to the reliability of the transit system. In some cases training of staff and minor schedule adjustments can address these problems. However, travel time may need to be added to certain routes. This may present an additional cost given the addition of revenue hours and the effort of changing published schedules and informing the public of the changes.

A top priority in improving Valley Transit operations is to make sure that transit scheduling, dispatch, and data collection software is working properly and, more importantly, is useful to agency staff. Technicians, schedulers, and supervisors should be able to poll AVL data regularly, produce playbacks of routes, and effectively monitor on time performance trends. Fareboxes should be linked to this system so that passenger counts and boardings can be tracked. If the equipment is faulty, Valley Transit must work with the

vendor and local information technology staff to get it repaired. This includes both software and hardware. Most vendors will offer training and technical support. Some service technical support packages require additional investment beyond the equipment purchase.

As travel time is added to routes to improve schedule adherence, there may be additional operating cost. Route-by-route analysis and field observations need to be undertaken to determine how much additional travel time may be needed, but budgeting an additional \$146,000 in the first year is a reasonable estimate. The additional cost of \$146,000 assumes an additional two hours of running time on four routes, and an average operating cost of \$70.00 per hour. If there is reduced running time, this figure could be lowered. Assume this to be a maximum given the parameters. Also, this additional cost may be recovered over time as revenues increase and further service adjustments are made.

Subcontractor Monitoring

As on-time performance will be monitored on the fixed-route service, subcontractor performance should be monitored as well. This includes Valley Transit II, Connector, human service transportation, and taxi programs that are supported within Valley Transit's portfolio of services. Drivers will deliver courteous and safe service with sufficient support from management to do their assignments in a safe, responsible, and efficient manner.

Periodic review of statistical performance and observation of operations will be scheduled consistent with current staffing availability. Periodic audits should be done of subcontractors. A starting point for developing these audits are questionnaires and agendas used for Federal Transit Administration (FTA) Triennial Reviews and Wisconsin Department of Transportation (WisDOT) Management Performance Reviews. If subcontractors are not compliant in state and federal policy areas then Valley Transit is vulnerable to findings at the time of audit. Unresolved audit findings can result in issues related to FTA funding eligibility. As with the fixed-route monitoring, a procedure for investigating customer complaints and feedback should be consistently applied to subcontractors.

Infrastructure and Capital Investment

Valley Transit has immediate and future capital needs that are currently unmet. While the fleet is currently in a state of good repair, there will be a wave of vehicles that are due for replacement or overhaul in the next decade. As is the case with many urban bus systems throughout the country, federal transit capital program realignments and funding reductions have left a major

gap in transit providers' ability to replace vehicles and equipment. While they still receive some funding through FTA and local sources, the future will call for a local or regional solution, barring the unlikely event that new state or federal programs are developed.

In the absence of a new source of funds, here are some initial steps for developing a capital investment program.

Asset Management

Valley Transit should begin this process by developing and updating its asset management plan. An asset management plan is a living document that implements a strategic approach for assessing needs and prioritizing investments for bringing public transit systems into a state of good repair.

Asset management plans should include the following:

- An assessment of all vehicles, facilities, and equipment documenting their age in relationship to their useful life and overall condition.
- Setting objective performance measures to measure the condition of assets.
- Prioritization of future investments.

Asset management plans also contain a reporting structure for monitoring. Staff will record the condition of the system, any changes in the condition of the system since the last reporting period, and progress toward meeting replacement and condition targets. This material should be reported on a quarterly basis to the Fox Cities Transit Commission.

In addition to the various performance measures set in the asset management plan, facilities and vehicles should be evaluated as to how well they meet current needs. For example, are transfer points and shelters adequate in terms of capacity? If the system is to grow sustainably, could it do so with the existing infrastructure? If there are looming unmet needs, they must be factors in prioritizing improvements.

The development of an asset management plan can be performed in house. However, there are also professional contractors with maintenance and investment planning expertise, and vendors of software packages that could assist Valley Transit with the development of an asset management plan. A technical assistance contract of this nature could have a budget of about \$50,000 for guidance in starting this project.

Capital Planning

As a working group was developed to approach on-time performance issues, a similar working group should be devoted to capital planning. Management of assets should be done in a way that focuses on the routine replacement of vehicles and equipment, and adopting practices that extend the life of each asset. A challenge faced by transit agencies is whether to dedicate resources toward fixing or replacing what is broken, or keep new assets in the best condition. In an environment where funding is scarce, trade-offs need to be made to balance these two objectives.

Good capital planning involves the following elements:

- Each capital project should be evaluated based on how it would achieve agency goals, and how it reflects the Valley Transit values. Projects will be rated based on their consistency with goals:
 - Improved operational efficiency
 - Good customer service
 - On-time performance
 - Supportive of different transportation modes
 - Ability to meet future demand
- Determine which capital projects have a return on investment or substantially reduce operating costs.
- Input from staff in multiple areas of the company (maintenance, finance, customer service, etc.)

Advocacy

Valley Transit management should evaluate existing approaches to advocacy for funding at the local level. In many cases, this will involve conducting research on other City of Appleton department practices. Valley Transit must research the practices of other city departments that operate vehicles and facilities and review their standards for vehicle replacement and facility modernization. This includes public works, police, fire, physical plant, etc. Before advocating for funding at a local level, understanding how transit stacks up to city departments is an important piece of data. Transit is a lifeline for many vulnerable populations, and thus should be prioritized accordingly.

Staffing

Immediate-term recommendations do not include changes to full time or part-time staffing. Increases in staffing are recommended for the 1-3 year time horizon.

Investment Summary

There are various sources of funding that support Valley Transit. For the purposes of this strategic plan, these funds are divided into three general groups. Operating funds are typically sourced from local governments, sponsors of service, WisDOT, and FTA. Required local match for this funding is about 30 percent of total costs. The most common source of transit capital assistance is FTA formula and discretionary funding. Required local match for FTA capital funding is 17-20 percent depending on the nature of the project. Transit planning assistance is also commonly sourced from FTA Section 5303 or 5304 funding, and requires a 20 percent nonfederal share. The following (see Table 1) is an overview of funding requirements for the Near Term Scenario.

Table 1. Near Term Funding Requirements

Project	Operating Funds	Capital Funds	Planning Funding
Operational Adjustments	\$146,000	\$0	
Asset Management Planning Assistance	\$0	\$0	\$0-\$50,000
Total	\$146,000	\$0	\$0-\$50,000
Local Share	\$43,800	\$0	\$0-10,000

- Total cost increase: \$146,000-\$196,000
- Total local share increase: \$43,800-\$53,800

3-Year Scenario – Moderate Investment

The 3-Year Scenario consists of moving Valley Transit toward a more private sector approach to providing transit service while maintaining the essential qualities of municipal services. Decision making should be thoughtful, but the approach will focus on moderate, controlled growth of the organization similar to the manner of many private sector businesses. Budgeting and finances will be consistent with current municipal practices.

The elements of improved quality service delivery and infrastructure in the Near-Term Scenario will be incorporated into this scenario. A major change will be that the current network will be “right-sized” to place transit service where it is needed and well used. Strategic investment decisions in new services will be made where a reasonable return on the investment can be expected.

Market research and data driven decisions will be key elements of service development. Valley Transit will gradually expand into supporting or leading other modes, depending on the partnerships that are developed and resources available. Experimental services will be added at a rate of approximately one or two per year, consistent with municipal budgeting practices. A more effective, business-similar, network will result.

Highlights of this scenario include:

- A focus on productive services
- Provide facilities and vehicles to support a higher level of service, including the replacement of the Neenah Transfer Center
- Service delivery reliability enhanced beyond the basic level of service
- Private sector decision making within government context
- Reduce service where and when lightly used; expand Connector as replacement
- Create service intense network where appropriate
- Add routes where data driven analysis indicates high probability of success
- Intense market research to understand travel patterns in the service area
- Vanpool/carpool matching for high employment areas
- New services established (one or two per year)
- Expand relationships with bicycle and pedestrian mode advocates

- Conducting outreach to specific segments of the Valley Transit market that are currently the most regular users of the service.

Service Description

Route Network

Existing Service

The philosophy of transit service development in the first three years of the plan implementation is focused on existing markets. If the existing service products work as effectively as possible, ridership will grow as the current users of the system will use Valley Transit more. Improvements in on-time performance, customer service, and facilities will make transit service more reliable and attractive.

Data should be collected from fareboxes to determine where transit service has the highest levels of use. These will be areas where transit investment is most effective. Conversely, this data will also be used to find areas of very low ridership. These portions of routes should be targeted for service reductions. If they are in areas of critical need (people with disabilities, transit dependent, etc.), but do not generate substantial fixed-route ridership, explore coordinating with other agencies or offering a more flexible transit mode. Low ridership or low density areas can also be served by the Connector.

New Service

In the first three years of the plan implementation, service development decisions should become more performance based. In Table 2, a set of performance measures is listed that should be considered when a local government, business, or elected official inquires about service expansion.

For both new and existing service, these measures should be used to monitor system performance. Additional performance measures are shown in Table 3 that evaluate the administrative performance of Valley Transit.

Table 2. Service Development Guidelines and Performance Measures

Service Criteria	Description
<p><i>Subsidy per Passenger</i> (Annual Operating Cost – Annual Revenue) ÷ Annual Ridership</p>	<p>Subsidy per passenger measures the local, state, and federal funding that is used to support each ride. Service projects should be rated on how well they minimize reliance on public subsidy:</p> <p>Projects that have a lower than average subsidy per passenger on a systemwide basis: High Rating</p> <p>If the project does not have a high rating, this measure can be refined by taking the average subsidy for different service types:</p> <ul style="list-style-type: none"> - High frequency fixed route (< 30 min freq.) - Regular fixed route - Circulators - Demand response
<p><i>Passengers per Revenue Hour (Productivity)</i> Annual Ridership ÷ Annual Revenue Hours</p>	<p>Productivity is a way of measuring how well Valley Transit serves the proposed market and how effective the proposed service will be.</p> <p>Productivity should be above the regional average. In the third year of operation a fixed-route service should carry at least 20 passengers per hour, and demand response service should carry at least three passengers per hour.</p>
<p><i>Capital Facility Coordination</i></p>	<p>Prior to making service changes or expansion, Valley Transit will make sure all capital facilities are funded, acquired, and/or constructed in coordination with the service change.</p>
<p><i>Benefits to People with Disabilities</i></p>	<p>New transit service should have a benefit to people with disabilities. This should be verified by reviewing demographics, and conducting outreach to regional human service agencies.</p>
<p><i>Benefits to Minority and Low Income Populations</i></p>	<p>Service modifications should benefit minority and low income communities. Service changes will be compliant with Title VI of the Civil Rights Act.</p>

Service Criteria	Description
<i>Population and Employment Density</i>	<p>The type of service that an area can support should be determined by the level of population and employment density. A minimum threshold for fixed-route service (hourly in a suburban environment) is 3 households per acre and 4 jobs per acre. Additional guidelines are as follows:</p> <ul style="list-style-type: none"> - High frequency service (15-30 minutes) complemented by local connecting and circulator routes requires densities of at least 18 people per acre and or 20 jobs per acre on multiple locations on the route - Lower density areas, or areas with few pockets of density, can support high frequency or express service during peak periods, and hourly circulator service.
<i>Local Funding Support</i>	<p>Valley Transit should seek out sponsorship of service from local government, businesses, non-profit agencies, etc. Projects that provide “overmatch” will be prioritized.</p>

Table 3. Agency Performance Measures

Performance Measure	Description
<i>Maintenance – Preventive Maintenance Schedule</i>	<p>Periodic audits and vehicle inspections will be conducted by Valley Transit maintenance staff to make sure that vehicles are being kept up to the schedules specified in the agency’s maintenance plan.</p>
<i>Maintenance – Time between Road Calls</i>	<p>Road calls for unscheduled maintenance (where buses are switched out of service due to mechanical failure) are indicators of fleet age, running conditions, driver training, and maintenance practices. The average time between road calls should be monitored on a monthly basis, and trends are an indicator of the transit system’s state of good repair.</p>
<i>Fuel Economy – Diesel Miles per Gallon</i>	<p>Fuel economy is an indicator of the following:</p> <ul style="list-style-type: none"> - A modernized fleet - Length of dwell time - Efficient design of routes - Traffic conditions <p>Trends in fuel economy should be monitored as a performance measure. Upward and downward trends should be investigated by operations and management staff.</p>
<i>Safety – Total Accident Rate and Preventable Accident Rate</i>	<p>In partnership with Transit Mutual Insurance of Wisconsin safety audit procedures, trends in both preventable and non-chargeable accident rates should be monitored. While Valley Transit has a good safety record, management of risk and employee training in safety and defensive driving will lower operating costs associated with insurance and damage claims.</p>

Performance Measure	Description
<i>Customer Satisfaction</i>	Survey questions and exercises like those presented at the Farm Market and on the Valley Transit website should be consistently presented to the public. The number of customer service inquiries should be tracked, and Valley Transit should be proactive in dealing with negative trends in public perception, since it is one of the agency's strongest assets.
<i>Goal Achievement</i>	Annual qualitative assessment of progress toward goals stated in the strategic plan should be conducted among Valley Transit staff and Fox Cities Transit Commission members.

Level of Service

Frequency Improvements

In the first three years of the plan implementation, expansion should be directed towards creating a high frequency network. This will be most effective for routes that already provide the highest ridership, connect key destinations, and have a comparatively low subsidy per passenger. Based on recent planning documents and ridership data, this includes Routes 12, 15, 20, and 30. When adding frequency it is also acceptable to add buses only on the portions of the route that have the highest ridership, which are typically major thoroughfares that connect key destinations. This would result in adding approximately four buses to weekday service. Ridership will increase with frequency if marketing efforts for the high frequency networks are included.

Developing a high frequency network will require additional investment. In Table 4 the funding required to make these frequency improvements is presented. The new services will cost approximately \$577,000 in operating deficit, for which revenues outside of passenger fares will be needed. A 30 percent share of operating costs (the typical local share) is approximately \$201,500.

Table 4. Additional Operating Investment

Route Number	12	15	20	30	TOTAL
Annual Operating Cost	\$370,590	\$384,833	\$455,541	\$424,629	
Annual Revenue Hours	4688	4999	5310	5310	
Cost/Hr.	\$79	\$77	\$86	\$80	
Additional Revenue Hours	2,088	2,088	2,088	2,088	
Additional Annual Operating Cost	\$165,058	\$160,378	\$179,128	\$166,973	\$671,897
New Annual Revenue	\$23,273	\$22,664	\$25,257	\$23,543	\$94,737
Operating Cost	\$141,785	\$138,074	\$153,871	\$143,429	\$577,160

Miscellaneous Service Changes

As frequency is added to these core routes, transfer times at the Fox Valley Mall, Neenah, and Downtown Appleton Transfer Points can be staggered to provide more options to passengers. As on-time performance is prioritized, travel time may also be added to bus routes so 30 and 60 minute transfer point times may not be exact. Added frequency on core routes provides convenient transfers to key regional destinations.

Transit markets should be identified and services tailored for those transit market segments. Unique services (trippers, unusual hours of service) may be incorporated into the current mix of services. Expansion of existing services will be made as required under law (ADA) or as preferred by local officials.

Management and Operations

On-Time Performance

There should be a key performance measure of 90-95 percent schedule adherence that is publicized on the Valley Transit website. This is a goal to which the internal on-time performance working group will adhere. Often times government agencies and private corporations develop performance dashboards where trends and data are presented transparently. On-time performance, customer complaint resolution, and ridership could all be posted on this dashboard.

Technology Training

Valley Transit management should make sure that technology is used in the most effective manner, and upgraded in a manner consistent with other departments in the City of Appleton. Additional technology training will become an integral part of employee training and development.

If adequate support is not obtained from the scheduling and dispatch software vendors, Valley Transit may need to purchase additional services from the current vendor, seek other vendors, procure information technology consultants, or purchase products that will bring practices in line and maximize the usefulness of existing services. Cost estimates for additional training range from \$15,000 - \$20,000 depending on the scope of work. This is based on technical assistance contracts and software service agreements or leases that have been purchased by other Wisconsin transit systems.

Paratransit Software

During outreach sessions with the Strategic Plan steering committee, feedback was provided on the scheduling process for Valley Transit II and other demand response services. Committee members made criticism of the time it took to schedule a ride or an appointment. Even for standing rides, people had to enter basic contact information each time they made an appointment. Some of this process improvement can be accomplished with better oversight of subcontractors and audits. Most modern paratransit software packages streamline the scheduling process to a point where when a passenger calls in, all of their contact information and ride history is made available to the dispatcher. The software currently used by the paratransit vendor has these capabilities, so this topic may be addressed as part of a review.

Also, as contracted service is re-bid, software capabilities can be made part of the vendor specifications. If a software upgrade is required, it can be expected that a wholly new purchase will be approximately \$80,000 - \$100,000 based on recent procurements for this software in the State of Wisconsin. Valley Transit can also explore the joint purchase and specification of transit software and hardware to receive favorable pricing and work toward interoperability and sharing of resources among regional transit providers.

Customer Focused Service Delivery

In the 3-Year Scenario, buses should operate on schedule and drivers should be supported in a manner that allows them to perform their duties in a safe,

responsible, and efficient manner. There will be several service delivery enhancements beyond the 3-Year Scenario. Extra buses should be added early during unusual weather conditions in anticipation of late buses. These “fill” buses should be managed by street supervisors. Transfers between buses should be guaranteed and assistance provided to late buses to make sure that all buses start their routes on-time.

If frequencies cannot be established that allow for 15-30 minute headways during the full service day, a “mobile dispatcher” concept should be deployed at major transfer points. Here a supervisor or senior driver will be available at the transfer center to meet passengers who miss connections and deliver them in a van or supervisor vehicle to a destination or transfer point (whichever is most efficient). This will eliminate the need to hold buses at transfer points and reduce the shockwave effect this has on the rest of the transit system. If staff resources are not available to fulfill this requirement, then additional staff should be hired. Priority should be placed on peak service times.

Additionally, incentives should be provided to use passes or other cashless fare media. This will speed up boarding times, and reduce the need for drivers to make change or potentially count cash. The fareboxes currently in use have the ability to use magnetic strip passes that can record transfers. These can also be used to collect data on transfers and origins and destinations.

Shift in Corporate Culture

Valley Transit currently operates as a department within the City of Appleton. However, transit systems are somewhat unique in comparison to other city departments. Where municipal strategic goals are often do more with less, a transit agency has goals of sustainable growth. At its core, however, it is providing a service. The future of Valley Transit’s development should be a fundamental shift from doing more with less, to offering the best possible product and service to a specific set of markets. This will be more evocative of a private-sector business than a public agency.

Infrastructure and Capital Investment

To operate more frequent service in this scenario, four additional peak buses must be added to the Valley Transit fleet. This presents additional capital investment of about \$1,600,000 - \$2,000,000 as the fleet is expanded and a 16 percent increase in funding that needs to be set aside for capital replacement

ITS improvements and repairs may range from \$15,000 - \$25,000 in purchased services. This includes service agreements with vendors or IT consultant services.

Staffing

Part-time staff should be added in the following capacities, resulting in one full time employee (FTE) at an estimated rate of \$60,000:

- Part-time drivers to handle fill routes during peak times when routes with longer run times fall behind, improving schedule reliability.
- Part-time grant writer or planner, and full time intern to seek out new funding opportunities, and assist with market research activities.

With the increase in service and rolling stock, additional investment will need to be made to support additional maintenance staff. This presents an approximate 20 percent increase to staff commitments.

Investment Summary

Table 5. New Investments in 3-Year Scenario

Project	Operating Funds	Capital Funds	Planning Funding
Increased Frequency	\$671,900	\$1,600,000 - \$2,000,000	\$0
Technology Training	\$15,000 - \$20,000	\$0	\$0
Paratransit Software Upgrade	\$0	\$80,000 - \$100,000	\$0
ITS Improvements	\$0	\$15,000 - \$25,000	\$0
New Staff	\$60,000	\$0	\$0
Neenah Transfer Center	\$0	\$400,000 - \$1,500,000	\$0
Total	\$746,900 - \$751,900	\$2,095,000 - \$3,625,000	\$0
Local Share	\$225,000	\$419,000- \$725,000	\$0

- Total increased investment: \$2,841,900 - \$4,376,900
- Total increased local share: \$644,000 - \$950,000

Valley Transit Future System Characteristics: 5-Year Scenario – Significant Investment

In the first three years of implementation, a foundation is set for improvement of the Valley Transit system. In years 3-5 the practices set forth will be continued with particular focus on securing stable funding and strategic investments in capital assets and personnel.

Service Description

Route Network

Performance Based Expansion

As stated in the 3-Year Scenario, service expansion will be based primarily on two strategies:

- The top priority for service expansion should be as additional frequency on the most productive bus routes.
- For geographic expansion of routes into new areas, all requests for service should be evaluated against service development performance measures.

Connector service should be implemented in areas where fixed-route performance thresholds are not met; however Valley Transit staff need to identify a funding source for these types of service projects.

Continuation of Service Development Practices

The service level of Valley Transit in this scenario will be noticeably different than the current network. Consistent with private sector practices, low ridership segments of routes should be eliminated. No passenger will be left behind, as taxi vouchers, Connector service, or paratransit can be used to current customers who lose fixed route service.

A high-frequency network of 15 or 20 minute intervals on a core fixed route network should be well established at this point. Bus frequencies will be increased in areas where people are most likely to use transit, and markets are already strong. This can include full routes or segments of existing routes. Staggered pulse times at transfer facilities will be acceptable with more frequent service.

A transit development plan should be crafted that focuses on opportunities to expand the high frequency network, and target opportunities for geographic expansion. Such an effort will likely require an addition of \$100,000 to the contracted services budget. Funding at an 80 percent share can be obtained from WisDOT via the FTA Section 5304 program, and matching funds can be obtained from a variety of non-federal sources. An additional grants/planning staff member is outlined under the heading of staffing.

Program Expansion

Valley Transit should begin coordinating, advocating, or sponsoring ridesharing and other multimodal services like bike sharing, car sharing, and capital investment in transit supportive infrastructure. Procedures for this are outlined under the heading of staffing.

Management and Operations

Management and operations should continue the practices set forth in the 3-Year Scenario. This includes:

- An internal goal of excellent schedule adherence, and developing an understanding of why on-time performance issues occur
- Continued technology and customer service training
- Successful deployment of new technology
- Guaranteed transfers, mobile dispatching

Infrastructure and Capital Investment

The facility, vehicle, and technology infrastructure should be maintained and enhanced at a higher level. A long term facility maintenance plan should be developed and rehabilitation/replacement of facility components should be programmed with adequate notice to avail Valley Transit of federal funding. Municipal bonding may be needed if FTA funding is inadequate.

Vehicles should be repaired and maintained so that the life of the vehicles can be extended in a cost-effective manner. When vehicles cannot be cost effectively maintained, they should be replaced. At this point in the plan implementation, Valley Transit's asset replacement plans will be consistent with other City of Appleton departments.

If sufficient funding is not available for new buses, used buses can be purchased from other transit systems or at auctions as a stop-gap measure. The purchase of used, high quality, buses may be required to expand service and Valley Transit maintenance personnel will have the training and expertise

to purchase and inspect potential replacement vehicles. Rehabilitation plans and life cycle schedules should be developed for all used vehicles.

Rehabilitation of the current facility can be accomplished in an incremental fashion. Further analysis is needed to determine if the additional vehicles and staff can be accommodated in the current facility or if minor modifications are needed.

Staffing

At this phase of plan implementation, key staff should be hired to deliver some plan elements. It is estimated that the total additional operating cost for the increased staffing will be approximately \$180,000 - \$210,000. This is based budgeting about \$60,000 per FTE.

Finance and Grants Management

An additional full time clerk and grants coordinator should be hired. Potential new funding models, such as a Regional Transit Authority or Regional Transit Commission, will increase workload in the financial area of the transit system, especially during the transition to a new system of governance. Eventually this person will lead efforts in seeking out new funding and grant opportunities. An ideal candidate for this position would be someone with a strong background in grant writing and non-profit management. This position will be tasked with the following:

- Assist Administrative Service Manager with budget preparation and accounting activities with local governments.
- Prepare applications for funding under competitive grant programs.
- Seek new funding opportunities and assist Community Outreach Manager in building relationships with philanthropic foundations and human service agencies.
- Assist Administrative Services Manager with grant reporting and data collection.

Planner

A full time Planner/Researcher will become an integral part of the management team. This person will create data driven service concepts in conjunction with input from passengers, drivers, management, local advocacy groups, and local elected and appointed decision makers. This person, with the general manager, will be a high profile position that interacts frequently with the customers, supporters, and funders of Valley Transit. This person will be part of the management team that consistently positions

Valley Transit as a valuable resource in meeting the varied transportation needs of the Fox Cities.

This position could be housed at Valley Transit, or be a cooperative appointment at the East-Central Wisconsin Regional Planning Commission shared among transit systems in the Fox Valley.

ITS Technician

Technology improvements in the 5-Year Scenario may require an additional full or part time person. A shared position with another municipality or transit system can be considered as a contract position. A private sector on-call contract is another option to enhance technological sophistication and better use of data at Valley Transit.

Bus Operators

As the system expands, additional part-time “fill” or “extra board” drivers will need to be added to support service expansion. New service can also be established on a contracted basis, and a cost-benefit analysis should be performed to determine the most cost-efficient method of service expansion.

Investment Summary

Table 6. New Investment in 5-Year Scenario

Project	Operating Funds	Capital Funds	Planning Funding
Transit Development Plan	\$0	\$0	\$100,000
New Staff	\$180,000 - \$210,000	\$0	\$0
Total	\$180,000 - \$210,000	\$0	\$100,000
Local Share	\$54,000 - \$63,000	\$0	\$20,000

- Total increased investment: \$280,000 - \$310,000
- Total increased local share: \$74,000 - \$83,000

Valley Transit Future System Characteristics: 10 Year Scenario – Fully Developed System

The 10-Year Scenario is an aggressive approach to transportation services. A combination of public and private strengths will provide the most cost-effective service that meets a wider range of transit needs than the current system or the proposed system in the 5-Year Scenario.

Transit will be operated from a business model that focuses on growth of specific transit market segments while protecting the current customer base. It will strengthen the long term growth and stability of the Valley Transit network, and deploy a variety of transportation strategies.

Service Description

Route Network

Existing Fixed Route

Serving a community of well over 200,000 people, the nature of the transit system will be better developed. The service improvements of the 5-Year Scenario will be enhanced with additional frequencies on the fixed route network where justified. The fixed route network will replace low ridership segments with alternative service models and add frequency to productive segments.) The fixed route system should continue to be monitored for changes in demographics or land use redevelopment or new development.

Previous transit planning efforts have identified opportunities to develop service in places like Greenville, Kaukauna, and west of US 41. Analysis performed in the strategic plan showed population and employment densities that would be supportive of transit. In the 10-Year Scenario service will be deployed into outlying areas of the Fox Cities. The addition of circulator routes in Kaukauna and Greenville will have an estimated annual operating cost of \$547,200. This is based on previous transit development plan recommendations with adjustments for inflation.

Connector

The Connector service will serve two equally important missions:

- 1) As it does today, the Connector will provide workforce connections, extending the regular bus routes beyond standard route boundaries and hours.

- 2) Being the mode of transportation that develops new markets for transit service. If there are locations where it is unclear if demand is sufficient to support a sustained fixed route, a service branded as the Connector operating as a deviated fixed-route service can be used to establish a base of ridership to evaluate future service. It is assumed that the local share of funding for this pilot program will be sourced from a sponsoring municipality, employer, or human service agency.

The Connector will be modified as changes occur. Additional vehicles may be assigned if frequency improvements will increase ridership in a cost effective manner; hours may be expanded or reduced depending on usage and proven demand; service area may be reduced if ridership is sufficient to support a new fixed route.

The Connector can also be a potential solution for seasonal workers needing longer distance transportation on a temporary basis. This type of service would be offered as a subscription, and a minimum ridership commitment would be required from a given employer seeking to be connected to transit service.

Ridesharing

The vanpool/carpool service should be aggressively expanded to serve destinations outside of the current service area to serve residents of the service area who travel long distances for work trips. It should also be expanded to smaller businesses in the Fox Cities and can be used for people who live outside the service area and are commuting to work within the service area.

Regional Services

Similarly, a commuter bus network should be developed to locations outside of the service area with cooperative funding agreements from businesses or the transit systems in adjacent regions. The system would focus on commuter trips, but will also serve other trip purposes that are not as repetitive as commuter trips. The routes can meet connecting services at transit locations in other cities, but should also be flexible enough to make stops at major traffic generators in the adjacent regions. If match funding is available, WisDOT Intercity Bus Assistance Program (85.26) funding can supplement this service for a startup period. 85.26 program funds are used to support intercity bus projects, with a priority given to operating assistance.

Existing inter-city carriers can be used to provide the supplemental service, or Valley Transit can create contracts for other operators to provide service that supplements the current service. Expansion of Route 10 with Oshkosh

Transit where Valley Transit operates additional trips is one example of expanded service to another community. The Janesville-Beloit shared route is another example of two transit systems sharing a route. The Milwaukee – Racine – Kenosha service is another example of long distance commuting service that is a model for service to cities outside the current service area.

Estimated operating costs, which could be shared with existing intercity service projects, would be approximately \$667,000 annually. This is based on previous transit development plan recommendations with adjustments for inflation.

Multimodal Outreach

Pedestrian and Bicycle modes are also an important component of transit service. The pedestrian environment is the start and end of each transit trip. Adequate sidewalks, accessible features, shelters, and wayfinding make transit more attractive to potential users and an easier option for current users. In addition to establishing the presence of pedestrian facilities on transit lines, it is important that these facilities make direct connections to key destinations. Bicycle travel is a complement to transit service because, like transit, it is an affordable transportation option, and it can extend the service area of a fixed transit route. People can use bicycles for “first and last mile” travel, and then use on-board bus bike racks to complete their trip. Valley Transit can become an influential factor in developing these modes. The relationships with local communities can be used to influence land use development and site development to make new or reconfigured construction amenable to transit, bicycle, and pedestrian modes.

Valley Transit has a strong marketing program that attempts to move people from single occupant automobiles to transit. This understanding of transportation decision making can be used to influence and stimulate people to use bicycles and pedestrian facilities more often for appropriate length trips. This will create multi-modal individuals, families, and neighborhoods. Bicyclists have a strong advocacy network in the Fox Cities, and Valley Transit can fill the gaps where appropriate to create a sophisticated transportation network where people use the most efficient and appropriate mode to meet their travel needs.

Management and Operations

Operations will change as service options are implemented. The strong performance standards of the 5-Year Scenario will form the basis for expanded service. Flexibility in personnel assignments will be a characteristic of a growing and changing transit system.

Planning and Development

Valley Transit's planning and administration staff should work to have a stronger, more proactive role in land use planning and development in the region. The Federal Highway Administration (FHWA) produced training materials and literature under the title of "[Transit at the Table: A Guide to Participation in Metropolitan Decision Making](#)." These training materials and their recommendations outline national best practices for incorporating transit supportive decision making into regional planning processes. United States Department of Transportation (USDOT) staff are available for technical assistance on this subject matter. Valley Transit staff should incorporate these strategies into future decision making processes. Topic areas include:

- How to be productively engaged in Metropolitan Planning Organization (MPO) activities
- Cultivating relationships with new partners, businesses, and stakeholders
- Engaging Valley Transit regional development issues beyond transit
- Participating in highway and corridor studies
- Identifying underutilized federal funding opportunities
- Engaging in regular self-assessments.

Infrastructure and Capital Investment

The facility, vehicle, and technology infrastructure will be maintained and enhanced. A long term facility maintenance plan will continue to be developed on an ongoing basis and rehabilitation/replacement of facility components will be programmed with adequate notice to avail Valley Transit of federal funding. Grants from sources other than the FTA should be pursued. Environmental investments to make existing and future facilities carbon neutral will be an integral part of facility design and management. Local municipal bonding may be necessary to accomplish infrastructure goals.

At this point in the plan's implementation, a new funding source for capital improvements will need to be identified if the transit system is to be sustained. State and federal programs can be developed over the next ten years that can serve as a remedy for mid-sized bus systems, however in the absence of this a local or regional solution is needed. As it stands today (without system expansion and based on transit development plan needs identified in WisDOT funding applications), Valley Transit has over \$1 million per year in capital investment needs to keep up with vehicle, facility, and equipment maintenance and replacement. As a new governance structure

is deployed, set-aside funds for capital investment must be part of the strategy. Expanded transit services will require the purchase of new vehicles.

Staffing

Operations

As the system expands, additional part-time “fill” or “extra board” drivers will need to be added to support service expansion. New service can also be established on a contracted basis, and a cost-benefit analysis should be performed to determine the most cost-efficient method of service expansion.

Future transit development plans and regional/commuter bus studies should outline administrative and operational staffing requirements.

Commuter Services/Contract Manager

A full time coordinator will be needed to monitor the rideshare and commuter services programs and promote them with the service area. This position can be created as a permanent part-time position and move to full time as the workload increases. In this scenario, a targeted approach will be used to provide the vanpool/carpool service to smaller employers than in the 5-Year Scenario. Car-sharing and bike-sharing promotional activities can also be assigned to this position.

This person will also work with finance and planning staff to conduct data analysis to determine where service should be provided within the current service area and where it would be cost-effective for service area residents who commute daily outside the service area. Contract monitoring will also be an essential part of this position if the services are contracted out. Estimated cost for this increased staff will be \$60,000 annually.

Investment Summary

Table 7. Increased Investment for 10-Year Scenario

Project	Operating Funds	Capital Funds	Planning Funding
Suburban Circulator Routes	\$547,000	\$800,000	\$0
Regional Bus Routes	\$667,000	\$0	\$0
New Staff	\$60,000	\$0	\$0
Total	\$1,214,000	\$800,000	\$0
Local Share	\$364,200	\$160,000	\$0

- Total increased investment: \$2,014,000
- Total increased local share: \$524,000

Summary Table

<i>Functional Area</i>	<i>Near Term Scenario</i>	<i>3-Year Scenario</i>	<i>5-Year Scenario</i>	<i>10-Year Scenario</i>
<p>Service Description</p>	<ul style="list-style-type: none"> The fixed route network and portfolio of Valley Transit services will be similar to what is currently offered. Adjust services to reduce or eliminate low-performing segments of fixed-routes. If they are in areas of critical need (people with disabilities, transit dependent, etc.), but do not generate substantial fixed-route ridership, explore coordinating with other agencies or offering a more flexible transit mode. Adjust schedules to address on time performance issues, add minor amounts of run time Use internal performance measures on both transit service and internal processes. Measure progress toward strategic planning goals. 	<ul style="list-style-type: none"> Geographic expansion is contingent upon meeting service development guidelines, and the availability of funding. Buses will be added to peak service to improve schedule reliability. Adjust services to reduce or eliminate low-performing segments of fixed-routes. If they are in areas of critical need (people with disabilities, transit dependent, etc.), but do not generate substantial fixed-route ridership, explore coordinating with other agencies or offering a more flexible transit mode. Reinvest service into high return areas that have transit supportive densities and strong ridership (Routes 12, 15, 20, 30). Establish high frequency network of routes in highest use areas. Incorporate staggered transfer times at hubs. Expand ADA complementary paratransit in a manner consistent with the expansion of fixed routes. Add tripper services to serve niche markets or areas of inconsistent demand. Use Comprehensive Operations Analysis as reference point. 	<ul style="list-style-type: none"> All new service should be implemented based on current market research and be consistent with Valley Transit service development guidelines. Valley Transit will begin coordinating, advocating, or sponsoring ridesharing and other multimodal services like bike sharing, car sharing, and capital investment in transit supportive infrastructure. 	<ul style="list-style-type: none"> Expand services geographically to accommodate new development only if it meets density thresholds. Examples include Town of Greenville and Kaukauna Circulator routes, and intercity bus service. Expand connector service as needs increase. Coordinate Fox Cities regional rideshare program, or co-promote with State of Wisconsin rideshare and vanpool programs. Deploy broad portfolio of commuter services: <ul style="list-style-type: none"> Fixed-route commuter buses Guaranteed ride home program Travel demand management Bicycle commuting infrastructure, outreach programs, and services Increase service frequencies and as markets develop.
<p>Management and Operations</p>	<ul style="list-style-type: none"> Develop on-time performance workgroup or process (including supervisory and front line operations staff) that can address the following on a regular basis: <ul style="list-style-type: none"> Identify schedule adherence issues Identify causes and remedies for poor on-time performance. Rapidly implement and monitor solutions. Update subcontractor monitoring procedures 	<ul style="list-style-type: none"> On-time performance and reliability becomes the primary focus of all operations. Before commencing expansion programs designed to attract new ridership to the transit system, the existing transit service should function as well as possible. Monitor subcontractor performance No structural changes to the organization 90-95% percent schedule adherence Expand technology training Customer-friendly service approach to service delivery <ul style="list-style-type: none"> Easy to use fare media Guaranteed transfers Adopt a flexible, private-sector approach to service delivery. Reduce unproductive services, and add service in areas of likely success. The market in the Fox Cities should drive expansion decisions. 	<ul style="list-style-type: none"> Be positioned to add trips on a real time basis to address schedule, weather, and capacity problems. Continue to monitor on-time performance, and make improvements. Train staff in areas of technology and customer service on an ongoing basis. Implement mobile dispatching and guaranteed transfers during critical times. 	<ul style="list-style-type: none"> Adopt a flexible, private-sector approach to service delivery. Adjust and align services based on strong performance standards while maintaining core services for those who rely on transit. Where possible, assign personnel flexibly. Valley Transit should have influence on local land use planning and development decisions among funding partners; communicate the understanding that the greatest return on transit investment comes from transit supportive site planning and densities. Continue to pursue forms of contracted service to maintain flexibility and control costs.

<p>Infrastructure and Capital Investment</p>	<ul style="list-style-type: none"> • Adopt asset management approach to guide future investments, and commit to keeping adequate asset replacement schedule. • Implement a performance based approach to capital planning • Compare Valley Transit vehicle replacement and maintenance standards to other departments within the City of Appleton. If inequities exist, advocate for funding parity. 	<ul style="list-style-type: none"> • Rehabilitate or replace Neenah Transfer Point • Purchase additional vehicles to maintain reliable peak service. • Improve technology in a manner consistent with local and regional plans. 	<ul style="list-style-type: none"> • Develop plan for addressing long-term facility replacement, rehabilitation, and expansion needs. • Continuously modify procedures to include best practices that extend the useful life of vehicles and facilities. • Invest in facilities and amenities that increase levels of passenger comfort, convenience, and safety. • Expand use of available transit technology. 	<ul style="list-style-type: none"> • Implement facility and vehicle maintenance and replacement plans as needed. • Establish capital funding program that is independent from FTA bus capital programs. • Purchase vehicles for expanded service.
<p>Staffing Requirements</p>	<ul style="list-style-type: none"> • No new staff required. 	<ul style="list-style-type: none"> • Full-time staffing should be maintained at current levels • Part-time staff should be added in the following capacities: <ul style="list-style-type: none"> ▪ Part-time drivers to handle fill routes during peak times. ▪ Part-time grant-writer or planner to seek out new funding opportunities. • Improve service delivery and personnel productivity to optimize staffing levels. • Add drivers, mechanics, and supervisors at a rate that keeps pace with service expansion. • Add “floating” or “extra board” driver to weekday schedule to handle late buses and provide a guaranteed transfer. 	<ul style="list-style-type: none"> • Add a staff person that dedicates time to planning and seeking out new markets and services. • Add a staff person that specializes in intelligent transportation systems and their transit applications. • Add staff planner • Assign current drivers to “extra board” duties. 	<ul style="list-style-type: none"> • Continue to add drivers and other operations personnel to match the needs of service expansion. • Add full time position to manage rideshare, multimodal planning, and travel demand management programs.

Summary of Funding

Many of the improvements recommended in this technical memo require additional investments. Current funding levels and funding sources will allow maintenance of current transit service, but will not be able to satisfy current levels of unmet need or the increasing costs of providing transportation services (current consumer price indices are increasing at rates of 1-2 percent per year, “intracity” transportation price indices are increasing at a rate of 3 percent per year).

Like many urban bus systems throughout the country, federal funding sources that support capital replacement and operating assistance have become less stable. In an effort to weather the uncertainty and decline in federal aid, many transit systems have pursued increased funding at the local, regional, and state levels. As numerous funding alternatives are outlined in Technical Memo #4, it should be noted that Valley Transit has diligently pursued two funding sources that would require action in the Wisconsin State Legislature: an increase in Wisconsin Chapter 85.20 formula funds, and the establishment of Regional Transit Authorities (RTA). Peer transit systems have successfully pursued these funding strategies to make up for losses and instabilities in FTA discretionary and formula funds. Neighboring states such as Minnesota, Michigan, and Illinois allow RTA’s to have taxing authorities to support transit, and Pennsylvania has increased transit aid to small and large urban bus systems to make up for shortfalls.

As investment needs are presented, Valley Transit’s pursuit of increased state funding (through increased transportation fund investment and formula changes) and RTA establishment is affirmed as the most rational course of action from the standpoint of good policy. Other funding strategies (private investment, increased property tax levy, transit as a public utility) should be pursued, but Valley Transit has already exhausted the nationally proven methods of equitably addressing funding shortfalls.

Below (Table 8) is a summary of additional investments in each funding scenario that go beyond annual increases in the cost of providing transportation as a result of inflation:

Table 8. Funding Summary

Time Period	Improvements	Total Increased Investment
Near Term Scenario	In the near-term, the strategies focus on improving internal processes in advance of new funding mechanisms, perfecting existing transit operations, and planning for future system growth. Strategic goals will be affirmed, and the agency will take a “private-sector” approach to managing its services.	\$146,000-\$196,000
3-Year Scenario	With new investment, Valley Transit will improve service for those who currently use transit and will build up the base of regular Fox Cities transit users. Expansion of service will be based on performance criteria. Technical capacity will be built up among agency staff, and vehicles and facilities will be acquired and developed.	\$2,841,900 - \$4,376,900
5-Year Scenario	Staff will be added to pursue new initiatives and better use technological applications. Performance based management will continue to be refined.	\$280,000 - \$310,000
10-Year Scenario	Valley Transit will undergo geographic expansion, and staff capacity will be built up in the areas of planning and travel demand management.	\$2,014,000
Total Investment into Expanded System		\$5,281,900 - \$6,896,900

In summary, to carry out the strategies in this implementation plan, Valley Transit will require an investment of an additional \$5.2 million at a minimum. This figure will be increased if more service is added beyond two routes in new markets, and added midday frequency on core routes.