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TMA EVALUATION PROGRAM



## TMA EVALUATION PROGRAM

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February 15, 1995

# TMA EVALUATION PROGRAM

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# TMA EVALUATION PROGRAM

## I. INTRODUCTION

### A. BACKGROUND

The support of transportation management associations (TMA), also commonly referred to as transportation management organizations (TMO), by the Florida Department of Transportation (FDOT) is part of the Florida strategic plan to reduce traffic congestion, improve air quality, and protect the environment.

State funding from FDOT may be provided to the TMAs organized as private non-profit corporations, in cooperation with local government[s] or regional commuter assistance programs, that are established according to local comprehensive plans or regional commuter assistance program goals. State start-up funds may be granted to TMAs in the following ratio: 50% - first year, 40% - second year, and 30% - third year. After the third year, "TMAs will be eligible for continued funding at the lesser of \$20,000 or 25% of their total budget, provided they are meeting the performance criteria outlined in their existing JPA [joint participation agreement]. Board member in-kind contributions may count toward local match requirements. Variations from these levels is permitted with prior consultation with the Central Office."

To be eligible for state funding, a TMA must provide the Department with a detailed Agency Annual Work Plan, articles of incorporation and bylaws, geographic boundaries, trip management goals, a financing plan, an institutional structure, and potential membership estimates. In addition to providing this information and as part of the condition for funding, the TMA "shall utilize the Department's TMA Self Evaluation program on an annual basis. Results of the evaluation will be reported to the District office annually."

The following represents the TMA Self Evaluation Program. Please refer to the FDOT Commuter Assistance Program Description Topic No.: 725-030-008C for more detailed information about TMA funding support and requirements.

### B. CRITERIA PURPOSES

The TMA Performance Criteria are the basis for assessing TMA performance and for giving feedback to the TMA and FDOT. In addition, the Criteria have many important roles in strengthening TDM effectiveness in Florida:

1. Designing the TDM evaluation requires the TMA to examine the clarity of its objectives, the ease with which they can be measured, and the possibility of their being achieved.
2. Redirecting efforts when it is determined elements of the program have or do not have desired results.
3. Showing evidence to other agencies and the public of the diligence and sincerity of the TMA.
4. Supplying powerful factual information for public relations campaigns.
5. Helping other TMAs to anticipate problems in implementing similar programs and provide yardsticks against which others may measure their success.

### **C. TMA PERFORMANCE GOALS**

The Criteria are designed to help TMAs enhance their performance through focus on dual, results-oriented goals:

1. delivery of ever-improving value to customers, resulting in greater use of alternatives to the single occupant vehicle by commuters; and
2. improvement of overall TMA operational performance (e.g., lower cost per person served).

### **D. OVERVIEW OF CRITERIA**

It is helpful to review, as a whole, the complete set of 7 Criteria responses. An eighth category, "Other", is provided to allow the TMA to provide any additional basis for evaluation. These Criteria are:

1. Corporate Leadership and Involvement
2. Suitability of Goals and Objectives
3. Development and Deployment of Strategic Plan
4. Financial Management Systems
5. Degree of External Visibility
6. Effectiveness of Programs
7. Measure of Commuter and Member Satisfaction

There are three main considerations in this review: (1) emphasis on the TMA's mission, goals, and objectives throughout the set of responses; (2) criteria that address factors particularly important to the TMA's operations should receive relatively more emphasis; and, (3) responses should be checked to ensure that responses to related Criteria are consistent, and that there is appropriate cross-referencing to minimize duplication.

## E. KEY CHARACTERISTICS OF THE CRITERIA

1. **The Criteria are directed toward results.** The Criteria focus principally on six key areas of TMA performance, given below. Results are a composite of:
  - a. corporate leadership and involvement
  - b. strategic planning
  - c. customer satisfaction/retention
  - d. cost effectiveness
  - e. financial stability
  - f. communications

Improvements in these six results areas contribute significantly to TMA performance. The results indicators also recognize the importance of contributions to improving other transportation operators or suppliers.

2. **The Criteria are nonprescriptive.** The Criteria's focus is on requirements that produce results, not on dictating procedures or imposing organizational structures. Through this approach, TMAs are encouraged to develop and demonstrate creative, adaptive and flexible approaches to meeting basic requirements. The nonprescriptive nature of the requirements thus fosters incremental and major ("breakthrough") improvement.
3. **The Criteria are flexible.** The selection of techniques, systems and organizational structure usually depends upon many factors such as TMA size, service area, the TMA's stage of development, and employee capabilities. The TMA, in cooperation with their FDOT District office and/or regional commuter assistance program, selects which data items, processes, and performance measures best describe its mission and accomplishments.
4. **The Criteria are comprehensive.** The Criteria address all internal and external requirements of the TMA, including those related to fulfilling its public responsibilities. New or changing strategies or directions of the TMA may be readily adapted within the same set of Criteria requirements.
5. **The Criteria are part of a feedback system.** The Criteria are a set of 7 basic, interrelated, results-oriented requirements. An assessment thus provides a profile of strengths and areas for improvement relative to the 7 areas. In this way, the assessment directs attention to processes and actions that contribute to the desired results.

## F. INSTRUCTIONS

1. Read the entire booklet before you begin.

The main sections of the booklet provide an overall orientation to the Criteria and how to gather what your TMA is asked to provide.

2. Anticipate assessment and feedback.

A well-written response is one that anticipates reviewer questions. A response should give clear information on how (approach) and on the implementation (deployment) of the approach. Anecdotal information should not be given as it is usually not possible to provide meaningful feedback. Examples are, of course, helpful but they often do not convey a picture of why the TMA is involved in such an activity or how it is carried out. If examples are used, make certain that they illustrate a more complete response than already presented.

3. Make responses concise.

Responses should provide as complete a picture as possible to enable meaningful evaluation and feedback. Responses should outline key process details such as methods, measures, implementation, and evaluation factors. However, the TMA should **not** use lengthy narratives or inclusion of information not directly responsive to Criteria requirements. For this reason, TMAs are urged to make all responses concise and factual. Statements should be supported with data whenever appropriate.

4. Understand the difference between measures and indicators.

All Criteria calling for results require data using key measures and/or indicators. **Measures and indicators both involve measurement related to performance.** When the performance can be measured directly, such as number of persons placed into carpools and carpool formation rate, the term "measure" is used. When the overall performance may not be evaluated in terms of one type of measurement, and two or more measurements are used to provide ("indicate") a more complete picture, the term "indicator" is used.

For example, "creativity" is not easily described in terms of a single measurement. Awards for marketing materials and increased awareness provide two indicators of creativity. However, the effectiveness of this creativity on travel behavior would require measuring changes to market share gain from introduction of these creative products or services to measure success.



5. Select relevant/important information.

Focus on information that is both directly responsive to the Criteria requirements and to meeting TMA goals and objectives contained in the TMA Overview (described below). Information and data included should be relevant and important to meeting the Criteria and improving the TMA's performance.

6. Cross-reference when appropriate.

Although TMAs should seek to make individual responses self-contained, there may be instances when responses to different Criteria are mutually reinforcing. In such cases it is appropriate to reference responses to other Criteria, rather than to repeat information presented elsewhere.

7. Review each response.

The TMA shall be required to respond to each of the 7 criteria. Each response should be reviewed to make certain that it addresses the Criteria requirements and is consistent with the TMA's mission, goals, and objectives contained in the TMA Overview.

## **II. TMA PERFORMANCE CRITERIA**

### **A. TMA OVERVIEW**

The overview is a summary of the TMA, addressing what is most important to the TMA and the key factors that influence how the TMA operates. It should help the reviewer understand why the TMA exists, who is involved, what are the TMA's products and services, and what resources are being brought to bear on the problems. The TMA Overview should describe:

1. the nature of the TMA's operation: products and services
2. principal customers (e.g., commuters, employers, etc.) and their special requirements.
3. a description of the TMA's service area (activity center or corridor)
4. key customer requirements (for example, prompt response or accurate information) for products and services. Briefly note significant differences in requirements among customer groups or markets, if any.
5. the TMA's relationship to other transportation providers (e.g., transit agency) or organizations (e.g., MPO).
6. the TMA's staff composition, including: number, type, educational level, etc.
7. major equipment, facilities, and technologies used
8. types and numbers of suppliers of goods and services (e.g., third party vanpool operators, taxi operators for the guaranteed ride home program). Indicate the importance of suppliers, and other TMAs, and any limitations or special relationships that may exist in dealing with such suppliers.
9. the regulatory environment within which the TMA operates, including non-profit status, contractual arrangements, concurrency requirement, etc.
10. other factors important to the TMA, such as major new directions for the TMA, major changes taking place in the industry, new alliances, etc.

The TMA Overview should be limited to four pages.

### **B. CORPORATE LEADERSHIP AND INVOLVEMENT**

The leadership category examines the TMA's Board of Directors or advisory committee and executive director's or program manager's personal leadership and involvement in creating and sustaining a customer focus, clear and visible values, and high expectations.

Reinforcement of the values and expectations requires substantial personal commitment and involvement. The leaders must take part in the creation of strategies, systems, and methods for achieving excellence. The systems and methods need to guide all activities and decisions of the TMA. Through their regular personal involvement in visible activities, such as planning, communications, review of TMA performance, and

recognizing employees for quality achievement, the Board members serve as role models for staff.

**1. Board of Directors and Executive Director Leadership**

- a. Describe the Board of Directors/Advisory Committee and executive director's/program manager roles and responsibilities in developing goals and objectives.
- b. Identify Board/Advisory Committee activities for leading and/or receiving Board/Advisory Committee training and communicating with TMA employees.
- c. Describe financial and operational performance monitoring systems including types, frequency, content, and use of reviews and who conducts them. Attach the most recent progress and financial report provided by the executive director to the Board.
- d. Describe the process of identifying and selecting new board members including identifying the skills and characteristics that are important to the TMA and comparing the strengths and weaknesses of the existing Board.
- e. Provide a list of TMA committees including mission, names of committee members, affiliations, and types (private/public).
- f. Reveal how the Board/Advisory Committee evaluates and improves the executive director's/program manager's effectiveness. Attach a copy of the Board's most recent performance review form used for evaluating the executive director/program manager as his or her duties relate to the performance of the TMA.

**2. Board of Directors Community Involvement**

- a. Provide a summary or listing of the **Board interactions** with local and business community leaders on TMA issues. Also include such communications with national, state, trade associations, other TMAs, and professional organizations. It should be recognized that the amount of time Board members can dedicate to the TMA is limited. At the TMA's option, include a listing of **Executive Director** interactions with local and business community leaders on TMA issues.

## C. SUITABILITY OF GOALS AND OBJECTIVES

This Category examines the process of setting goals and objectives. Major emphasis is placed understanding why the TMA chooses its mission, goals, objectives, and activities.

### 1. Scope and Management of Performance Data and Information.

- a. List and define the data and information that is used to measure the TMA's performance in achieving the TMA's goals and objectives. Briefly describe each.

### 2. Benchmarking

This Criteria addresses data and information related to other TMAs and to best practices. The two major premises underlying this Criteria are: (1) For their key programs or services, TMAs need to "know where they stand" relative to other TMAs or commuter assistance programs and what are the "best practices" for similar activities among other TMAs or commuter assistance programs; and, (2) comparative and benchmarking information provides impetus for significant (sometimes "breakthrough") improvement, and alerts TMAs to new practices. The Criteria addresses the key issues in management of benchmarking. It is anticipated that the existence of benchmark information for many of the TMA programs or services may not be readily available. TMAs may request the assistance of the TDM Clearinghouse in seeking benchmark information.

- a. Describe the criteria for selecting benchmarks.
- b. Describe the process used by the TMA for obtaining and using comparative information. Information might include:
  - (1) information obtained from other organizations;
  - (2) information obtained from a review of the literature; and,
  - (3) evaluation by independent organizations.
- c. Describe how this benchmarking information is used to set goals and objectives and improve performance.

### 3. Analysis and Uses of Data to Develop Goals and Objectives and Products and Services.

Management by fact is a core concept in the Criteria. The Criteria call for a wide variety of data--nonfinancial and financial--to guide a TMA's courses of action toward beneficial results. Despite their importance,

however, individual facts do not usually provide a sound basis for action or priorities.

Action depends upon understanding cause and effect and between processes and results. Process actions may have many resource implications; results may have many cost and revenue implications as well.

- a. Describe the key steps in the processes for delivering services and how performance at each step is tracked and maintained. For example, the TMA may re-evaluate how it delivers its guaranteed ride home program. The old method may have required the commuter to pre-register with the TMA, receive prior approval to use the program from the Employee Transportation Coordinator, pay taxi fare and get reimbursed, and have to wait 1 hour for the only approved taxi cab provider. After evaluating the customer's experience, the TMA might arrange to have several taxi cab providers accept vouchers for payment directly by the TMA.
- b. Describe how processes are improved to achieve better quality, response time, and operational performance. Describe how each of the following is used or considered:
  - (1) process simplification (e.g., data entry and mailing sent by same person);
  - (2) benchmarking information (e.g., how long it takes other TMAs to fill requests);
  - (3) research and testing;
  - (4) use of alternative technology (e.g., voice mail access to commute information); and
  - (5) information from customers of the processes--within and outside the TMA.
- c. Describe how the TMA receives and uses planning input from others such as the regional commuter assistance program, MPO, etc.
- d. Describe how new and/or modified products and services are designed and introduced to meet both **commuter** needs and performance requirements. Factors that might need to be considered in design include: cost, privacy concerns, convenience, third-party capabilities; and support for Employee Transportation Coordinators.

- e. Describe how the TMA's products and services are designed and managed so that current **employer and member** requirements are met and continuously improved (e.g., surveys of employers determined they want real-time access to a transportation advisory system for major reconstruction projects). TMA services also might include providing information to employers on transportation issues such as parking, bus pass sales, etc.

## **D. DEVELOPMENT AND DEPLOYMENT OF STRATEGIC PLAN**

The Strategic Planning Category examines the TMA's long-range (e.g., 3 years) planning process and how the goals and objectives and annual work plans are integrated into the overall strategic plan. Include how this process integrates commuter, member and employer requirements and how plans are carried out. Also discuss how progress is shared with key stakeholders such as the MPO and transit agency.

### **1. Strategic Plan Development**

- a. Describe the process used to examine the TMA's strengths and weaknesses as well as opportunities for and threats to the TMA.
- b. Attach a copy of the TMA's strategic plan.

### **2. Implementation of Strategic Plan**

- a. Describe how the budget, staff, and volunteer resources are allocated to carry out the plan.
- b. Describe how the TMA relates current year work program to strategic plan.

### **3. Coordination with Regional Transportation Organizations**

- a. Describe how it ensures alignment of TMA plans and activities with area long range transportation plans.
- b. Describe how the TMA communicates its plans and reporting progress to the TMA Board, FDOT, RCAP, MPO, and other stakeholders.

#### **4. Local Transportation Service Supplier Quality and Support**

- a. Describe how the TMA's quality requirements are defined and communicated to the TMA's suppliers (e.g., regional commuter assistance program's ridematching services, taxi cab providers for guaranteed ride home programs) or suppliers to its customers (e.g., third-party vanpool provider).
- b. Describe how the TMA determines whether or not its quality requirements are met by transportation providers. Describe how performance information is fed back to suppliers.

### **E. FINANCIAL MANAGEMENT SYSTEMS**

This Category examines the TMA's financial management systems. This information supplements the audit required by the joint participation agreement. The Criteria address financial performance via two major avenues: (1) emphasis on improved productivity, and lower overall operating costs; and (2) support for TMA strategy development, TMA decisions, and innovation.

For technical, fairness, and procedural reasons, care should be exercised when comparing the financial performance between TMAs. These reasons are: (1) short-term improvements in efficiency may be affected by factors such as accounting practices (2) Some TMAs historically have higher measures of efficiency levels than others as a nature of their market (e.g., high density, bedroom communities 30 miles from a downtown and partially served by high occupancy vehicle lanes are fertile areas for carpool and vanpool formation. Therefore, vehicle miles of travel reduced could be expected to be significantly higher than a TMA near the center city.) (3) The time interval between quality improvement and overall financial improvement depends upon many factors. This interval is not likely to be the same from TMA to TMA. (4) The Criteria measure performance relative to rigorous, customer-oriented, TMA performance criteria. Though improved quality and productivity are likely to improve a TMA's overall effectiveness and efficiency, its financial performance depends also on environmental factors and public policies--which the TMA Performance process cannot measure directly. The inclusion of aggregate financial indicators in evaluations would thus place at a disadvantage programs in the areas without trip reduction ordinances or parking problems. Such programs may have the most to offer from the point of view of sharing management strategies. (5) Efficiency depends upon many external factors, such as local, national, and international economic conditions and business cycles. Such conditions and cycles do not have the same impact on all types of programs or on individual TMAs.

#### **1. Budget Preparation and Monitoring**

- a. Describe how budgets are prepared and monitored.

- b. Describe how plans consider cash flow requirements.
- c. Attach a copy of the most recent income statement, balance sheet, and statement of cash flows.
- d. Attach a copy of the TMA's internal control procedures.
- e. Attach a copy of the audited financial statements and management letter from the auditor. Describe what actions have been taken to correct deficiencies, if any, identified by the auditor. Attach copies of minutes reflecting the acceptance of the auditor's report and subsequent actions.
- f. Provide information on trends of membership levels, new member recruitment, retention, and, revenue and in-kind contributions from members.
- g. Attach a copy of the dues structure and number of members per category.

## **F. DEGREE OF EXTERNAL VISIBILITY**

The external visibility category examines the TMA's advocacy, educational, and outreach efforts and how these relate to enhancing the customer service focus of the organization. Also examined is the potential reach of promotional efforts and their impact in convincing customers to consider alternative commute modes.

### **1. Promotional Efforts**

- a. Describe the process used to determine how the promotions will fulfill the TMA's goals and objectives.
- b. Include information on the direct costs and in-kind contributions of promotional efforts.

### **2. Education Opportunities**

- a. Identify opportunities for professional development including training and conferences for TMA staff and members of the Board.
- b. Describe the variety and types of educational opportunities provided to TMA members and their employees. These may include:



- (1) Employee transportation coordinator training programs.
  - (2) Seminars, workshops, and courses offered by the TMA at employer worksites
  - (3) Employer site visits
  - (4) Transportation Days
- c. Explain how the TMA communicates its goals, objectives, mission statement and product offerings to the commuters in the TMA's service area. Describe how the TMA uses these opportunities to enhance its appearance as an advocate of commute alternatives. These may include:
- (1) News articles written about the TMA
  - (2) Presentations at public meetings and/or hearings
  - (3) The use of public service announcements and community television channels
  - (4) Other outreach activities

### 3. Results of External Visibility Efforts.

- a. Describe how the effects of promotion, educational outreach and advocacy are measured. Include what impacts are measured, what process was used to determine which effects should be measured, and how the analysis of these impacts are used to refine and enhance promotional, advocacy, educational and outreach efforts.
- b. Identify local government policies and programs that support the TMA and/or transportation demand management strategies. These may include: trip reduction ordinances, congestion management plan includes an active role for the TMA, etc.

## G. EFFECTIVENESS OF PROGRAMS

This Category examines the TMA's operational performance. A successful evaluation will use procedures that determine one or more of the following: (1) the extent to which the program has achieved its stated objectives (e.g., increases in Average Vehicle Occupancy); (2) the extent to which the accomplishment of the objectives can be attributed to the program (direct and indirect effects). (3) the degree of consistency of program implementation to plan (relationship of planned activities to actual activities)., and, (4) the relationship of different tasks to the effectiveness of the program (productivity). In areas with a regional commuter assistance program, some performance measurements may be included as part of the RCAP evaluation. The TMA should coordinate efforts with the RCAP.

## 1. Evaluation Methods

- a. Describe the methods for collecting the data for evaluation purposes. Some of the most commonly used methods involve: employee surveys; program participation documentation (e.g., registrations for preferential parking, applications for subsidies); vehicle counts; and time sheets or activity logs. The evaluation method and data collection requirements depend on the measures of effectiveness being used.
- b. Attach copies of surveys (if applicable) and findings.

## 2. Product and Service Results

- a. Summarize trends and current levels for all key product and service features described in the TMA Overview (e.g., vanpools in operation, customers served, employee transportation coordinators) features; compare current levels with appropriate benchmarks. **These measures, taken together, best represent the most important factors that predict achievement of desired end results described in the TMA Overview.**
- b. Report data which are objective measures of product and service and may be routinely collected by other organizations or on behalf of the TMA (e.g., regional commuter assistance programs may provide information to the TMA regarding demand for ridematching in the TMA's service area).
- c. Determine cost effectiveness for the key results by allocating the expenditures for the period costs to the measures of effectiveness (e.g., cost per person served, cost per vehicle miles of travel reduced, etc.).

## H. MEASURE OF COMMUTER AND MEMBER SATISFACTION

The Satisfaction Category examines the TMA's relationships with customers (i.e., commuters and members), and its knowledge of customer requirements. Also examined are the TMA's thresholds to determine customer satisfaction, current trends and levels of customer satisfaction and retention, and these results relative to other TMAs.

**1. Customer Expectations: Current and Future.**

- a. Describe how the TMA determines near-term and longer-term requirements and expectations of customers.
- b. Describe how the relative importance of specific product and service features is determined for customer groups.
- c. Identify how other key information and data such as complaints, gains and losses of customers, and product/service performance are used to support the determination.
- d. Provide information on how the TMA addresses future requirements and expectations of customers.

**2. Commitment to Customers**

- a. Describe the TMA's commitments to customers regarding its products/services and how these commitments are evaluated and improved. Examples of commitments are product and service guarantees, such as the response time for a guaranteed ride home program or how personal information confidentiality is maintained.
- b. Describe how these commitments:
  - (1) address the principal concerns of customers;
  - (2) are free from conditions that might weaken customers' trust and confidence; and
  - (3) are communicated to customers clearly and simply.
- c. Summarize how the TMA evaluates and improves its commitments, and the customers' and members' understanding of them, to avoid gaps between customer and member expectations and TMA performance. Include:
  - (1) how information/feedback from customers is used; and
  - (2) how product/service performance improvement data are used.

**3. Customer Satisfaction**

- a. Describe how the TMA determines customer satisfaction and customer intentions to use the TMA's services again. Include a brief description of processes and measurement scales used; the frequency of determination; and how objectivity and validity are

assured. Indicate significant differences, if any, in processes and measurement scales for different customer groups or segments.

- b. Describe how customer satisfaction measurements capture key information that reflects customers' likely future market behavior, such as intentions to use the TMA's services again or positive referrals.
- c. The TMA's products and services might be provided via employee transportation coordinators (ETCs). Thus, "customers" should take into account these ETCs as well as the commuter.
- d. Identify customer **dissatisfaction** indicators including number and type of complaints received.

#### 4. Customer Satisfaction Results

- a. Summarize trends in the TMA's customer satisfaction and trends in key indicators of customer dissatisfaction.
- b. Report trends in measures and/or indicators of customer dissatisfaction. Address the most relevant and important indicators for the TMA's products/services.

### I. OTHER

Other factors important to the TMA, such as major new directions for the TMA or additional qualitative information, that are not reflected in the above Criteria. Please describe the approach, implementation processes, and results for these factors.