



Understanding, Choosing, and Tracking Performance Metrics

Guidance for Federal Transit Administration Section 5310 Applicants and Subrecipients



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What is a performance metric?

Performance metric is a broad term for items you can measure to determine how successful your program is and how efficiently you are operating.¹ You can create or identify performance metrics to measure specific elements of your work and to help ensure your goals are clear. They solidify the specific actions your program will take to accomplish your goals.²

It is important to consider whether the performance metrics your program chooses are valid, meaning that they measure what you want them to measure. This can mean your metrics are valid to your organization internally, or that they help you decide whether your work has been successful. Your metrics may be more broadly valuable to your agency's performance in the eyes of other organizations or the populations you serve.³ While there are performance metrics that are required for the Section 5310 application and reporting processes – such as unlinked passenger trips – your program should also choose as many metrics as you find valuable and that you can accurately track.

How can tracking performance metrics help my organization succeed?

While performance metrics are necessary to include in the FTA Section 5310 application, they can also help your organization grow and thrive during your regular operation, and be useful when seeking funding from other sources. Here are a few ways that performance metrics can help your organization:

Performance metrics can measure your program's success and help find areas for improvement. Establishing performance metrics can help your program monitor if it is successful in fulfilling its intended goals, as well as evaluating whether a program needs to be improved to better serve the public. By looking into the numbers produced from your program, it can give your organization a better idea of your program's impact in the community.^{6, 7, 8, 9} If there are certain areas where the numbers are lower than your organization had expected, then you can discuss opportunities for increasing those numbers.

Knowing your program's performance metrics can help improve discussion within your organization. When your program uses performance metrics to explain its activities, it can help those within your organization understand the impact of its services. If other members of your organization can see the numbers behind your program, it can help further discussions and potentially help your program gain additional internal resources improve service. You should strive to demonstrate successful results and effective leadership in your program, and tracking and reporting on performance metrics are one way of doing this.³

Performance metrics can be used to show others outside your organization how your program succeeds. Performance metrics can also help people outside of your organization understand your services, including programs with similar goals, individuals who use your services, and the public at large. By tracking performance metrics and showing the outcomes of a provided service, you hold your program accountable to the public and, as a result, strengthen trust in your program.⁵

How do I decide which performance metrics to use with my program?

Choosing which performance metrics to track can seem difficult, but there are a few important considerations your team can draw on when choosing what is valuable to measure for your organization.

Some performance metrics are easier to track than others. Some performance metrics are easily trackable, but others can be harder to measure. The *number of people who received services* is easy to track, while *community impact* is too broad and hard to define. Begin with finding easily countable, quantifiable outputs rather than the harder to define outcomes.

Some performance metrics that may be easy to track include:

Unlinked passenger trips counts the number of total one-way trips provided to all riders during a specific period. For example, if one vehicle transports three individuals from their homes to the grocery store and then back home, six unlinked passenger trips were provided. DRPT requires all programs to report unlinked passenger trips on a monthly basis through OLGA.

Number of requests for service counts the total number of requests for transportation, whether trips were provided or not. This metric can be used to track demand for your transportation service and to determine when service needs to be increased or decreased depending on demand.

Canceled or no-show trips counts the number of scheduled trips that were either canceled before they could be completed or for which the rider did not show up. These are valuable metrics when comparing total scheduled trips to total completed trips, and to determine whether some riders may have a pattern of canceling or not showing up for trips that needs to be discussed to prevent further service interruptions for other riders.

Hours traveled to provide trips is a count of the total transportation service hours, from the time a vehicle leaves your organization to the time it returns at the end of service. By tracking the number of trips provided during the hours of service, your organization can look for efficiency opportunities for future trips.

Number of individuals that received travel training is a count of the total number of riders who completed travel training. With this basic performance metric tracked, your organization can then expand to other metrics that would be valuable to measuring the success of travel training.

Some performance metrics that may be difficult to track include:

Satisfaction can be hard to measure with confidence, but there are approaches that can give you an idea of how satisfied your users are. Surveys can give you a percentage metric that can help gauge how happy a rider is with your service. Mobility management and operating programs can measure satisfaction.

Service accessibility can help you determine the number of riders that would have struggled to find transportation without your service. For example, you could ask riders how they found transportation before using your mobility management service, or whether your travel training program gave them the confidence to ride fixed-route transit rather than paratransit, or even if your program helped them gain the confidence needed to access transportation more frequently.

Rides facilitated can be measured by organizations that provide mobility management services but not direct transportation. Tracking the number of rides referred to a transportation provider and completed successfully can help show community impact and robust community relationships.

Some metrics are possible to count and not quite as broad, but still hard to track.

Examples include *how often individuals use services you refer them to* and *changes in frequency of transit use after travel training* and *frequency of community engagement*. While each of these is quantifiable, each would require additional work and communication with individuals using transportation or other community service providers to measure. If you are able, it could help to discuss metrics like these within your organization and with community partners to determine whether a more difficult measure could be tracked.

You can group multiple performance metrics to address one issue that is important to your organization.

The performance metrics your program chooses should be as comprehensive as possible in order to give a complete picture of your operations.⁴ If there are performance metrics that may be difficult to measure on their own, using a combination of metrics may answer a question that is too difficult to answer with one metric. *Frequency of community engagement* could be measured by tracking the number of trips to social destinations as compared to the number of trips to medical or essential life trips. Adding in a qualitative measure like a survey could help identify whether riders feel more engaged in their community because of the availability of your transportation service.

The performance metrics you choose can be used in multiple ways and do not have to be delegated to only one category.

Your organization should choose performance metrics that are clear and understandable to all of your administrators and that are relevant to your program, but that can also be flexible and used to show progress toward many of the goals of your program.⁵ For example, the number of hours of travel training provided can be used to show community involvement and how your organization helps make transportation more accessible.

Once I decide on my performance metrics, how do I keep track of them?

Once you determine which performance metrics would best represent your activities, the next step is to figure out how you will keep track of them.

Using technology where available. Technology has become a useful tool for tracking performance metrics. When considering various options for your own program, it is important to consider the following:

What software is already available to you? Organizations may already be completing other functions using software that hasn't yet been applied to transportation. It is important to communicate with your organization to find out what software licenses the organization already owns that you may be able to use. Speaking with the appropriate staff at your organization could also result in a new software purchase if you are able to provide information about the benefits to your program.

Have you explored free or low-cost options? Organizations may not have resources to spend on new software, but that does not mean there are no technological options available. Using technology does not automatically mean that your program is expected to spend additional money, but it may require out-of-the-box thinking as you consider how to utilize tools that are already available to you. If your agency uses Gmail, for example, Google Sheets can be used to track performance metrics. Microsoft Excel can also be used to track and analyze data and to create a variety of charts and graphics to help tell your story.

Tracking without technology. While technology can make performance metric tracking easier, you do not have to use software to track or analyze performance metrics. If you do not have access to software for tracking performance metrics, it is important to develop an organized system to manually track data. Your program's staff should determine which metrics will be tracked and provide training to each person who will be tracking data to ensure the tracking process is consistent across staff. Try to minimize changes to the tracking process to avoid fatiguing staff to the changing process. To support those staff who will be tracking data, create shared definitions and provide each person with a printed and electronic copy of the definitions, and provide one point of contact who can answer any questions that may come up. The documents used for tracking performance metrics should be maintained in a single location, and one person should be responsible for consolidating the data into one master file on a regular basis.

Examples of performance metrics to support Section 5310 programs

While your organization should track performance metrics for its own benefit and not just for the purpose of Section 5310 applications and reporting, there are certain performance metrics your group will either be required to track or might find helpful.

Ridership, through unlinked passenger trips, measures each time a passenger uses your transportation services to get from Point A to Point B. A passenger riding to a doctor's appointment represents one trip, and the passenger riding back home is counted as a second trip. Two passengers riding to the grocery store and then back home count as four trips. Ridership is required to be reported on a monthly basis through OLGA.

If your program uses volunteers, then tracking **volunteer hours** will help show your community's involvement in its success. Transportation funding is limited and volunteers help to minimize cost, maximize budgets, and maintain community relationships.

Mileage per vehicle allows your organization to track the number of miles traveled while ensuring preventative maintenance is performed on time. Tracking this measure over time will help your agency project replacement dates for all of your project vehicles. Mileage is required to be reported for each 5310 vehicle twice per year through TransAM.

Ride completion percentage tracks the number of rides completed versus the number of rides requested. Ride completion percentage is valuable in assessing the need for more vehicles, staff, or volunteers to complete additional rides. It can also be helpful to track the reason why a ride wasn't completed to further identify program and communication needs.

Destinations travelled tracks where your users are going and can be combined with other metrics such as time to complete trips to determine possible processes to make service more efficient. This metric can help you describe how physically far-reaching your services are by showing the reach of your services, and can help you show how many businesses or services your organization helps support.

Number of accessible trips requested can help your agency gauge whether your fleet of vehicles can sufficiently meet the demand for accessible trips.

Service demand by time or day tracks the number of requests for trips at a certain time of day or on a certain day of the week. By tracking when rides are most frequently requested, your program can shift resources to ensure staff are working when there is a higher demand for services. If very few trips are requested at certain times or on certain days, then you may decide to shift the hours your transportation service is available.

Not all performance metrics work for every organization. Organizations and programs that don't offer rides may not be able to track metrics like ridership, but they can track activities that help to facilitate rides and fill gaps in service in other ways. For organizations that do not offer rides themselves, it is important to track metrics relevant to what your organization does offer.

Training and information sessions provided is particularly useful for organizations that offer travel training, but can be tracked by any organization that offers regular training. Many organizations offer training or information sessions on their services or on services that help seniors or individuals with disabilities obtain access. Tracking these numbers can show awareness, which could be correlated with ridership and ride completion percentage. (Note: This type of training is not the same as the required training for staff of agencies that receive FTA Section 5310 funding.)

Number of advertisements can help demonstrate program outreach, particularly if your program has a process for tracking response to ads by monitoring call volume or conducting surveys. This metric can track any advertising or awareness strategy your agency uses, including distributing fliers or brochures, placing paid newspaper ads, and others. Any action your organization takes to raise awareness of its Section 5310 program might be useful to track.

Contacts received tracks the number of people who contact the organization or program to gain more information or schedule a ride. In conjunction with advertisements, this performance metric can support tracking overall awareness of the program, and can be used as a measure to gauge advertising success if you capture the referral source from each individual.

Community outreach contacts can be tracked to demonstrate your program's efforts to educate and serve more individuals. This can be accomplished by tracking visits or calls to senior centers, doctors' offices, and other locations that seniors or individuals with a disability may regularly visit.

Interactions with community partners or other transportation providers can help your program provide services through more collaborative efforts, and is a required component of the Section 5310 program. Engaging with community partners and other transportation providers outside of the meetings arranged by DRPT can lead to service improvements and consolidation, filling gaps in existing service, and providing for efficiency of travel for individuals using multiple transportation services to complete a longer trip. Your program can track the rates of meetings, conversations, and other interactions along with any service improvements.

¹ Ho, A. (2003). Perceptions of performance measurement and the practice of performance reporting by small cities. *State and Local Government Review*, 35(3), 161-173.

² Boyne, G.A., Meier, K.J., O'Toole, L.J., & Walker, R.M. (2006). *Public service performance: Perspectives on measurement and management*. Cambridge University Press.

³ Morgeson, F.V. (2014). *Citizen satisfaction: Improving government performance, efficiency, and citizen trust*. Palgrave Macmillan.

⁴ Bouckaert, G. (1993). Measurement and meaningful management. *Public Productivity & Management Review*, 17(1), 31-43.

⁵ Hakes, J. (2001). Can measuring results produce results: One manager's view. *Evaluation and Program Planning*, 24(3), 319-327.

⁶ McDavid, J.C. & Hawthorn, L.R.L. (2006). *Program evaluation & performance measurement: An introduction to practice*. Sage Publications.

⁷ Behn, R. (2003). Why measure performance? Different purposes require different measures. *Public Administration Review*, 63(5), 586-606.

⁸ Boyne, G.A., Meier, K.J., O'Toole, L.J., & Walker, R.M. (2006). *Public service performance: Perspectives on measurement and management*. Cambridge University Press.

⁹ Rietveld, P. (2002). Institutional dimensions of sustainable transport. In W.R. Black & P. Nijkamp (Eds.), *Social change and sustainable transport* (pp. 55-59). Indiana University Press.



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