



MOVING BEYOND CONGESTION



REGIONAL PERFORMANCE MEASURES

2009 REPORT CARD

Overall regional performance is a function of five major areas:

- **Service Coverage** - monitors both how much service is available to people in the region (in terms of population and square miles) and how much of that service capacity is used.
- **Service Efficiency and Effectiveness** - evaluates the level of resources spent on delivering service in relation to the level of service provided and the extent to which passengers are using that service.
- **Service Delivery** - reflects the quality of the service delivered.
- **Service Maintenance and Capital Investment** - indicates the allocation of capital funds and the replacement and maintenance of infrastructure components on a schedule consistent with their life expectancy.
- **Service Level Solvency** - assesses financial condition to ensure that there are sufficient resources to meet current and ongoing budgetary needs (both operating and capital).

EXECUTIVE SUMMARY

The Regional Performance Measures Report Card has been developed by the RTA as part of its oversight function to support the evaluation and management of the region's public transit system, emphasizing both transparency and accountability. The 2009 Report Card builds on the data presented in 2007 and 2008 and continues to offer a unique perspective by aggregating data from the CTA, Metra, and Pace to assess how all three agencies, taken together, are meeting the transit needs of the region. Overall, the performance measures in this report show positive trends for the RTA region when viewed over the full five-year period, but show declines in performance in 2009 resulting from the regional and national economic downturn that began in 2008.

Ridership for the RTA system declined by 2.4% in 2009 as jobs in the Chicago metropolitan area decreased by 5.2% and the unemployment rate climbed from 6.2% in 2008 to 10.0% in 2009. In January 2008, the Illinois State Legislature passed funding and reform legislation that increased funding to support RTA services from the sales tax, the Public Transportation Fund, and the City of Chicago's Real Estate Transfer Tax. While the new taxes increased the amount of regional funding available by \$236.6 million in 2008 compared to 2007, this amount was still \$91.7 million below the funding level anticipated following enactment of the legislation. The new funding enabled the regional transportation system to avert fare increases and significant service cuts that were scheduled to go into effect in January 2008. The economic recession that developed later in 2008 caused a steep decline in revenues, including those anticipated from the new taxes. In 2009, with new tax programs effective for the full year, the funding level came in \$23.4 million above the actual amount received in 2008.

Many transit agencies throughout the country were forced to both raise fares and cut service in response to the severe economic shortfalls they faced. The Chicago region was able to withstand the economic downturn without implementing service cuts in 2009 because of the improved funding arrangements created with the passage of the 2008 legislation. Fare increases were implemented on both CTA and Pace services in January 2009, however. Metra, which had just raised fares in February 2008, did not increase fares again in 2009.

This report card describes the performance measures associated with five major areas: service coverage, service efficiency and effectiveness, service delivery, service maintenance and capital investment, and service level solvency over the five-year period 2005-2009.

Service coverage indicators monitor both how much service is available to people in the region (supply) and how much of that supply is actually used by the public (consumption). During the past five years, changes in the service supplied and service consumed measures largely paralleled one another through 2008, but there was a decrease in service consumed in 2009 in response to regional job losses.

Transit capacity, a measure of supply, describes the number of trips available to be taken. This measure is derived from the average number of seats per transit vehicle (and standing room, if applicable), overall miles traveled by transit vehicles, and average trip length. The need to serve high peak period demand determines the level of maximum capacity and results in excess system capacity during the off-peak periods. Because of the high peak period demands

in Northeastern Illinois, transit vehicle miles and transit capacity have steadily increased over the 2005-2009 period, while trip length has decreased and the available seating capacity has fluctuated due to changes in the active vehicle fleet. Overall, the transit capacity in 2009 was at its highest point for the five-year period, indicating an overall increase in transit coverage and availability to Chicagoland residents.

Service consumption can be stated in terms of ridership and total passenger miles, which is the cumulative distance traveled by all passengers. Both measures show steady increases from 2005-2008 and a decrease in 2009. Still, ridership was 5.1% higher in 2009 than in 2005, which can be attributed to such factors as increased gasoline prices, which made transit a more appealing travel option to many drivers, the implementation of free ride programs, and service enhancements implemented by each of the service boards.

Metra completed service improvements on three lines in 2006 -- the Union Pacific West, the SouthWest Service, and the North Central Service -- extending the reach of their service area to new stations and increasing the frequency of service. New "Sunrise Express" service was added in 2007 on the Union Pacific North Line to provide early morning reverse-commute options, in 2008, additional weekend service was added on the Union Pacific North Line and the Milwaukee North Line, and in 2009 new Saturday service was introduced on the South West Service Line.

There were also a number of changes to CTA services throughout the five year period, including bus enhancements to North and South Lake Shore Drive, Evanston and Skokie routes in 2005, changes to 14 bus routes as part of the West Side Corridor Service revisions in 2006, and South Loop bus route service enhancements in 2009. The West Side Corridor improvements also included changes to two rail lines in 2006 -- the opening of the new Pink Line service and enhancements to the Blue Line Service. At the end of 2008, as part of the Brown Line capacity expansion project, the CTA resumed four-track operations between Belmont and Fullerton, providing passengers on the Red, Brown, and Purple lines improved peak service, faster trains, and increased frequency. Finally, in 2009 the final two stations on the Brown Line were reopened with full ADA accessibility.

Levels of ADA paratransit service increased in the region with the consolidation of all city and suburban ADA paratransit services at Pace in 2006. Pace bus fixed route service improvements occurred with the North Shore and Fox Valley initiatives in 2005 and the South Cook and Will County Initiative in 2008 and 2009. Pace vanpool service also expanded steadily through 2008 and then fell off in 2009 as the economy worsened and gas prices decreased, reducing the cost incentive to vanpool over driving independently.

Service efficiency and effectiveness measures evaluate the cost of supplying transit services. Total operating costs rose steadily throughout the five-year period, except for a dip in 2008 attributable to a decline in CTA's general fund expenses resulting from the issuance of \$1.9 billion in pension obligation bonds. Compared to a regional inflation increase of 8.1% between 2005 and 2009, operating costs grew at a somewhat faster rate of 13.0% and were affected by increases in cost inputs that trended above inflationary rates such as fuel and health care.

Because transit capacity increased at a greater rate than cost, the efficiency of providing service on a per-unit basis improved. Adjusted for inflation, the cost per unit of transit capacity remained at the 2008 level, the lowest level of the five years under review. Operating cost per trip has increased at a lower rate than inflation over the five-year period, despite a drop in ridership in 2009, pointing to increased cost effectiveness. The operating cost per passenger mile, adjusted for inflation, remained stable over the five-year time period.

Service delivery indicators focus on customer service and safety. On-time performance is a key indicator of service delivery, and although the service boards use different methodologies to assess on-time performance for each mode, weighting their values by the number of passengers carried provides a regional measure that shows an improving trend for the three years for which data are available. Reportable major safety and security incidents data are comparable for only the last two years of this report. In 2008, the National Transit Database (NTD) expanded the definition of what constituted a “major” incident, creating an increase in the incidence of this measure. Comparing performance in 2009 to 2008, using consistent reporting definitions, there was a decrease in the number of incidents per passenger, which is also indicative of improved service delivery. Regional customer satisfaction measures are currently under development and are expected to be available for the 2011 report year.

Service maintenance and capital investment performance indicators evaluate reliability and the state of good repair. Following a decline through 2008 related to new buses in the Pace and CTA fleets, the percent of vehicles beyond their useful life showed a slight uptick in 2009 as a greater percentage of Metra and CTA rail vehicles reached an age beyond their useful life. Miles between major mechanical failures showed steady improvement in the years 2005 through 2009, reflecting the improved reliability gained with the investment in new buses. In 2009, the amount budgeted for capital maintenance contributed to reliability improvements; with an 11% gain over 2008 levels, the 2009 amount was the highest allocation of capital program dollars appropriated to maintenance in the past five years. The newly-completed Capital Asset Condition Assessment shows an urgent need for major capital infusion over the next ten years to bring the region’s transit infrastructure up to a state of good repair.

Service level solvency measures showed some improvement in 2009, largely due to fare increases at Pace and CTA in January 2009. The increase in fare revenues outpaced the decrease in ridership, resulting in a net gain in fare revenue per trip. The non-fare revenue per trip (which includes public subsidies to transit) also increased, and the decrease in ridership in 2009 further contributed to the increase in the amount of subsidy funding per passenger. Adjusted for inflation, non-fare revenue per trip is lower than in 2005, which is a positive indicator of solvency demonstrating a lower reliance on public funding per passenger trip. In 2009, funding levels for all three service boards benefited from federal stimulus money from the American Recovery and Reinvestment Act passed in February 2009. However, the net amount of new capital funds available to finance the maintenance, enhancement, and expansion of the system’s infrastructure was 6.8% lower in 2009, and remains significantly lower than the levels achieved between 2002 and 2004. Capital program funds will be impacted by the system’s heavy financial leveraging against future federal capital grants, thereby reducing the amount of available funds for new infrastructure needs as funds are diverted to pay debt service.

NOTES

- 1) This analysis is based on published data from the National Transit Database (NTD), RTA's audited financials, and operating data from the three Service Boards.
- 2) General expenditures associated with the RTA as the funding, planning and oversight agency for the region have been added to the Total Operating Expense figures obtained from the NTD and aggregated for the Service Boards.
- 3) The inflation rate used is the Consumer Price Index (CPI) published by the Bureau of Labor Statistics, for the Chicago-Gary-Kenosha area.
- 4) Changes from the 2008 Regional Report Card:
 - CTA and Pace's on-time performance data has been restated for each year to reflect their current methodology to measure on-time performance.
 - Pace fare revenue has been restated for 2005-2007 to conform to revised allocation assumptions.
 - Total regional major safety and security incidents for 2007 have been restated to rectify a reporting error.
 - The term "non-fare revenue" has been used to replace the term "fare subsidy" used in the 2008 Report Card. "Non-fare revenue" more clearly describes the revenue that is a combination of system-generated revenue (i.e., advertising and concessions) and public funding for transit service operations.
 - 'Miles Between Major Mechanical Failures' have been restated for prior years to reflect the **total** annual miles traveled by transit vehicles, in lieu of vehicle revenue miles, to more accurately reflect the usage of service vehicles. Additionally, as of 2009, NTD implemented a requirement that agencies report major mechanical failures of purchased transportation service, whereas prior years only included directly-operated service failures.
 - In 2009, NTD required Metra to change how it reported capital project credits making Metra expense data between 2008 and 2009 inconsistent. In 2009, capital project credits were no longer allowed to be subtracted from expenses as they had been in years 2006 through 2008. Capital project credits represented 5% of Metra's operating costs in 2009.
 - Capital Program Funding figures have been restated to include proceeds from CTA bond sales, debt service, and capital transfers to operations.
 - Useful life calculations adhere to the FTA definition of a four-year minimum useful life for vanpool and small bus vehicles.

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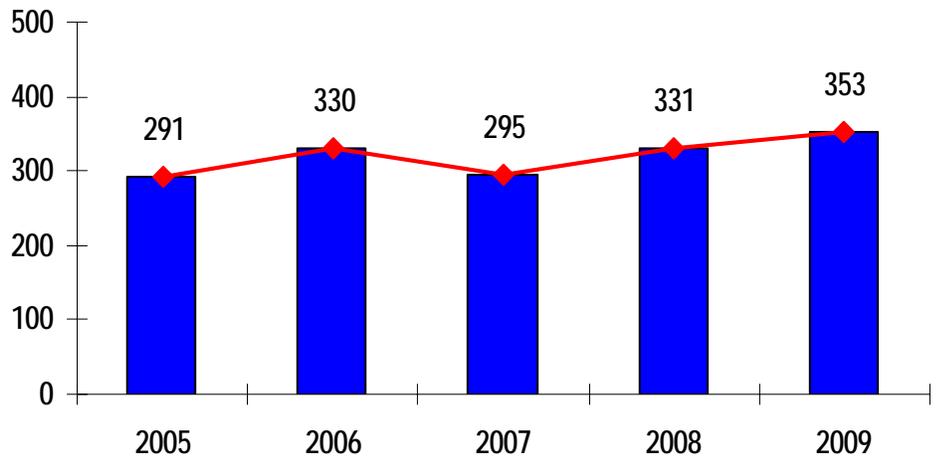
SERVICE COVERAGE: Service Supplied

Transit Capacity (trips)

The amount of service provided as measured in trips available to be taken.

Transit Capacity per Area Resident

The number of trips available for each resident in the region to take annually.

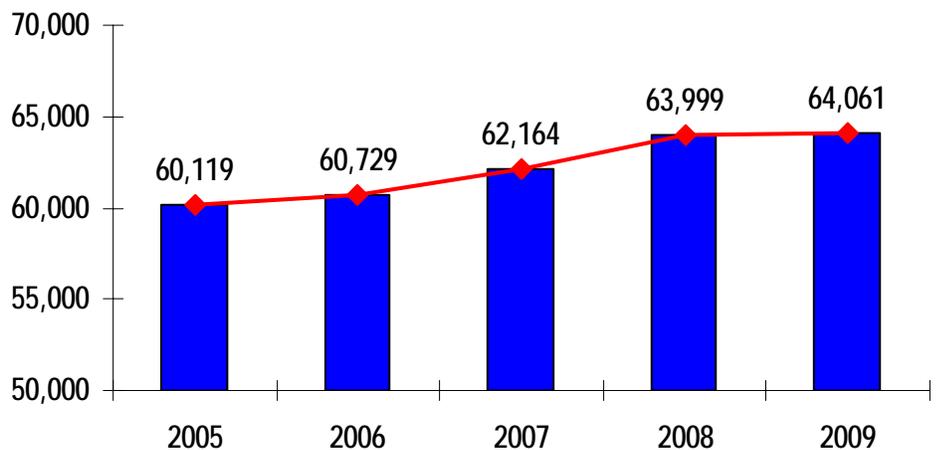


Vehicle Revenue Miles

The amount of service provided as measured in miles traveled by vehicles while in service.

Vehicle Revenue Miles per Service Area Square Mile

The number of miles of travel provided annually per square mile of the service area.

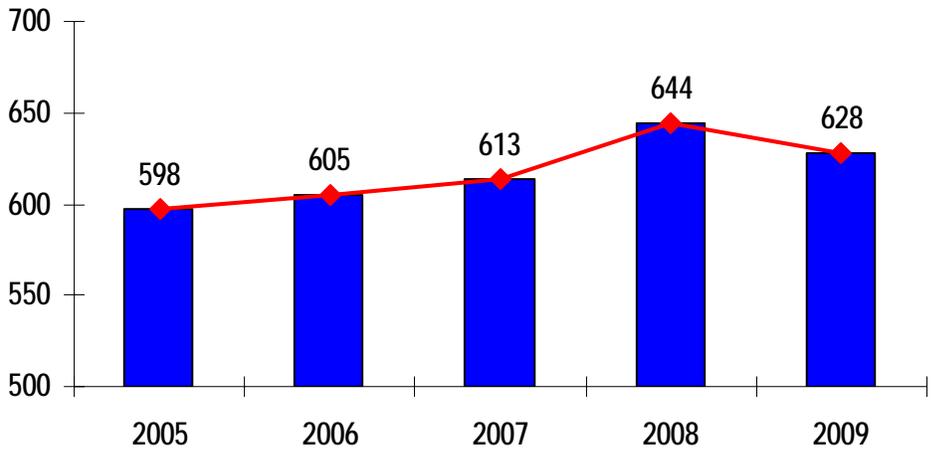


SERVICE COVERAGE: Service Consumed

Passenger Trips (Ridership)

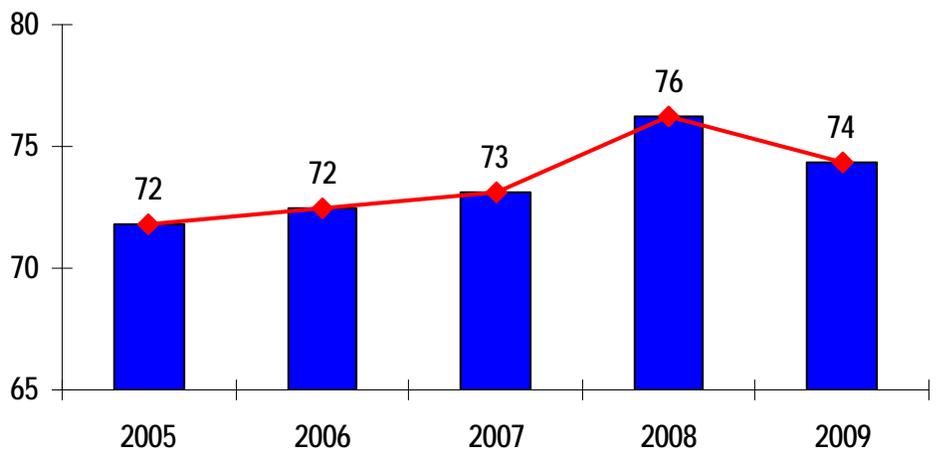
The number of times passengers board buses and trains, including transfers from one bus or train to another in order to complete their trips.

Passenger Trips (in Millions)



Passenger Trips per Area Resident

The average number of rides taken per resident annually.

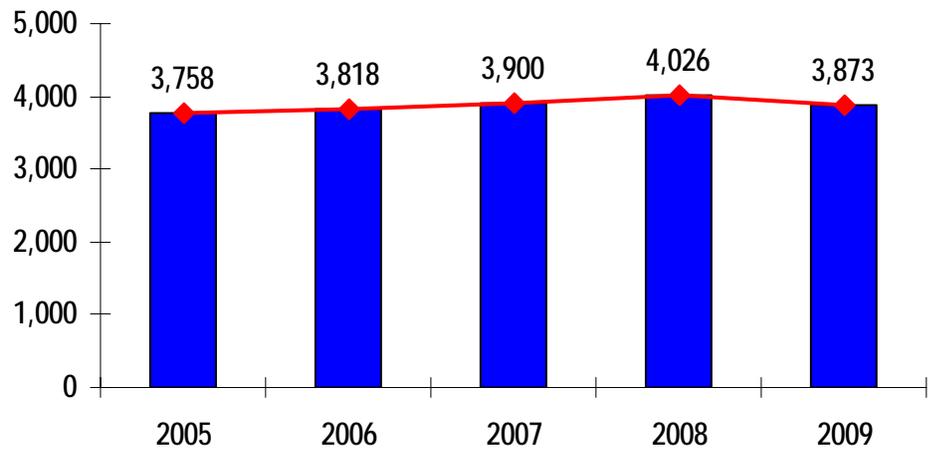


SERVICE COVERAGE: Service Consumed

Passenger Miles

The cumulative sum of the distances ridden by all passengers.

Passenger Miles (in Millions)



SERVICE EFFICIENCY AND EFFECTIVENESS: Service Efficiency

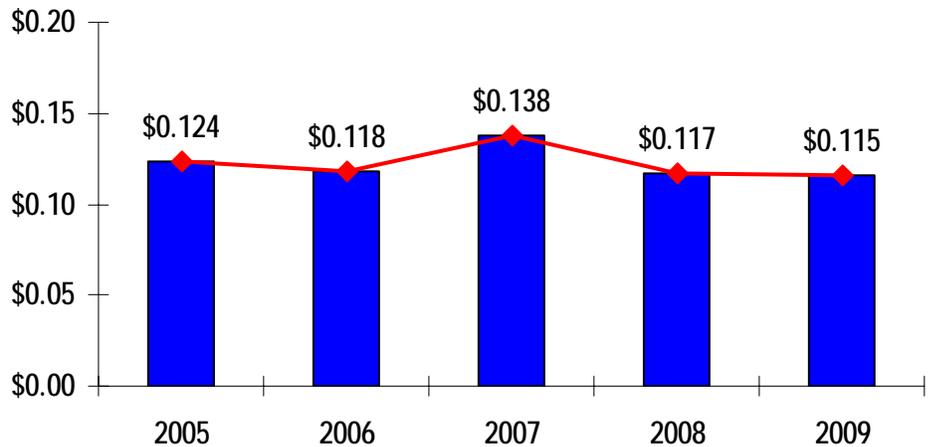
Operating Cost*

The expenses of operating the transit system.

Operating Cost per Unit of Transit Capacity

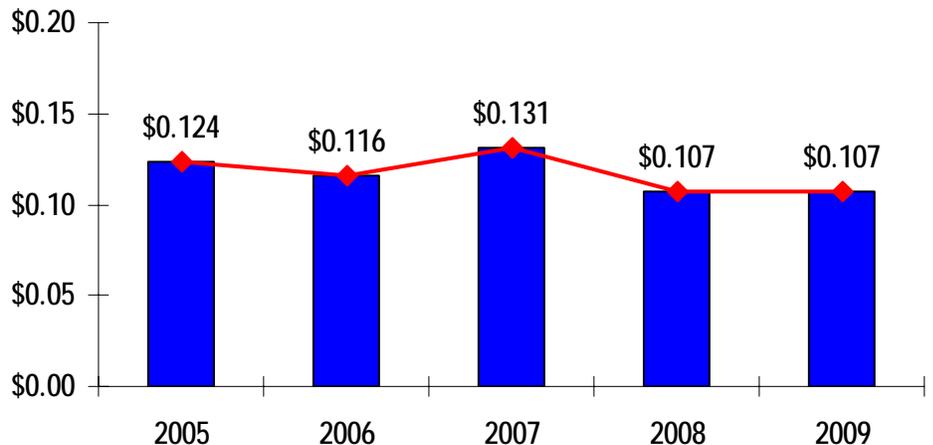
The average cost of providing a passenger seat or space for each mile of an individual trip, whether or not it is taken.

*Note: in 2009, NTD required a change in how Metra reported capital project credits (see Note 4, page 5).



Operating Cost per Unit of Transit Capacity

*Adjusted for inflation
Constant 2005 dollars*



SERVICE EFFICIENCY AND EFFECTIVENESS: Cost Effectiveness

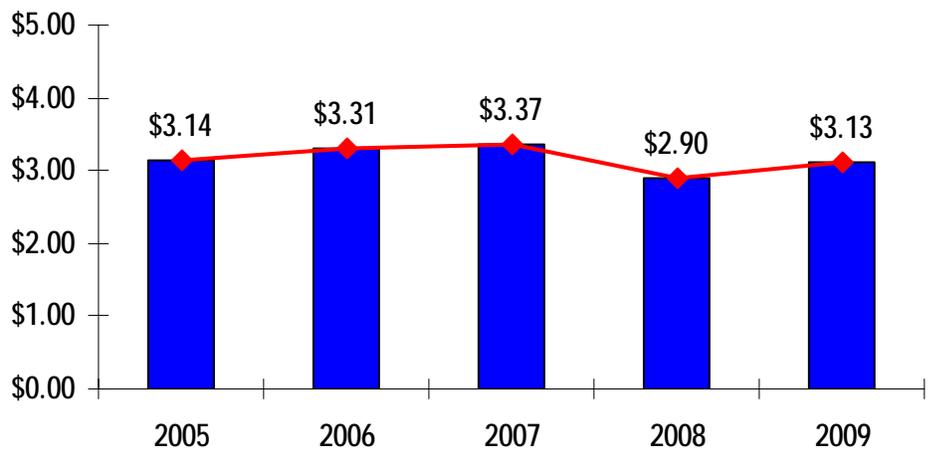
Operating Cost per Passenger Trip

The average cost of
each individual trip
taken.



Operating Cost per Passenger Trip

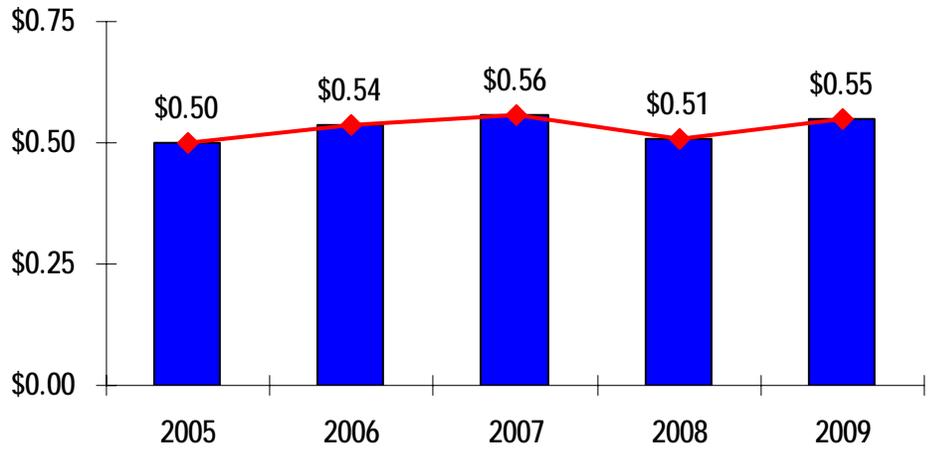
*Adjusted for inflation
Constant 2005 dollars*



SERVICE EFFICIENCY AND EFFECTIVENESS: Cost Effectiveness

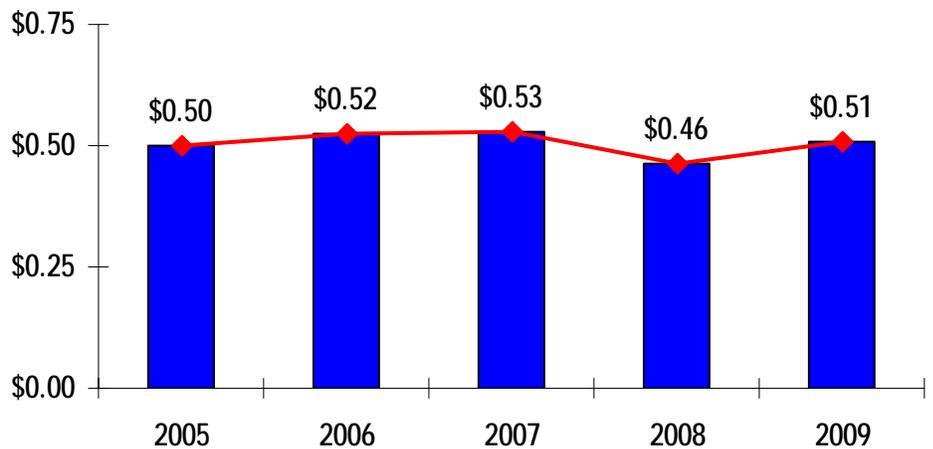
Operating Cost per Passenger Mile

The average cost of providing each mile of each individual trip taken.



Operating Cost per Passenger Mile

*Adjusted for inflation
Constant 2005 dollars*

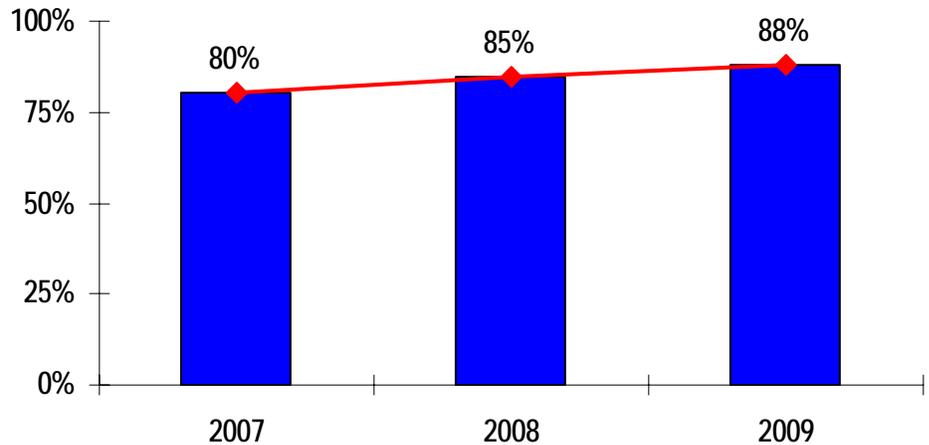


SERVICE DELIVERY: Customer Service and Customer Safety

On-Time Performance*

The percentage of time that buses and trains are considered on schedule, based on each service board's on-time performance measurement definition.

*Note: Data are not available from all Service Boards prior to 2007. Figures have been re-calculated to reflect CTA and Pace's current methodology to measure on-time performance.



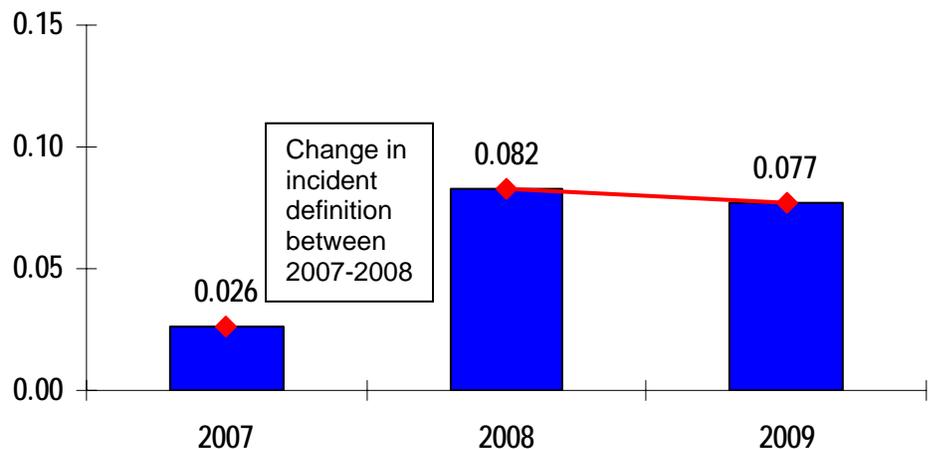
Major Safety and Security Incidents**

Accidents, casualty, and crime statistics reported under the Federal Transit Administration (FTA) National Transit Database (NTD) reporting system. Data are not available from all Service Boards prior to 2007.

Major Incidents per 100,000 Passenger Trips

The number of combined major safety and security incidents per 100,000 trips taken.

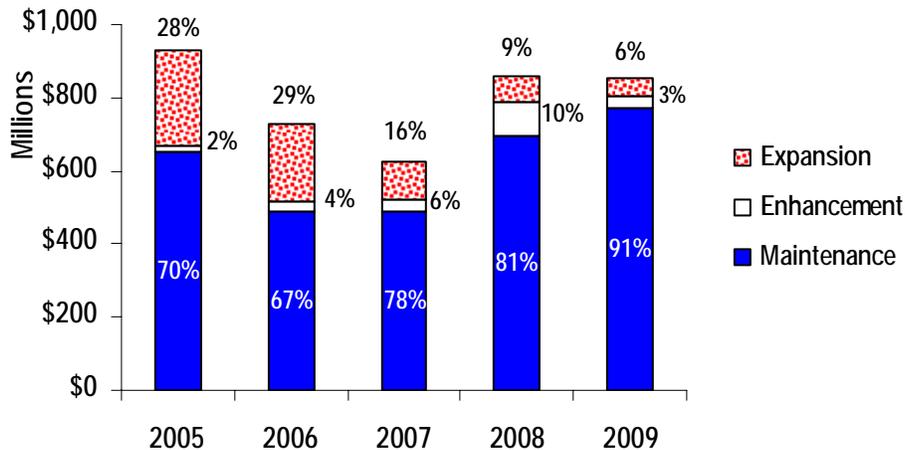
**Note: The NTD lowered its reporting thresholds for incidents in 2008, resulting in a substantial increase in the number of reportable events.



SERVICE MAINTENANCE AND CAPITAL INVESTMENT: State of Good Repair

Capital Program Maintenance / Enhancement / Expansion

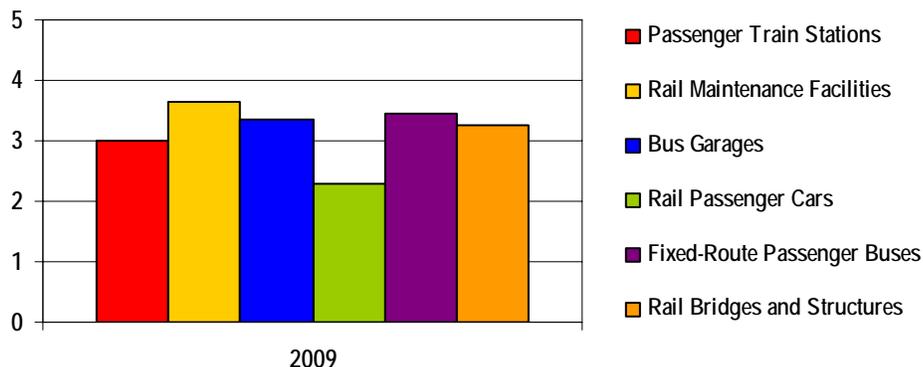
The annual allocation of projects budgeted within each category as a percent of the total capital program.



State of Good Repair

The percentage of assets rated “adequate with no backlog” as part of a physical condition assessment that takes into consideration useful life as defined by the Federal Transit Administration, major rehabilitations, routine maintenance, inspections, etc.

The Capital Asset Condition Assessment rated the Service Boards’ assets on a five-point scale ranging from 1 representing an asset “past its useful life,” to 5 representing a relatively new asset in “excellent” condition. Anything rated 3 or higher can be considered to be in a “State of Good Repair.” Although many of the categories exceed the minimal acceptable rating, there are numerous assets within each category that achieved ratings of 1 or 2, meaning they are past their useful life and are the most difficult and expensive to maintain.

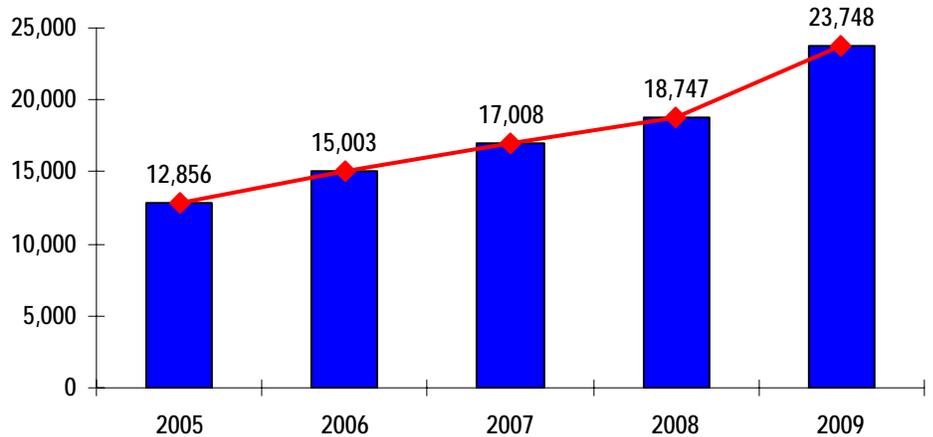


SERVICE MAINTENANCE AND CAPITAL INVESTMENT: Reliability

Miles Between Major Mechanical Failures

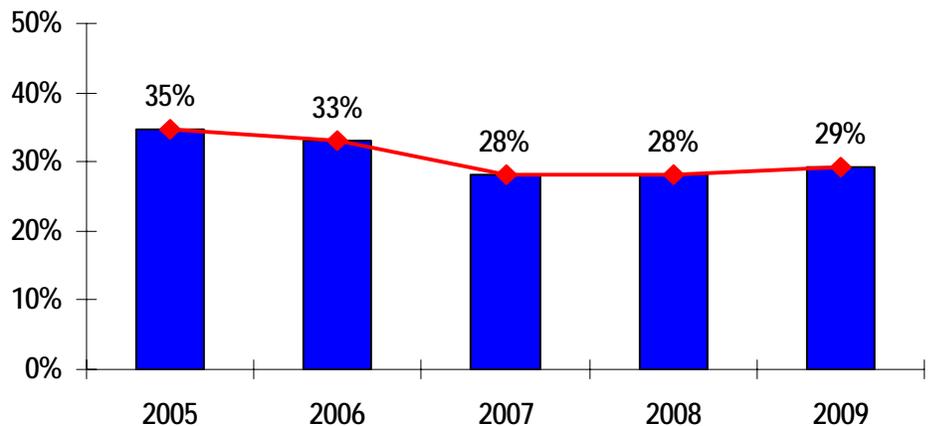
The average distance that vehicles of all modes travel in service (total vehicle revenue miles plus deadhead miles) between mechanical failures that prevent them from completing a scheduled trip or from starting the next scheduled trip.

*Note: in 2009, NTD began reporting failures of purchased transportation service, whereas prior years only included directly-operated service failures.



Percent of Vehicles Beyond Useful Life

The percentage of vehicles in the total vehicle fleet that have reached the end of their minimum useful life as defined by the Federal Transit Administration (4 years for new automobiles or vans, 12 years for new buses, and 25 years for new rail cars). Rehabilitations that may be undertaken to keep vehicles in service beyond FTA guidelines are not included in these data.



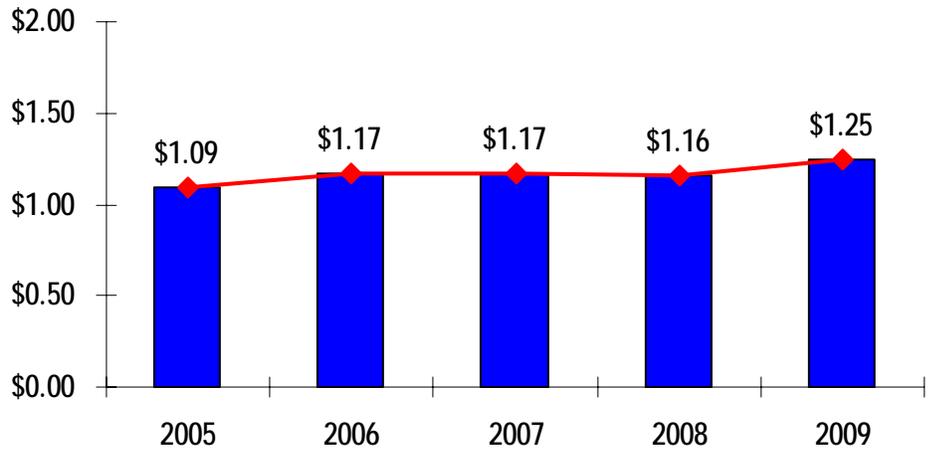
SERVICE LEVEL SOLVENCY: Operations

Fare Revenue

The total amount of money that passengers pay in fares.

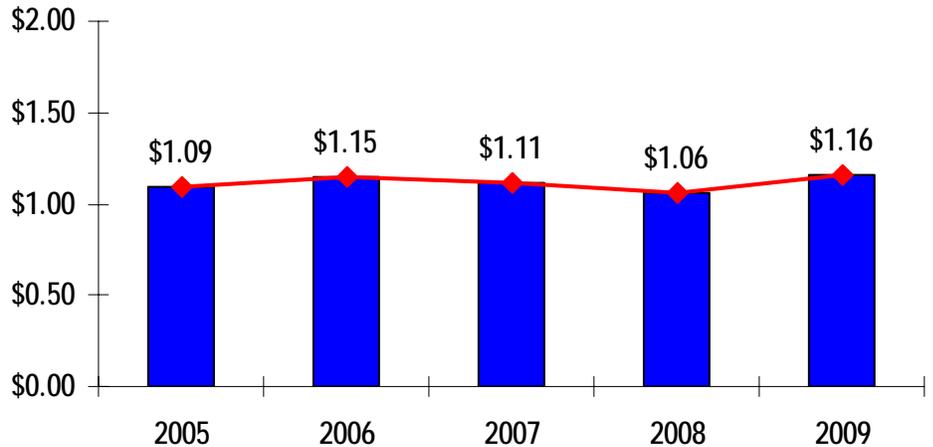
Fare Revenue per Passenger Trip

The average fare paid
by customers per trip.



Fare Revenue per Passenger Trip

*Adjusted for inflation
Constant 2005 dollars*



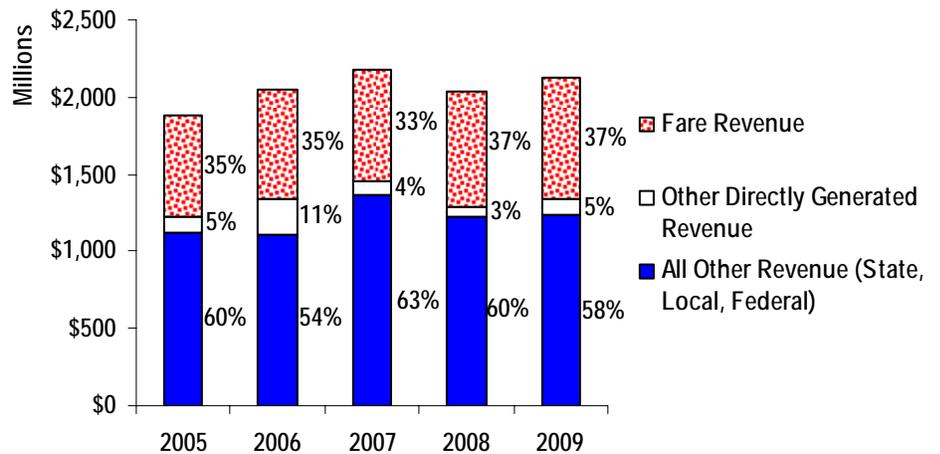
SERVICE LEVEL SOLVENCY: Operations

Non-Fare Revenue

The amount of revenue from all sources, other than fare revenue, that is required to cover the total cost of operations. Non-fare revenue includes system-generated revenue (advertising, concessions, etc.) and state, local, and federal revenue.

Non-Fare Revenue As Compared to Total Revenue

Operating costs are covered through the balance between fare revenue, other directly generated revenue (advertising, concessions, etc.) and all other revenue (State, Local, and Federal).



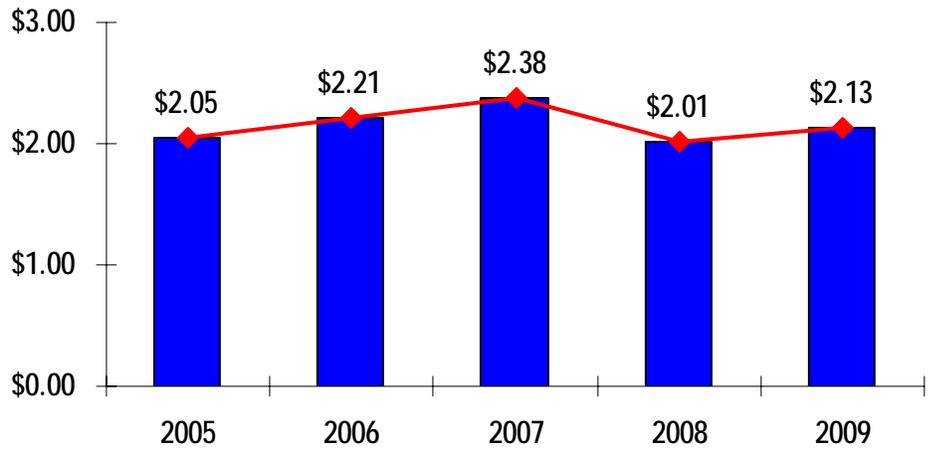
SERVICE LEVEL SOLVENCY: Operations

Non-Fare Revenue

The amount of revenue from all sources, other than fare revenue, that is required to cover the total cost of operations. Non-fare revenue includes system-generated revenue (advertising, concessions, etc.) and state, local, and federal revenue.

Non-Fare Revenue per Passenger Trip

The amount of revenue from sources other than fares required to cover the average cost of a passenger trip.



Non-Fare Revenue per Passenger Trip

*Adjusted for inflation
Constant 2005 dollars*

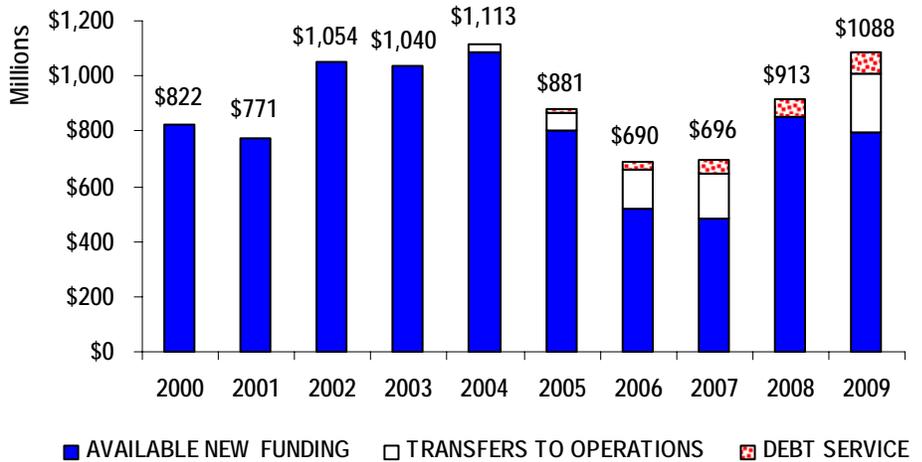


SERVICE LEVEL SOLVENCY: Capital

Capital Program Funding

The amount of new capital funds budgeted to finance the maintenance, enhancement and expansion of the transit system's infrastructure. Capital funds budgeted in one year may not actually be expended until subsequent years due to the longer-term nature of capital project implementation. Capital funding amounts include capital funding transferred to operations and debt service paid on capital bonds, which began in 2004. The region's capital program is shown for the past ten years to put into perspective the lower levels of investment in the physical plant for the last five years compared to the preceding five.

Capital Program Funding (in Millions)



Capital Program Funding

*Adjusted for inflation
Constant 2000 dollars*

